PHILIPPINES

BRANDED RESIDENCES MARKET SNAPSHOT 2026

C9 HOTELWORKS

ASIA OVERVIEW

TOTAL MARKET VALUE

2026

PHP2.5 Trillion

(USD40 Billion)

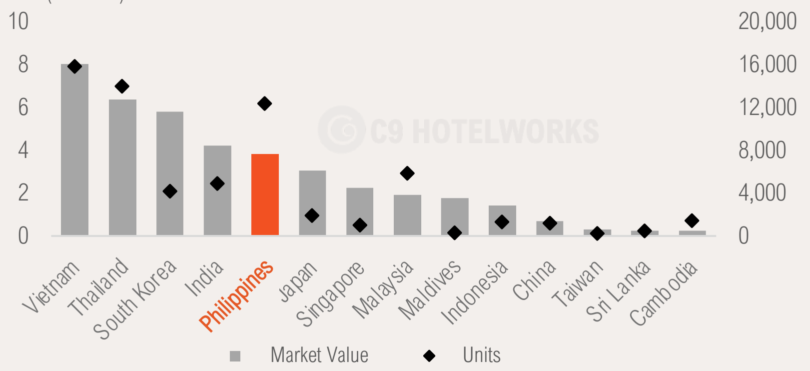
+30.3% Y-O-Y

2025

PHP1.9 Trillion

(USD30.7 Billion)

BRANDED RESIDENCES MARKET VALUE AND SUPPLY BY COUNTRY



Note: Market value is calculated based on the projects on active sale (launched projects).

Source: C9 Hotelworks Market Research

PHILIPPINES

PHP 235.5B (USD 3.8B) MARKET VALUE

7,433 LAUNCHED UNITS

26% LUXURY DEVELOPMENTS

The Philippines' branded residences market reached PHP235.5 billion (USD3.8 billion) in 2026 across 7,433 launched units, the third-largest launched supply in Asia. 26% of developments are luxury tier (10 of 38 properties), with the upscale tier accounting for the largest share at 66%.

Note: Luxury share is based on number of properties (launched and unlaunched projects).

Source: C9 Hotelworks Market Research

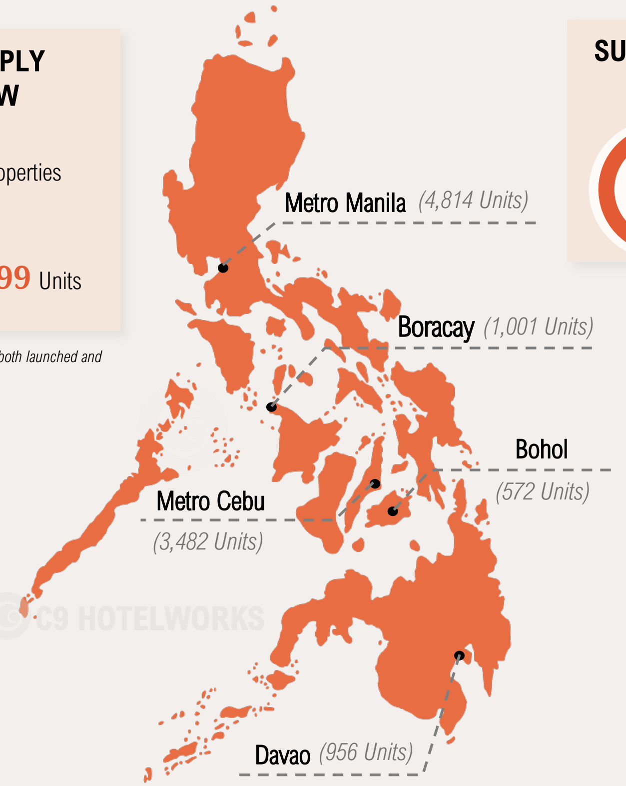
PHILIPPINES MARKET SNAPSHOT

TOTAL SUPPLY OVERVIEW

38 Properties

12,299 Units

Note: Total country supply includes both launched and unlaunched properties and units.



SUPPLY BY DESTINATION

Resort 45%

Urban 55%

SUPPLY BY PRODUCT TYPE

97% Condominiums

1% Landed Properties

2% Hybrid

Source: C9 Hotelworks Market Research

40% MIXED-USE DEVELOPMENTS

Philippines' supply is 40% mixed-use (4,866 units), 33% co-located with a hotel and 27% standalone, making it one of the countries with the most mixed-use branded residences in Asia.

USD 514K/UNIT MARKET DRIVEN BY VOLUME

Philippines ranks third in Asia by launched units (7,433) but fifth by market value (USD 514K/unit).

39% METRO MANILA LEADS SUPPLY

Metro Manila (39% with 4,814 units) and Metro Cebu (28%) lead the Philippines' branded residences supply, together accounting for two-thirds of total volume, followed by Boracay (8%).

Source: C9 Hotelworks Market Research