



Dubai Residential Real Estate

Q2 2025 Market Overview

Key Highlights: Q2 2025

Market Overview

Dubai's residential market recorded a transaction value of AED 153.8 billion in Q2 2025, reflecting a 33% increase from AED 115.6 billion in Q1. This represents the highest quarterly total observed to date and reflects continued activity across both off-plan and completed properties.

The number of transactions rose from 43,612 units in Q1 to 51,354 units in Q2, supported by larger transaction sizes and increased interest in premium properties. Since early 2022, transaction volumes have steadily grown, reaffirming Dubai's position as a key global residential market.

Price Trends

Residential prices continued to rise across most segments. Apartment prices increased from AED 1,741 to AED 1,769 per sq ft between April and June, bringing the cumulative growth since January 2024 to 24.6%.

Villas saw stronger price growth, rising from AED 2,140 to AED 2,200 per sq ft during the same period, marking a total increase of 28.1% since January 2024. Villas consistently maintained a price premium of AED 400–450 per sq ft over apartments, reflecting demand for larger, low-density living formats.

Sub-Market Performance

In the apartment segment, Palm Jumeirah remained the highest-priced area with an average of AED 3,260 per sq ft, up 4.8% over the quarter. DIFC (+5.0%), MBR City, and Dubai Marina (+2.5% each) also recorded quarterly gains. By contrast, Downtown Dubai, Business Bay, and Creek Harbour saw slight declines ranging from -0.5% to -1.4%.

In the villa segment, Palm Jumeirah retained its leading position at AED 5,994 per sq ft. Dubai Hills Estate posted the highest quarterly growth at +9.5%, followed by The Lakes (+7.8%) and Jumeirah (+5.4%). Meanwhile, Jumeirah Golf Estates and Jumeirah Islands recorded quarterly declines exceeding 5%, suggesting localized corrections.

Key Highlights: Q2 2025

Luxury Market Momentum (AED 10M+ Deals)

Dubai's luxury residential segment recorded 2,530 transactions in Q2 2025, totaling AED 51.4 billion. Most of this activity originated in the off-plan market, which contributed 77% of the total value (AED 39.8B) and 80% of volume (2,019 units).

Villas continued to lead in the luxury segment, accounting for 73% of value and 78% of sales. Key transactions included an AED 300M EOME-branded villa in Palm Jumeirah and an AED 219M Four Seasons-branded apartment in DIFC. Notable luxury communities with strong activity included The Oasis, Palm Jebel Ali, The Acres, Palm Jumeirah, and Dubai Hills Estate.

Developer & Off-Plan Market Trends

Emaar Properties remained the top-performing off-plan developer in Q2 2025, transacting AED 31.2 billion – more than double the total of Damac Properties (AED 13.6B). By unit volume, Damac led with 4,658 units, followed by Emaar's 4,604 units. Other active developers included Meraas, Nakheel, and Sobha, reflecting strong demand across branded and master-planned communities.

Mid-sized developers such as Danube, Samana, and Azizi also recorded notable activity, particularly by unit count, under scoring the range of market participants.

Ready Market & Community Trends

Among ready villas, Palm Jumeirah (AED 1.8B) and Dubai Hills Estate (AED 1.4B) recorded the highest transaction values, indicating continued interest from end-users and investors in established, centrally located communities.

In the ready apartment market, activity remained concentrated in high-end areas. Price movements were limited, suggesting a degree of stability in parts of the secondary segment.

Key Highlights: Q2 2025

First-Time Home Buyer Programme

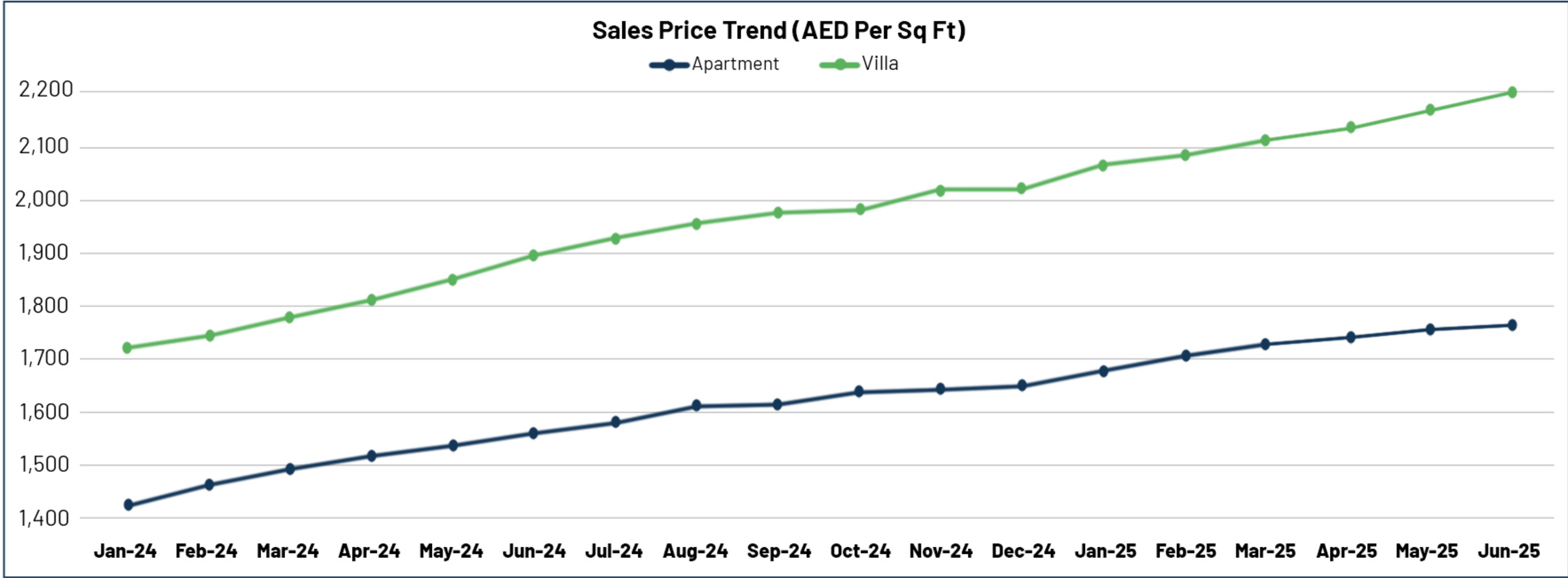
On 2 July 2025, the Dubai Land Department (DLD) and Department of Economy & Tourism officially launched the First-Time Home Buyer Programme. Geared toward both Emiratis and expatriates purchasing properties under AED5million, this aligns with Dubai's Real Estate Strategy 2033 and D33 agenda to increase homeownership and contribute significantly to GDP.

The initiative provides such as priority access to new developments, preferential pricing from select developers, tailored mortgage packages alongside developer-backed incentives, and installment-based payment options for DLD fees via credit cards.

Tokenisation of Real Estate

In June 2025, DLD completed its second tokenised real estate sale on the PRYPCO Mint platform. Additionally, in May 2025, DLD, in collaboration with VARA, the UAE Central Bank, and Dubai Future Foundation, unveiled a multibillion-dollar project to enable fractional property ownership via tokenisation—targeting a \$16billion asset base by 2033

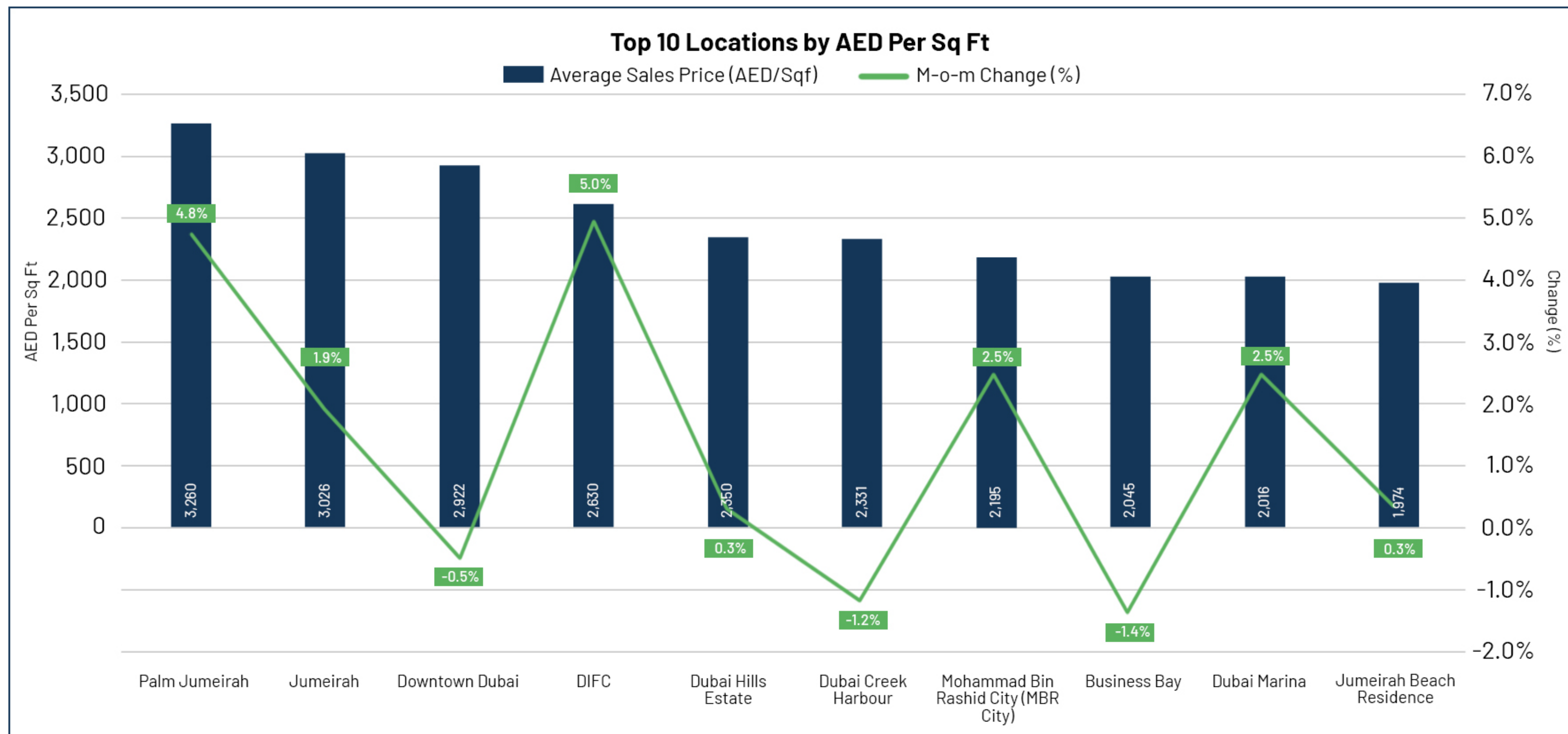
Reidin Residential City-Wide Sales Price Trend



| | | | | | | | | | | | | | | | | | | |
|-----------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Apartment | 1,421 | 1,454 | 1,486 | 1,513 | 1,530 | 1,561 | 1,576 | 1,608 | 1,610 | 1,634 | 1,639 | 1,647 | 1,674 | 1,703 | 1,725 | 1,741 | 1,763 | 1,769 |
| Villa | 1,717 | 1,743 | 1,776 | 1,811 | 1,847 | 1,896 | 1,927 | 1,955 | 1,980 | 1,984 | 2,019 | 2,024 | 2,065 | 2,085 | 2,113 | 2,140 | 2,176 | 2,200 |

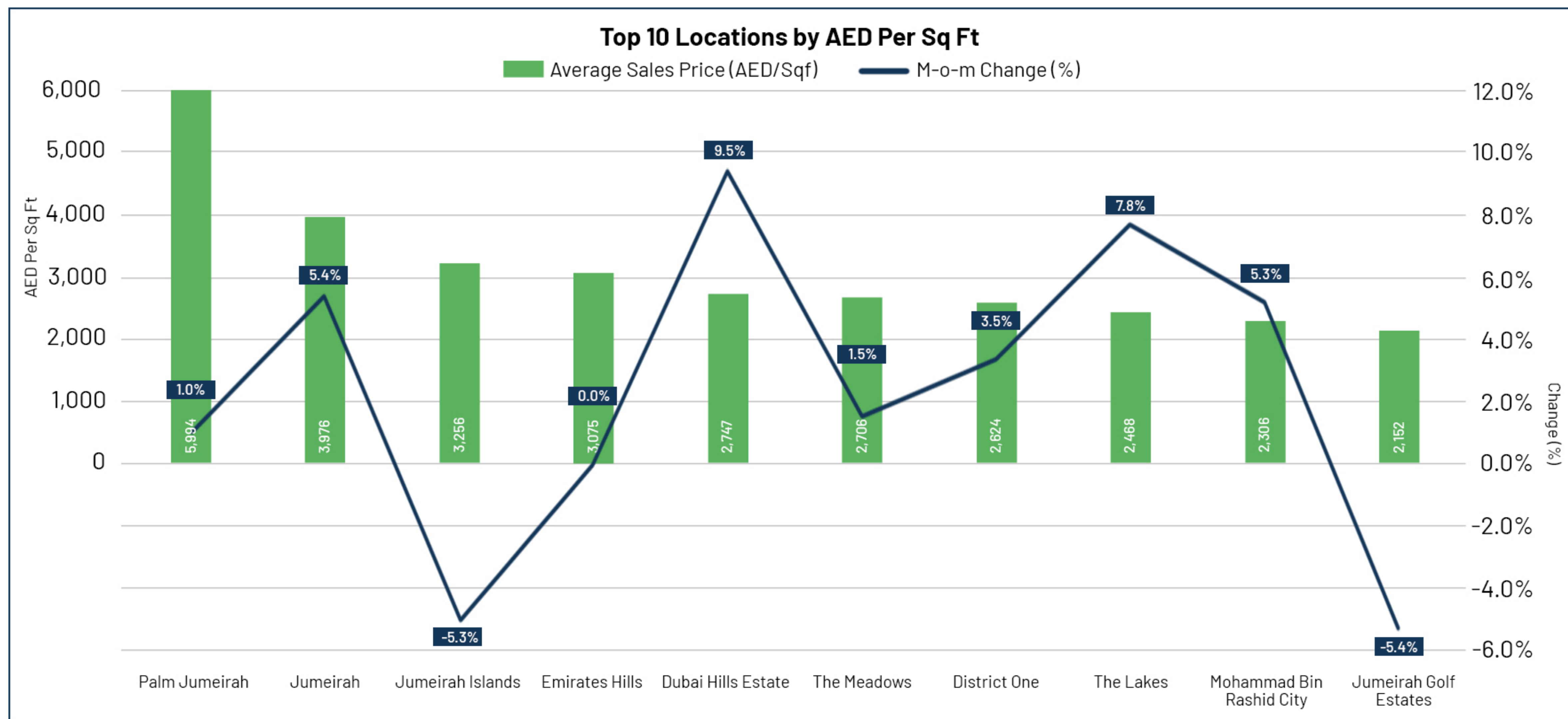
- Between January 2024 and June 2025, both apartment and villa segments in the UAE have recorded consistent and substantial growth in average sales price per square foot.
- Apartment prices rose by approximately 24.6%, from AED 1,421 to AED 1,769, while villa prices experienced a sharper increase of 28.1%, climbing from AED 1,717 to AED 2,200.
- Throughout the 18-month period, villas maintained a clear pricing premium over apartments, with a steady gap of around AED 400 to 450 per sq ft.
- In the latest quarter (Q2 2025), apartment prices increased from AED 1,741 in April to AED 1,769 in June, while villa prices climbed from AED 2,140 to AED 2,200 over the same period.

Reidin Apartments Sales Price Trend



- In Q2 2025, apartment prices across Dubai's top sub-communities displayed varied movements, with several prime locations continuing to command high values.
- Palm Jumeirah retained the top position with the highest average sales price at AED 3,260 per sq ft, reflecting a quarterly increase of 4.8%, followed by Jumeirah at AED 3,026 and Downtown Dubai at AED 2,922.
- While Downtown saw a marginal decline of -0.5%, areas like DIFC recorded the strongest price growth of 5.0%, reaching AED 2,620.
- Mohammed Bin Rashid City (MBR City) and Dubai Marina both saw identical quarterly gains of 2.5%, with average prices of AED 2,195 and AED 2,016 respectively.
- On the contrary, Dubai Creek Harbour and Business Bay experienced modest quarterly declines of -1.2% and -1.4%, respectively.

Reidin Villas Sales Price Trend



- Villa prices across Dubai's top sub-communities remained mixed in Q2 2025, with significant variance in both pricing and quarterly growth.
- Palm Jumeirah continues to command the highest price at AED 5,994 per sq ft, with a moderate 1.0% increase. Dubai Hills Estate recorded the highest quarterly growth at 9.5%, reaching AED 2,747 per sq ft. The Lakes and Mohammed Bin Rashid City (MBR City) followed with solid price increases of 7.8% and 5.3%, respectively.
- In contrast, Jumeirah Golf Estates and Jumeirah Islands experienced notable declines of -5.4% and -5.3%, respectively, signalling some correction in those sub-markets.
- Despite this varied performance, the data suggests continued buyer interest in centrally located and well-established villa communities, particularly those offering lifestyle and waterfront appeal.

Total Sales Transactions Quarterly Trend



- Dubai's residential market continued its strong upward trajectory in Q2 2025, reaching a record-high transaction value of AED 153.8 billion, up from AED 115.6 billion in the previous quarter—marking a sharp 33% quarter-on-quarter growth.
- While transaction volumes increased from 43,612 units in Q1 2025 to 51,354 units in Q2 2025, the overall market momentum remains high.
- This recent surge in value builds on a sustained growth pattern since early 2022, where quarterly transaction values have more than tripled—from AED 44.5 billion in Q1 2022 to the current level.
- Volume growth has generally followed suit, peaking in Q3 2024 at 48,688 units, then fluctuating slightly but staying close to the 50,000-unit mark, reaching 51,354 units in Q2 2025.
- The consistent rise in transaction value reflects increasing unit prices and growing investor appetite across both off-plan and ready segments, signalling continued confidence in Dubai's residential property market.

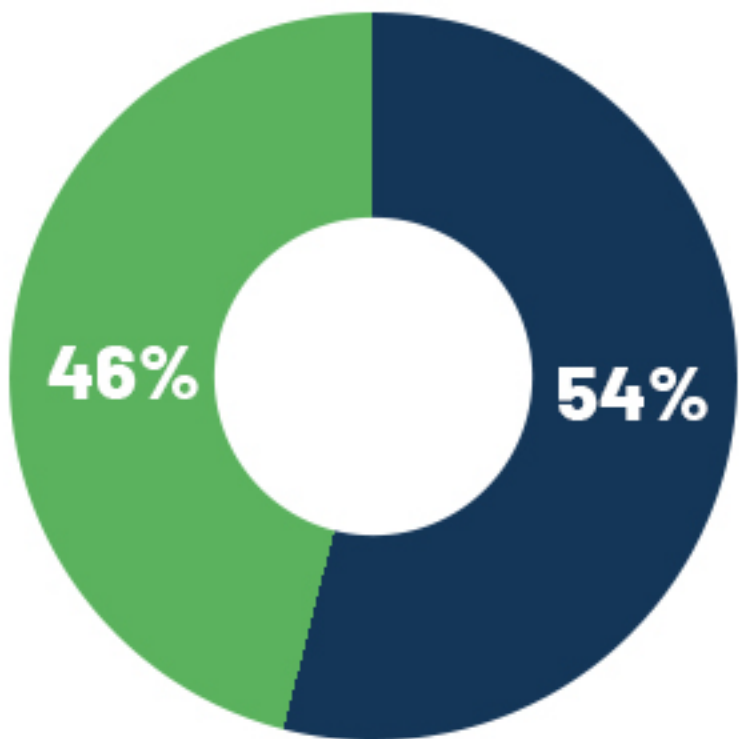
Sales Transactions

Total Volume & Value

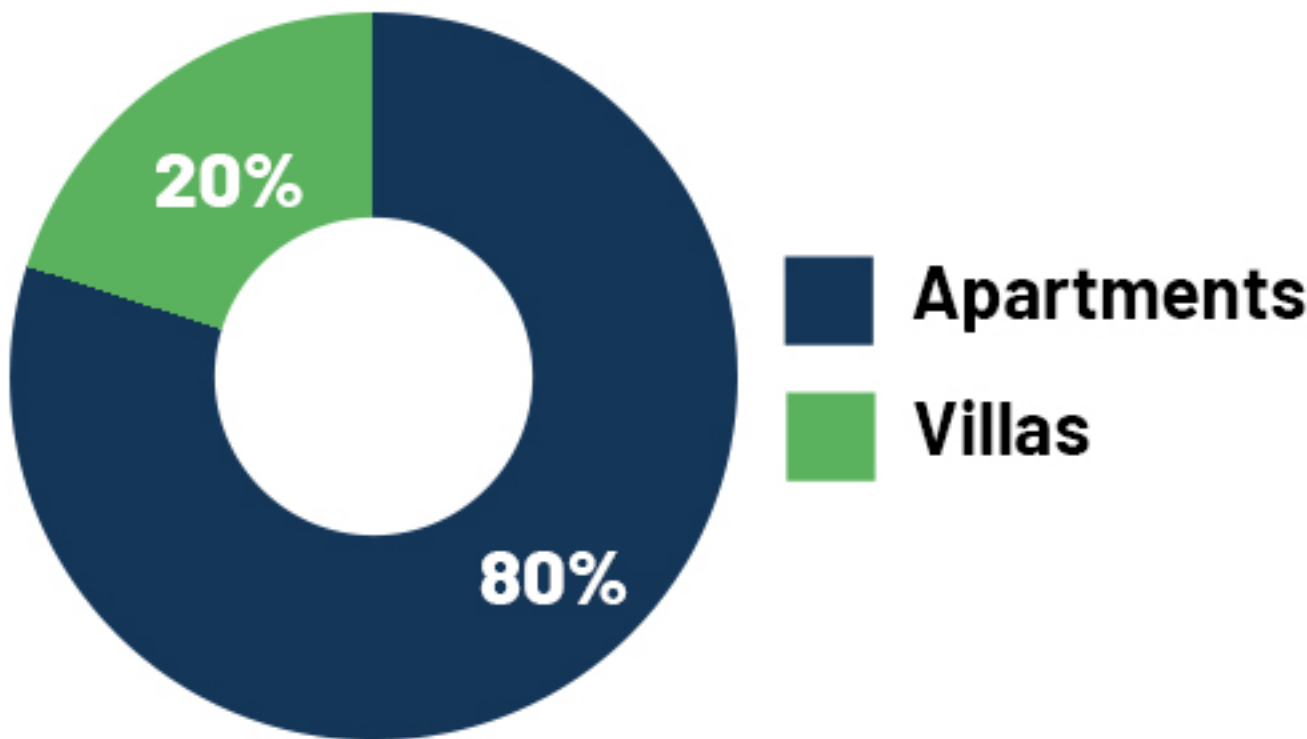
| Sales Transactions | Total Value (AED Bn) | Total Volume |
|--------------------|----------------------|--------------|
| Apartment Sales | 83.6 | 40,873 |
| Villa Sales | 70.2 | 10,481 |
| Grand Total | 153.8 | 51,354 |

*The classification of apartments includes Serviced/Hotel Apartments, while villas also comprise Villa Plots.

Total Value (AED Bn)



Total Volume



Top 10 Locations by Value (AED Bn)

| | |
|---------------------------|---------|
| The Oasis by Emaar | 14.9 Bn |
| Damac Island City | 8.4 Bn |
| Dubai Investment Park 2nd | 6.9 Bn |
| Business Bay | 6.4 Bn |
| Jumeirah Village Circle | 5.3 Bn |
| Downtown Dubai | 5.1 Bn |
| Palm Jebel Ali | 5.0 Bn |
| Palm Jumeirah | 4.8 Bn |
| Al Wasl | 4.3 Bn |
| Dubai Hills Estate | 4.1 Bn |

Top 10 Locations by Volume

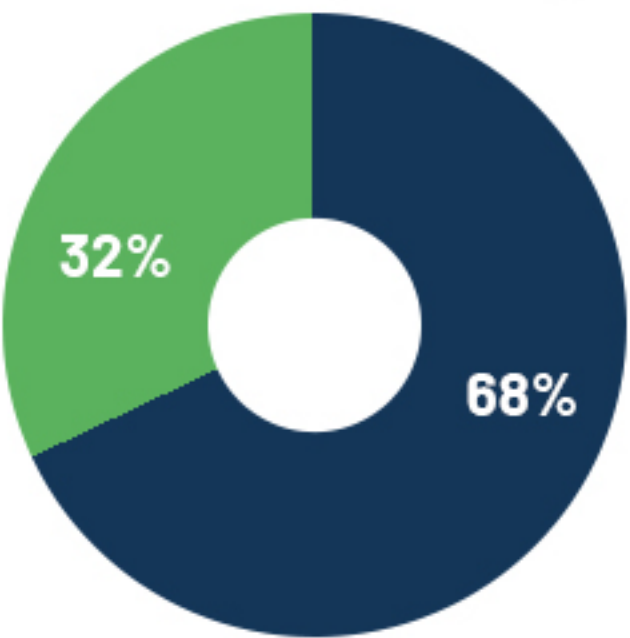
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|------------------------------|-------|
| Jumeirah Village Circle | 4,870 |
| Business Bay | 2,776 |
| Damac Island City | 2,680 |
| Dubailand Residence Complex | 1,781 |
| Dubai Production City (IMPZ) | 1,692 |
| Uptown Motorcity | 1,482 |
| Dubai Marina | 1,453 |
| Dubai Islands | 1,240 |
| Dubai Investment Park 2nd | 1,220 |
| Dubai Creek Harbour | 1,191 |

Sales Sequence: Primary vs Secondary

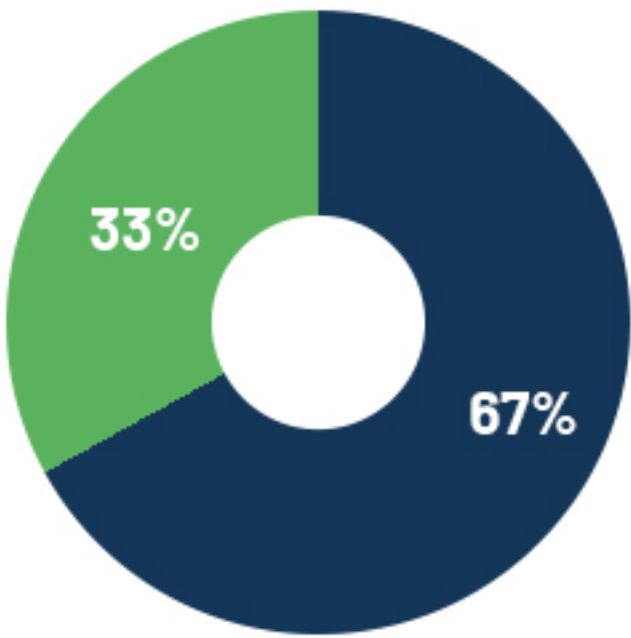
Primary and Secondary Sales Split

| Sales Sequence | Total Value (AED Bn) | Total Volume |
|-----------------|----------------------|--------------|
| Primary Sales | 104.0 Bn | 34,193 |
| Secondary Sales | 49.8 Bn | 17,161 |
| Grand Total | 153.8 Bn | 51,354 |

Total Value (AED Bn)



Total Volume

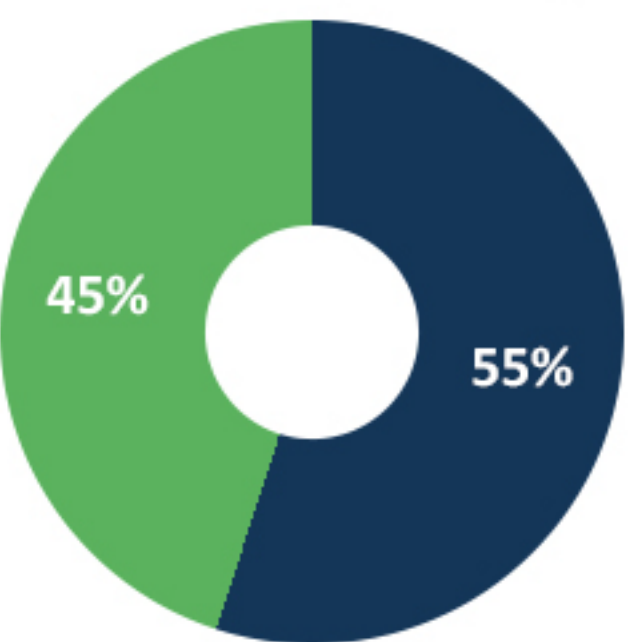


■ Primary Sales
■ Secondary Sales

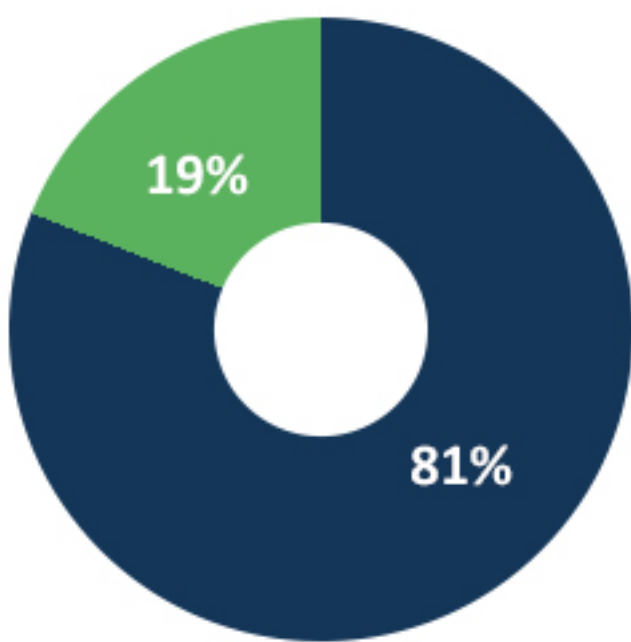
Primary Sales Split By Property type

| Property Type | Total Value (AED Bn) | Total Volume |
|-----------------|----------------------|--------------|
| Apartment Sales | 57.5 Bn | 27,692 |
| Villa Sales | 46.4 Bn | 6,501 |
| Grand Total | 104.0 Bn | 34,193 |

Total Value (AED Bn)



Total Volume

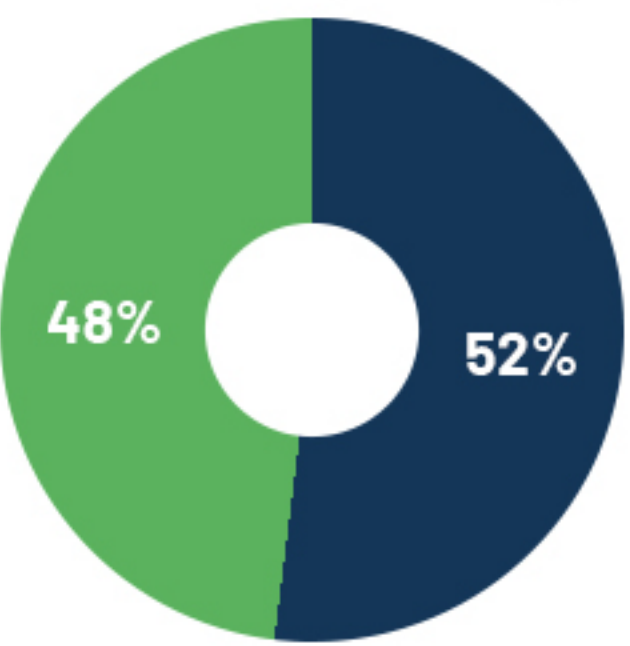


■ Apartment Sales
■ Villa Sales

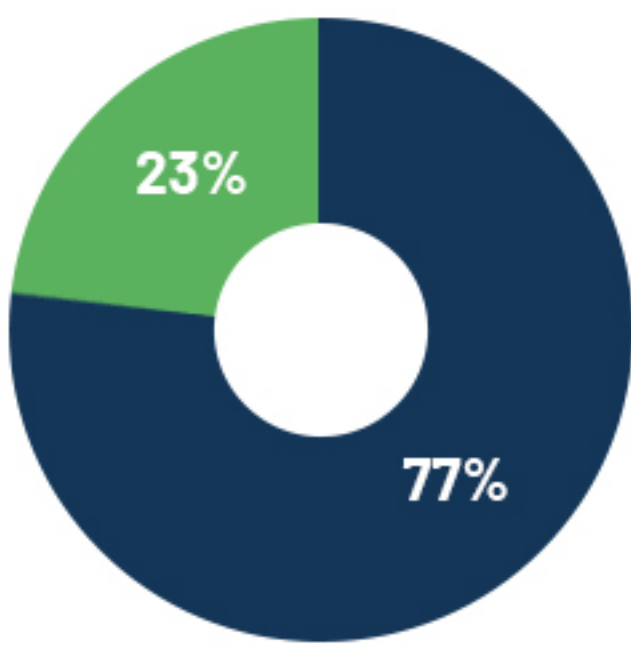
Secondary Sales Split By Property type

| Property Type | Total Value (AED Bn) | Total Volume |
|-----------------|----------------------|--------------|
| Apartment Sales | 26.0 Bn | 13,181 |
| Villa Sales | 23.8 Bn | 3,980 |
| Grand Total | 49.8 Bn | 17,161 |

Total Value (AED Bn)



Total Volume



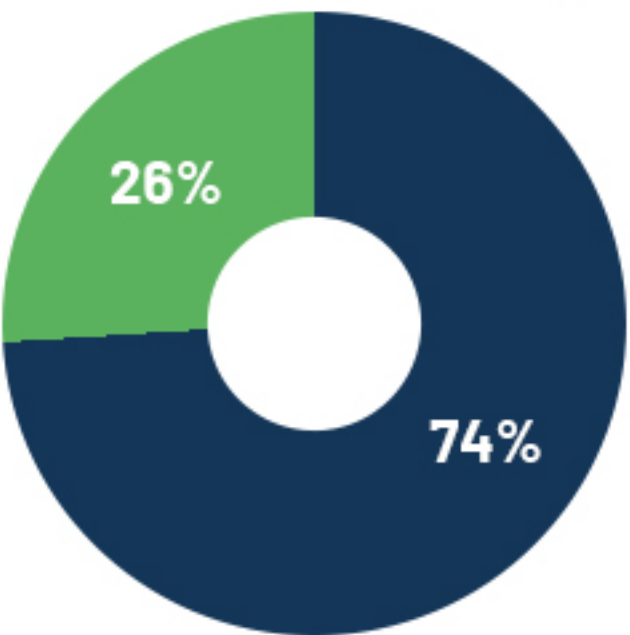
■ Apartment Sales
■ Villa Sales

Transaction Type: Off-Plan vs Ready

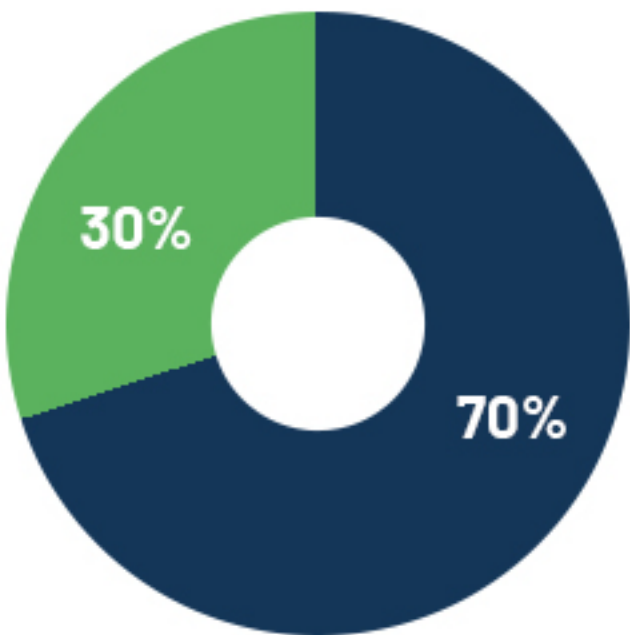
Off-Plan and Ready Sales Split

| Transaction Type | Total Value (AED Bn) | Total Volume |
|------------------|----------------------|--------------|
| Off-Plan Sales | 113.4 Bn | 36,184 |
| Ready Sales | 40.4 Bn | 15,170 |
| Grand Total | 153.8 Bn | 51,354 |

Total Value (AED Bn)



Total Volume

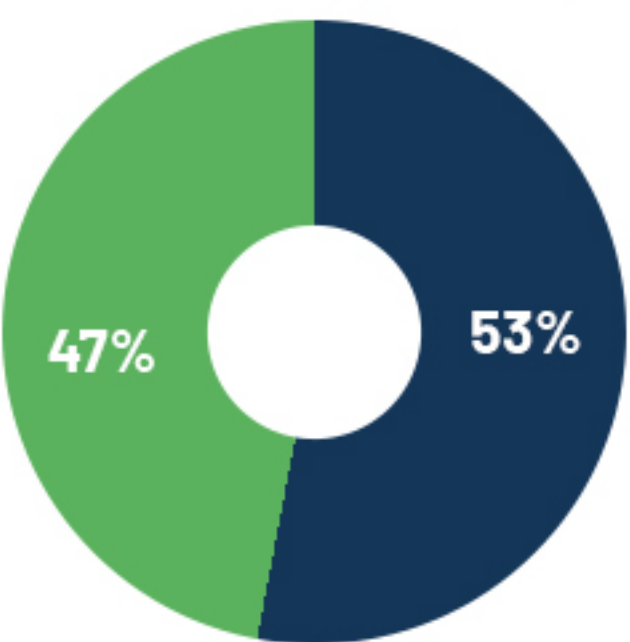


■ Off-Plan Sales
■ Ready Sales

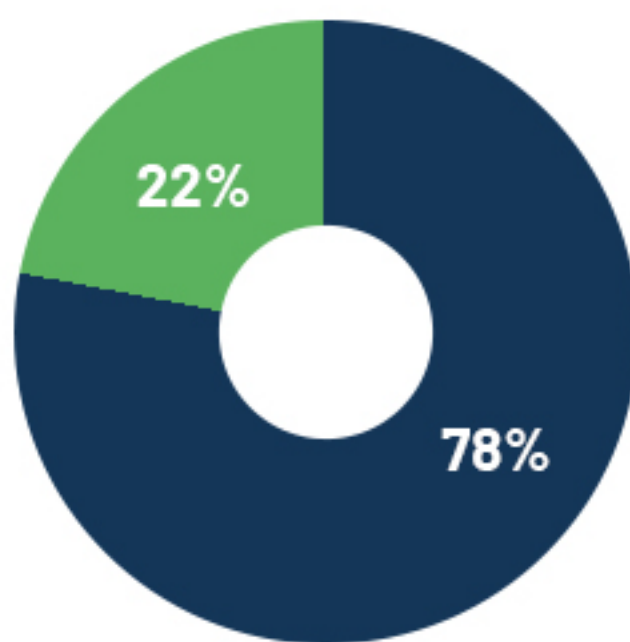
Off-Plan Sales Split By Property type

| Property Type | Total Value (AED Bn) | Total Volume |
|-----------------|----------------------|--------------|
| Apartment Sales | 59.9 Bn | 28,258 |
| Villa Sales | 53.5 Bn | 7,926 |
| Grand Total | 113.4 Bn | 36,184 |

Total Value (AED Bn)



Total Volume

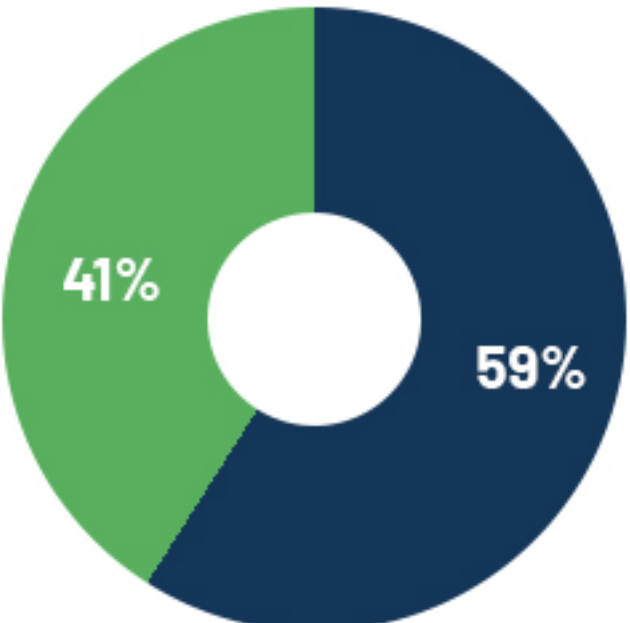


■ Apartment Sales
■ Villa Sales

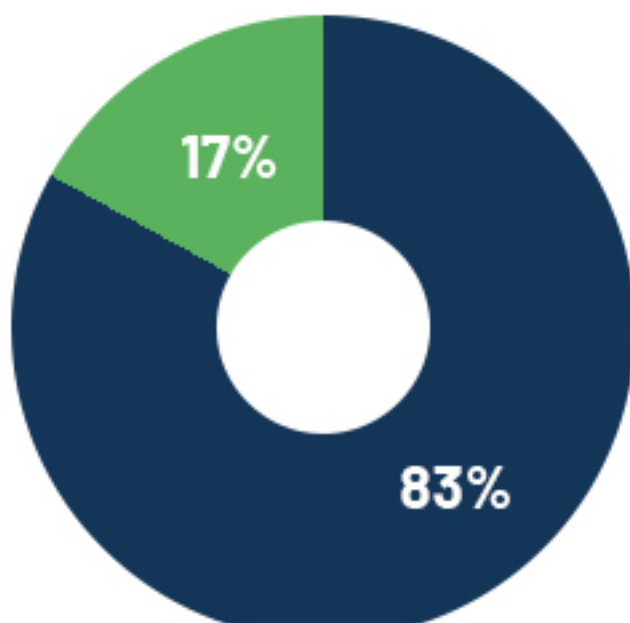
Ready Sales Split By Property type

| Property Type | Total Value (AED Bn) | Total Volume |
|-----------------|----------------------|--------------|
| Apartment Sales | 23.6 Bn | 12,615 |
| Villa Sales | 16.7 Bn | 2,555 |
| Grand Total | 40.4 Bn | 15,170 |

Total Value (AED Bn)



Total Volume



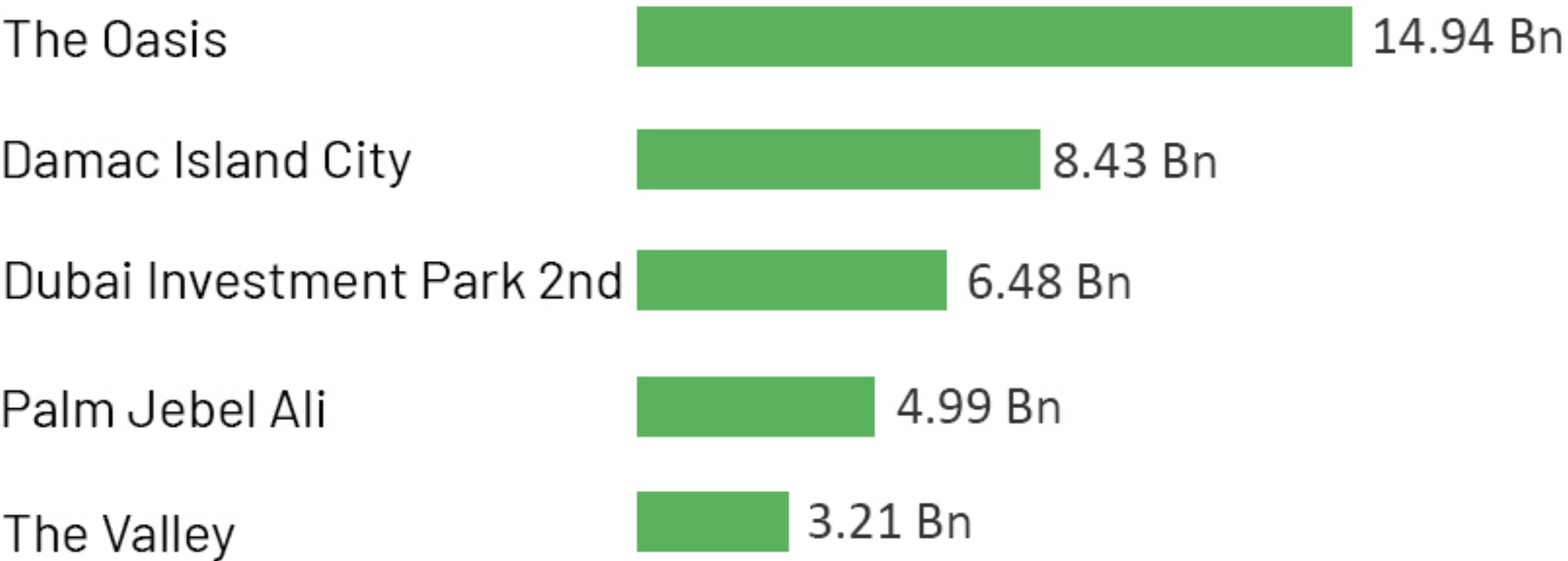
■ Apartment Sales
■ Villa Sales

Off-Plan Market Overview

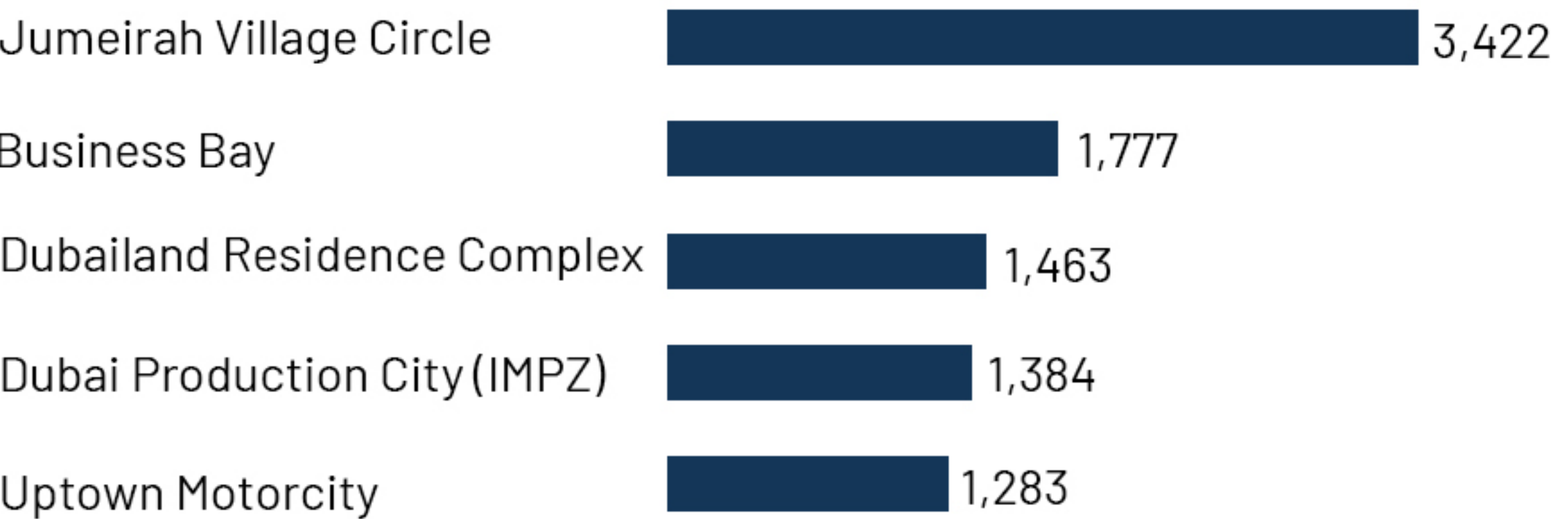
Top 5 Off-Plan Apartment Locations
by Value (AED)



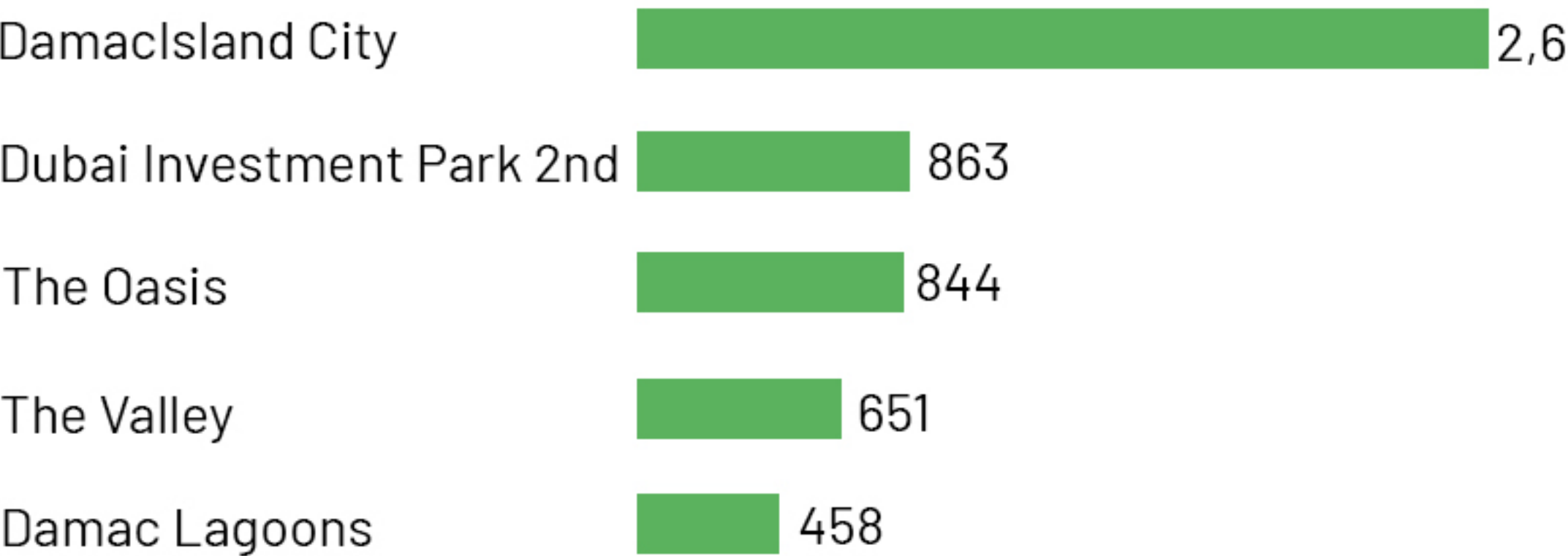
Top 5 Off-Plan Villa Locations
by Value (AED)



Top 5 Off-Plan Apartment Locations
by Volume



Top 5 Off-Plan Villa Locations
by Volume



Off-Plan Market Overview

Top Off-Plan Developers by Value

| | |
|--------------------------------|----------|
| Emaar Properties PJSC | 31.23 Bn |
| Damac Properties | 13.64 Bn |
| Meraas Development L.L.C | 7.37 Bn |
| Nakheel PJSC | 7.16 Bn |
| Sobha Real Estate L.L.C | 6.96 Bn |
| H&H Investment and Development | 4.13 Bn |
| Binghatti Holding Limited | 2.88 Bn |
| Beyond Debelopments | 2.30 Bn |
| Nshama - Nshama Properties | 1.64 Bn |
| Danube Properties | 1.63 Bn |

Top Off-Plan Developers by Volume

| | |
|----------------------------|-------|
| Damac Properties | 4,658 |
| Emaar Properties PJSC | 4,604 |
| Sobha Real Estate L.L.C | 2,987 |
| Binghatti Holdings Limited | 2,072 |
| Danube Properties | 1,110 |
| Samana Developers | 981 |
| Azizi Developmants | 805 |
| Meraas Development L.L.C | 736 |
| Nakheel PJSC | 715 |
| Imitiaz Real Estate | 618 |

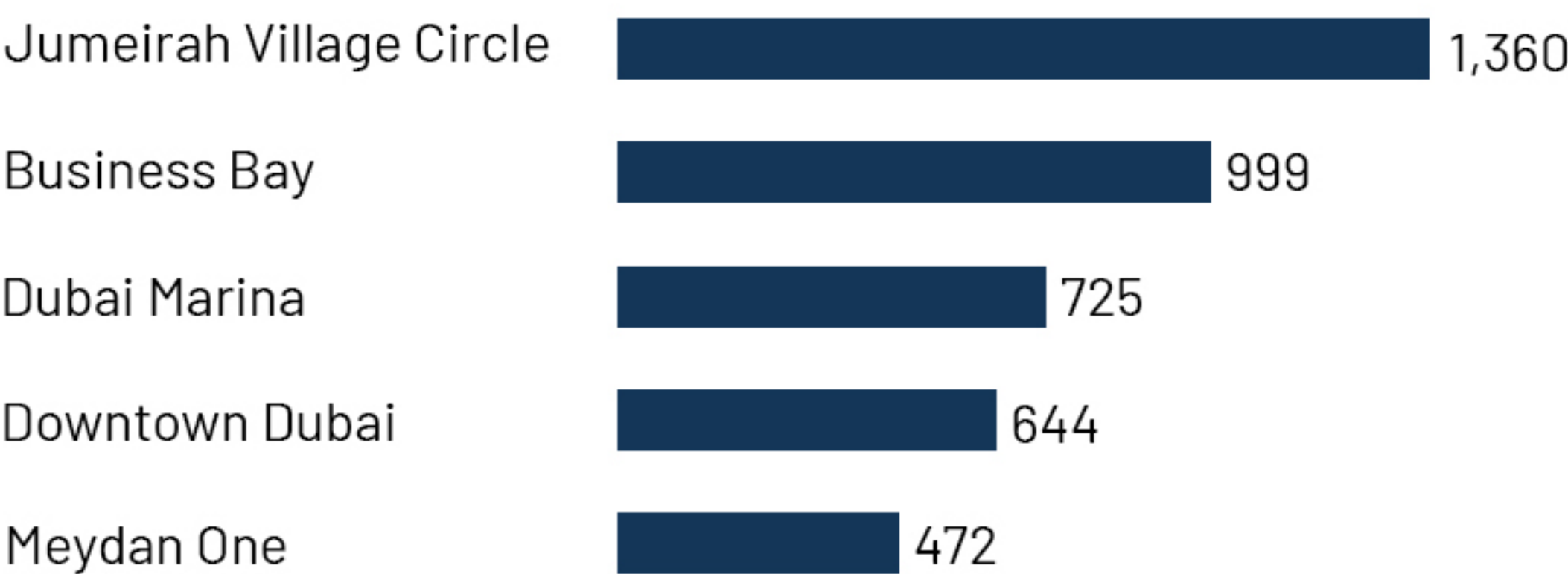
- In the off-plan residential market, Emaar Properties leads by a significant margin in terms of transaction value, recording AED 31.23 billion – more than double that of the second-ranked Damac Properties, which logged AED 13.64 billion.
- Other notable developers by value include Meraas Development (AED 7.37 billion), Nakheel PJSC (AED 7.16 billion), and Sobha Realty (AED 6.96 billion), all contributing to the robust off-plan pipeline.
- In terms of volume, Damac Properties narrowly edged out Emaar, registering the highest number of units sold at 4,658, closely followed by Emaar's 4,604 units. Sobha Real Estate took third place with 2,987 units, while Binghatti followed with 2,072 units.
- Mid-sized players such as Danube, Samana, and Azizi also made the top 10 by volume, reflecting the competitive diversity in the off-plan space.
- Developers such as Meraas and Nakheel appear mid-range by value but rank much lower by volume, indicating their projects tend to be higher-ticket and more premium in nature despite fewer unit launches.

Ready Market Overview

Top 5 Ready Apartment Locations
by Value (AED)



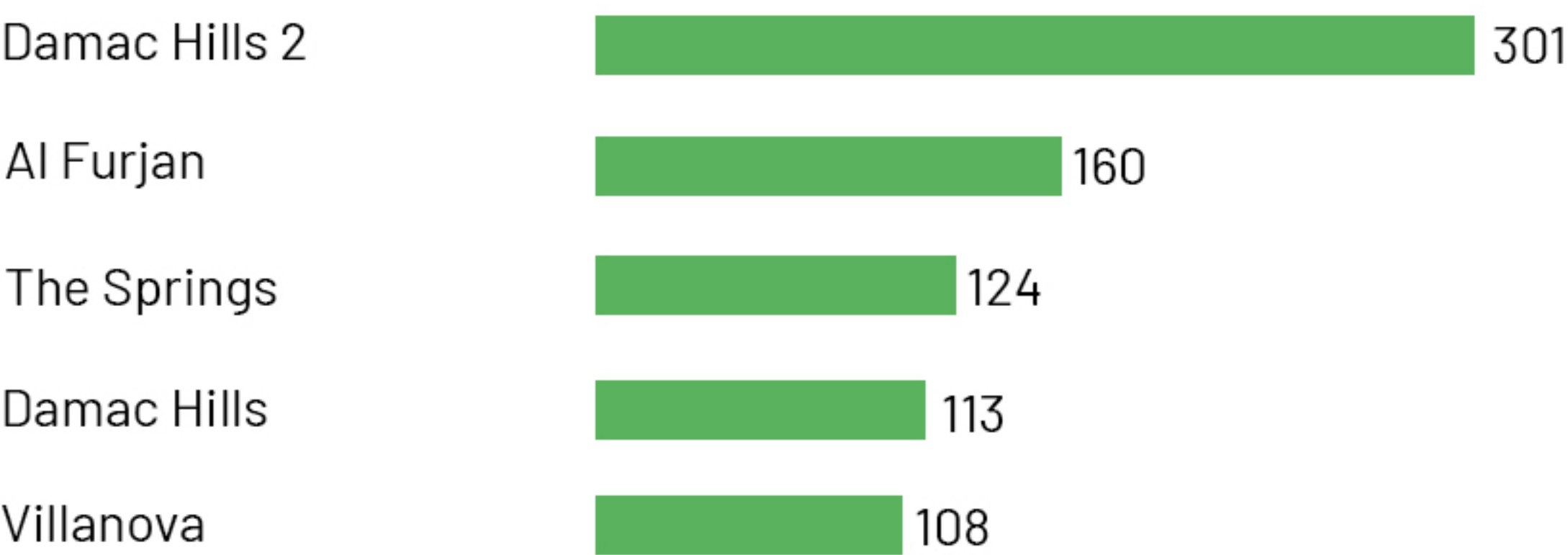
Top 5 Ready Apartment Locations
by Volume



Top 5 Ready Villa Locations
by Value (AED)



Top 5 Ready Villa Locations
by Volume

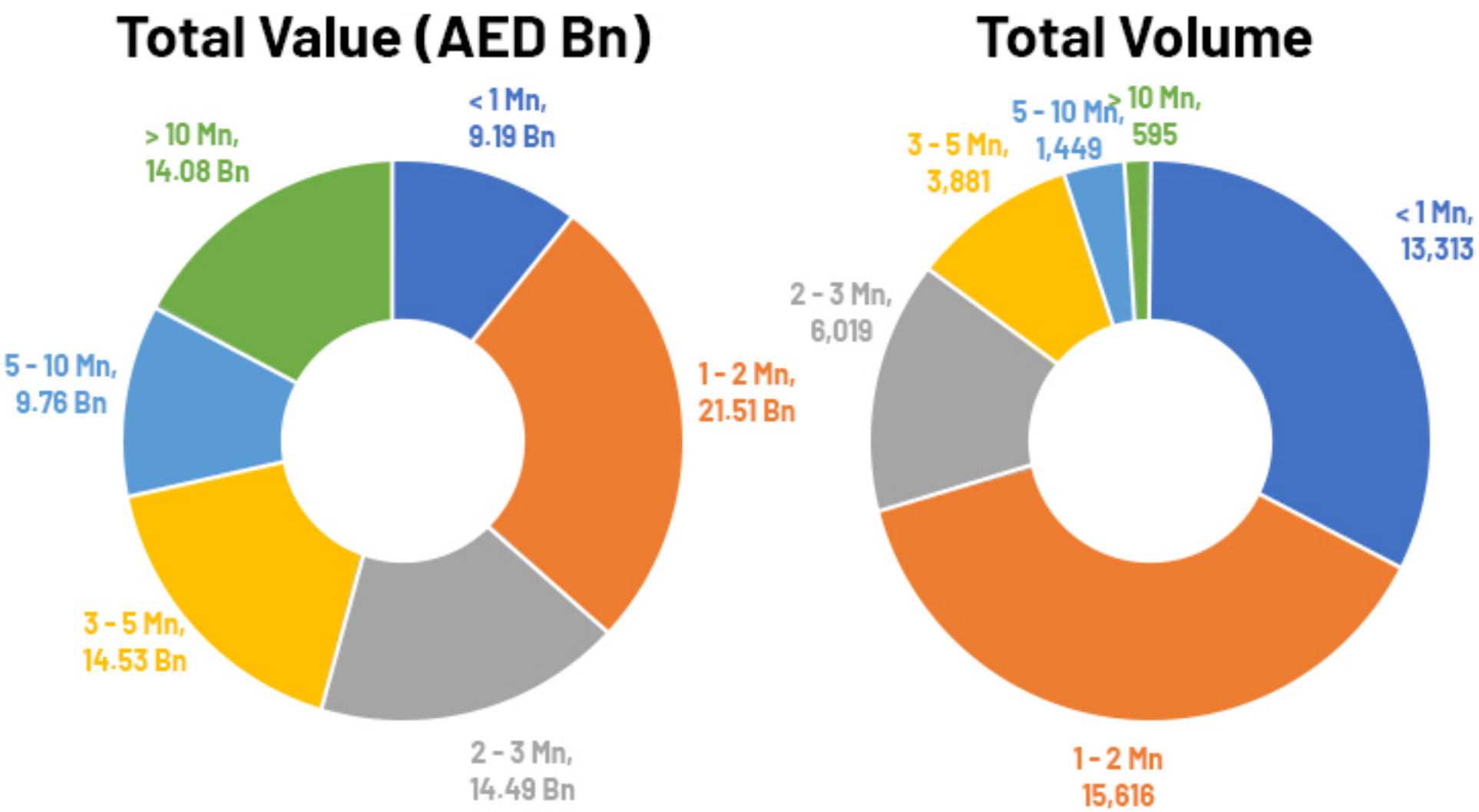


Ticket Size Split by Typologies

Apartment Ticket Split

| | Total Value (AED Bn) | Total Volume |
|-----------|----------------------|--------------|
| < 1 Mn | 9.19 Bn | 13,313 |
| 1 - 2 Mn | 21.51 Bn | 15,616 |
| 2 - 3 Mn | 14.49 Bn | 6,019 |
| 3 - 5 Mn | 14.53 Bn | 3,881 |
| 5 - 10 Mn | 9.76 Bn | 1,449 |
| > 10 Mn | 14.08 Bn | 595 |

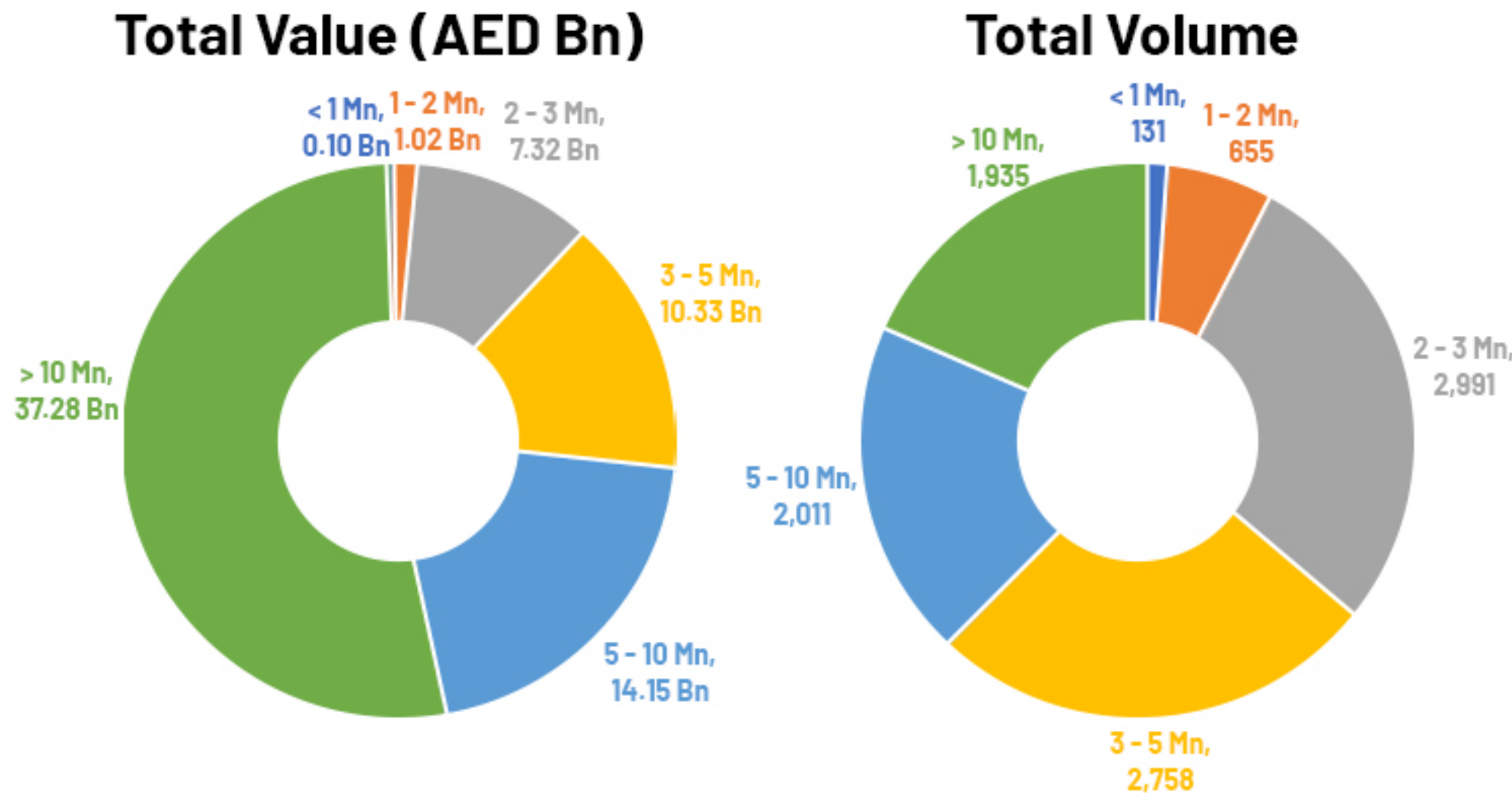
Apartment Ticket Size (%)



Villa Sales Split

| | Total Value (AED Bn) | Total Volume |
|-----------|----------------------|--------------|
| < 1 Mn | 0.10 Bn | 131 |
| 1 - 2 Mn | 1.02 Bn | 655 |
| 2 - 3 Mn | 7.32 Bn | 2,991 |
| 3 - 5 Mn | 10.33 Bn | 2,758 |
| 5 - 10 Mn | 14.15 Bn | 2,011 |
| > 10 Mn | 37.28 Bn | 1,935 |

Villa Ticket Size (%)



Luxury Market Overview

- Dubai’s luxury residential market (transactions above AED 10 million) continued its strong momentum in Q2 2025, recording a total of AED 51.4 billion in transaction value across 2,530 units.
- Off-plan sales remained the dominant force, accounting for 77% of total value (AED 39.8 billion) and 80% of total volume (2,019 units). Within this segment, villa sales represented the lion’s share, contributing 73% of value and 78% of volume, driven by demand for large-format, branded, and waterfront residences.
- In contrast, ready sales totalled AED 11.6 billion across 511 units, with villas again comprising over 70% of both value and volume.
- Among the top-performing off-plan communities by value were The Oasis (AED 14.9 billion), Palm Jebel Ali, and The Acres, reflecting a clear shift toward master-planned luxury enclaves. On the ready side, Palm Jumeirah (AED 1.8 billion) and Dubai Hills Estate (AED 1.4 billion) led in transactional value.
- The quarter also featured ultra-prime deals such as the AED 300 million EOME villa sale in Palm Jumeirah and the Four Seasons Private Residences apartment in DIFC sold for AED 219 million, demonstrating sustained appetite for trophy assets.

Top 5 Off-Plan Luxury Communities by Value

| Location / Sub-Community | Value (AED Bn) | Volume |
|--------------------------|----------------|--------|
| The Oasis | 14.9 Bn | 318 |
| Palm Jebel Ali | 5.0 Bn | 93 |
| The Acres | 2.0 Bn | 40 |
| La Mer | 1.9 Bn | 86 |
| Jumeirah Second | 1.7 Bn | 35 |

Top 5 Ready Luxury Communities by Value

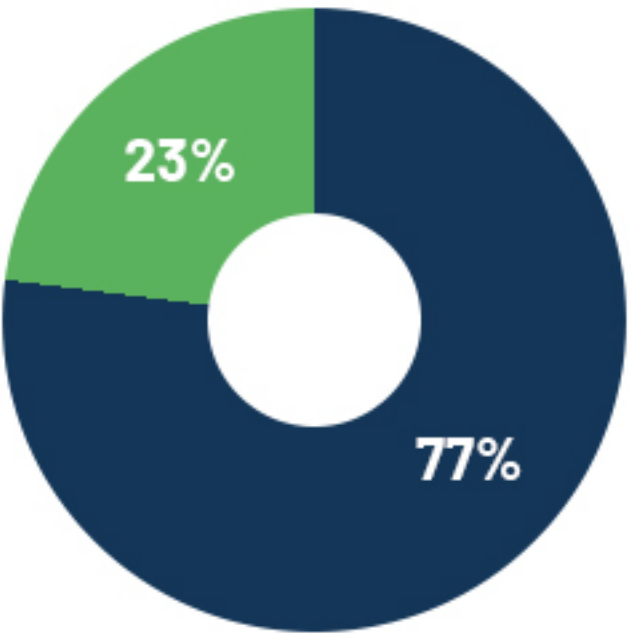
| Location / Sub-Community | Value (AED Bn) | Volume |
|--------------------------|----------------|--------|
| Palm Jumeirah | 1.8 Bn | 62 |
| Dubai Hills Estate | 1.4 Bn | 47 |
| Jumeirah Golf Estates | 1.0 Bn | 46 |
| Al Barari | 0.8 Bn | 25 |
| DIFC | 0.8 Bn | 15 |

Luxury Market Overview

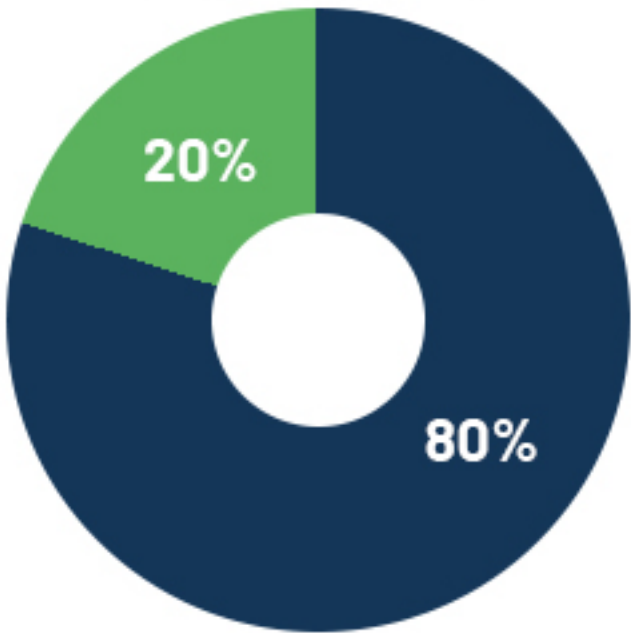
Off-Plan and Ready Sales Split

| Transaction Type | Total Value (AED Bn) | Total Volume |
|------------------|----------------------|--------------|
| Off-Plan Sales | 39.8 Bn | 2,019 |
| Ready Sales | 11.6 Bn | 511 |
| Grand Total | 51.4 Bn | 2,530 |

Total Value (AED Bn)



Total Volume

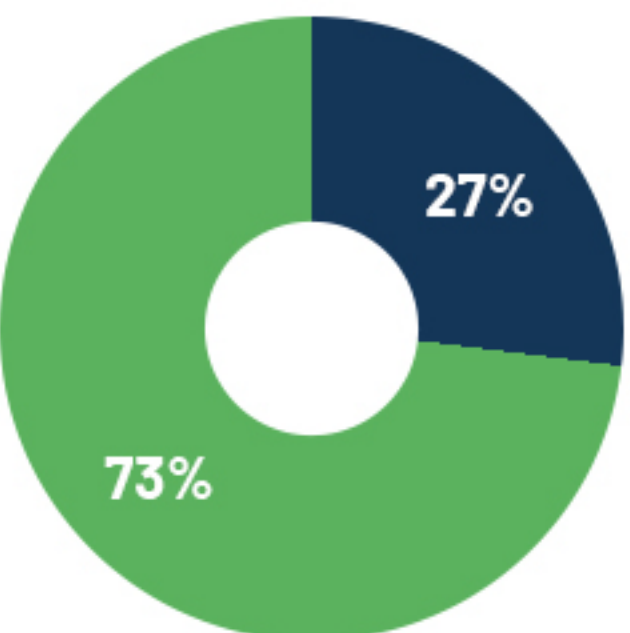


■ Off-Plan Sales
■ Ready Sales

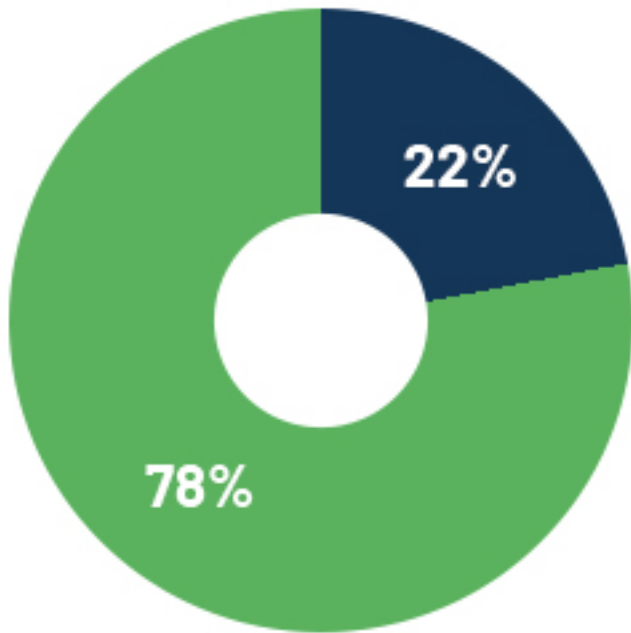
Off-Plan Sales Split By Property type

| Property Type | Total Value (AED Bn) | Total Volume |
|-----------------|----------------------|--------------|
| Apartment Sales | 10.7 Bn | 450 |
| Villa Sales | 29.0 Bn | 1,569 |
| Grand Total | 39.8 Bn | 2,019 |

Total Value (AED Bn)



Total Volume

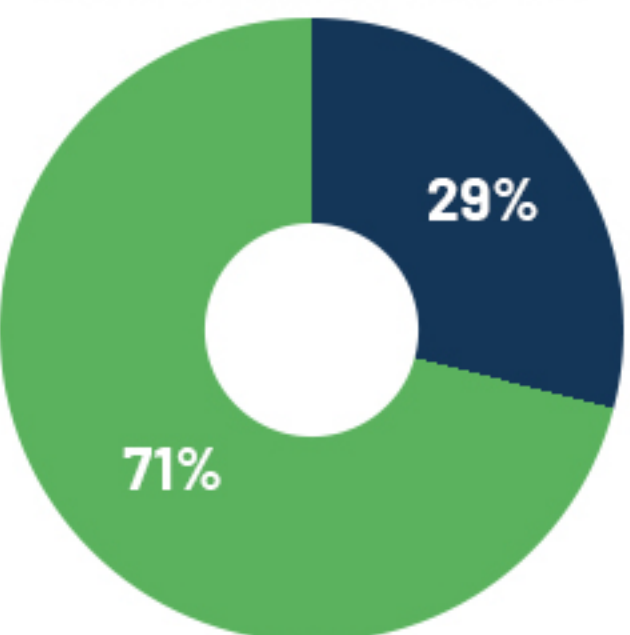


■ Apartment Sales
■ Villa Sales

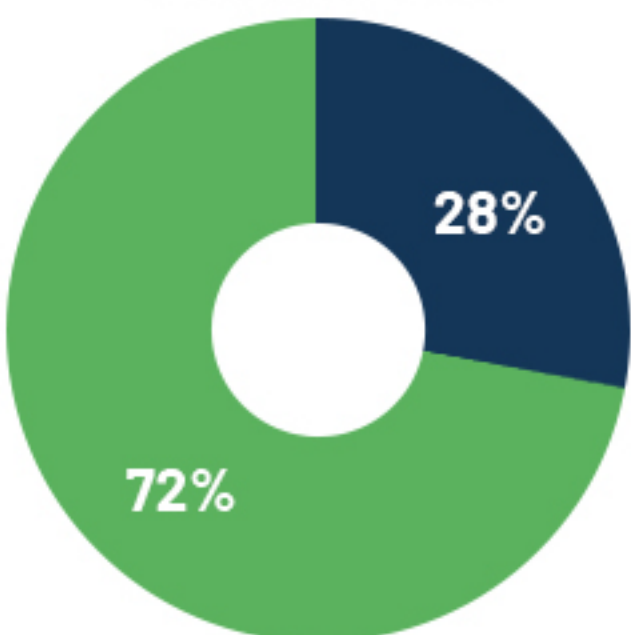
Ready Sales Split By Property type

| Property Type | Total Value (AED Bn) | Total Volume |
|-----------------|----------------------|--------------|
| Apartment Sales | 3.3 Bn | 145 |
| Villa Sales | 8.3 Bn | 366 |
| Grand Total | 11.6 Bn | 511 |

Total Value (AED Bn)



Total Volume



■ Apartment Sales
■ Villa Sales

Luxury Market Overview

5 Most Expensive Transactions of Q2 2025 – Apartments

| Sale Month | Project Name | Location | Developer | Sale Value (AED) | Average Price/ Sq ft | Sales Sequence | Transaction Type |
|------------|--------------------------------------|---------------------|-----------|------------------|----------------------|----------------|------------------|
| Jun | Four Seasons Private Residences DIFC | DIFC | H&H | 219.0 Mn | 12,166 | Secondary | Ready |
| Jun | Peninsula Dubai Residences Tower 1 | Jumeirah Second | H&H | 170.0 Mn | 7,516 | Primary | Off-Plan |
| May | Jumeirah Residences Asora Bay | La Mer | Meraas | 163.9 Mn | 9,013 | Primary | Off-Plan |
| Apr | Bulgari Lighthouse Dubai | Jumeirah Bay Island | Meraas | 155.8 Mn | 13,368 | Primary | Off-Plan |
| Jun | Bulgari Lighthouse Dubai | Jumeirah Bay Island | Meraas | 146.6 Mn | 12,576 | Primary | Off-Plan |

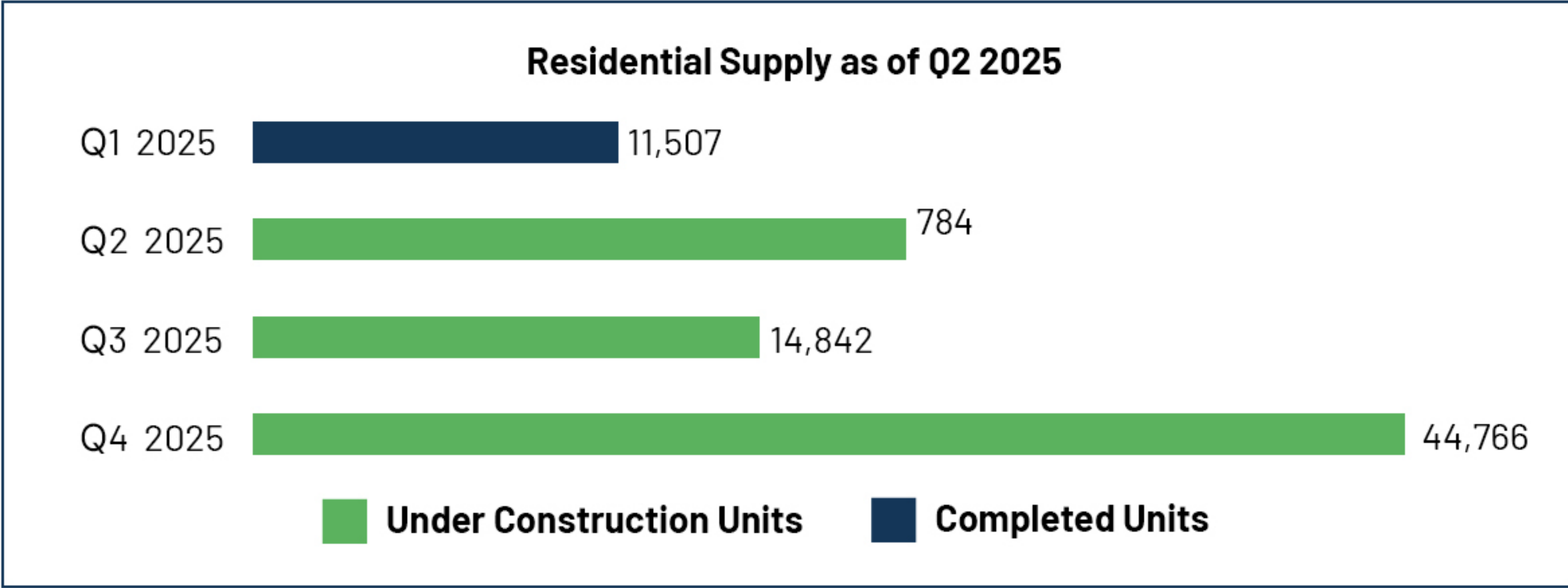
5 Most Expensive Transactions of Q2 2025 – Villas

| Sale Month | Project Name | Location | Developer | Sale Value (AED) | Average Price/ Sq ft | Sales Sequence | Transaction Type |
|------------|----------------------------|---------------------|------------------------|------------------|----------------------|----------------|------------------|
| May | EOME | Palm Jumeirah | Blue Haven Real Estate | 300.0 Mn | 18,534 | Primary | Off-Plan |
| Apr | Jumeirah Bay Island Villas | Jumeirah Bay Island | Meraas | 225.0 Mn | 26,159 | Secondary | Ready |
| Apr | EOME | Palm Jumeirah | Blue Haven Real Estate | 180.0 Mn | 6,551 | Primary | Off-Plan |
| Jun | EOME | Palm Jumeirah | Blue Haven Real Estate | 125.0 Mn | 8,154 | Secondary | Off-Plan |
| Apr | Al Barari Villas | Al Barari | Al Barari Development | 121.2 Mn | 7,364 | Secondary | Ready |

Completed & Upcoming Supply Overview

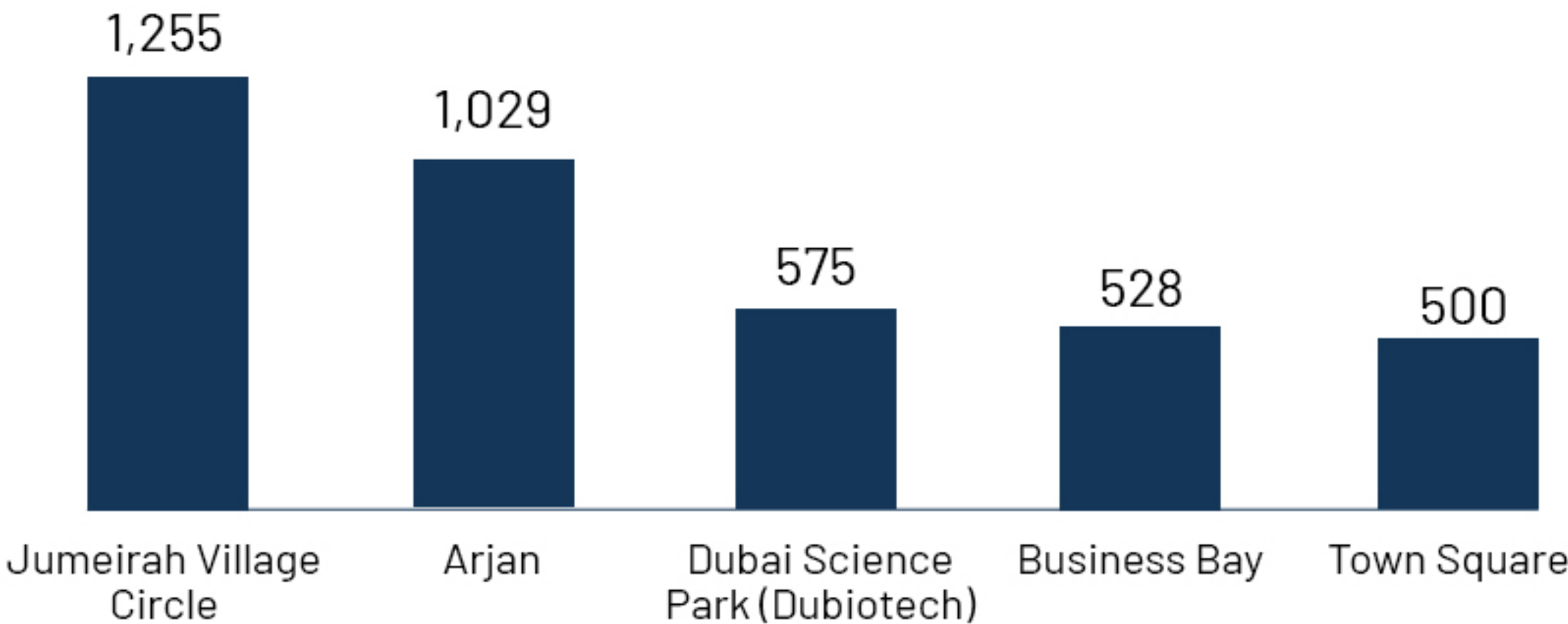
Completed & Under Construction Units

| Status | Q1 2025 | Q2 2025 | Q3 2025 | Q4 2025 |
|-----------------------------|---------|---------|---------|---------|
| Completed Units | 11,507 | 6,461 | 176 | |
| Under Construction Units | | 784 | 14,842 | 44,766 |
| Total Units (2025 Handover) | 78,536 | | | |

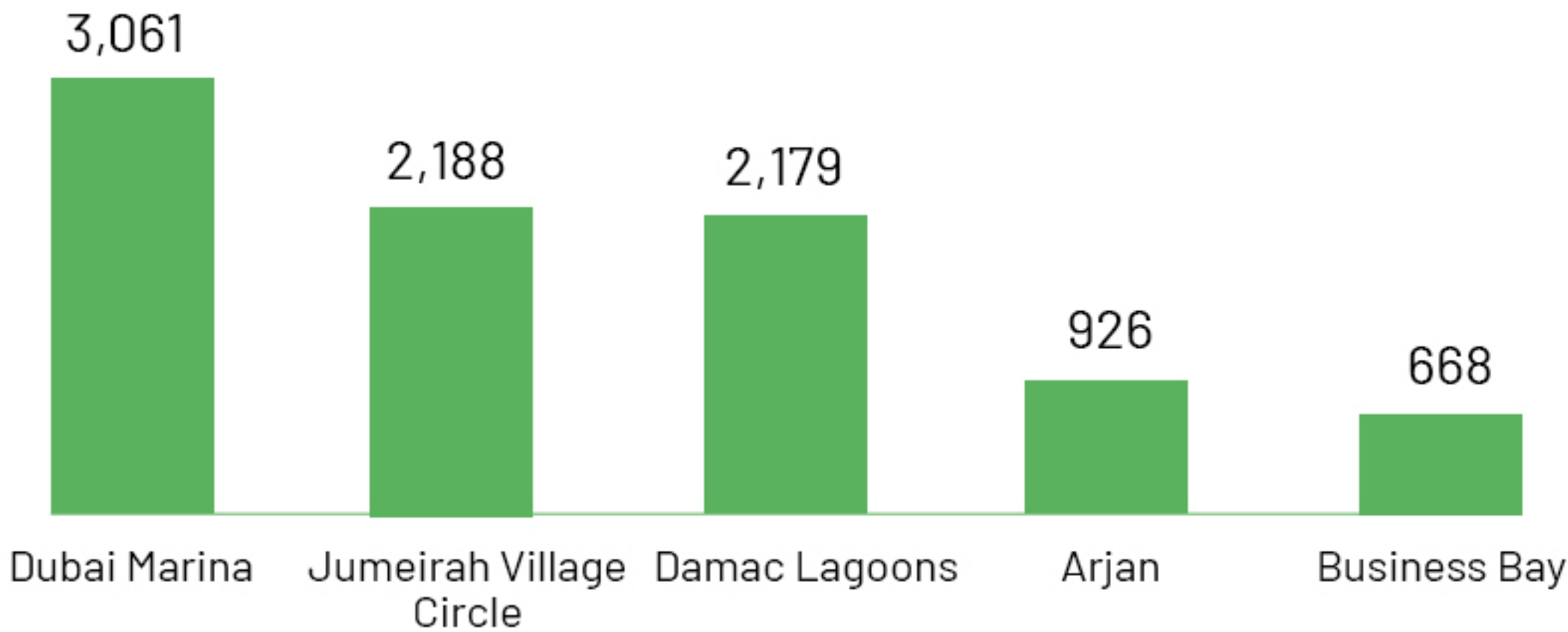


Completed & Upcoming Supply Overview

Top Completed Supply Locations in Q2 2025



Under Construction Supply Locations in Q3 2025



Completed & Upcoming Supply Overview

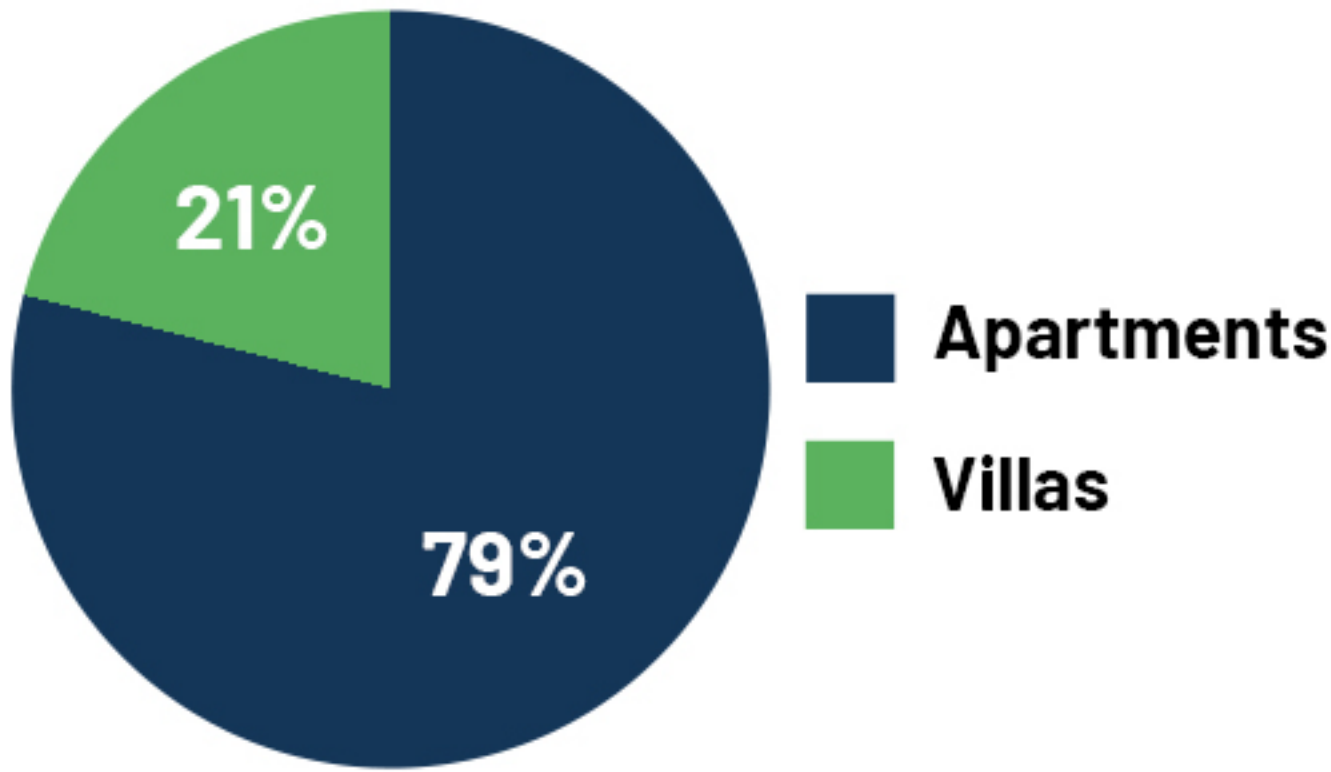
Completed Units in Q2 2025 by Property Type

| Property Type | Completed Units |
|---------------|-----------------|
| Apartments | 5,109 |
| Villas | 1,352 |
| Total | 6,461 |

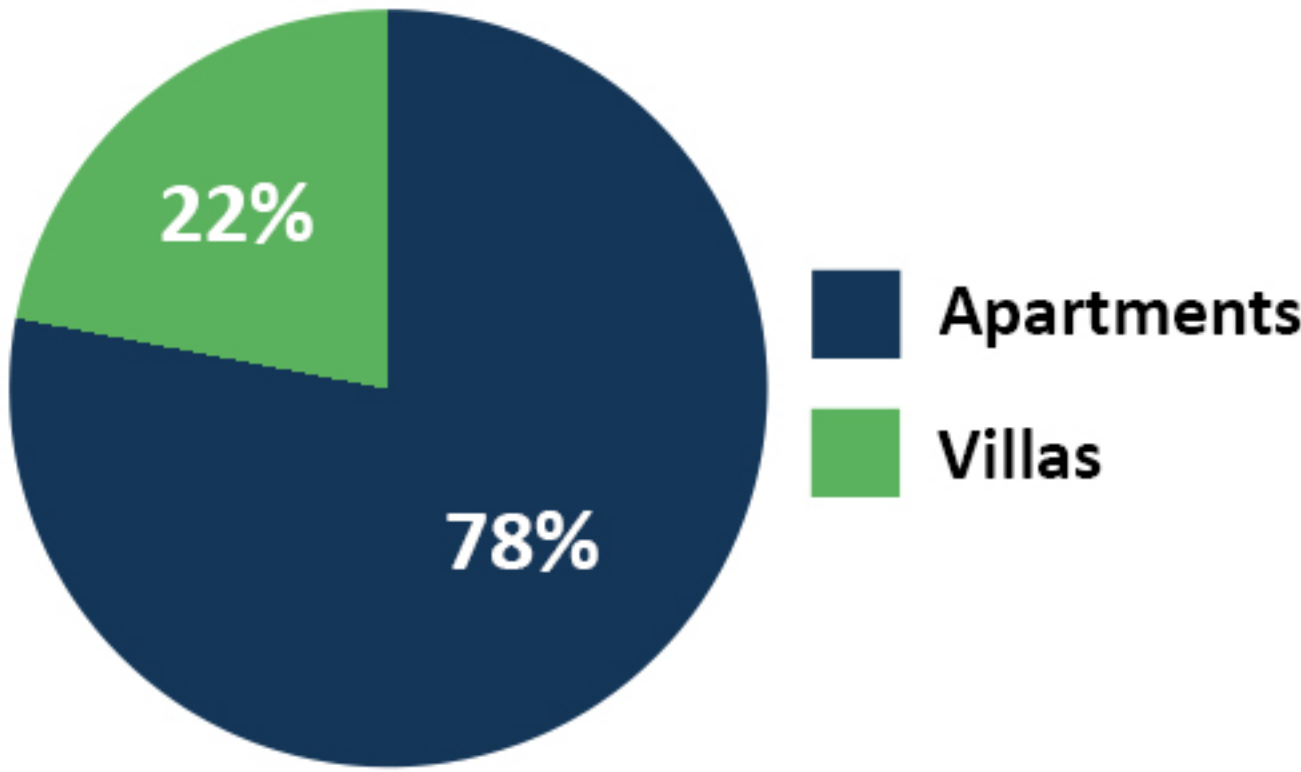
Under Construction Units in Q3 2025 by Property Type

| Property Type | Under Construction Units |
|---------------|--------------------------|
| Apartments | 11,643 |
| Villas | 3,199 |
| Total | 14,842 |

Completed Units



Under Construction Units



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