THAILAND

BRANDED RESIDENCES MARKET REVIEW

C9 HOTELWORKS

ASIA OVERVIEW

TOTAL MARKET VALUE

2026

THB1.3 Trillion

(USD40 Billion)

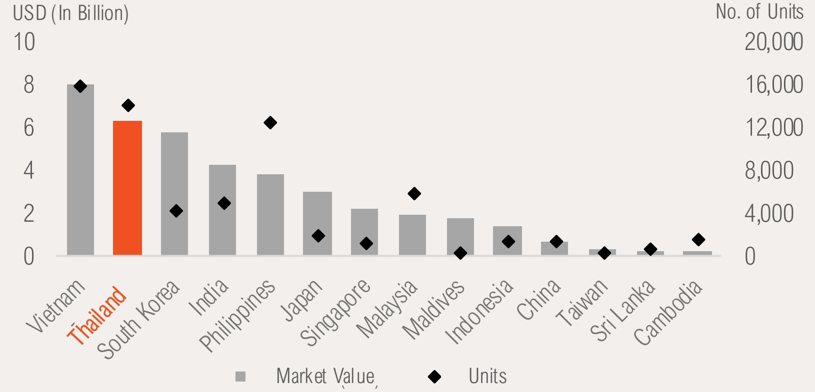
+30.3% Y-O-Y

2025

THB992.3 Billion

(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

THAILAND

THB 205.3B
(USD 6.4B)
MARKET VALUE

13,124
LAUNCHED UNITS

48%
LUXURY DEVELOPMENTS

Thailand's branded residences market reached THB205.3 billion (USD6.4 billion) in 2026, a 13.3% year-on-year increase across 13,124 launched units. 48% of developments are luxury-tier, with Thailand leading Asia at 30 luxury projects, ahead of Vietnam (18) and South Korea (13) as the next two largest markets.

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

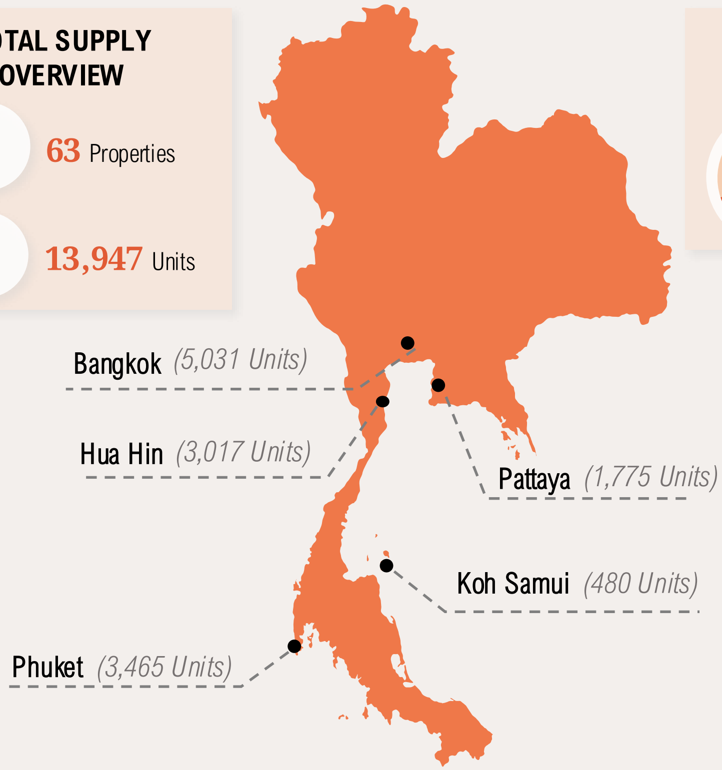
Source: C9 Hotelworks Market Research

THAILAND MARKET SNAPSHOT

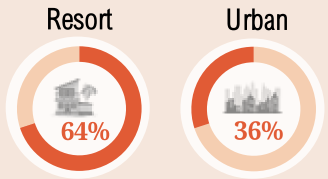
TOTAL SUPPLY OVERVIEW

63 Properties

13,947 Units



SUPPLY BY LOCATION



SUPPLY BY PRODUCT TYPE

96% Condominiums

3% Landed Properties

1% Hybrid

Note: Total country supply (launched and unlaunched projects) includes 179 additional units across Khao Yai, Rayong, Nakhon Si Thammarat and Phang Nga.

Source: C9 Hotelworks Market Research

22% **STANDALONE DEVELOPMENTS**

Standalone branded residences account for 3,008 units in Thailand, 72% resort-led, representing a 22% share of total supply ahead of Asia's 17% regional average.

3 **NON-HOSPITALITY BRAND PROJECTS**

Thailand's non-hospitality pipeline now includes Porsche Design Tower (Bangkok) and design and fashion brands (Phuket).

3 **KEY DESTINATIONS**

Bangkok and Phuket lead Thailand's branded residences supply by unit count, with Koh Samui's holiday villa market underpinning the case for emerging villa-led branded residences development.

Source: C9 Hotelworks Market Research