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Savills Singapore: Luxury brands to account for 75% of Singapore's branded residences pipeline

Singapore's ultra-prime branded residences market forecast to grow 29% by 2032

For Immediate Release – Singapore's branded residences market is entering a more mature phase of development, remaining firmly concentrated at the luxury end even as the wider Asia Pacific market diversifies into a broader range of brands and price points, according to Savills' *Branded Residences Asia Pacific 2026* report.

Singapore ranks 11th in Asia Pacific for branded residential projects, with the market forecast to grow 29% by 2032. With only a handful of schemes delivered over the past two decades, limited supply and exclusivity continue to define the market, with luxury brands accounting for 68% of completed projects and 75% of the pipeline.

This sets Singapore apart from the wider Asia Pacific market, where only 48% of pipeline projects are in the luxury segment as upper-upscale, upscale and selected midscale brands capture a growing share of development activity. Globally recognised names including St. Regis, Ritz-Carlton, W and Aman continue to reinforce Singapore's position as an ultra-prime branded residential market.

Despite this diversification, pricing power is strengthening. The average brand premium across Asia Pacific has risen from 23% to 29% over the past year, compared with a global average of 33%.

Press Release

Southeast Asia emerges as a key growth market

Across Southeast Asia, the branded residences story is being shaped by both rapid market expansion and growing demand for resort-led developments.

Vietnam is Asia Pacific's fastest-growing branded residential market, with the number of projects forecast to increase 152% by 2032, while Thailand remains one of the region's leading markets. Established resort destinations including Phuket and Bali continue to attract development as affluent buyers increasingly seek second homes combining lifestyle, investment and long-term wealth-planning considerations.

Resort developments are expected to account for 65% of Asia Pacific's branded residences pipeline, up from 50% of completed schemes. The trend is also driving greater adoption of integrated hotel-and-residential developments, which offer shared amenities, professional management and lifestyle services.

Looking ahead, Savills expects further growth in large-scale, master-planned communities combining branded residences with hotels, retail, wellness and leisure; a growing focus on wellness and longevity; and expansion into secondary and tertiary resort markets where land is more accessible and premiums may be greater.

“Asia Pacific remains a key growth engine for branded residences, but its next chapter will be defined by the breadth of its markets, not the scale of its leading ones,” **comments Louis Keighley, head of Savills Global Residential Development Consultancy.** “In many markets, greater brand diversification would be expected to dilute premiums. Instead, we are seeing the opposite. Fuelled by the expansion of resort developments and a more informed buyer base, brand premiums across the region continue to strengthen.”

"Singapore may be a relatively small branded residences market, but its scarcity, concentration of globally recognised luxury brands and limited supply of high-quality branded schemes have reinforced its position at the ultra-prime end of the market. Across Southeast Asia, the growth story is quite different, with markets such as Vietnam and Thailand seeing a broader expansion of branded residences, particularly in resort destinations. This gives buyers a growing range of options across the region, depending on whether they are looking for lifestyle, investment or a combination of both," **adds Otto Twist, Southeast Asia Director, International Residential Sales, Savills Singapore**.

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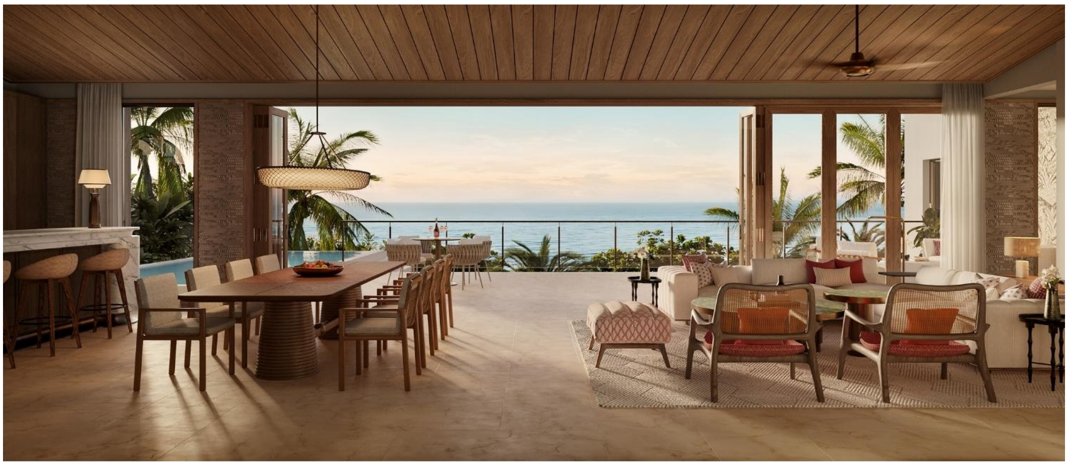

Mandarin Oriental Residences, Bali, Indonesia

Notes to Editor:

Hi-res pictures can be found here:

https://www.dropbox.com/scl/fi/5dyjx3ypuou31n60kax4i/APAC-Branded-Residences-Pic.zip?rlkey=jgimn68u2bep0p123sh46rmak&st=c77xam5a&dl=0

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About Savills

For over 160 years, Savills has been helping people thrive through place and spaces.

Listed on the London Stock Exchange, we have more than 40,000 professionals collaborating across over 70 countries, delivering unrivalled coverage and expertise to the world of commercial and prime residential real estate.

By applying world research data and trends to local and global settings, we're able to empower our clients with insights from the forefront of the industry – bringing their aspirations to life through innovative, tailor-made solutions.

Whether we are working with a global corporate looking to expand, an investor seeking to sustainably optimise their portfolio, or a family trying to find a new home, we help our clients make better property decisions.

Savills Singapore puts our clients at the forefront of everything we do. And that has led us to where we are today – an award-winning real estate services provider in the Asia Pacific region.

We strive to be visionaries in better crafting astute property decisions for individuals, businesses and investors. We believe that our clients' achievements are a testament to our value-based expertise, and commitment to delivering premium service.

Our team of professionals, with their deep knowledge of specialist property sectors, is dedicated to providing tailored solutions that align with our clients' objectives. We take pride in the comprehensive range of services we offer: transactional advice in investment, industrial, commercial, residential, retail, project management, research and consultancy, property and facilities management and valuation.

Unwavering in our focus to deliver innovative solutions, excellent customer service, and build long-term relationships with our clients, we constantly adapt to meet the evolving needs of our clients. We remain committed to their success and strive to exceed their expectations in every interaction.

For more information about Savills Singapore, visit our website at www.savills.com.sg

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