

THE LANDSCAPE OF BRANDED RESIDENCES IN INDIA-2025

2ND EDITION

Greetings,

As we navigate India's extraordinary economic transformation, branded residences have emerged as the cornerstone of a new luxury paradigm, one that transcends traditional real estate boundaries to create lasting lifestyle ecosystems. Having led Noesis Hotel Advisors Private Limited through over 2,300 hospitality and real estate mandates across India and South Asia, I have observed a fundamental shift in how affluent Indians approach homeownership, investment strategies, and lifestyle aspirations.

India's branded residences sector has experienced remarkable transformation in 2025, evolving into a sophisticated niche that now accounts for 8% of the Asia-Pacific regional market share through ~4,000 units across 16 developments. These projects span the country's leading urban centres, Mumbai, Delhi, Bengaluru, and Hyderabad, as well as burgeoning destinations such as Chennai, Kolkata, and Pune. Each development represents a convergence of global brand ethos and local market insights, delivering residences that transcend the ordinary through bespoke design standards, world-class amenities, and service protocols that uphold the brand promise.

This sector is strategically positioned within India's ₹3,60,000 crore residential real estate Tier-1 market, focusing on the ultra-luxury segment that has demonstrated exceptional resilience and sustained growth momentum. Despite broader economic headwinds, primary market sales of luxury housing have consistently outperformed, with premium properties constituting over 62% of sales activity and ultra-premium units posting a 28% year-on-year increase in transaction volumes during Q1 2025. Such figures underscore the enduring appeal of high-end real estate that offers both an exclusive lifestyle experience and robust capital appreciation potential.

As affluent Indian households deepen their portfolio diversification strategies, branded residences present compelling value propositions. Developers benefit from accelerated sales velocities and premium pricing powered by brand recognition, while hospitality operators unlock new revenue streams beyond transient hospitality

through licensing fees and resident services. Buyers, in turn, enjoy an integrated living ecosystem, concierge services, wellness facilities, curated events, and global loyalty benefits, all delivered within a secure, investment-grade real estate asset.

By leveraging the comprehensive insights in this report, you will be well-prepared to navigate the dynamic branded residences landscape, pioneer innovative projects, and forge strategic partnerships that shape the future of luxury living in India.



With warm regards,

Nandivardhan Jain

CHIEF EXECUTIVE OFFICER

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Market Evolution: The Data Behind India's Branded Living Transformation

The operational evolution of branded residences in India reflects a fundamental transformation in how luxury real estate projects are conceived, developed, and managed. As COO of Noesis Hotel Advisors Private Limited, I observe this shift from traditional developer-led models toward sophisticated brand partnership frameworks that deliver enhanced value to residents, developers, and operators alike.

India's branded residences landscape has evolved significantly from its early days when only a handful of hotel brands offered residential extensions. Today, we see a diverse ecosystem encompassing international hotel groups like Marriott, Four Seasons, and Accor, alongside emerging non-hotel brands from fashion, automotive, and lifestyle sectors. This diversification creates multiple pathways for developers to access premium branding while offering consumers varied lifestyle propositions tailored to their specific preferences and aspirations.

The operational complexity of managing branded residences demands sophisticated service delivery systems that go far beyond traditional property management. These developments require specialized teams trained in hospitality standards, advanced technology platforms for seamless resident experience, and robust governance structures that balance homeowner autonomy with brand compliance requirements. The service component often includes 24/7 concierge services, professional housekeeping, maintenance excellence, wellness programming, and curated lifestyle experiences that justify the premium residents pay for branded living.

Market data substantiates the strong performance of this sector. Asia-Pacific's branded residences pipeline totals USD 30.7 billion across 38,893 units, with India contributing

~4,000 units concentrated entirely in urban markets. Mumbai's luxury segment alone recorded ₹14,750 crore in sales above ₹10 crore during H1 2025, with branded residences typically commanding 21-80% price premiums over comparable non-branded stock. These metrics demonstrate sustained buyer acceptance and willingness to pay for branded differentiation.

Geographic distribution patterns reveal strategic market concentration in India's most affluent urban centers. Delhi NCR leads with 42% market share, Mumbai follows at 24%, and Pune contributes 11% of supply. This concentration aligns with broader luxury market dynamics where NCR contributed 26% of Pan-India revenue in H1 2025, validating the location strategies employed by international operators seeking maximum market impact.

The stakeholder ecosystem in branded residences involves complex relationships between brand owners, developers, operators, residents, and homeowner associations. Successful projects require careful orchestration of these relationships through well-structured agreements that define responsibilities, revenue sharing, service standards, and long-term governance protocols. The sophistication of these arrangements has improved dramatically as the market has matured, reducing conflicts and enhancing project outcomes.

Technology integration represents a critical operational dimension that distinguishes modern branded residences from earlier generations. Today's developments incorporate smart home systems, mobile connectivity platforms, predictive maintenance protocols, and AI-driven security systems that enhance both resident convenience and operational efficiency. The ability to seamlessly integrate technology while maintaining human service touch points often determines resident satisfaction levels.

Looking ahead, several trends will shape the operational evolution of India's branded residences sector. Sustainability and wellness integration are becoming standard

expectations rather than differentiators. Residents increasingly demand green building certifications, energy efficiency, air and water quality monitoring, and comprehensive wellness programming that supports their lifestyle objectives.

The emergence of tier-two markets presents new operational opportunities and challenges. Cities like Jaipur, Goa, Coimbatore, and other lifestyle destinations offer attractive entry points for branded residences, but require different operational approaches compared to established metropolitan markets. Understanding local market dynamics, service availability, and cultural preferences becomes critical for successful project execution in these emerging locations.

Our role at Noesis Hotel Advisors Private Limited centers on ensuring that operational excellence translates into sustainable value creation for all stakeholders. Through rigorous planning, continuous innovation, and deep market understanding, we help transform branded residence concepts into thriving communities that set new standards for luxury residential living in India.



Warmly,

Vijay Bhandari

CHIEF OPERATING OFFICER

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IHCL

"Luxury Branded Residences is witnessing a surge in demand in line with the growing affluence in urban India. As consumers seek curated living experiences, the fusion of hospitality and real estate is redefining residential offerings."

Suma Venkatesh, EVP – Real Estate & Development, IHCL



HYATT™

"Branded residences are fast gaining popularity in India, offering homeowners the assurance of world-class hospitality with the comfort of private luxury living. With our Andaz Residences, New Delhi and Grand Hyatt Residences, Mumbai, we see tremendous potential in this space as a natural extension of Hyatt's promise of exceptional guest experiences."

Sunjae Sharma - Managing Director, India & Southwest Asia, Hyatt.



Hilton
FOR THE STAY

"Branded living in India is about blending world-class service with the warmth of home, so residents don't just own a space, they step into a new way of life. As the concept takes root in the region, it will reshape aspirations further, offering homes that combine curated lifestyle with lasting value."

Zubin Saxena - SVP, Region Head South Asia, Hilton.



bobby mukherji
architects
Mumbai | Milan | Delhi

"In a branded residence, you don't just own a home—you live the brand. From impeccable design to curated amenities and hospitality-grade service, every aspect ensures residents enjoy a lifestyle that mirrors the brand's promise, every single day."

Bobby Mukherji - Founder & Design Principle.



GRAHAM ASSOCIATES
GLOBAL MARKETING SOLUTIONS

"I'm excited to be part of the inaugural Branded Residences Summit and look forward to seeing many industry leaders there. Noesis has brought together an impressive gathering of movers and shakers who are driving the Indian luxury residential landscape."

Chris Graham FCIM - Managing Director, Graham Associates.



ACCOR

"Extremely looking forward to sharing with industry colleagues on the topic of branded residential, the business model itself, advantages of Developers/Investors, Residence Owners, and Operators/Licensors of Brands, as well as exploring the potential for branded residential in India."

Daniel von Barloewen - Senior Vice President, Accor One Living, Head of Global Mixed-Use Development.



pininfarina

"How Pininfarina, starting in 1930 from automobiles, transformed the Branded Real Estate Market through timeless and authentic experiences where lifestyle, Design, and measurable value converge."

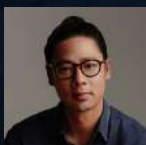
Fabio Calorio - SVP Global Brand Extension, Pininfarina.



SUVIDHA
LIFESPACES
Passion for Perfection

"Branded residences in India are not just homes; they are a fusion of global lifestyle standards with our country's cultural richness. They bring the trust, design, and service ethos of iconic brands into Indian real estate, offering residents not just luxury, but an elevated sense of belonging and aspiration. As India's economy and aspirations grow, branded residences will stand as symbols of confidence, credibility, and a truly world-class living experience."

Dr. Adv. Harshul Savla, D.Litt. Partner - Suvidha Lifespaces, National Best Selling Author.



HBAresidential

"Believes often defines lifestyle choices and it's reflected in the association of branded residences which resonates with us."

H Y MAK - Design Director at HBA Residential.



yoo

"A Brand's Identity should be the heartbeat that binds every resident to every space, forging a timeless and expressive affinity."

Jagdish Johal - Managing Partner, YOO.



"We've designed Taj Sky View to be a haven for the first citizens of Chennai. A place that exudes warmth and luxury in equal measure."

Ampa Palaniappan - Managing Director, Ampa Group.



"Branded residences in India are moving from being a niche concept to becoming a mainstream aspiration. For many homeowners, it's not just about buying real estate, it's about buying into a lifestyle and the trust that an established hospitality brand brings. At Royal Orchid and Iconiqa, we see branded residences as an extension of hospitality - where services, design, and community living come together. India's young demographic, rising wealth, and appetite for global experiences make this an exciting space that is only going to grow stronger. The potential here lies in creating residences that feel personal, curated, and deeply connected to how people want to live today."

Arjun Baljee - Founder, Iconiqa & President, Royal Orchid Hotels.



"Branded residences are no longer a niche concept but the future of luxury living in India. With projects like Trump Tower Kolkata, Trump Towers Gurgaon, and the upcoming Smartworld and M3M-branded residences in Noida, we are redefining aspirational living, combining global luxury standards with India's unique cultural and market dynamics. These developments offer a seamless blend of sophistication, convenience, and exclusivity, setting new benchmarks for design and lifestyle."

Ashish Jerath - President Sales and Marketing, Smart World Developers.



Branded residences are more than just homes; they embody trust, service, and design that reflect global lifestyle standards. Being among the first to bring this concept to India, I have always believed that luxury living must go hand in hand with credibility and community. Today, branded residences stand as symbols of aspiration and confidence, offering Indian homeowners a truly world-class living experience."

Sagar Chordia - Director, Panchshil Realty.



India is waking up to the branded real estate market. Like anything new, the needs and challenges posed by this new sub-sector are unique. Indian developers can benefit from established practices and learnings from the UAE market. Hopefully this session can help establish that."

Saurabh Gupta - CEO, Dalands Group.



"India has the opportunity to create a unique path for our luxury hospitality segment. Unique to our climate and cultural richness. We can draw from our artisanry and creative talent to redefine beauty and luxury in a conscious, socially sustainable way, as high fashion has done for India. Branded residences will provide that opportunity for designers and consumers!"

Shimul Javeri Kadri - Founding Partner, SJK Architects.



"Our motivation was to create something that stands apart: a landmark that reflects scale, sophistication, and a lasting legacy. Partnering with a global hospitality brand allowed us to combine international standards with our vision, and deliver not just residences, but an elevated way of life."

Sudeep Bhatt - Director of Strategy, Whiteland Corporation.



"If you build it, they will come — this saying has never been truer than in today's India. Branded residences have evolved beyond a niche concept and are now becoming the benchmark for aspirational living. They offer the convenience and service of a luxury hotel, within the comfort of your own home — a complete reversal of the traditional 'home away from home' idea that hotels once embodied."

Suhail Kannampilly - Managing Director, Concept Hospitality



"The future of luxury living is deeply personal, design-led, and emotionally resonant. That is where branded residences are heading."

Yukti Nagpal - Visionary Leader & Director, Gulshan Group

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Defining Branded Residences



Branded residences are revolutionizing the property sector by delivering distinctive and transformative residential experiences.

Envision a lifestyle where sophistication and ease effortlessly merge. Consider a home that surpasses conventional standards, providing not merely accommodation but a thoughtfully orchestrated living experience. This represents the enchanting realm of branded residences, a specialized market flourishing within India's dynamic metropolitan centers. The fundamental principle governing these developments is quite straightforward. A branded residence typically constitutes a mixed-use development that incorporates residential units alongside a conventional hotel facility. The complete development (encompassing both hotel and residential components) receives branding and operational management from an organization, frequently a hospitality operator.

Every branded residential unit features a home-oriented design, incorporating provisions for kitchen facilities, private and/or communal bathroom arrangements, recreational areas and supplementary spaces depending on configurations and project classifications. The premium positioning associated with these developments suggests opulently crafted units, featuring cutting-edge amenities, delivering a superior residential experience versus non-branded alternatives.

Research indicates there are 126,129 branded residence units across 788 projects worldwide, projected to reach 1,600 schemes by 2030. In India, the sector has grown

to ~4,000 units across 16 developments, representing 8% of Asia-Pacific market share, within a ₹3,60,000 crore Tier-1 residential market showing 9% YoY growth.

India's thriving branded residences deliver a living experience beyond comparison. These homes transform the elegance and hospitality of premium hotel accommodations into your everyday existence. Personal assistants manage your requirements, while advanced fitness facilities, rooftop pools, and tranquil wellness centers become natural extensions of your residential environment.

Beyond the grandeur that branded residences possess, they also foster a sense of community through their selective nature; as premium dining establishments, luxury retail venues and cultural attractions frequently characterize numerous developments.

Your reliable brand manager orchestrates premium gatherings and activities, from intimate gallery exhibitions to sommelier sessions conducted by celebrated specialists.



The Value Proposition Revolution

The genuine benefit proposition, however, centers on the quality of facilities and services provided by these developments. Every development will deliver a range of 'standard' services that are included within yearly maintenance fees, and 'customized/requested' services which are elective and incur extra costs when accessed. Several standard services encompass recreational facility access (fitness center, pool), round-the-clock protection, attendant parking and brand membership rewards. Requested services encompass wellness treatments, fitness coaching sessions/packages and private meal service. The ultimate combination of standard and requested services does show differences between developments, especially based on the specific demographic/segment the development is targeting.



Typologies and Development Models

Traditionally Branded Residences predominantly consisted of hospitality-led developments, where a portion of the development was allocated to residential apartments for purchase, connected with the hospitality facilities and bearing the hospitality brand. The advancement in consumer behavior, brand recognition and transformation of living preferences are crucial elements affecting buyers. In alignment with contemporary movements and an expanding varied demand, labels and enterprises from diverse sectors like apparel, automotive and retail are seeking to establish a presence in this market to stay competitive.

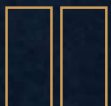
TYPOGRAPHIES



Hotel led developments with integrated residences



Luxury resorts with residences used as holiday lets



Residential led developments with hotel adjacent



Residential developments with hotel management



Residential developments with remote hotel tie in



Evolving from the conventional branded residence framework, varied adaptations have emerged globally to accommodate demand in different markets and destinations. One variation would be independent residences, solely the branded residence without the connected hotel. Non-hospitality brands such as Trump Towers (Mumbai, Pune, Delhi & Kolkata) and Aston Martin (Miami), have developments corresponding with this configuration. Another variation would be a Branded Residential project with a hotel that is neighboring such as Three Sixty West (Mumbai) and Raffles Residences (Boston). Hospitality-led developments with incorporated residences will generally feature the ground levels operating as a hotel while the higher levels will house the residential apartments for instance Four Seasons (Mumbai) and Mandarin Oriental (New York). Premium resorts like St. Regis (Miami) and St. Regis (Costa Mujeres) both feature separate residential apartments in their layouts. Residential apartments with distant hotel connection are a fairly recent innovation that merges the advantages of property ownership with the resident having access to facilities and services from a neighboring hotel.

Deal Structure and Stakeholders Involved

The deal structure in branded residences involves multiple parties – the developer, the brand/operator (often a hotel chain), sometimes a designer, and finally the purchaser/end-user.



DEVELOPER

- Is responsible for financing, construction, and marketing of the residences.
- Negotiates agreements with the brand/operator and designer. The developer can also be a consortium of Land owner and/or investor.

BRAND/ OPERATOR (HOTEL CHAIN)

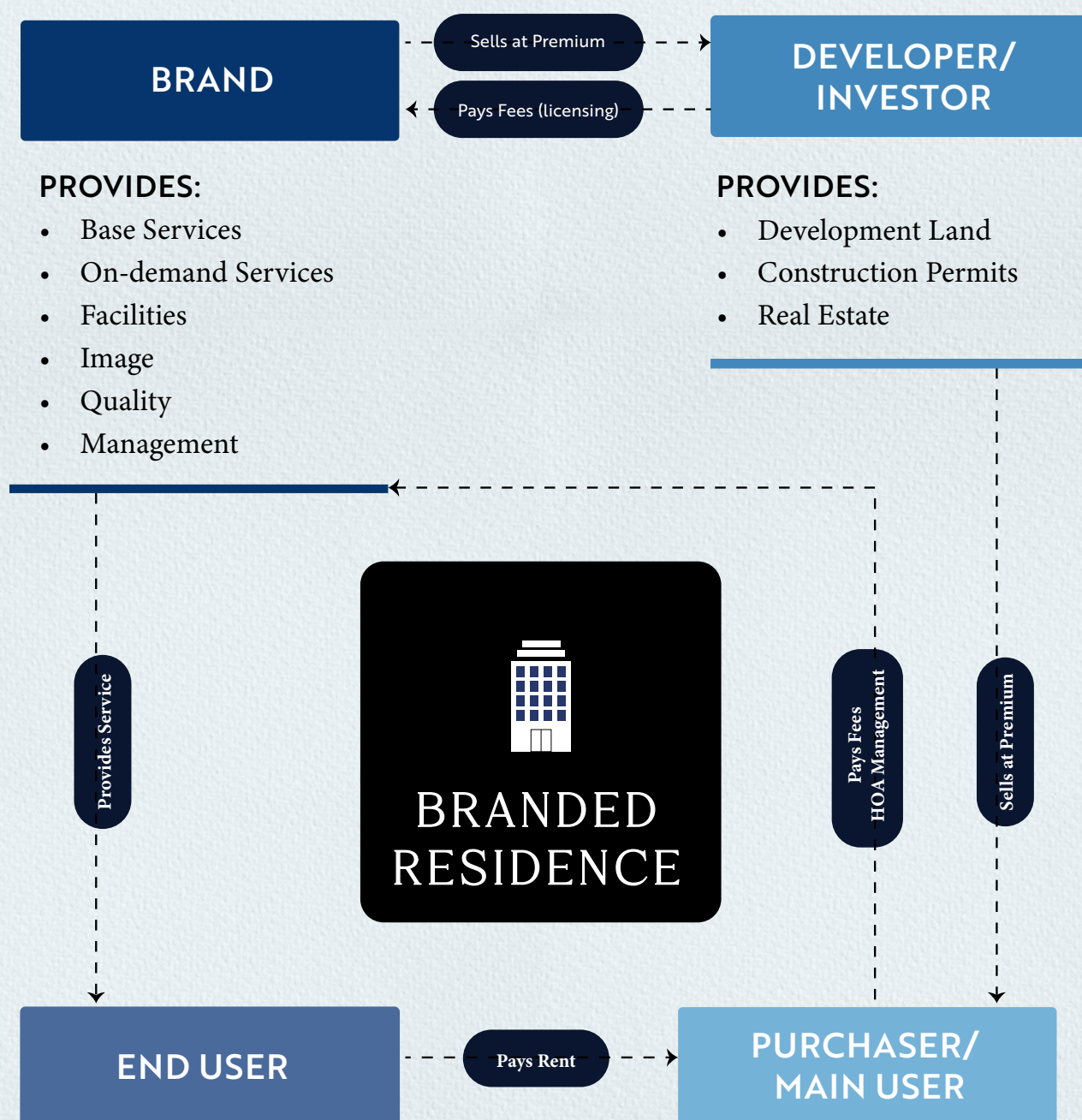
- Licenses their brand name and potentially their design standards to the project also providing technical service to the end users.
- May offer operational expertise in areas like property management, resident services, or even rental programs (depending on the agreement) in case of a hotel operating brand.
- Receives a brand licensing fee from the developer, typically a percentage of the total sales value or a fixed fee per unit.

DESIGNERS

- Designers meticulously translate the brand's core values, aesthetics, and signature style into the architecture, interior and/or exterior design, and overall environment of the residence.

PURCHASER/ UNIT OWNERS OR END USER:

- Units can be sold as a long-term living space similar to any traditional apartment or residential property. Owning a branded residence is associated with luxury, exclusivity, and a connection to a well-regarded brand. It signifies a certain level of taste and success. Branded residences are meticulously designed and built to uphold the brand's standards. The End User can expect high-quality materials, finishes, and attention to detail.

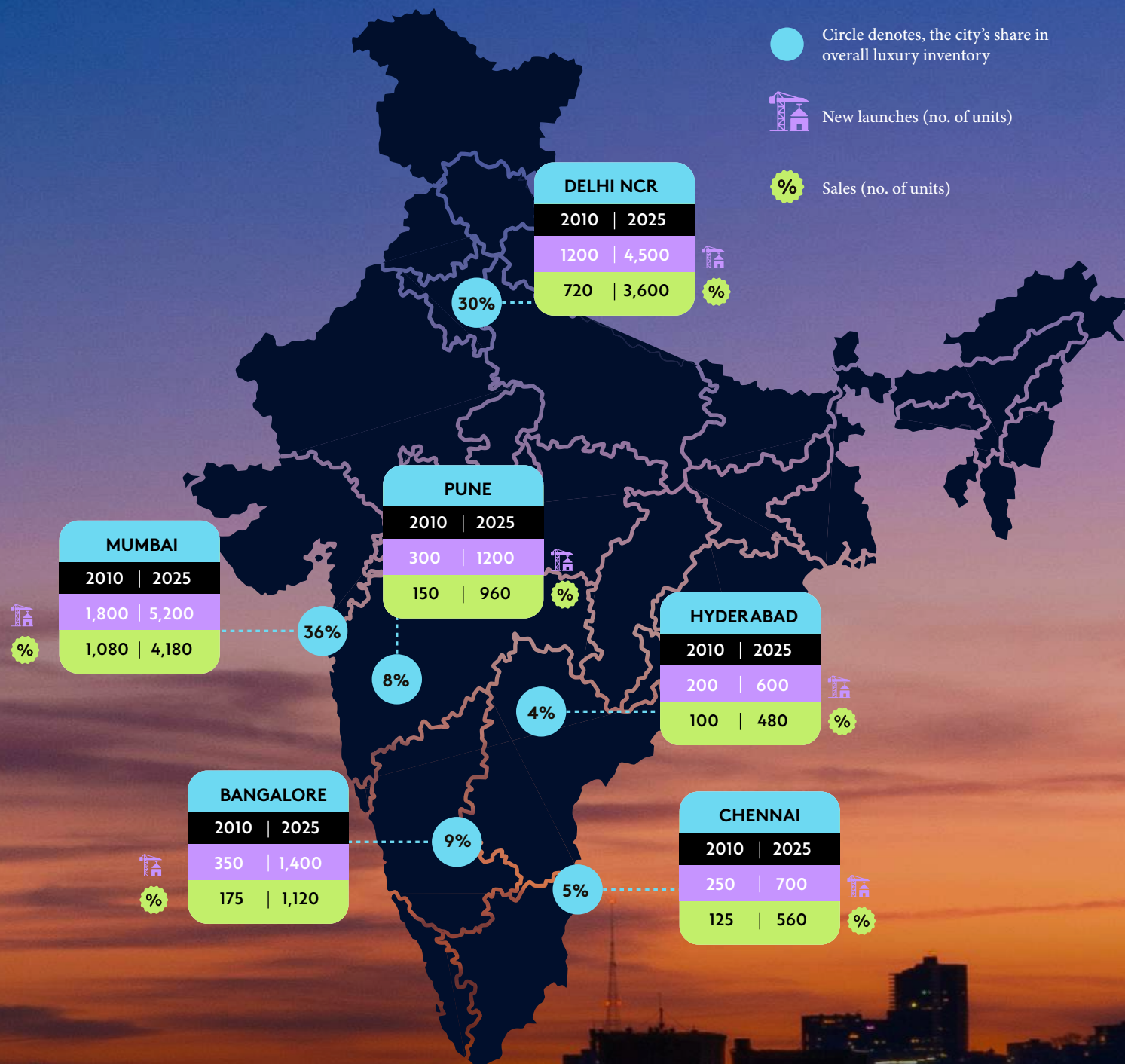


Market Performance and Analytics



City-Wise Luxury Hotspots in India.

Indicating new launches and sales of luxury, non branded, real estate units



India's Luxury Residential Real Estate Hotspots

India's residential real estate market achieved unprecedented scale in H1 2025, with ₹3,60,000 crore in primary housing sales across Tier-1 cities, marking a 9% growth from H1 2024's ₹3,30,750 crore. This performance establishes a robust foundation for branded residences expansion, with the sector targeting the ultra-luxury segment (₹10+ crore) that has demonstrated exceptional performance. (CREDAI-CRE Matrix, 2025)

MARKET DISTRIBUTION BY REVENUE (H1 2025)

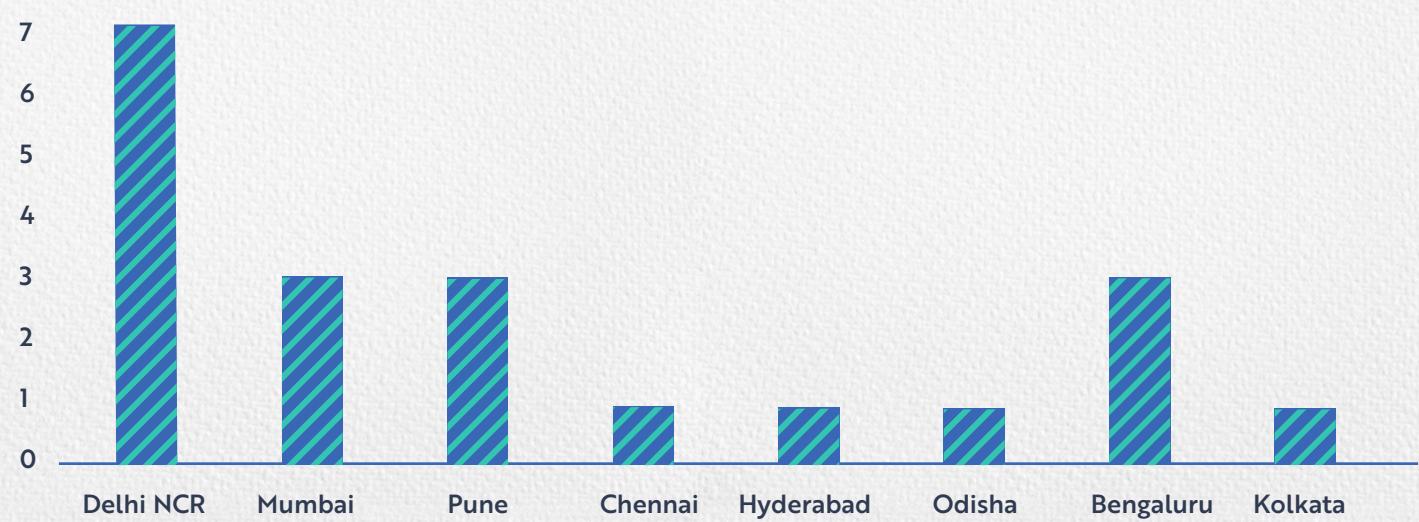
NCR	26% (₹93,600 crore) - 73% sales above ₹3 crore.
MUMBAI	23% (₹82,800 crore) - ₹14,750 crore luxury market.
HYDERABAD	16% (₹57,600 crore) - 35% luxury concentration.
BENGALURU	14% (₹50,400 crore) - Tech hub premium demand.
PUNE	9% (₹32,400 crore) - Established branded residences market.
OTHERS	(Ahmedabad, Chennai, Kolkata): 12% combined.

This is an indicative list and not an exhaustive list.

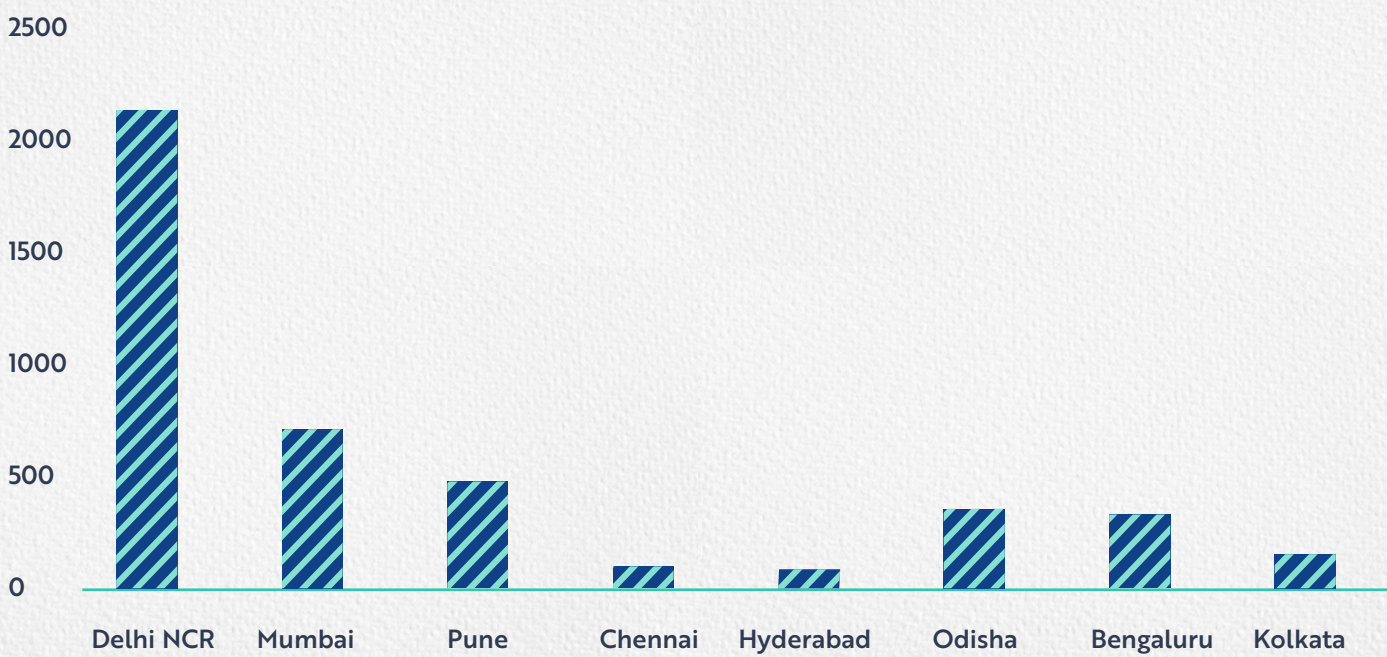
The luxury segment (₹5+ crore) has demonstrated exceptional growth validating branded residences positioning.

Branded Residence Presence Across Indian Cities

Total Operational & Planned Branded Residences Schemes Across Indian Cities



Total Operational & Planned Branded Residence Units Across India



Branded Residences:

GOING FOR GROWTH 2025

India's branded residences sector has experienced remarkable transformation in 2025, evolving into a sophisticated market segment that represents 8% of the Asia-Pacific regional market share through ~4,000 units across 16 developments.

Fueling the rise:

AFFLUENT CONSUMER BASE:

India's economic growth has fostered a significant population with high disposable incomes. Current HNWI Population: 85,698 (6% YoY growth).

ASPIRATIONAL LIVING:

Branded residences cater to the desire for a curated lifestyle experience. Residents gain access to unparalleled amenities like concierge services, spas, fitness centers, fine dining, and exclusive resident-only events.

IMPECCABLE SERVICE:

Residents receive the same meticulous attention to detail and personalized service standards as hotel guests, ensuring a hassle-free living environment.

BRAND PRESTIGE:

Owning a branded residence offers the prestige and cachet of being associated with a globally recognized brand, enhancing the overall value proposition.

BRAND PRESENCE IN INDIA IN THE BRANDED RESIDENCES SEGMENT

— HOTEL BRANDS —



— NON-HOTEL BRANDS —



Hotel and Non-Hotel Brands



HOTEL BRANDS

ESTABLISHED REPUTATION:

Hotel brands have a well-defined image and existing customer base, making it easier to attract buyers.

PROVEN MANAGEMENT EXPERTISE:

Hotel brands have extensive experience in managing hospitality services, which can be beneficial for residents.

LIMITED DESIGN CREATIVITY:

Hotel brands may have stricter design guidelines, potentially limiting architectural and design innovation.

NON-HOTEL BRANDS

UNIQUE DESIGN AND LIFESTYLE:

Non-hotel brands can offer a more unique and differentiated design aesthetics and lifestyle experiences.

FLEXIBILITY IN AMENITIES:

Amenities can be tailored to a specific target market and needs of its residents, potentially going beyond traditional hotel offerings.

MANAGEMENT EXPERTISE:

Developers may need to find alternative partners for managing resident services if the non-hotel brand lacks experience.



Branded Residences:

GOING FOR GROWTH 2025





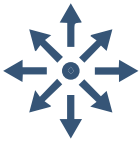
MARKET SIZE AND TRAJECTORY:

India demonstrates a distinctive market structure contrasting sharply with global patterns: 63% non-hotel brands vs 37% hotel brands (Global Pattern: 80% hotel brands vs 20% non-hotel brands). This unique positioning reflects market sophistication and consumer preferences for design-led experiences.



PRODUCT INNOVATION:

The evolution of the concept to move beyond traditional iterations encourages developers to explore standalone residences, branded villas, and mixed-use developments to cater to diverse buyer preferences.



DIVERSIFICATION OF PLAYERS:

The growing appetite and diverse taste of potential investors or buyers has led to a diversification of players to help capture the variety of market demand. While established names like Four Seasons and the Leela command a sizeable space in the branded residence market, players like Yoo are also catering to different clientele looking for a similar experience. Real estate giants are partnering with hospitality brands to leverage their expertise.

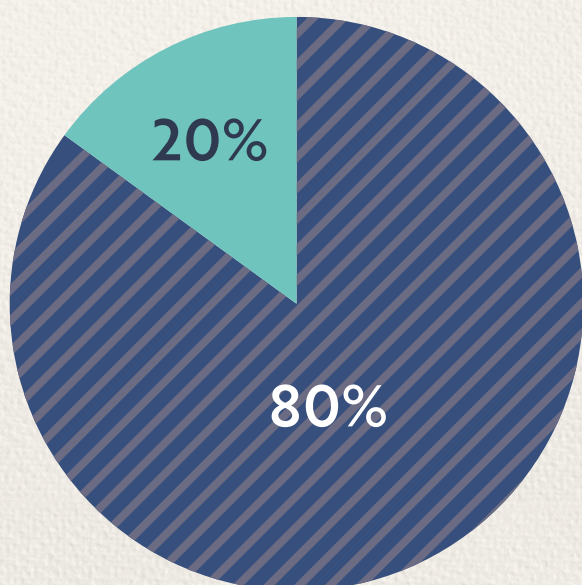


LOCATION FOCUS:

Major metro cities indicate an established appetite for luxury lifestyle. Mumbai, Delhi-NCR and Bengaluru are witnessing a surge in branded residences. However, emerging cities like Surat, Ahmedabad, Jaipur, Chandigarh and Indore show a promise of infrastructure, development, FDI and commercial growth that will also satiate the appetite for investors to own a branded residence in the area. Bhubaneswar, Chennai and Goa are attracting interest from developers and investors.

Share of Schemes Under Hotel vs Non-Hotel Brands

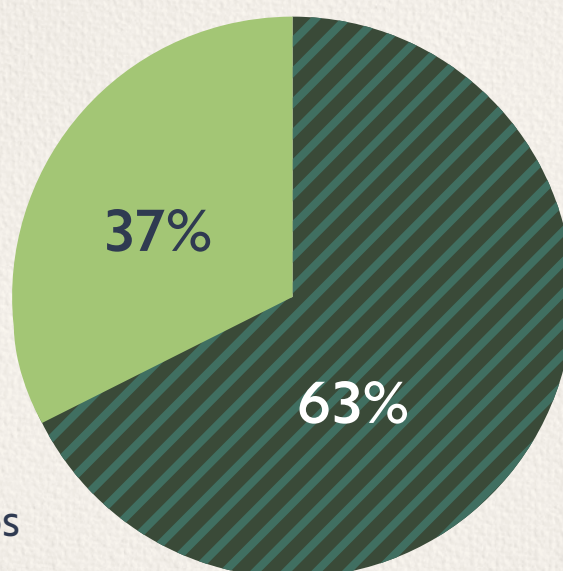
The figures annexed indicate the share of branded residence schemes globally and in India as of 2025. In India the Non-Hotel brands have the largest share in number of schemes.



GLOBAL SHARE OF SCHEMES - HOTEL VS NON-HOTEL

 HOTEL BRANDS  NON-HOTEL BRANDS

INDIAN SHARE OF SCHEMES - HOTEL VS NON-HOTEL



 HOTEL BRANDS  NON-HOTEL BRANDS

Rising Affluence In India 2025

In 2025, India has 85,698 HNWI individuals with a net worth of US\$ 1 million. This was an increase of 6% on a year-on-year basis, projected to reach 93,753 by 2028, UHNWI growth 50% by 2028 (fastest globally). (Knight Frank, McKinsey & BOF, 2025)

REAL ESTATE INVESTMENT PREFERENCES:

Indian HNWIs allocate 22-25% of their wealth to prime residential real estate, with 80-90% of holdings concentrated within the country. Among young HNWIs aged 18-35 with incomes over INR 1 crore, 89% prefer property ownership, while highend real estate represents 29.8% of luxury investment preferences among next generation wealth holders.



MARKET SEGMENTATION AND PRICING ANALYSIS

The luxury segment shows remarkable momentum, with developer approaches shifting toward luxury categories and INR 10+ million introductions soaring 110% annually in H1 2025. This advancement was accelerated by 35% supply growth in INR 10-30 million and 16% growth in INR 30-50 million segments, with luxury launches increasing from 35% to 40% of total introductions.

India has been upgraded from an "Emerging Market" to a "Growing Market" within the "Dynamic Urban Centers" category, grouped alongside Australia, China, and South Korea. This reclassification reflects India's rapidly expanding branded residences portfolio, driven by luxury tourism growth and rising wealth concentration in key metropolitan areas.

Mumbai: Branded Residences Success Validation

MARKET LEADERSHIP PERFORMANCE

Mumbai's luxury housing market performance in H1 2025 provides definitive validation for branded residences potential, with the city recording **₹14,750 crore** in luxury sales (₹10+ crore segment) - **the highest ever half-yearly performance.**

RECORD-BREAKING METRICS:

- **₹14,750 crore** total luxury sales (highest ever half-yearly)
- **501 primary luxury units** sold (19% growth YoY)
- **Average luxury unit value:** ₹29.4 crore
- **12-month record:** ₹28,750 crore across 1,335 units



MICRO-MARKET ANALYSIS VALIDATING BRANDED RESIDENCES

Primary Luxury Sales Performance H1 2025:

LOCALITY	VALUE SOLD	UNITS	AVG. PRICE	YOY GROWTH	BR CORRELATION
Worli	₹2,400 Cr	32	₹75 Cr	Premium stability	Four Seasons location
Bandra West	₹1,057 Cr	44	₹24 Cr	+192% value growth	Emerging premium
Prabhadevi	₹1,034 Cr	56	₹18.5 Cr	+21% value growth	Strong demand base
Tardeo	₹875 Cr	47	₹18.6 Cr	+21% value growth	Fastest growing
Malabar Hill	₹681 Cr	44	₹15.5 Cr	Consistent premium	Heritage luxury

PRICE SEGMENTATION ALIGNMENT

- **₹10-20 Crore Segment:** 77% market share (core branded residences target)
- **₹20-40 Crore Segment:** 23% share with **138% growth since H1 2022**
- **₹40+ Crore Ultra-Luxury:** Tripled from 17 units (H1 2022) to 53 units (H2 2024)



Sustainability Integration & Environmental Standards

GREEN BUILDING CERTIFICATION LEADERSHIP

*India retains its position as the **third-largest market globally for LEED certifications**, with **370 projects covering 8.5 million gross square meters** certified in 2024. This achievement reflects institutional commitment to environmental responsibility in luxury real estate.*

CERTIFICATION SYSTEMS AND BENEFITS:

- **LEED (IGBC administration):** International standards adapted for India
- **IGBC Green Building Rating:** Domestic certification framework
- **GRIHA Assessment:** Integrated habitat evaluation
- **BEE Star Rating:** Energy efficiency certification
- **Market Premium:** 10-20% higher resale values for certified properties

ENVIRONMENTAL PERFORMANCE STANDARDS

ADVANCED SUSTAINABILITY FEATURES:

- **Solar Energy Integration:** India's rooftop capacity reaching 13.7 GW (2024)
- **Water Conservation:** Rainwater harvesting, greywater recycling systems
- **Energy Efficiency:** Building management systems, high-performance glazing
- **Green Infrastructure:** Rooftops providing insulation and biodiversity
- **Resource Optimization:** Comprehensive recycling and waste management

Technology Integration & Smart Living Standards

ADVANCED HOME AUTOMATION REQUIREMENTS

Contemporary branded residences incorporate sophisticated technology as baseline features:

- **Smart Home Automation:** 75% buyer expectation
- **AI-Driven Systems:** Predictive maintenance, personalized environmental controls
- **Integrated Security:** Biometric access, facial recognition, comprehensive monitoring
- **Energy Management:** IoT ecosystems supporting sustainability objectives

CONNECTIVITY AND DIGITAL INFRASTRUCTURE

Essential Technology Integration:

- **Voice-Controlled Automation:** Seamless device connectivity
- **Energy Optimization:** AI-driven consumption management
- **Wellness Technology:** Air purification, water treatment systems
- **Flexible Configurations:** Post-pandemic home office requirements

MARKET ACCELERATION FACTORS:

The pandemic accelerated demand for technology integration, with flexibility and personalization becoming essential components of contemporary branded residences development.



Branded Residences Hotspots

TIER 1 CITIES

MUMBAI



AFFLUENT POPULATION:

Mumbai has emerged as India's wealthiest city housing 1,42,000 millionaire families.

MARKET PRESENCE:

There are now three branded residence projects in Mumbai, with additional developments underway. International hotel giants Four Seasons and Ritz-Carlton continue their strong presence in the city's luxury residential segment.

DELHI

LUXURY MARKET:

Delhi NCR holds the second-highest concentration of 68,200 millionaire families.

ESTABLISHED PLAYERS:

A well-established market with branded residences from Trump Towers, Whiteland Westin Residences, and others. Delhi NCR now holds 7 branded residence projects under its belt.

BENGALURU

TECH SAVVY CLIENTELE:

Bengaluru, with its thriving tech industry, is home to 31,600 millionaire families with 120% growth over the past decade, ranking 3rd globally for wealth expansion. It has witnessed surge in demand for luxury apartments, with branded residences catering to this segment.

MARKET LEADERS:

Embassy ONE Four Seasons Residences, Prestige Leela Residences and Leela Residences Bhartiya City maintain established presence in the city.

HYDERABAD



STRONG INFRASTRUCTURE DEVELOPMENT:

The expansion of the Outer Ring Road (ORR) to 158-kilometer eight-lane expressway and upcoming Regional Ring Road (RRR) enhance connectivity and create attractive environments for residents, including those seeking branded residences with premium accessibility.

MARKET ENTRANTS:

YOO along with developer Myscape Properties have successfully established presence in the branded residences space in Hyderabad with the launch of YOO Hyderabad - the city's first ever branded residences project.

Branded Residences Hotspots

EMERGING MARKETS



FASTEST GROWING MARKET:

Pune's branded residence market has achieved remarkable 15% annual growth in 2025, attracting tech professionals, NRIs, and a rising population of high-net-worth individuals.

PIONEERING DEVELOPER:

Panchshil Realty has been a key developer in Pune with 3 branded residence projects under its umbrella including YOO Pune, YOO Villas & Trump Towers.



CHENNAI

GROWING AFFLUENCE:

Chennai's increasing prosperity and expanding high-income population are drawing top developers eager to serve surging demand for luxury residences.

RECENT LAUNCH:

Taj Sky View, developed by Ampa Group and managed by IHCL's Taj Hotels, launched in 2024 on Nelson Manickam Road, delivering Chennai's first luxury branded residences and setting a new benchmark in the city's upscale housing sector.



KOLKATA

EXISTING LUXURY MARKET:

Kolkata already boasts a thriving luxury real estate market with established premium developments. Projects such as Forum Atmosphere and The 42 have created strong foundations for branded residences to flourish.

RECENT LAUNCH:

Trump Towers Kolkata, located near EM Bypass in Science City, achieved remarkable success with 80% of its 137 units sold by September 2024, demonstrating strong market appetite for luxury branded living.

GOA



LUXURY SECOND HOMES:

Goa leads India with 35% of the nation's second-home buyers, attracting investors seeking branded residences as luxury retreats and profitable investment opportunities.

INVESTMENT POTENTIAL:

Annual property appreciation of 15-30% and exceptional rental yields of 8-12% make Goa an attractive investment destination for real estate developers and discerning buyers.

CASE STUDY – A



Trump Towers, Mumbai

Developer: Lodha

Operator/Brand: Trump

Units: 390

Size: 17 Acres

Configurations: 3 BHK and 4 BHK

Trump Towers, Mumbai

PROJECT NAME & LOCATION:

Trump Towers, Worli,
Mumbai

PROJECT DESIGNER/ ARCHITECT:

WOHA & HBA

DEVELOPER:

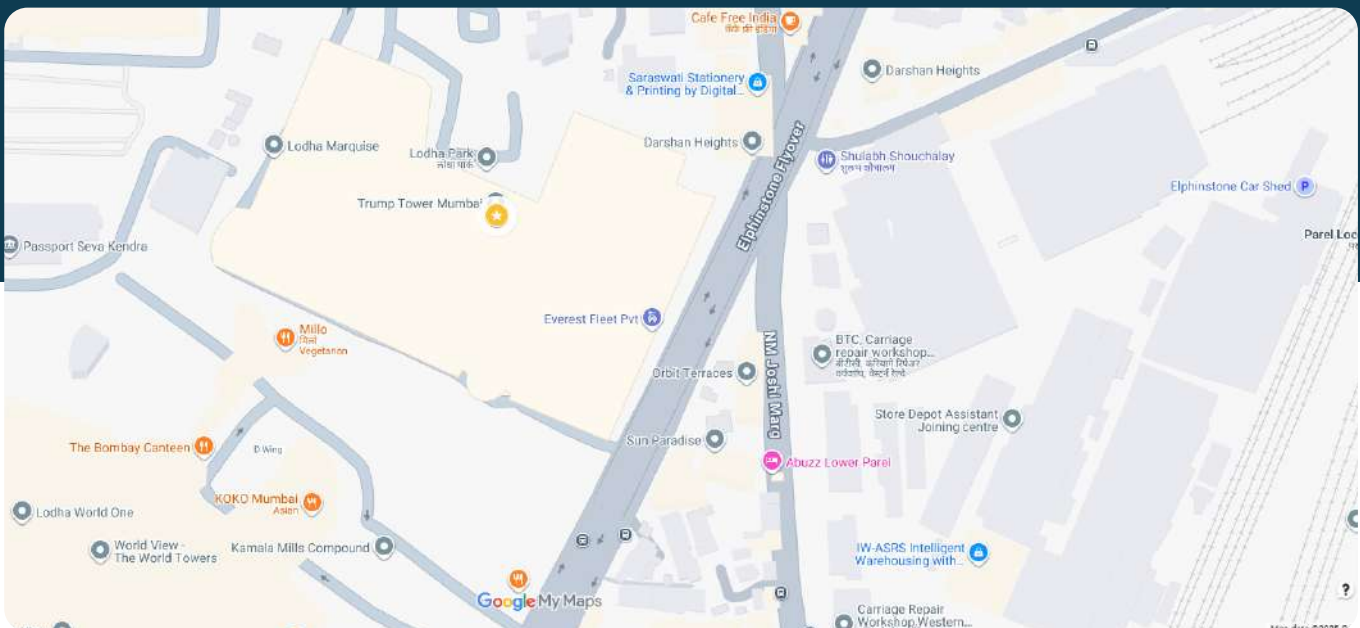
Lodha

KEY FEATURES AND AMENITIES:

Putting Green, Swimming
Pool, Gymnasium, Restaurant

Trump Tower Mumbai is a prime example of a branded residence in India. Located in the affluent Worli district, it boasts a dazzling golden curtain-wall façade and soars 78 stories high, offering stunning views of the Arabian Sea and the Mumbai skyline. Developed by Lodha Developers and branded by The Trump Organization, it represents a collaboration of luxury living and internationally recognized prestige.

Overall, Trump Tower Mumbai represents a significant development in India's branded residence market. It caters to a niche segment of affluent buyers seeking a luxurious lifestyle experience with the cachet of an internationally recognized brand.



CASE STUDY – B



*Four Seasons
Private Residences,
Bengaluru*

Developer: Embassy Group
Operator/Brand: Four Seasons
Units: 109
Size: 33 Acres
Configurations: 2, 3, 4 and 5 BHK

Four Seasons Private Residences, Bengaluru

PROJECT NAME & LOCATION:

Embassy One, Four Seasons, Bengaluru

PROJECT DESIGNER/ARCHITECT:

Yabu Pushelberg

DEVELOPER:

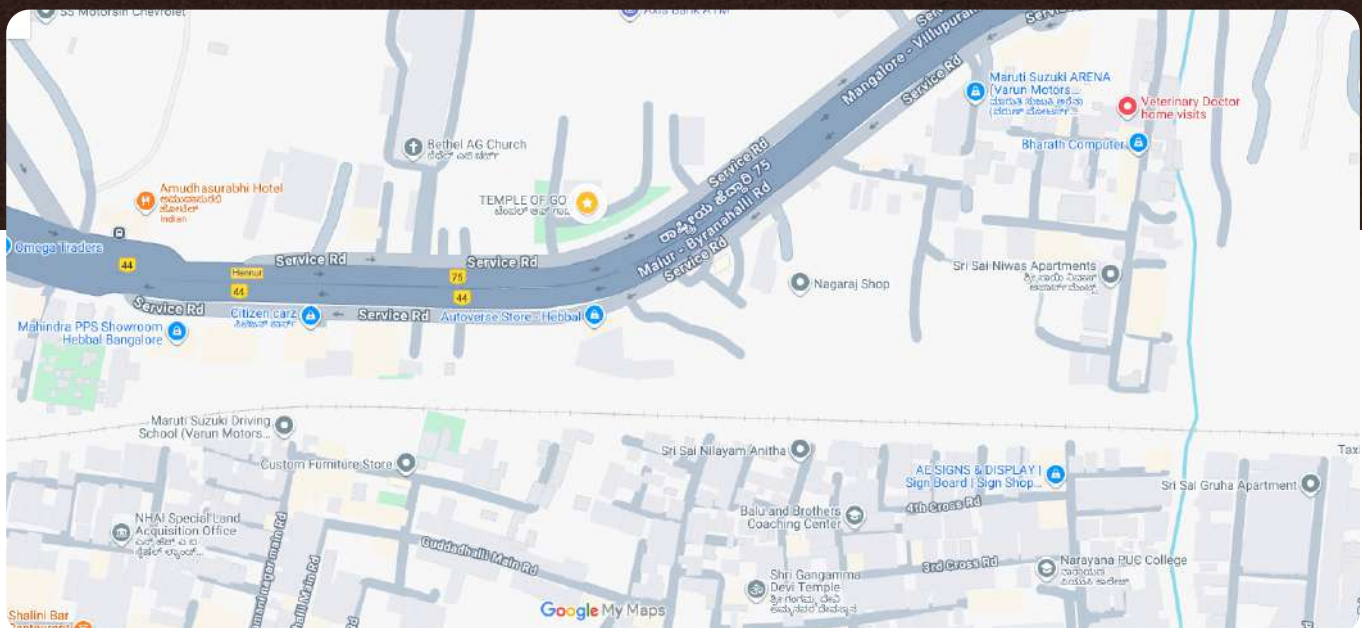
Embassy One

KEY FEATURES AND AMENITIES:

Swimming Pool, Bar and Restaurant

Embassy ONE is the emergence of an elevated, integrated lifestyle, it seamlessly combines the legendary Four Seasons hospitality and bespoke private residences with luxury shopping, gourmet dining and corporate office spaces.

Spread across two immaculately designed 30 storey towers, the residences unfold a canvas for inspiring, effortless living with signature Four Seasons service.



CASE STUDY – C



*Ampa Hi-Life
Chennai*

Developer: Ampa Group

Operator/Brand: Taj

Units: 123

Size: 12 Acres

Configurations: 3 BHK and 4 BHK

Ampa Hi-Life Chennai

PROJECT NAME & LOCATION:

Ampa Hi-Life Chennai

PROJECT DESIGNER/ ARCHITECT:

Bharati Meraki

DEVELOPER:

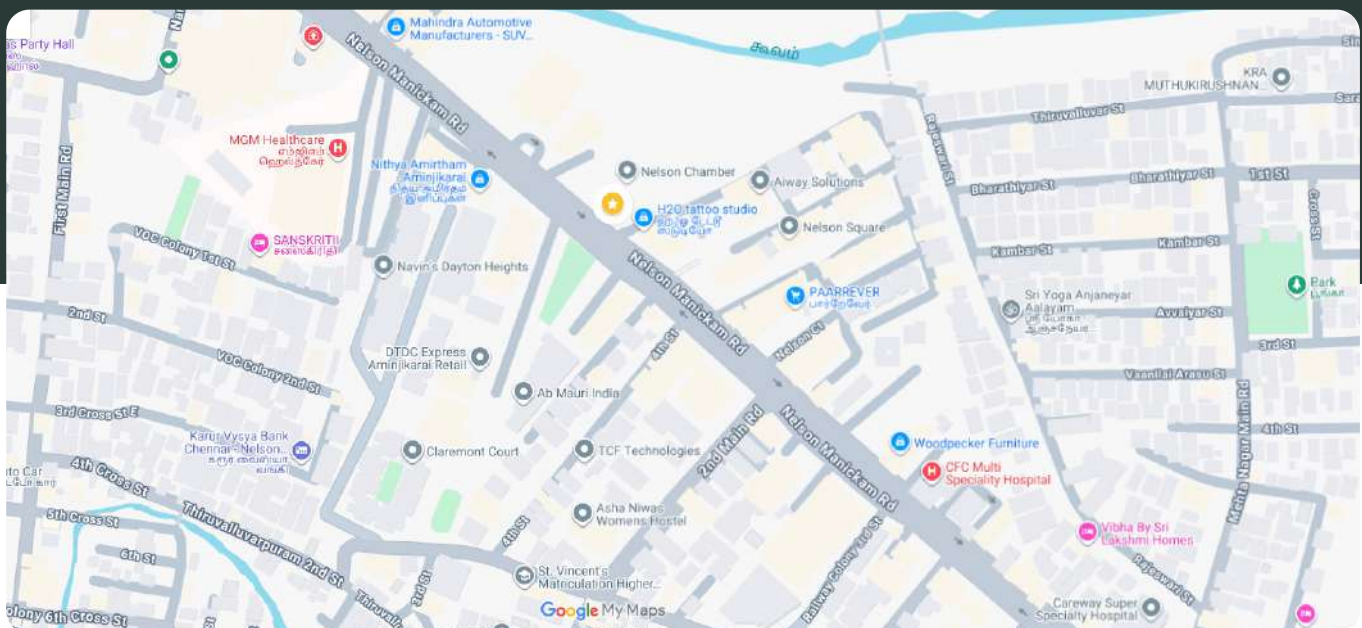
Ampa Group

KEY FEATURES AND AMENITIES:

Gym, Swimming Pool, Yoga
Pavillion

The project is a collaboration between the Ampa Group and the Taj Group, and it will be the first Taj branded residences in the world.

The project offers a variety of luxurious amenities to its residents, including a spa, a gym, a theater, a swimming pool, and a clubhouse. The project also has a multi-level security system to ensure the safety of its residents.



CASE STUDY – D



*Trump Towers,
Delhi NCR*

Developer: Tribeca Developers and
M3M India

Operator/Brand: Trump

Units: 250

Project Size: 22 Acres

Configurations: 3 BHK and 4 BHK

Trump Towers, Delhi NCR

PROJECT NAME & LOCATION:

Trump Tower Delhi NCR

PROJECT DESIGNER/ ARCHITECT:

Morphogenesis

DEVELOPER:

Tribeca and M3M Developers

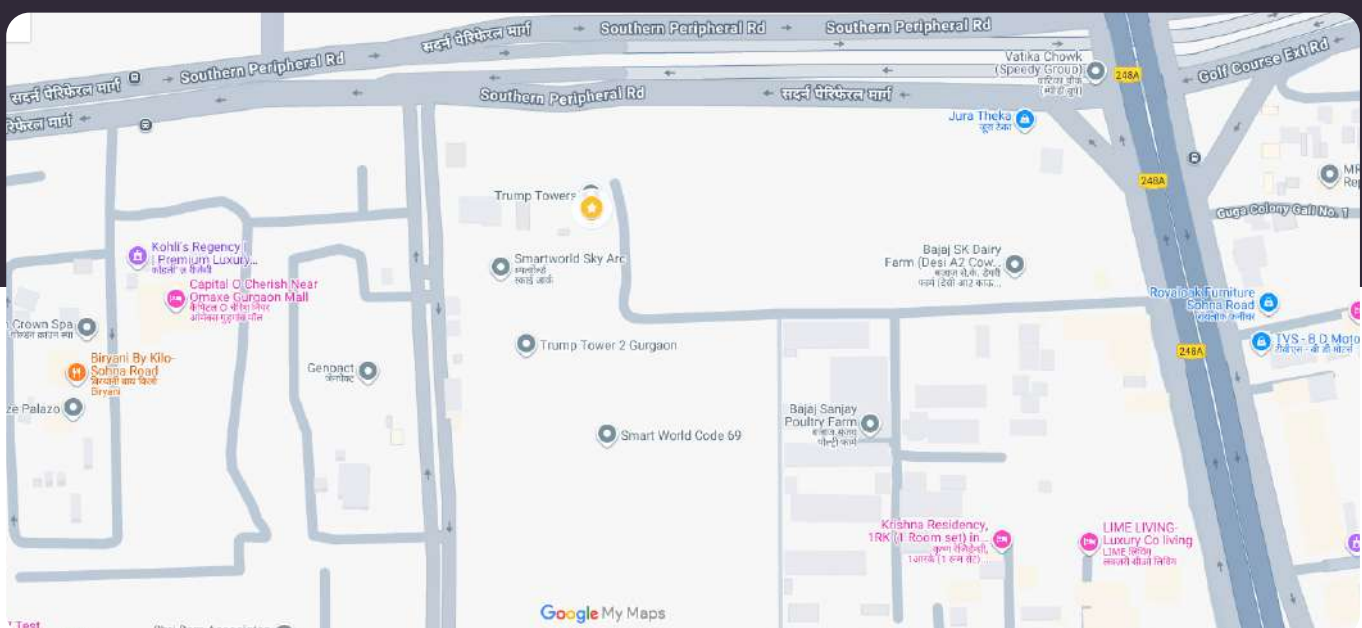
KEY FEATURES AND AMENITIES:

Gym, Swimming Pool, Yoga
Pavillion

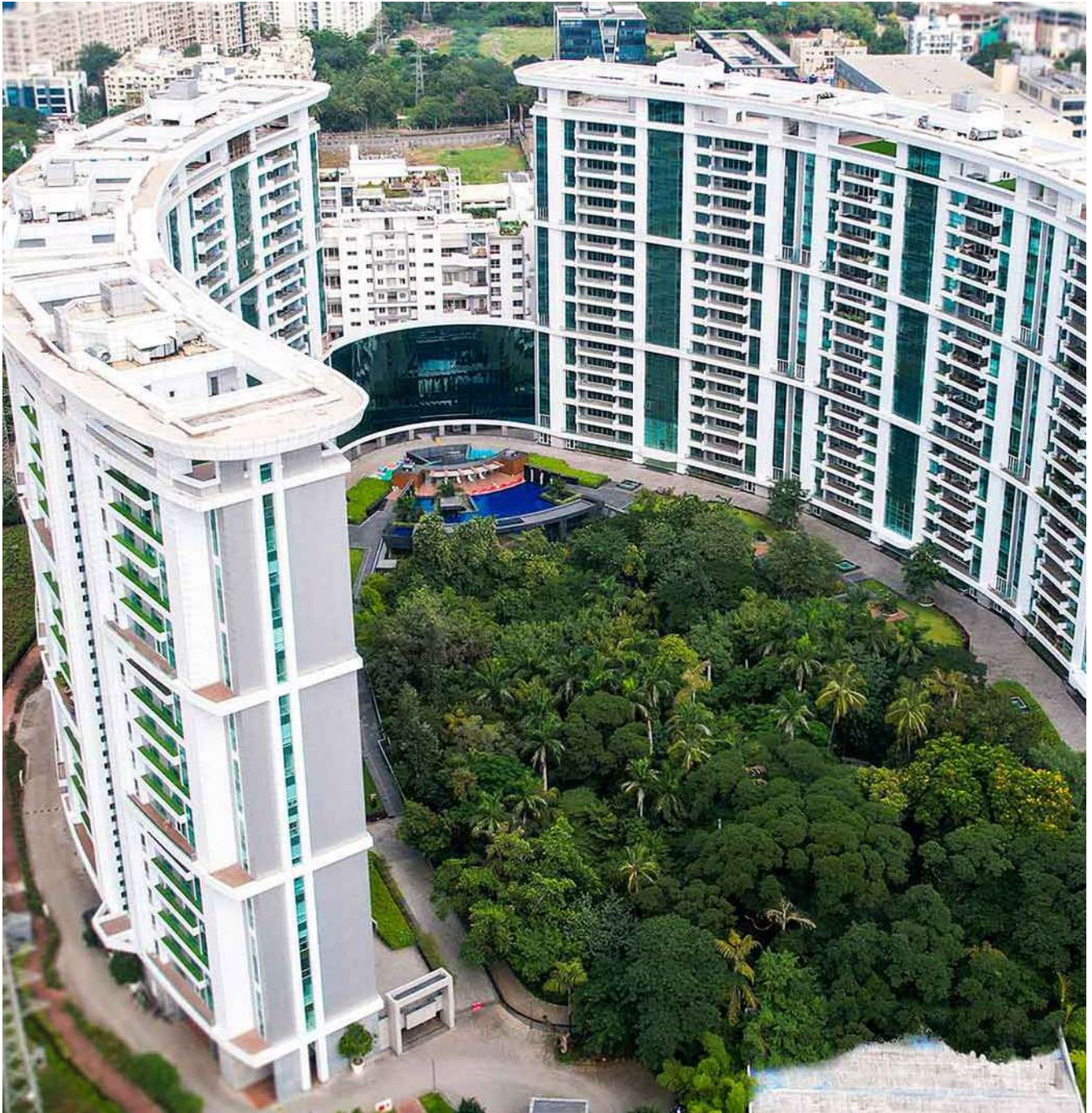
Trump Tower in Gurgaon is a residential project by Tribeca Creators LLP. This posh high-rise comprises spacious 3 BHK and 4 BHK ultra luxury apartments that are located in Sector 65, Gurgaon.

The Trump Towers in Delhi NCR is a well-known address that is home to some of the city's most influential people. At the Trump Towers the airy, double-height living room offers sweeping views over the full arc of the city's skyline.

The Trump Club, a personal utopia at your own backyard is the array of venues for entertainment, fitness and relaxation.



CASE STUDY – E



YOO Pune

Developer: Panchshil Reality

Operator/Brand: YOO

Units: 228

Size: 18 Acres

Configurations: 4 BHK and 5 BHK

YOO Pune, by Panchshil Reality

PROJECT NAME & LOCATION:

YOO Pune By Panchshil Reality

PROJECT DESIGNER/ ARCHITECT:

YOO

DEVELOPER:

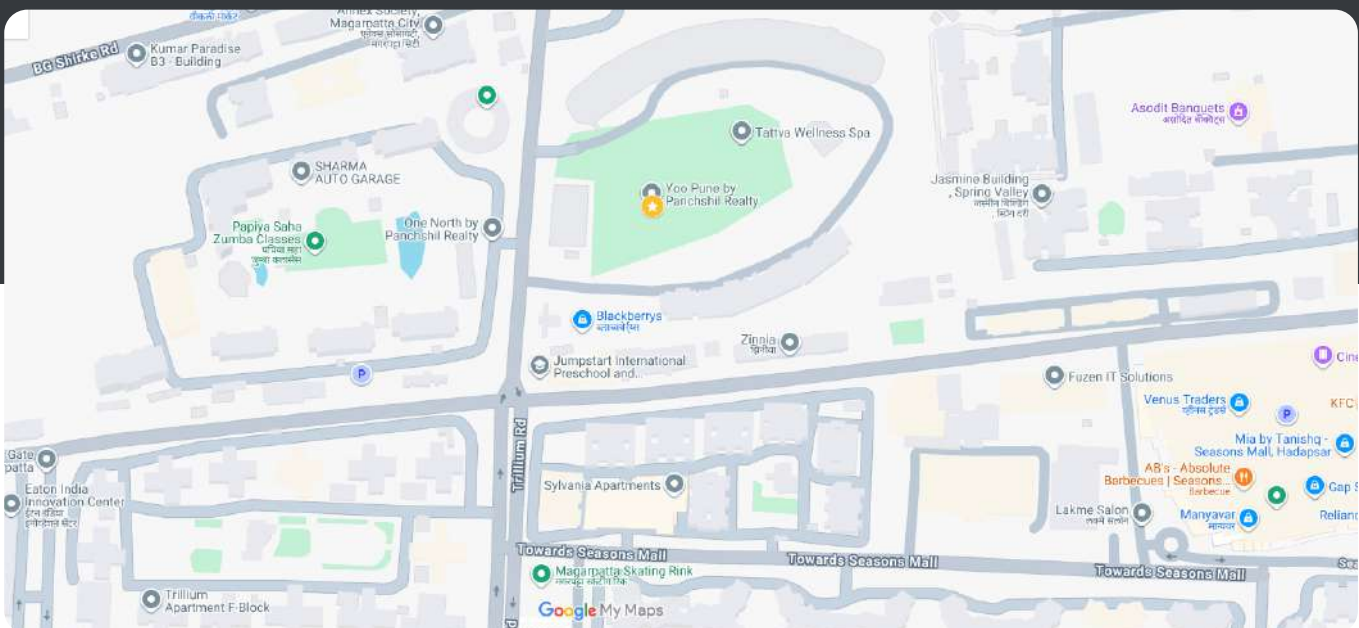
Panchshil Reality

YOO is a global brand of real estate place-makers, developers and designers.

YOO have evolved into the world's largest non-hotel residential brand with 52 projects completed worldwide and 30+ under development.

YOO Pune is India's first ready-to-move-in YOO branded residence set within an expanse of 13 acres and offers a designer-led living Built around 5 acres of lush green dense landscape, these residences provide a life that is centered in nature, rooted in luxury.

YOO Pune, Philippe Starck's flagship project in India, is a mix of 4 & 5 BHK apartments & penthouses. The 228 designer residences in 6 sprawling towers is an ode to international living.



CASE STUDY – F



YOO Hyderabad

Developer: MySpace Properties Pvt Ltd
Operator/Brand: YOO Worldwide London
Units: 99-101
Size: 2.49 acres
Configurations: Exclusively 4 BHK

CASE STUDY - G



DN YOO Odisha

Developer: DN Homes

Operator/Brand: YOO Worldwide London

Units: 402

Size: 3 acres

Configurations: 3BHK and 4BHK

DN YOO Odisha, by DN Homes

PROJECT NAME & LOCATION:

DN YOO Odisha, Gajapati Nagar, Chandrasekharpur, Bhubaneswar

PROJECT DESIGNER/ARCHITECT:

Philippe Starck with YOO Studio London

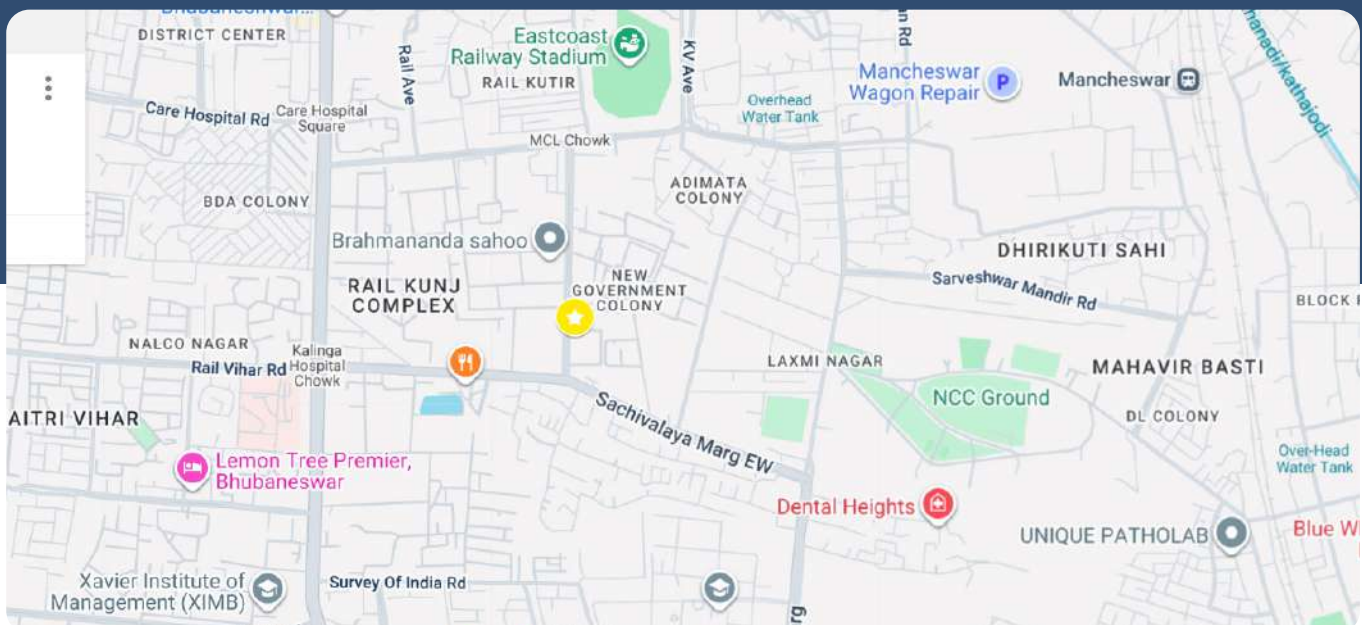
DEVELOPER:

DN Homes (established 2003)

DN YOO Odisha is a luxury branded residential project by DN Homes and YOO Worldwide, located in Bhubaneswar's Gajapati Nagar. Set across 3 acres with three towers, it offers 402 exclusive 3 and 4 BHK apartments, with unit sizes ranging from 1,526 to 1,860 sq. ft.

The project boasts a 44,000 sq ft two-level clubhouse, three swimming pools, double-height sky gardens, and a poolside restaurant.

DN YOO Odisha achieved ₹225 crore in pre-launch sales and is scheduled for possession in February 2029, establishing a new standard for luxury living in Eastern India.



CASE STUDY - H



*Four Seasons
Private Residences
Mumbai, Worli*

Developer: Provenance Land

Operator/Brand : Four Seasons

Units : 41

Size: 1.01 acres

Configurations: 3 BHK, Multilevel 5
& 6 BHK

Four Seasons Private Residences Mumbai, Worli

PROJECT NAME & LOCATION:

Four Seasons Private Residences, Worli, Mumbai

PROJECT DESIGNER/ARCHITECT:

Gensler and Yabu Pushelberg Studios

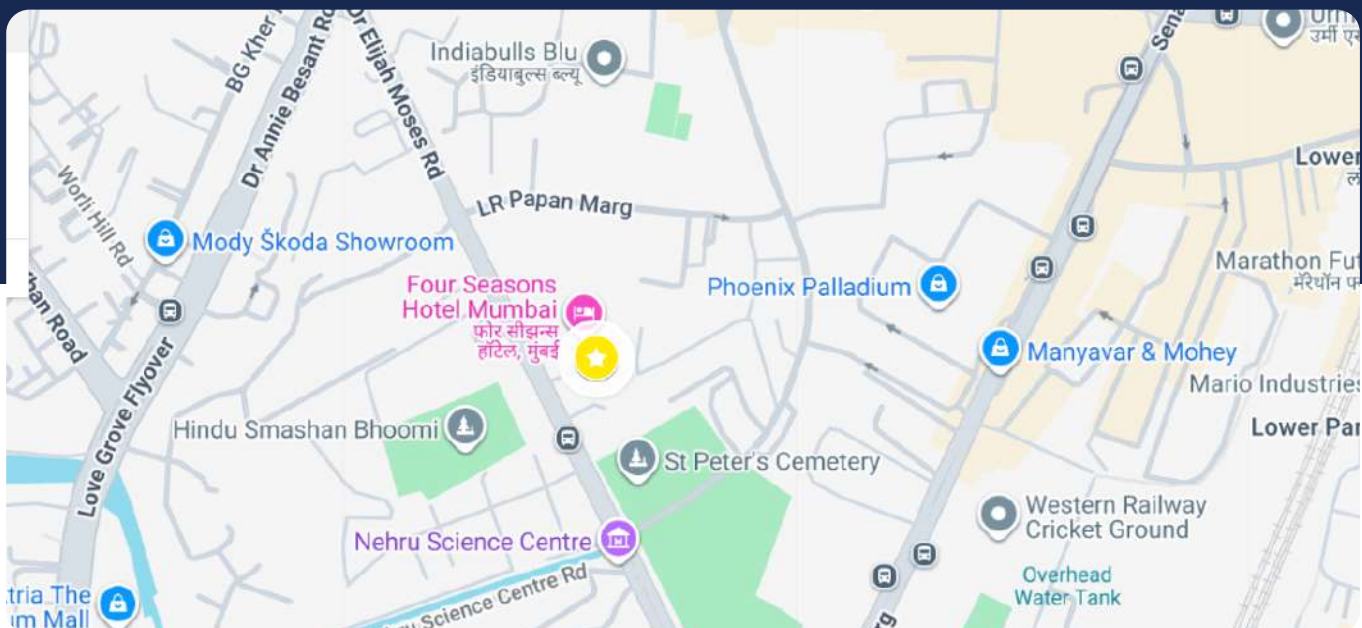
DEVELOPER:

Provenance Land

Four Seasons Private Residences Mumbai, located in Worli, is a 64-storey ultra-luxury tower with just 41 exclusive homes, making it one of the world's tallest branded residential developments.

Designed by Gensler and Yabu Pushelberg, the project offers expansive full-floor three-bedroom residences and multi-level five- and six-bedroom duplexes. Amenities include a private Residents' Club, rooftop cinema and lounge on the 65th floor, and direct access to the adjacent Four Seasons Hotel Mumbai.

With over 90% of units sold, this project sets new standards for privacy, luxury, and hospitality-integrated living in Mumbai.



CASE STUDY - I



Trump Residences (Trump Tower 2)

Developer: Smartworld Developers &
Tribeca Developers LLP

Operator/Brand: The Trump Organization

Units: 298

Size: 3.5 acres

Configurations: 3 BHK, 4 BHK & 5+1 BHK
Penthouses (including Double Height)

Trump Residences, by Smartworld Developers & Tribeca Developers

PROJECT NAME & LOCATION:

Trump Residences (Trump Tower 2), Sector 69, SPR Road, Gurgaon

PROJECT DESIGNER/ARCHITECT:

Matteo Nunziati (Interior Design), Morphogenesis (Architecture), Shapoorji Pallonji (Construction Partner)

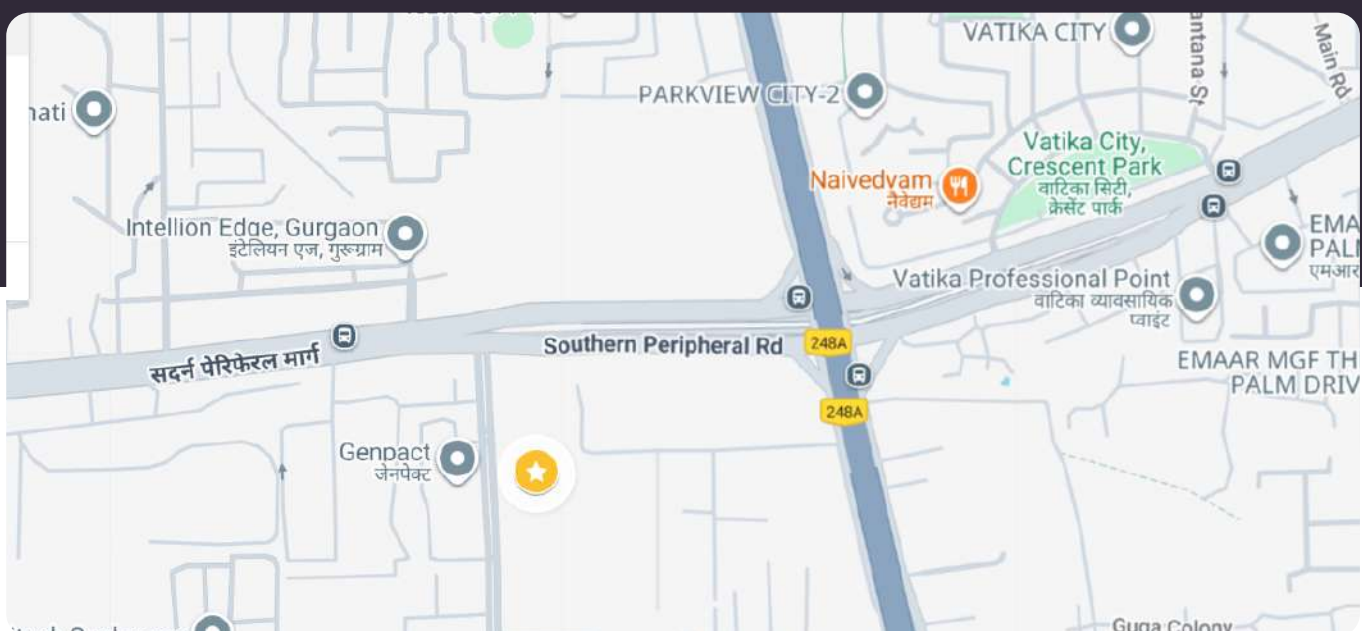
DEVELOPER:

Smartworld Developers in partnership with Tribeca Developers LLP

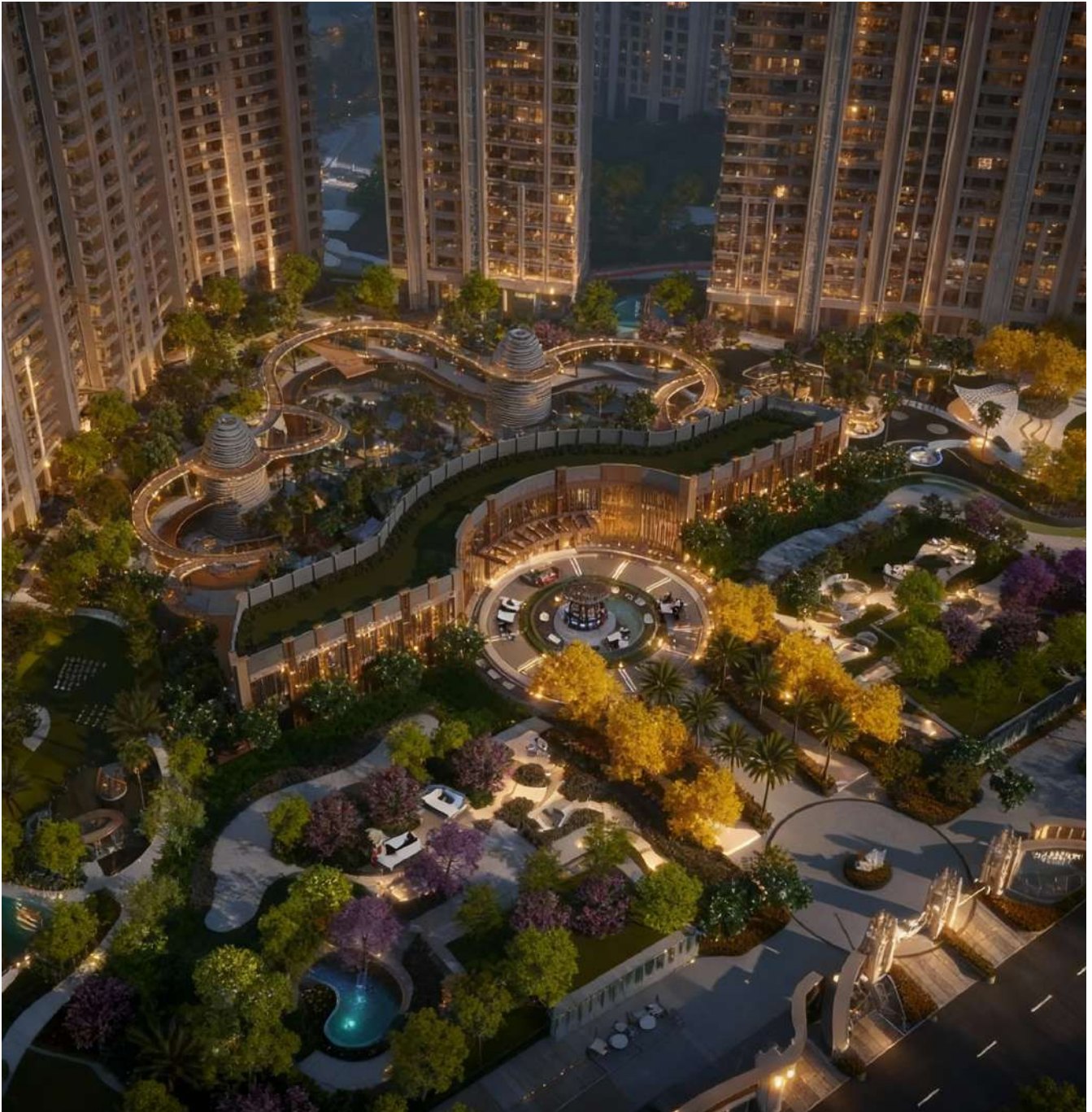
Trump Residences represents Gurgaon's second Trump development, making it the only city outside New York housing multiple Trump towers.

These twin 51-floor landmarks in Sector 69 showcase Trump's evolved design through glass facades and Italian designer Matteo Nunziati's interiors. Featuring 3 BHK (3,100 sq ft), 4 BHK (4,000-5,000 sq ft), and 5+1 BHK penthouses (8,000 sq ft) with private elevators, the project targets ultra-luxury buyers.

Signature amenities include India's first residential aquarium bar, indoor heated plunge pools, interconnected rooftop facilities, and a 41,000+ sq ft clubhouse with yoga and meditation spaces. Expected completion by 2029 reinforces Gurgaon's premium branded residences status.



CASE STUDY - J



Whiteland Westin Residences

Developer: Whiteland Corporation Private
Operator/Brand: The Westin (Marriott International)

Units: 1,550

Size: 20 acres

Configurations: 3 BHK & 4 BHK
(2,650–4,300 sq ft)

Whiteland Westin Residences Dwarka Expressway, Delhi NCR

PROJECT NAME & LOCATION:

Hafeez Contractor (Design Consultant), Cooper Hill (Landscaping), BM&A (Interior Design)

PROJECT DESIGNER/ ARCHITECT:

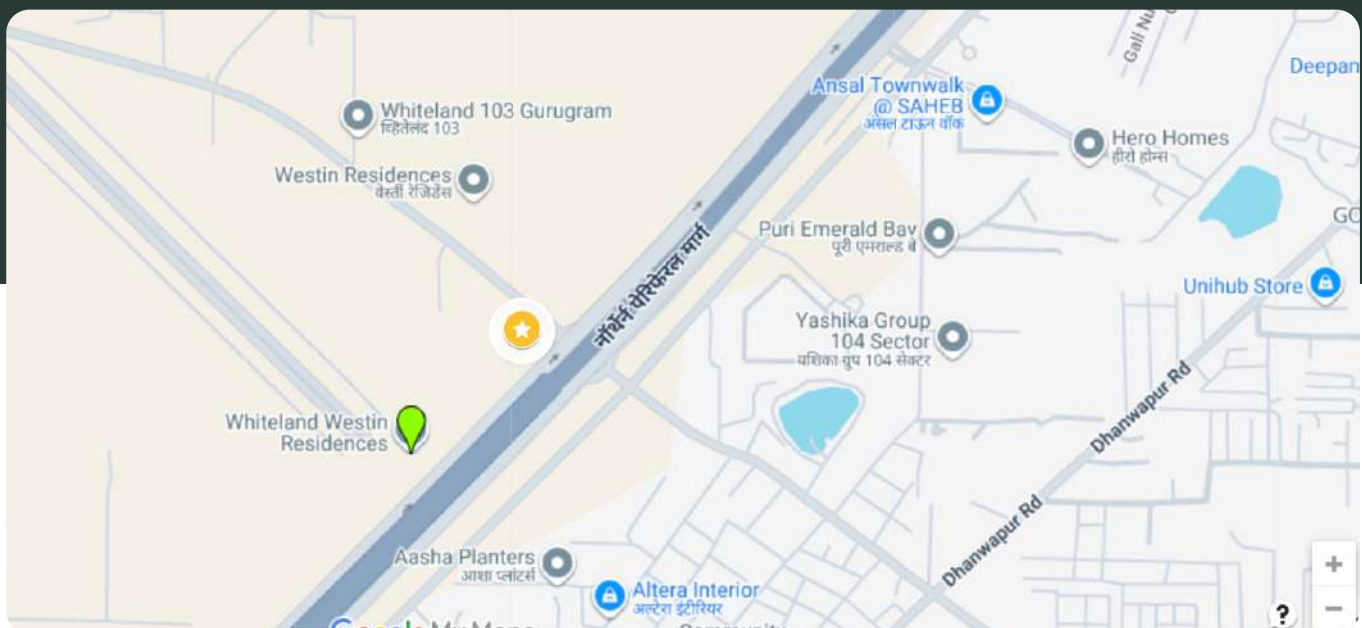
Matteo Nunziati (Interior Design), Morphogenesis (Architecture), Shapoorji Pallonji (Construction Partner)

DEVELOPER:

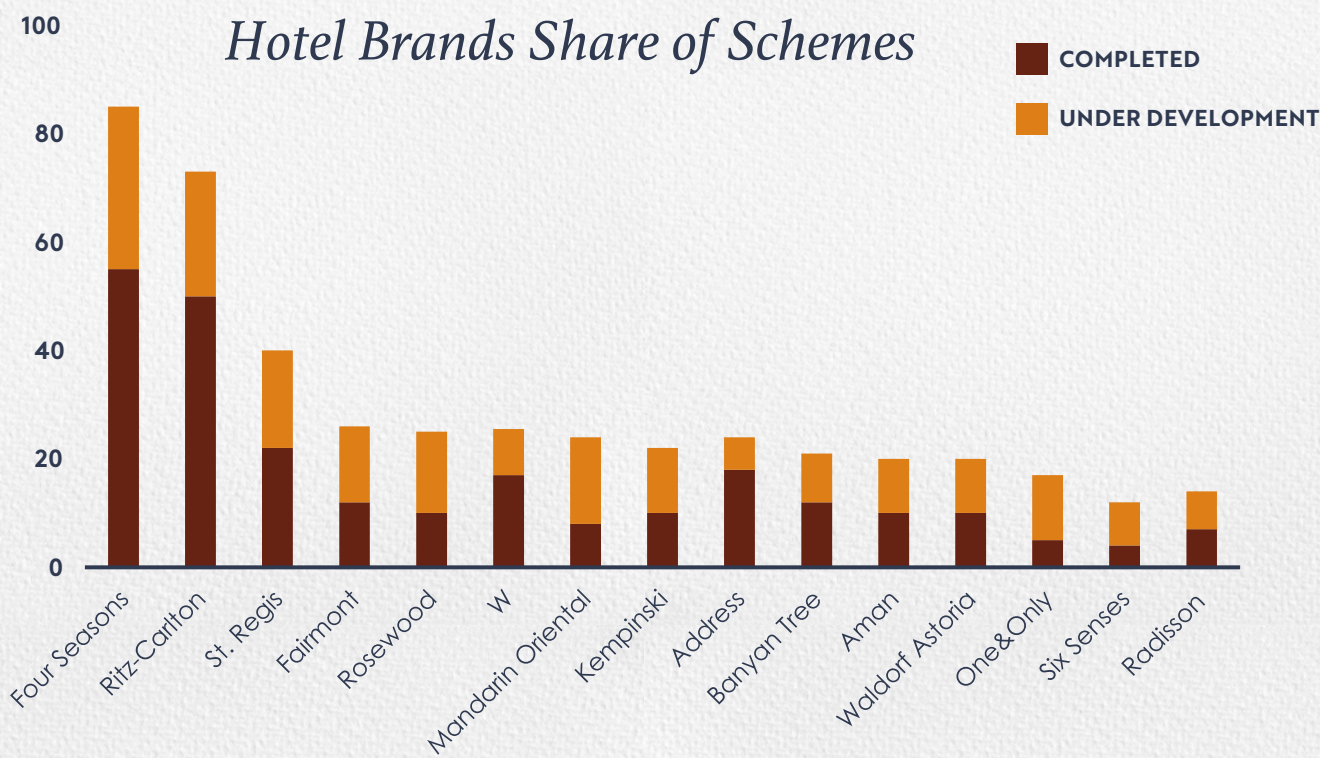
Whiteland Corporation Private Limited

Whiteland Westin Residences is North India's first standalone Westin-branded residential project. Developed by Whiteland Corporation with Marriott International, it spans 20 acres in Sector 103, Delhi NCR.

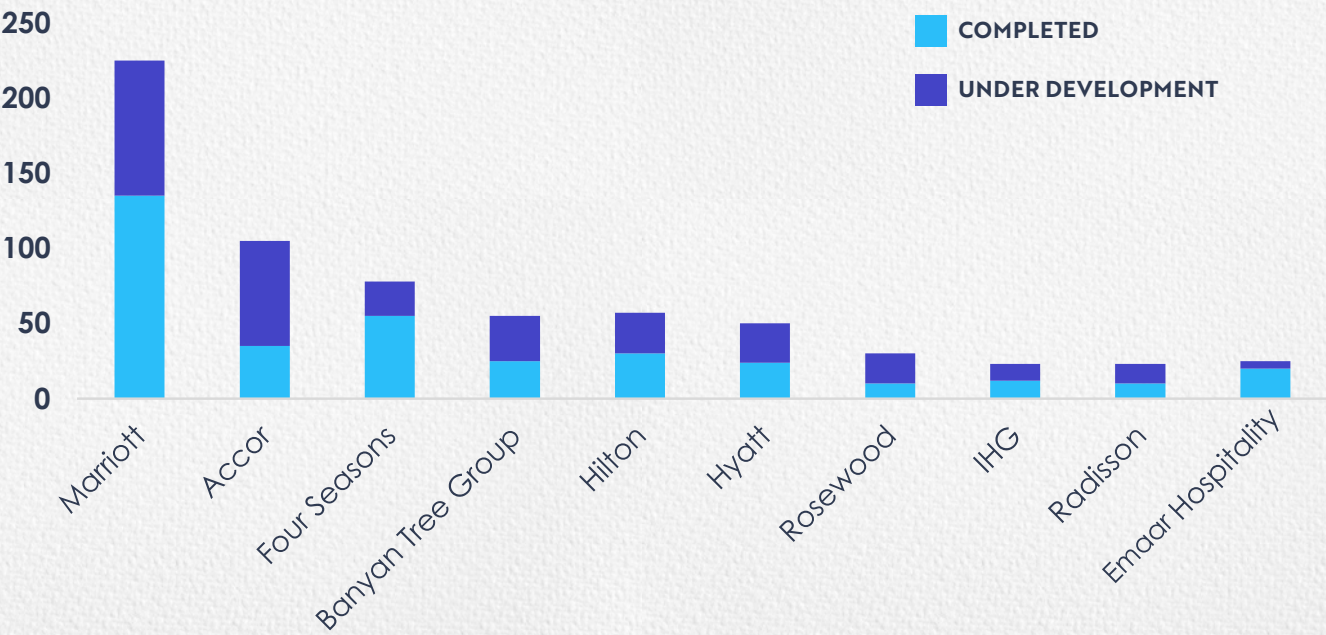
Designed by Hafeez Contractor, Cooper Hill, and BM&A, the G+43 and G+40 towers house 1,550 apartments (3 BHK and 4 BHK, 2,650–4,300 sq ft) on 20–30 ft stilts, eliminating ground-level traffic. Amenities include a 175,000 sq ft clubhouse, tennis courts, indoor/outdoor pools, spa and wellness center, movie theater, restaurants and bars, a 300-seat ballroom, and 18 guest suites. IGBC Gold pre-certified, with 75% open green space and 15 min airport access, it completes by 2031, starting at ₹7 cr.



Current Global Project Schemes in Branded Residences



Top 10 Hotel Parent Companies



Branded Residence Market Analysis– Global

- 126,129 Branded Residence Units across 788 projects worldwide.
- Over 1,600 schemes forecast by 2030.
- Hotel Brands dominate with a share of 80% of the projects.
- Marriott is the largest operator, followed by Accor. YOO is the leading non-hospitality brand.
- Non-Hospitality Brands account for 20% of the projects worldwide.
- Dubai is the world's leading hotspot for branded residences followed by South Florida, New York, Phuket, and London.

Asia-Pacific Market Leadership



The Asia-Pacific branded residences market is led by established international hotel groups, with Marriott International topping the regional podium with 18 existing projects and 19 in the pipeline, followed by Four Seasons (12 existing, 4 pipeline) and Accor (8 existing, 32 pipeline). This brand distribution reflects the sector's evolution from luxury-focused developments to broader market segment penetration.

The hospitality sector's commitment to branded residences is exemplified by Four Seasons' strategic target of achieving 40% of their portfolio in branded residences within five years, demonstrating the sector's transition from ancillary revenue streams to

core business focus. Leading hospitality players including Four Seasons, Marriott, Accor, Hilton, Aman, and Mandarin Oriental continue to dominate the segment, setting standards for luxury and service delivery.

The global branded residences sector experienced unprecedented growth in 2024, with **240 new projects added across 100 markets worldwide**, representing a remarkable **180% expansion** over the past decade. The Asia-Pacific region has emerged as the global growth engine, with **Thailand leading at 18% regional market share**, followed by **Philippines (12%)** and **South Korea (11%)**.

REGIONAL MARKET STRUCTURE:

BANGKOK:	4,525 units across 15 projects (urban leadership)
PHUKET	3,201 units across 24 projects (resort market dominance)
VIETNAM	18,197 units across 61 developments (27% regional share)
INDIA	~4,000 units across 16 developments (8% share, 100% urban)

Branded Residence Surge – India



Surge in Indian Residence Projects:

INDIA'S STRATEGIC MARKET POSITION:

India's current 8% share of Asia-Pacific existing supply, while modest, represents substantial growth potential given expanding ultra-high-net-worth population and economic fundamentals. The premium potential for branded residences reaches highest levels in less mature markets due to limited high-quality supply and strong brand association prestige.

EXPANDING MARKET:

Market expansion opportunities align with infrastructure development timelines, economic growth patterns, and demographic trends that support luxury residential demand. These factors combine to create compelling development opportunities for brands and developers while providing residents with access to global lifestyle standards in emerging urban centers.

INFRASTRUCTURE DEVELOPMENT IMPACT

METROPOLITAN TRANSPORT NETWORK ENHANCEMENT:

Infrastructure development creates significant value enhancement opportunities for branded residences projects through improved accessibility and connectivity. Properties with superior connectivity consistently outperform market averages in both capital appreciation and rental yields, making infrastructure proximity a critical factor in branded residences site selection and development planning.

Metro connectivity enhancement particularly benefits branded residences by improving accessibility to central business districts, airports, and entertainment zones, essential factors for target demographics including senior executives, entrepreneurs, and affluent professionals. This connectivity premium supports branded residences development economics while providing residents with convenience essential to their lifestyle requirements.

AVIATION INFRASTRUCTURE AND CONNECTIVITY:

Aviation infrastructure expansion significantly influences branded residences development opportunities, with improved connectivity creating new corridors for luxury residential development, particularly relevant for branded residences targeting frequent travelers and international business professionals.

Airport proximity premiums are well-established in major Indian cities, with properties near airports demonstrating superior appreciation compared to citywide averages. These premiums support branded residences development economics while providing residents with international connectivity essential to their professional and personal requirements.

SMART CITY INTEGRATION AND DIGITAL INFRASTRUCTURE:

Smart city initiatives provide digital connectivity, automated services, and integrated urban systems that enhance branded residences value propositions. Digital infrastructure development enables sophisticated home automation, energy management, and security systems that have become standard expectations in branded residences.

These technological capabilities support sustainability objectives while providing convenience and efficiency benefits valued by target demographics. The integration of digital infrastructure into urban planning creates foundations for comprehensive branded residences development that meets contemporary luxury living standards.



What to Expect:

DIVERSIFICATION:

Look beyond just hotels – luxury car brands, fashion houses and even renowned designers might join the branded residences space in India with some already having done so.

TIER-2 GROWTH:

While metros lead the way, expect branded residences to surge in tier-2 cities like Surat and Indore, catering to a broader audience.



Pipeline Trends - Global

The branded residences sector has historically been led by schemes from luxury hotel developers, but as the sector continues to grow and diversify other brands and chain scales are capturing increasing market share. In the year 2023, there were nearly 250 projects in North America, around 150 in Asia-Pacific, approximately 90 in Latin America, 110 in Europe, 70 in the Middle East and North Africa, and around 10 in Africa. In 2025, globally there are around 788 Branded Residences projects. A pipeline of Branded residences will take this figure to nearly 1,600 by 2030. Brands are now moving towards emerging markets to capitalize on rapid economic growth and rising demand by the affluent population.





Since branded residences have been an asset class reserved primarily for the global high net-worth population, there have been a few things which have been absolutely critical for buyers. Services and amenities such as the concierge, fitness centers, restaurants & bars, and housekeeping remain key, but there are new elements which have become integral for today's buyers. Wellness and experiential amenities have risen in importance, especially post pandemic.

These amenities and focus on the lifestyle of branded residence owners are a key part of the new generation of lifestyle and leisure hospitality brands in the pipeline. Buyers are also increasingly interested in sustainable schemes and schemes with both indoor and outdoor space. These changes represent more of a shift towards the desire for living spaces and amenities that suit the lifestyles of an increasingly discerning set of buyers.

Trends in Branded Residences - Global

In terms of the brands operating the sector, the global space is largely captured by hotel brands, which accounted for nearly 80% of completed schemes. Four Seasons tops the list with over 80 total projects. The Ritz-Carlton comes in as a close second, with nearly 80 schemes of their own, followed by St. Regis and Fairmont.

Speaking in terms of hotel **parent companies**, Marriott emerges as the world leader, single-handedly commanding over 200 projects under their belt. Despite the French trailblazer Accor placing second, their total projects sum up to just over 125.

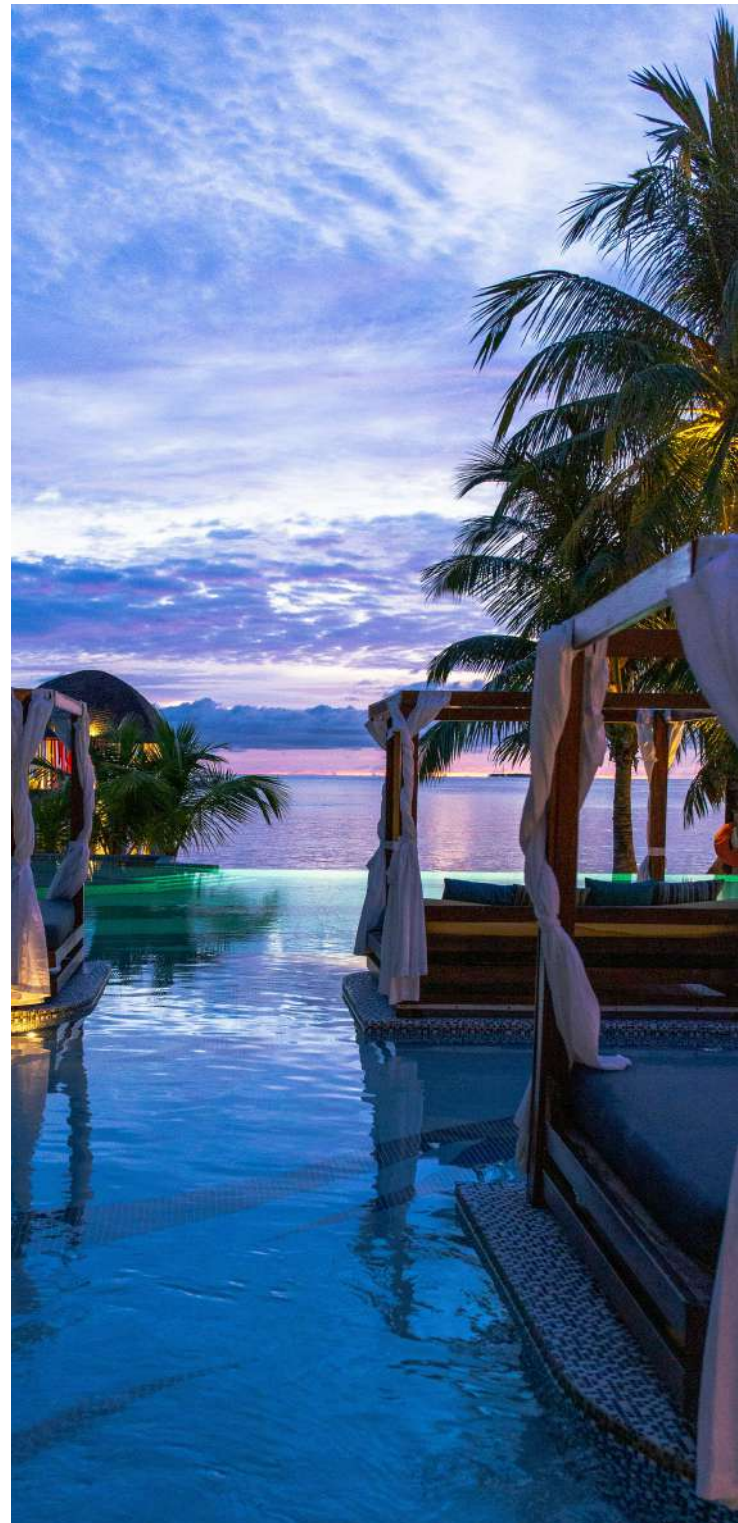
Branded residences come at a premium compared to traditional luxury apartments. Studies suggest an average ticket size between <9 crore (US\$1.08 million) and <10 crore (US\$1.2 million) for a branded residence. Existing projects in prime locations like Mumbai can range from <70,000 (US\$794) to <1,80,000 (US\$2,043) per square foot.

Trends in Branded Residences – Global Non-Hotel Players

ARCHITECT /INTERIOR	AUTOMOBILE	FASHION	DEVELOPER	RESTAURANTS
Yoo	Lamborghini	Elie Saab	Trump	Mr C
Pininfarina	Aston Martini	Armani	Candy & Candy	Hard Rock
LightArt	Buggatti	Versace	Related	Casa Tua
Greg Norman	Porsche	Fashion TV	Berkeley Group	Major Food Group
Philippe Starck		Roberto Cavalli	Emaar and Aldar	Nobu
Kelly Hoppen		Fendi		
1508		Baccarat		
Yabu		Bulgari		
HBA		Fendi		
Tristan Aeur		Missoni		
Yves Rochon		Ferre		
Goddard Littlefair		Diesel		
Cesar Pelli		Dolce and Gabbana		
Frank Gehry				
Daniel Libeskind				
Renzo Piano				
Norman Foster				
Moshe Safdie				
Jen Michel				
Zaha Hadid				

Trends in Branded Residences - India

- As the sector continues to grow, the locations where branded residential schemes can be found are growing too.
- Delhi NCR leads with current and planned supply of around 2117 units, followed by Mumbai with 715 units, Pune which is home to 479 units, Odisha with 402 and Chennai with 123 units.
- Major International Hotel Brands like Four Seasons and Marriott have already marked their footprint into the Branded residences landscape of India. With domestic brands like Taj and Leela also taking a step forward in this direction with projects in Chennai, Bengaluru and Delhi NCR region.
- Trident Residences by the Oberoi Group has ventured into this space with their recent collaboration with BI Group.
- India's branded residences sector has demonstrated exceptional expansion. Based on internal research this specialized market has surged more than 160% over the previous ten years, with projections indicating the industry will achieve \$5 billion plus in value by 2025. Key drivers fueling this growth include increasing household wealth, the accelerating growth of high-net-worth individuals (HNWIs), and consumer attraction to internationally recognized luxury brands.

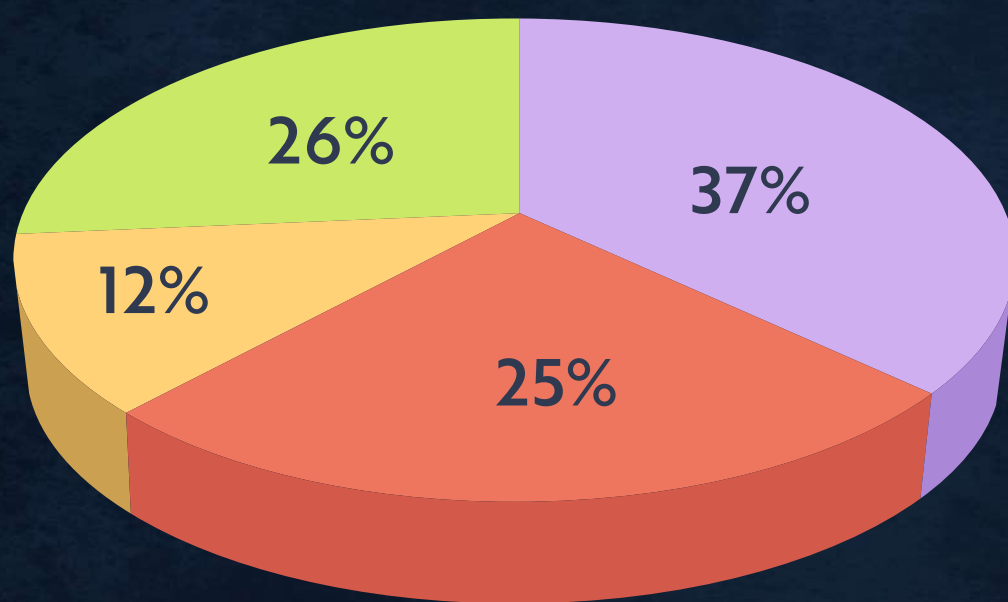


Non-Hotel Branded Residences - Global



The non-hotel branded luxury residential sector is driven primarily by established real-estate developers rather than hotel or consumer brands. Independent high-end projects now account for over 70 percent of premium launches globally, led by major residential groups, boutique luxury builders, private equity real-estate funds, and marquee architecture firms. Developers remain the dominant force, delivering signature design-led residences with full ownership models and bespoke amenities, without affiliation to hotel operators.

SHARE OF NON-HOTEL BRANDS BY CATEGORY



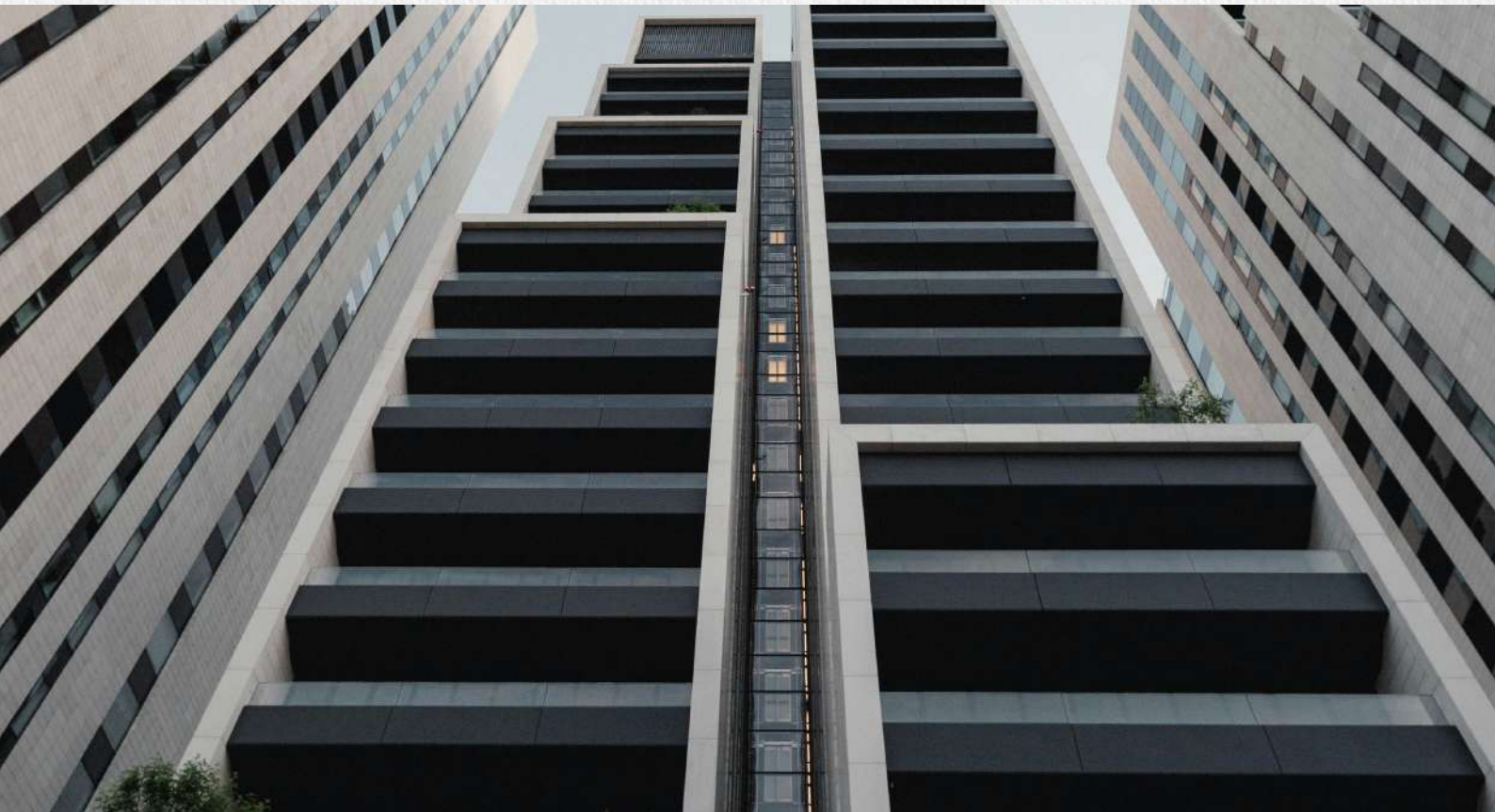
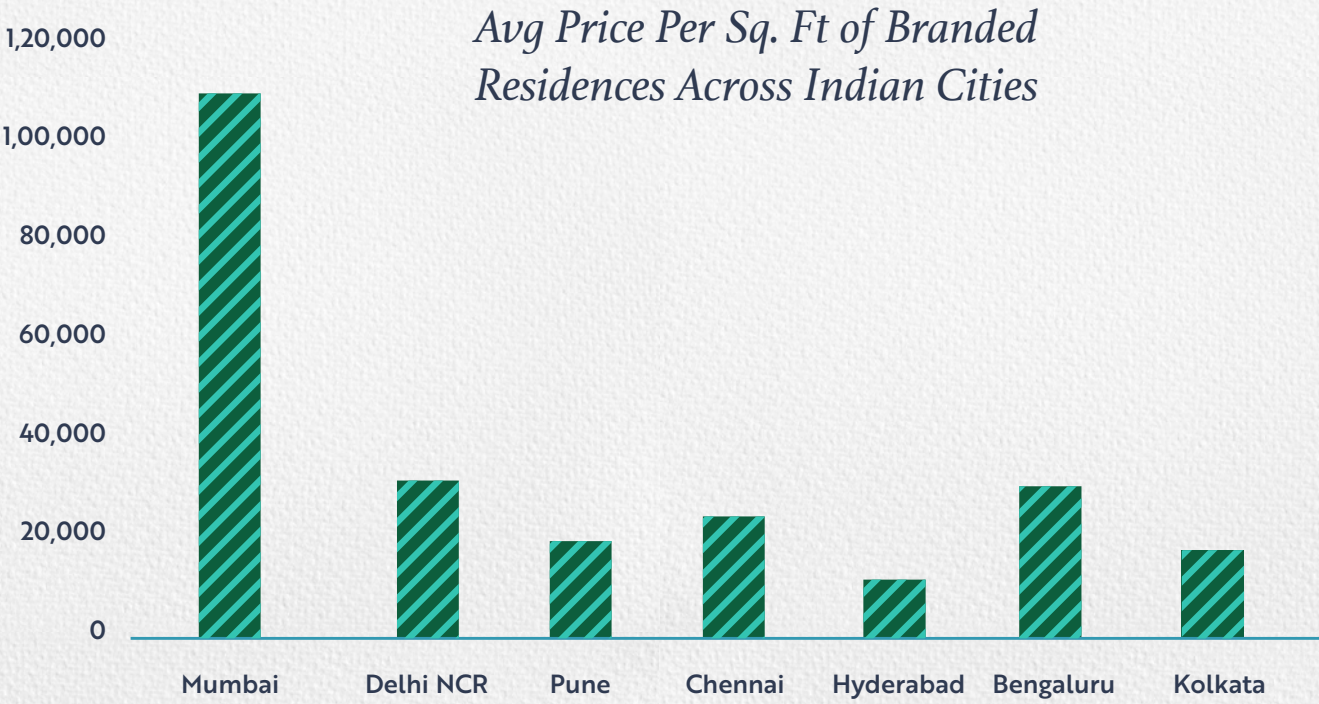
DEVELOPER

ARCHITECT/INTERIOR

FASHION

AUTOMOBILE

Branded Residence Price and Market Value – Indian Cities



CASE STUDY:

Price Premiums in Pune

To determine the price premiums that the branded residences command in their respective city/location, we have used the below approach to make the detailed analysis:

- We first established the weighted average price per sq ft of various properties in the area.
- We then established the weighted average price per sq ft of three branded residence projects:
 - Yoo Pune, Magarpatta
 - Yoo Villas, Kharadi
 - Trump Tower Pune, Kalyani Nagar

PUNE PRICE PREMIUMS

PARTICULARS

PRICE PREMIUM

**Branded Residence Projects vs
Top Luxury Residence Projects
in similar market**

75%

We determined that branded projects command a higher premium over high-end residential projects. The average price premium for the branded residential projects in Pune is around 75%.

Why Branded Residences for Developers?

**SLS Residences
Dubai Business Bay
SOLD OUT**



35%
Premium

371
Residences

\$7,100
SLS Residences Dubai
Bay pricing / sq m

SUPERLATIVE
AMENITIES/
SERVICE

+

BRAND
EXPRESSION

=

- Branded residences create a newer, deeper form of luxury expression, allowing residents to fully immerse with brands they align with.
- A Branded residence experience is a tailor made response to the evolving consumer trends, combining two strong social symbols together.
- Luxury brands (hotel and non-hotel) are excited to tap into the Indian market, giving developers (i) a wide range of choices which resonate with their parcel and target market and (ii) a strong bargaining power to command financial negotiations.

A STRONG PRICE PREMIUM

Built in their traditional form (conjoined with the hotel), developers can:

- Capitalize off the booming hospitality segment.
- Improve sales velocity from brand assurance to generate strong development cash flows for both - transient and long-term units.

PRICE PREMIUM



Our analysis shows the premium for branded residences in India over non-branded products to range above 21% to 80%. It's important to note that this premium can vary significantly by location depending on various factors like location, accessibility, unique amenities and market trends.

When a luxury brand is given to a residential product, it benefits from the same qualities of that brand by association

and design. Purchasers of branded residences are assured of a limited supply of quality product that shares the brand's values. Pre-existing brand awareness means the residential product may enjoy a greater profile and attract a larger demand base. For this reason, purchasers are willing to pay more for branded than non-branded property.

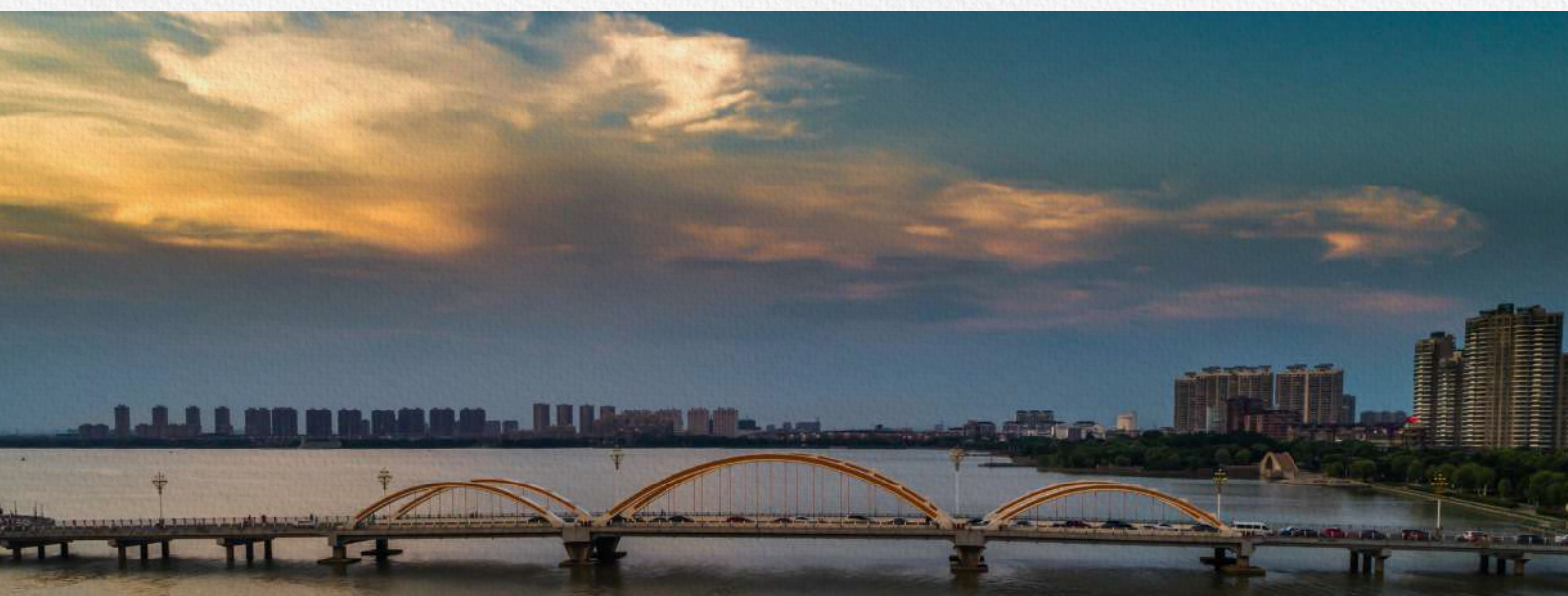
Price Premium Advantages – Global

HIGH PREMIUM

Prime global city/location	5-Star Luxury Hotel Service	Specialized curated services
Ultra-prime locality with high accessibility	Luxury Spa and Welleness Facility	Concierge for well tailored services
Renowned Architect/Designer	Exclusive Club Memberships	Exclusive Resident use services
Excellent Views/Upper Floors	Unique Experiences and Leisure Facilities	Brand value association

MODEST TO MEDIUM PREMIUM

Highly desired location	High quality hotel service	Concierge security and management
Prime location with good accessibility	Spa facilities	Residents-only area
Quality building developer	Health and Leisure facilities	Recognition and priority for residents
Recognized Architect/Designers	Good quality restaurants and bars	Discounts for Residents
Good views	Desirable experience	Cachet and confidence from the brand



BENEFITS FOR DEVELOPERS

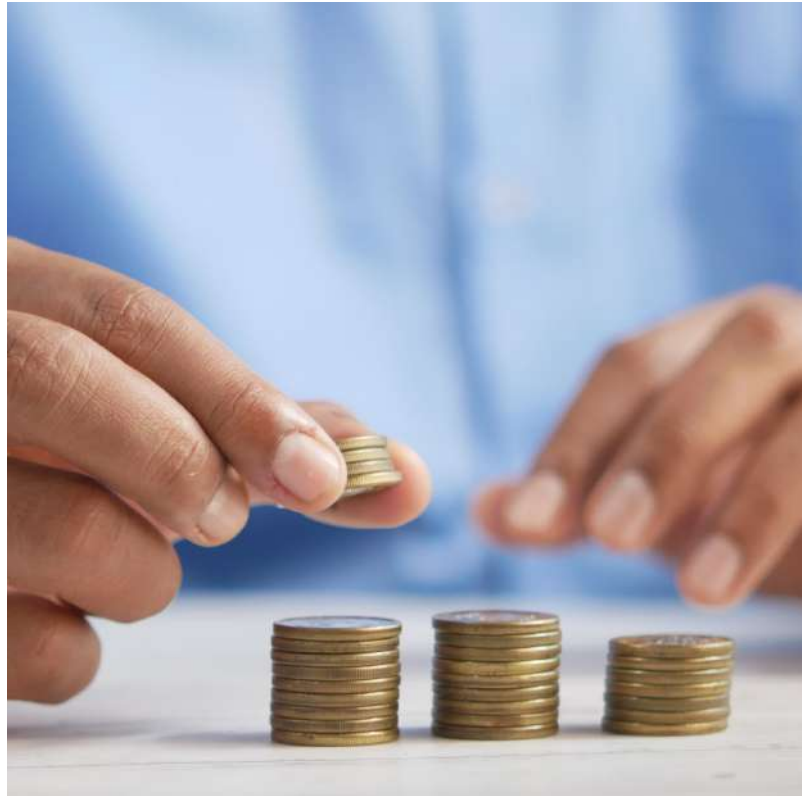
There are several benefits for developers to collaborate with brands for branded residences:

INCREASED MARKET APPEAL AND RECOGNITION:

- **Brand prestige:** Partnering with a well-established luxury brand like Trump® instantly elevates the project's status and attracts potential buyers seeking that specific brand association.
 - **Targeted marketing:** The brand's existing customer base becomes a potential pool of buyers for the developer.
-

PREMIUM PRICING AND FASTER SALES:

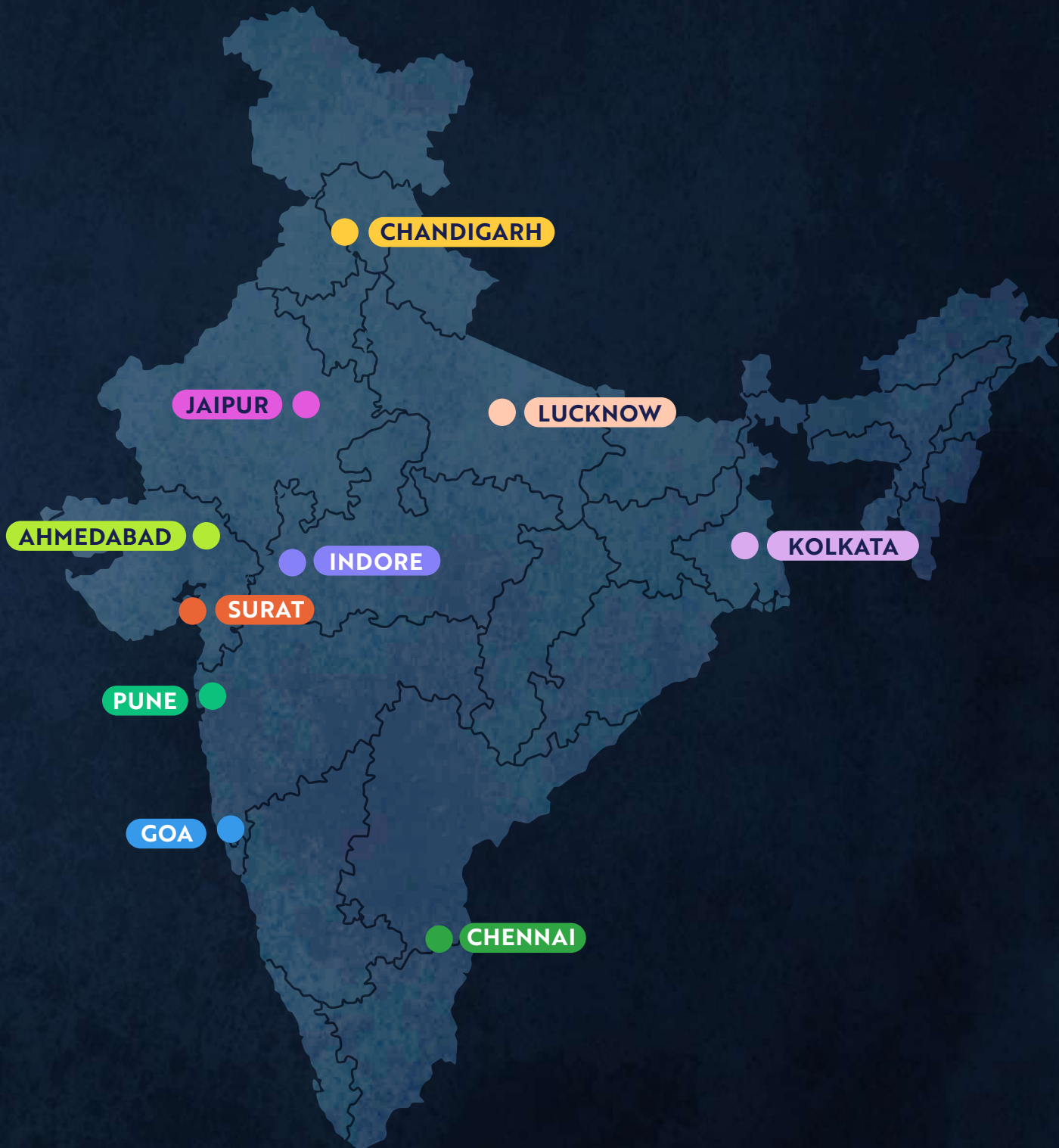
- **Higher price points:** Branded residences often command a price premium compared to unbranded luxury apartments.
 - **Faster sales cycle:** The brand association can attract more interest and lead to quicker sales.
-



ENHANCED DESIGN AND AMENITIES:

- **Branded design elements:** The brand's design expertise and signature style can be incorporated into the architecture, interiors, and overall aesthetic.
 - **Exclusive amenities:** Collaboration may lead to unique amenities aligned with the brand's image, like a signature spa experience or a private members' club.
-

MAP OF EMERGING CITIES



EMERGING CITY CHANDIGARH

Chandigarh, the planned city known for its modern architecture and green spaces, has the potential to become an emerging city for branded residences. Here's a breakdown of the reasons why:

Chandigarh Highlights:

AFFLUENT POPULATION:

Chandigarh boasts a high standard of living with a wealthy population. This demographic is a prime target market for luxury branded residences.



GROWING DEMAND FOR LUXURY REAL ESTATE:

As disposable income rises, the demand for luxury apartments and residences with high-end amenities is increasing in India.





LIMITED SUPPLY:

Currently, the branded residence market in Chandigarh is relatively uncrowded, offering a potential firstmover advantage for developers.

**Some of the top localities for premium residences in Chandigarh include:*

LOCALITY

ZIRAKPUR

NEW CHANDIGARH

MULLANPUR

SECT 49, CHANDIGARH



EMERGING CITY AHMEDABAD

THRIVING ECONOMY:

Ahmedabad boasts a dynamic economy with stronghold in pharmaceuticals, textiles, information technology, and manufacturing sectors. This economic strength attracts professionals and business leaders who often seek convenient and prestigious living spaces.

A 2025 Gujarat Budget Analysis projects the Gross State Domestic Product (GSDP) to reach ₹29.82 lakh crore (US\$358 billion) by 2025-26, indicating continued 12% annual growth that fuels surging demand for branded residences.





Some of the top localities for premium residences in Ahmedabad include:

LOCALITY

GIFT CITY

AMBLI

SATELLITE

SCIENCE CITY

BODAKDEV

AMBLI BOPAL



EMERGING CITY JAIPUR

ECONOMIC DEVELOPMENT:

As per the Rajasthan Economic Review 2024-25 by the Directorate of Economics and Statistics, the GSDP (nominal) of Rajasthan is projected at INR 17,04,000 crores (\$205 billion) in 2024-25, with a per-capita income of INR 1,85,053. Besides its role as the provincial capital, educational, and administrative center, the economy of Jaipur is driven by tourism, gemstone cutting, luxury jewelry manufacturing, textiles, and information technology.



INDUSTRIES:

Jaipur has emerged as a hub of automotive industries with JCB, Hero MotoCorp and Robert Bosch GmBH having their manufacturing plants in Jaipur.



Fine Acres and Wyndham have recently announced a Branded Residence project in Amer, Jaipur. Fine Acres is a well known resort developer whereas Wyndham is one of the largest hotel franchisor in the world.

Some of the top localities for premium residences in Jaipur include:

LOCALITY

C SCHEME

JLN MARG

SWAGE FARM

NIRMAN NAGAR



EMERGING CITY

GOA

GOA: A PARADISE POISED FOR BRANDED RESIDENCES

Goa, India's sunshine state, is known for its pristine beaches, vibrant nightlife, and a laid-back charm. While traditionally a tourist haven, Goa is now setting its sights on a new horizon – becoming a potential hub for branded residences. Here's why this beach paradise holds promise for this niche market:

Goa's image as a leisure and luxury destination aligns perfectly with the aspirations of many branded residence owners. The opportunity to own a residence managed by a world-renowned hospitality brand or fashion house, nestled amidst the idyllic Goan landscape, offers an unmatched allure.



POTENTIAL FOR FIRST MOVERS:

While Goa boasts luxury hotels, major branded residence developers haven't made a significant mark yet. This presents a golden opportunity for first movers to establish themselves and capture a significant share of this emerging market.



Some of the top localities for premium residences in Goa include:

LOCALITY

CANDOLIM

ARPORA

PANAJI

PORVORIM

CUNCHELIM

OTHER EMERGING CITIES – SURAT

Surat, the "Diamond City of India," is synonymous with wealth and a burgeoning taste for luxury. The city's economic boom, fueled by the diamond industry and textiles, has fostered a growing affluent population seeking a sophisticated lifestyle. Here's why Surat shines:



AFFLUENT CLIENTELE:

The city boasts a high concentration of high-net-worth individuals, creating a ready market for branded residences.

UNDERSTATED OPULENCE:

Surat's culture leans towards understated elegance, potentially attracting brands offering a refined and personalized living experience.

STRATEGIC LOCATION:

Situated in Gujarat, Surat offers easy access to Mumbai, further enhancing its appeal.

Some of the top localities for premium residences in Surat include:

LOCALITY

VESU

ADAJAN

PAL

ALTHAN

VIP ROAD VESU

BHIMRAD



OTHER EMERGING CITIES – INDORE

Indore, the vibrant heart of Madhya Pradesh, is rapidly transforming into a major commercial and cultural hub in India. While not yet a dominant player in the branded residence market, the city exhibits intriguing possibilities for future growth. Here's a deeper look at why Indore could be an emerging destination for branded residences:

Indore's growth trajectory, rising affluence, and existing tourist base suggest potential for future development in the branded residence space. Monitoring local developer activity, pilot projects (like those seen in Jaipur), and trends in India's luxury real estate market can provide valuable insights into the potential of branded residences in Indore.





Some of the top localities for premium residences in Indore include:

LOCALITY

BICHOLI MARDANA

BYPASS/ SUPER - CORRIDOR

VIJAY NAGAR

TALAWALI CHANDA

MR 10

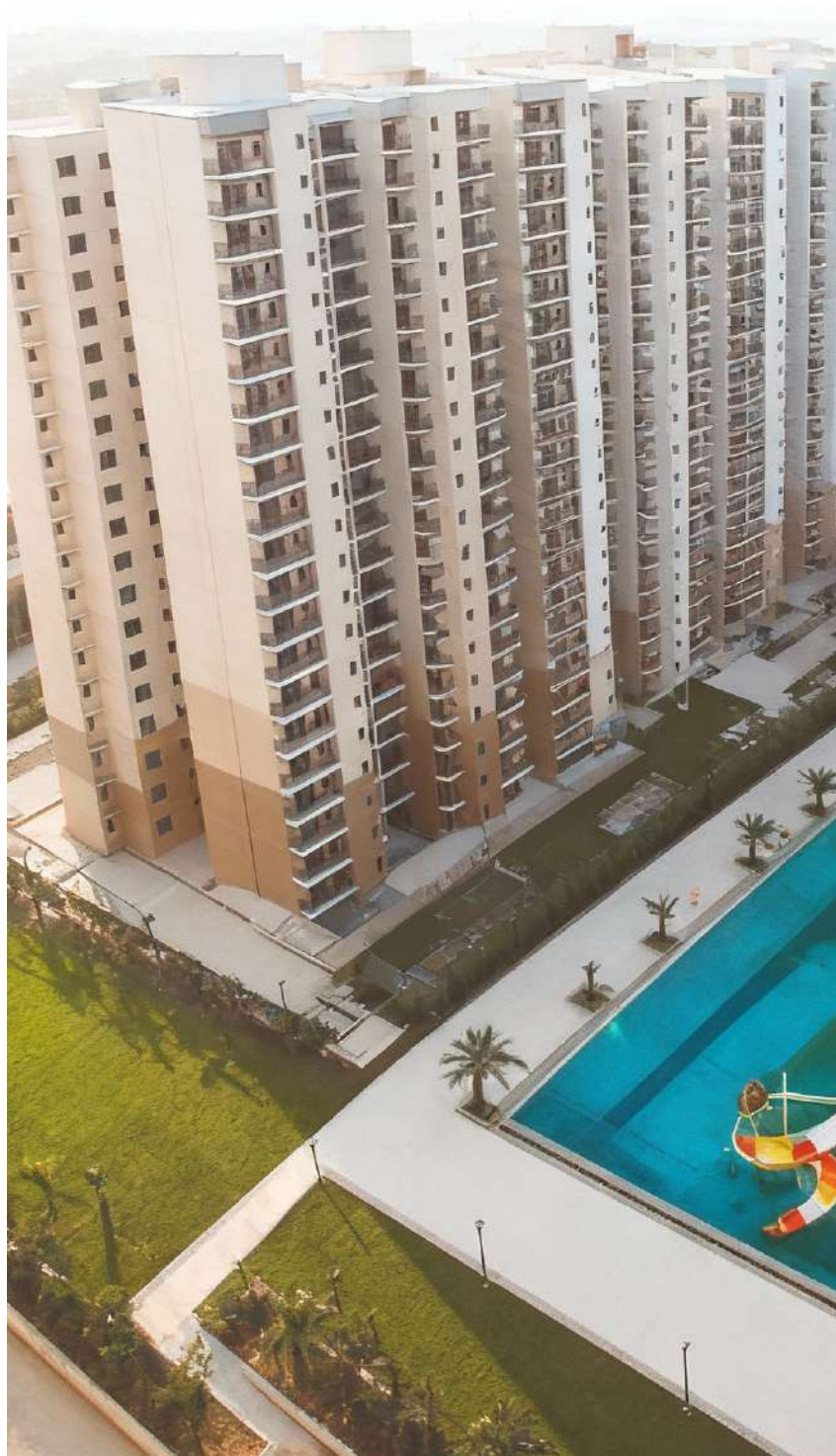


OTHER EMERGING CITIES – LUCKNOW

Lucknow, the captivating "City of Nawabs," is undergoing a renaissance. While steeped in historical splendor, Lucknow is embracing modern development, making it a potential contender for the next wave of branded residences in India. Here's why Lucknow deserves a closer look:

RICH HERITAGE AND CULTURAL BLEND:

Lucknow boasts a unique blend of Mughal architecture and colonial influences, offering a captivating backdrop for branded residences. Imagine a world-renowned brand curating a living experience that seamlessly blends historical charm with contemporary luxury.





Some of the top localities for premium residences in Lucknow include:

LOCALITY

GOMTI NAGAR

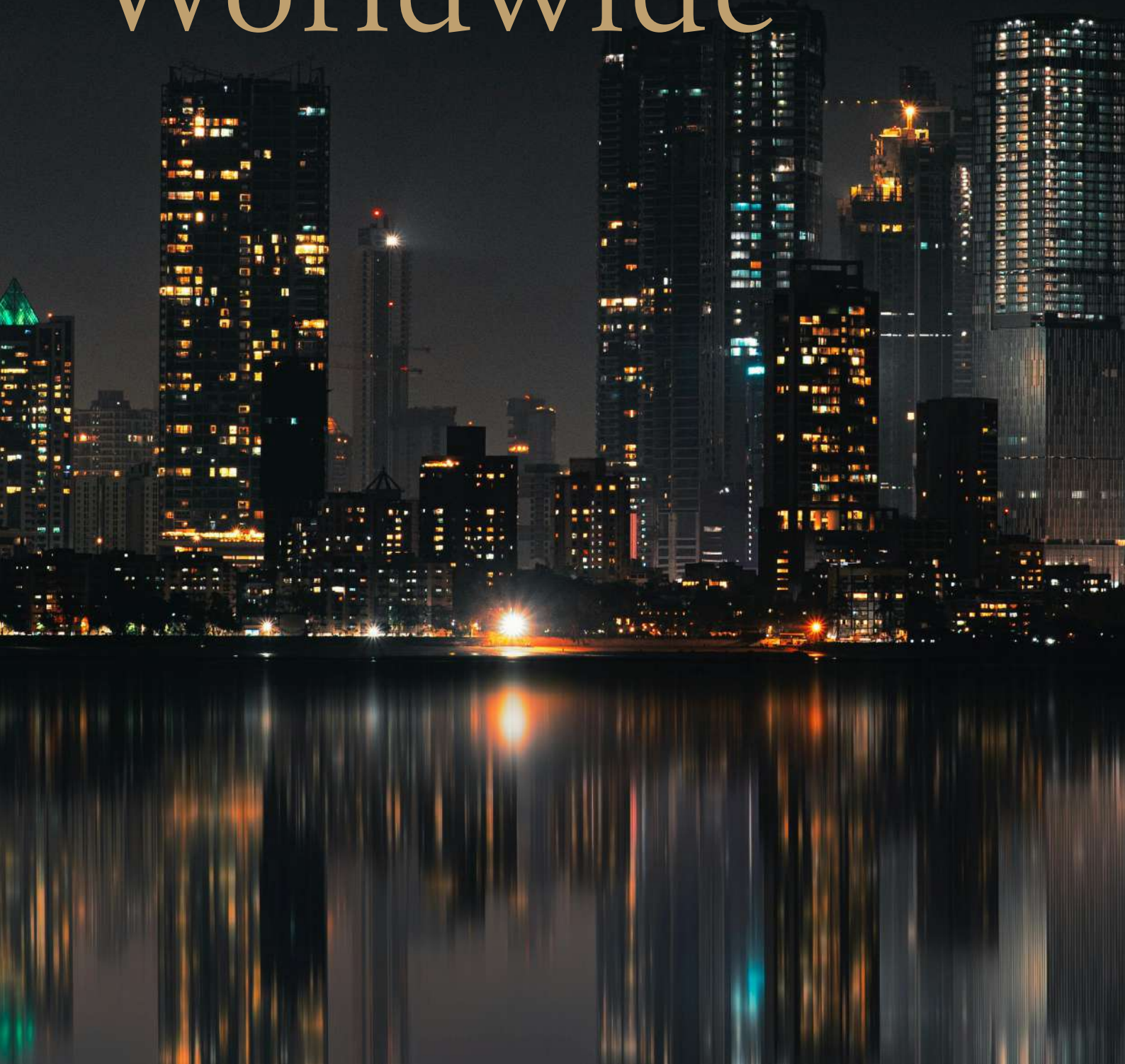
VIBHUTI KHAND

CHINHAT

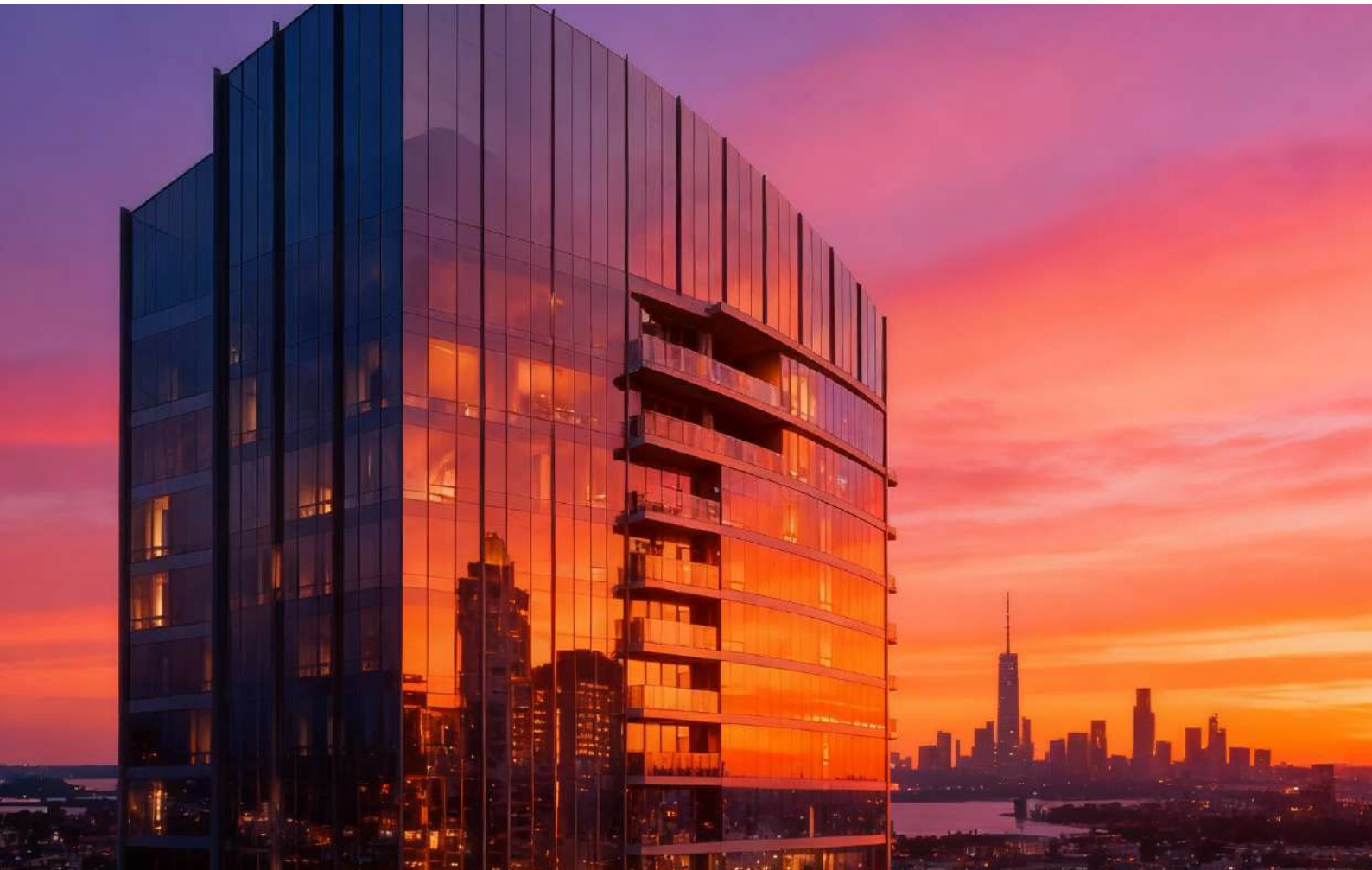
MAHANAGAR

ALIGANJ

Branded Residences: Worldwide



RAFFLES RESIDENCES, BOSTON



ATTRIBUTES

DESCRIPTION

Developer	<i>Noannet Group</i>
Chain	<i>Accor</i>
Location	<i>430 Stuart St, Boston, Massachusetts 02116, United States of America</i>
Core Amenities	<i>24/7 Concierge, 24/7 Security, 24/7 Valet, Wine Selection Services, F&B Tastings, Inroom Dining</i>
À La-Carte Amenities	<i>Personal Chef/Catering, Nutritionist and Wellness, Shopper Service, PA/Secretary, Childcare, Dry Cleaning, Private Limousine Service, 'While Away' Maintenance, Florist, Pet Walking, Magazine/Newspaper Doorstep Delivery, Housekeeping</i>
Reported Premium	<i>50%</i>
Inventory	<i>146 units</i>

FAIRMONT ROYAL PALMS, MARRAKECH



ATTRIBUTES	DESCRIPTION
Developer	<i>Semaris LTD</i>
Chain	<i>Accor</i>
Location	<i>Km 12 Route D'Amizmiz, Marrakech 40000, Morocco</i>
Core Amenities	<i>6 Restaurants, 3 Bars, 2 Gyms, 4 Tennis Courts, Signature Spa, Farm</i>
À La-Carte Amenities	<i>Childcare, Chauffeur, Fitness Instructor, Golf Instructor, In-Room Dining, 'While Away' Maintenance, Housekeeping, Pool Maintenance, Landscaping, Shopper, Dry Cleaning</i>
Reported Premium	<i>95%</i>
Inventory	<i>53 units</i>

RAFFLES RESIDENCES OWO, LONDON



ATTRIBUTES	DESCRIPTION
Developer	<i>Hinduja Group</i>
Chain	<i>Accor</i>
Location	<i>57 Whitehall, London SW1A 2BX, United Kingdom</i>
Core Amenities	<i>Lounges, Private Dining, Game Zone, 16 Seater Cinema, Fitness Studio, Treatment Suite</i>
Reported Premium	<i>40%</i>
Inventory	<i>85 units</i>

ASTON MARTIN RESIDENCES, MIAMI



ATTRIBUTES	DESCRIPTION
Developer	<i>G&G Business Development</i>
Chain	<i>Aston Martin</i>
Location	<i>300 Biscayne Blvd Way, Miami, Florida 33131, United States of America</i>
À La-Carte Amenities	<i>Art Gallery, Business Centre, Conference Room, Kids Room, Teen Centre, Game Room, Vending Area, Fitness Centre, Spa, Spinning Room, Boxing Room, Sauna, Meditation Room, Salon, Virtual Golf, Movie Theatres, Infinity Pool, Cabanas, Sky Bar, Chef's Kitchen, Private Dining Room, Yacht Parking, Butler Service</i>
Inventory	<i>391 units</i>

BENTLEY RESIDENCES, MIAMI



ATTRIBUTES	DESCRIPTION
Developer	<i>Dezer Development</i>
Chain	<i>Bentley</i>
Location	<i>18401 Collins Ave #2420, Sunny Isles Beach, Florida 33160, United States of America</i>
On-Demand Service	<i>Restaurant/Hotel/Limousine/Travel/Golf/Tennis/Sports & Entertainment Information and Reservation Service, Car Concierge, Laundry, Dry Cleaning, Yacht Reservation, Packing & Shipping Coordination</i>
À La-Carte Amenities	<i>Housekeeping Services, Handyman Services, Grocery Shopping, Plant Maintenance, Personal Chef, Dog Walking, Pet Grooming, Spa Treatments, Nanny & Childcare, Alterations, Car Washing & Detailing, Personal Chef, Personal Trainer</i>
Inventory	<i>216 units</i>

ST. REGIS COSTA MUJERES



ATTRIBUTES	DESCRIPTION
Developer	<i>AB Living Group</i>
Chain	<i>Marriott</i>
Location	<i>Blvd. Kukulcán km 1.5 entrada a Puerto Cancún, 77500 Cancún, Q.R., Mexico</i>
Core Amenities	<i>Lounge & Library, The Drawing Room, Wine Vault, St Regis Bar, Tequila Room</i>
À La-Carte Amenities	<i>Beach Club, Infinity Pools, Drawing Room, Library, Water Park, Kids Club, Cooking Classes, Spa and Fitness Center, Rooftop Pool and Lounge, Ballrooms, Meeting Spaces and Boardrooms, Outdoor Cinema</i>
Inventory	<i>80 units</i>

RITZ CARLTON HANOI



ATTRIBUTES	DESCRIPTION
Developer	Masterise Homes
Chain	Marriott
Location	25-27 P. Hai Bà Trưng, Hàng Bài, Hoàn Kiếm, Hà Nội 100000, Vietnam
Amenities	Lobby Lounge, Game Room, Theater, Indoor Pool, Gym, Kid's Club, Private Function Space with Show Kitchen, Boardroom & Lounge
Inventory	104 units

ST REGIS MIAMI



ATTRIBUTES	DESCRIPTION
Developer	<i>Related Group & Integra Investments</i>
Chain	<i>Marriott</i>
Location	<i>1809 Brickell Ave, Miami, FL 33129, United States</i>
Amenities	<i>Fine Dining, Exclusive Beach Club, Green Terrace, Media Room, Business Centre, Conference Rooms. Children’s Entertainment Room. Ten Room, Multi-Sport Simulator, Climate Controlled Storage, Private Marina, Infinity Pool, Chartered Yacht, MichelinQuality Food</i>
Inventory	<i>152 units</i>

W RESIDENCES KOH SAMUI



ATTRIBUTES

DESCRIPTION

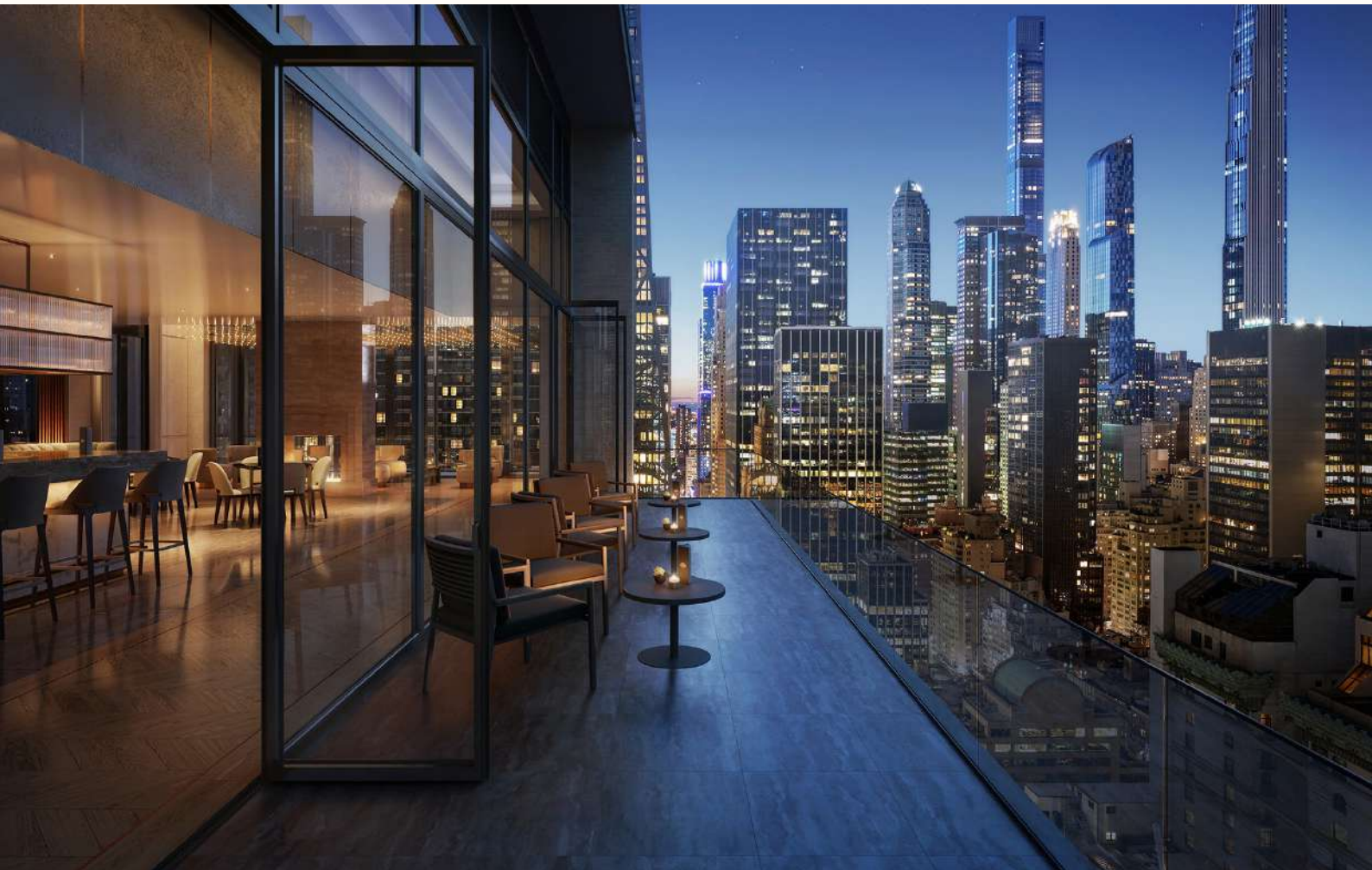
Developer	<i>City View Place Holdings</i>
Chain	<i>Marriott</i>
Location	<i>4, 1, Mae Nam, Amphoe Ko Samui, Surat Thani 84330, Thailand</i>
Amenities	<i>24-hour reception, Concierge service, Welcome Ambassador, Lounge, On-site all-day dining restaurants, Bar, Beach Club, Spa, Tennis court, Fitness centre, Swimming pool, Giant chessboard, 24-hour security system with CCTV. Additional services, In-house spa services, In-house dining table service, Personal chef, Food purchasing service (Grocery Pick-up and fridge stocking), Laundry service, Attorney / Notary Public Service, Interpretation service, Shuttle service, International parcel or document delivery service, Pet service, Conference service</i>
Inventory	<i>17 units</i>

THE LAKES BY YOO



ATTRIBUTES	DESCRIPTION
Developer	City View Place Holdings
Chain	YOO
Location	High Street, Lechlade GL7 3DT, United Kingdom
Amenities	Farm to Plate Ingredients, Lakeside Restaurant, Event Spaces, Open Kitchen, Waterside Terrace, Private Bar
Details/Notable Facts	The project is split across a massive land parcel and features unique typologies, such as cabins, farm barns, lakeside apartments and homes with their own private nature reserves

MANDARIN ORIENTAL 5TH AVENUE, NEW YORK CITY



ATTRIBUTES	DESCRIPTION
Developer	SHVO
Chain	Mandarin Oriental
Location	685 5th Ave, New York, New York 10022, United States of America
Core Amenities	Michelin-Star Private Dining, Floral Services, Dog Walker, Dinner Reservations, Laundry, Spa Services, In-Room dining, Concierge, Digital Stylist, Private Shopping
Inventory	65 units

MARRIOTT AND JW MARRIOTT RESIDENCES, GRAND MARINA SAIGON



ATTRIBUTES

DESCRIPTION

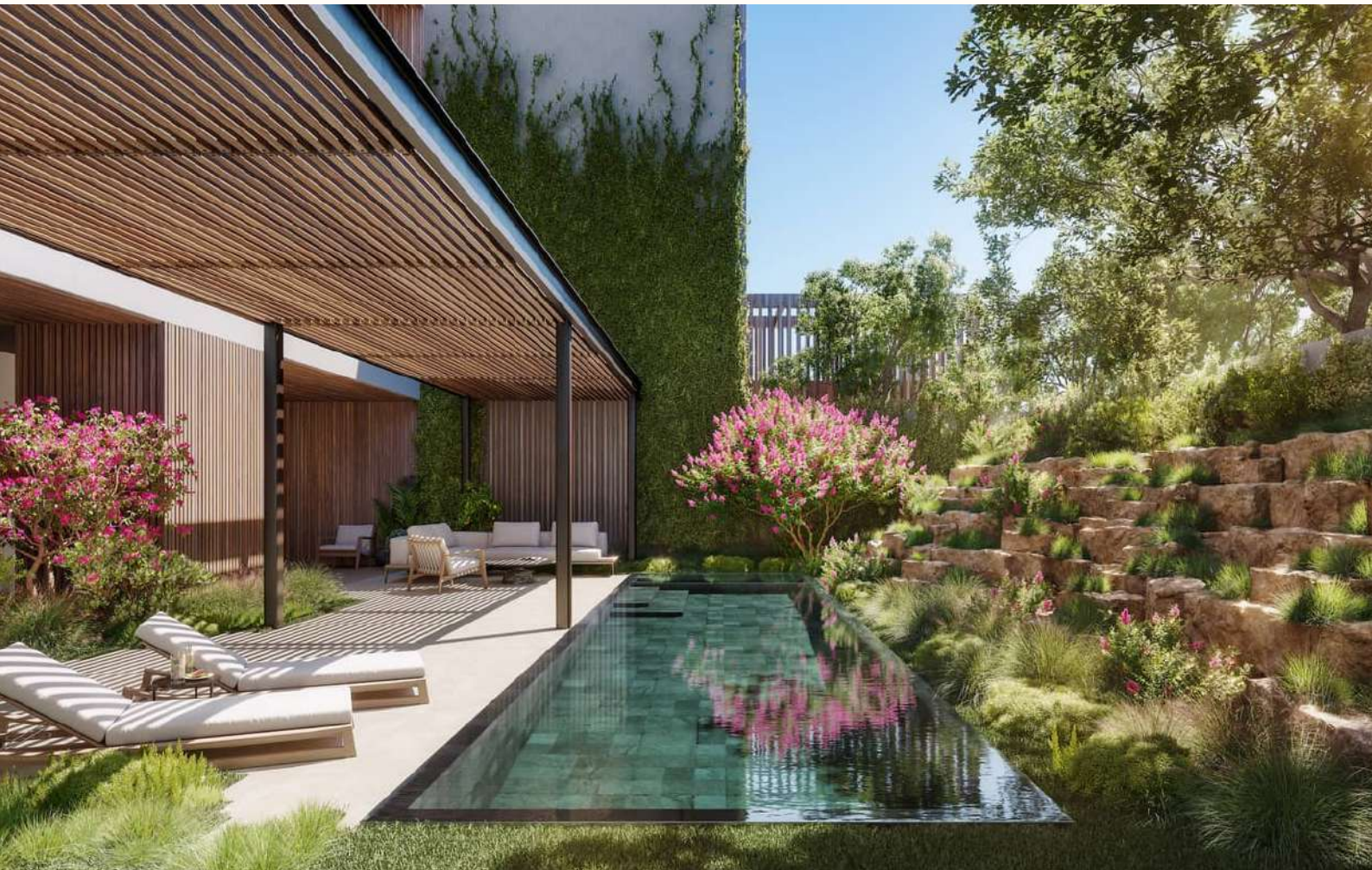
Developer	<i>Masterise Group</i>
Chain	<i>Marriott</i>
Location	<i>No. 2, Ton Duc Thang, Ben Nghe Ward, District 1, Ho Chi Minh City, Vietnam</i>
À La-Carte Amenities	<i>Grocery Shopping, Laundry, Alterations, Car Washing/Detailing, Vacation Planning, Equipment Rental, PA/Secretary, Function Planning, In-Residence Dining, Mail Shipping, Personal Chef, Plant Care, Personal Trainer, Transaltion Services, In-Hope Spa, Nanny & Childcare, Pet Grooming</i>
Inventory	<i>3800+ units</i>

NOBU RESIDENCES, LOS CABOS



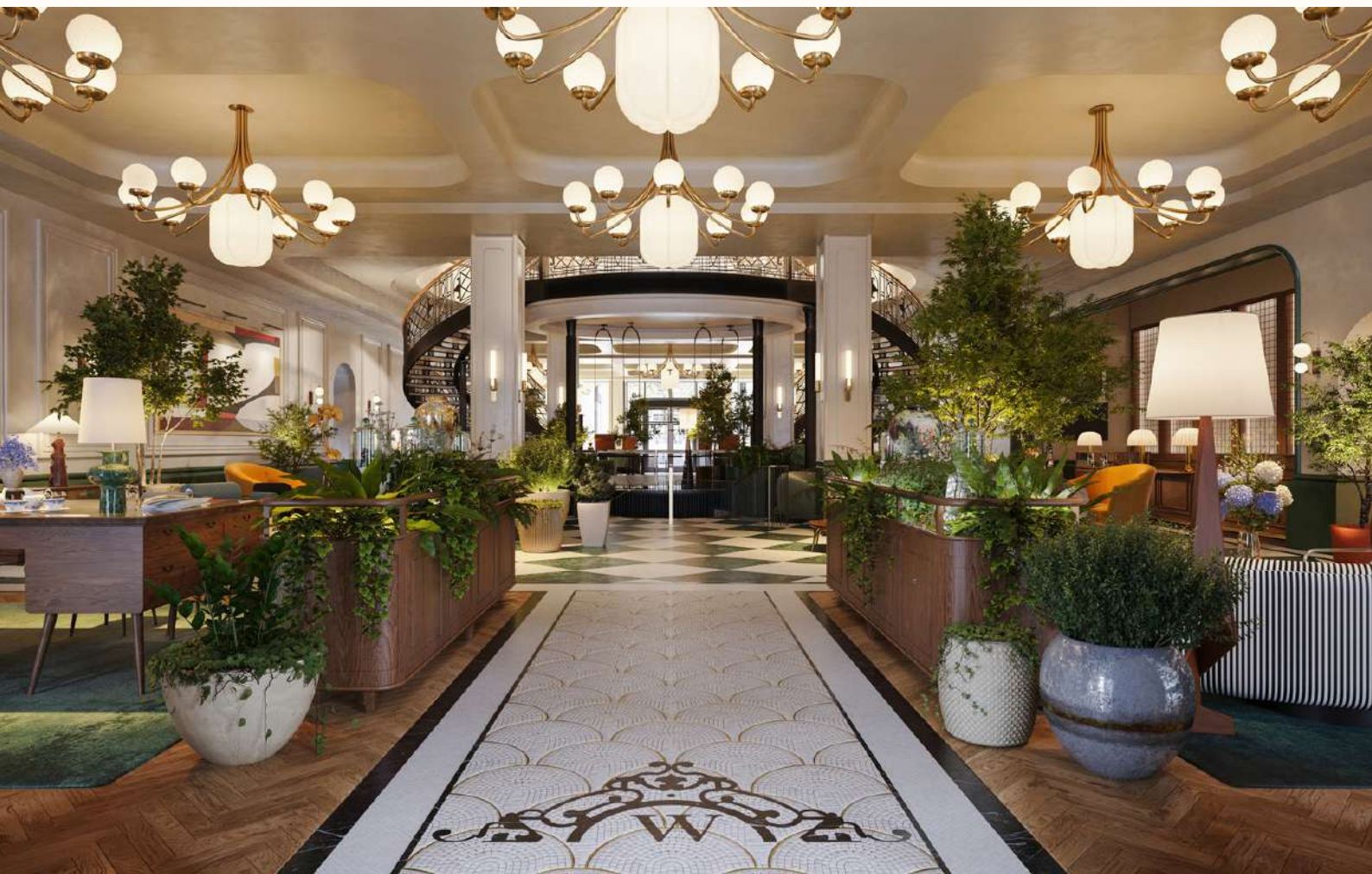
ATTRIBUTES	DESCRIPTION
Developer	<i>Nobu</i>
Chain	<i>Nobu</i>
Location	<i>Diamante Blvd. Polígono 1. Fracción D, Fraccionamiento Diamante, 23473 Cabo San Lucas, B.C.S., Mexico</i>
Core Amenities	<i>Bathtubs/Soaking Tubs, Exclusive (Simmons) Nobu Beds, Double vanities with Italian Stone, Local Ambassador / Personal Concierge</i>
Inventory	<i>60 units</i>

FOUR SEASONS LAKE AUSTIN



ATTRIBUTES	DESCRIPTION
Developer	<i>Austin Capital Partners</i>
Chain	<i>Four Seasons</i>
Location	<i>98 San Jacinto Blvd, Austin, Texas 78701, United States of America</i>
Amenities	<i>Infinity Pool, Cabanas, Private Dining, 96 Seater Theater, Private Marina, Clubhouse, Indoor Sports Club</i>
Inventory	<i>188 units</i>

THE WHITELEY SIX SENSES



ATTRIBUTES	DESCRIPTION
Developer	<i>Meyer Bergman</i>
Chain	<i>Six Senses</i>
Location	<i>The Whiteley, Queensway, London, W2 4YN</i>
Core Amenities	<i>Lobby Bar and Lounge, All-Day Dining Restaurant, Six Senses Spa, Indoor Swimming Pool, Alchemy Bar, Gym, Relaxation Room, Six Senses Place Amenities, Central Bar and Lounge, Restaurant, Private Dining Rooms, Co-Working Spaces, Wellness Rooms, Meeting Spaces</i>
Inventory	<i>14 units</i>

NUJUMA, A RITZ-CARLTON RESERVE, SAUDI ARABIA



ATTRIBUTES	DESCRIPTION
Developer	<i>The Ritz-Carlton Hotel Company (Marriott International)</i>
Chain	<i>Four Seasons</i>
Location	<i>Ummahat Islands 2-3, Red Sea, Saudi Arabia</i>
Amenities	<i>65 private villas; panoramic sea-view pools; Neyrah Spa; Conservation House; Galaxea Diving Center; four dining venues (Sita, Jamaa, Tabrah, Maia); stargazing telescopes; on-site farm activities</i>
Inventory	<i>65 villa</i>
Average Villa Size	<i>Approximately 2,100–3,500 sq ft (one- to two-bedroom configurations) s</i>
À La Carte Amenitiess	<i>Customized stargazing experiences; private yacht and dive charters; in-villa dining and Moringa spa rituals; personal wellness consultations; cultural and conservation excursions; private fitness sessions; bespoke event planning</i>

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