

The background of the slide is a faded, high-angle photograph of a city skyline, likely Dubai, showing numerous skyscrapers and modern buildings. In the foreground, there are some green spaces and a road.

DUBAI RESIDENTIAL MARKET OVERVIEW

AUGUST 2025

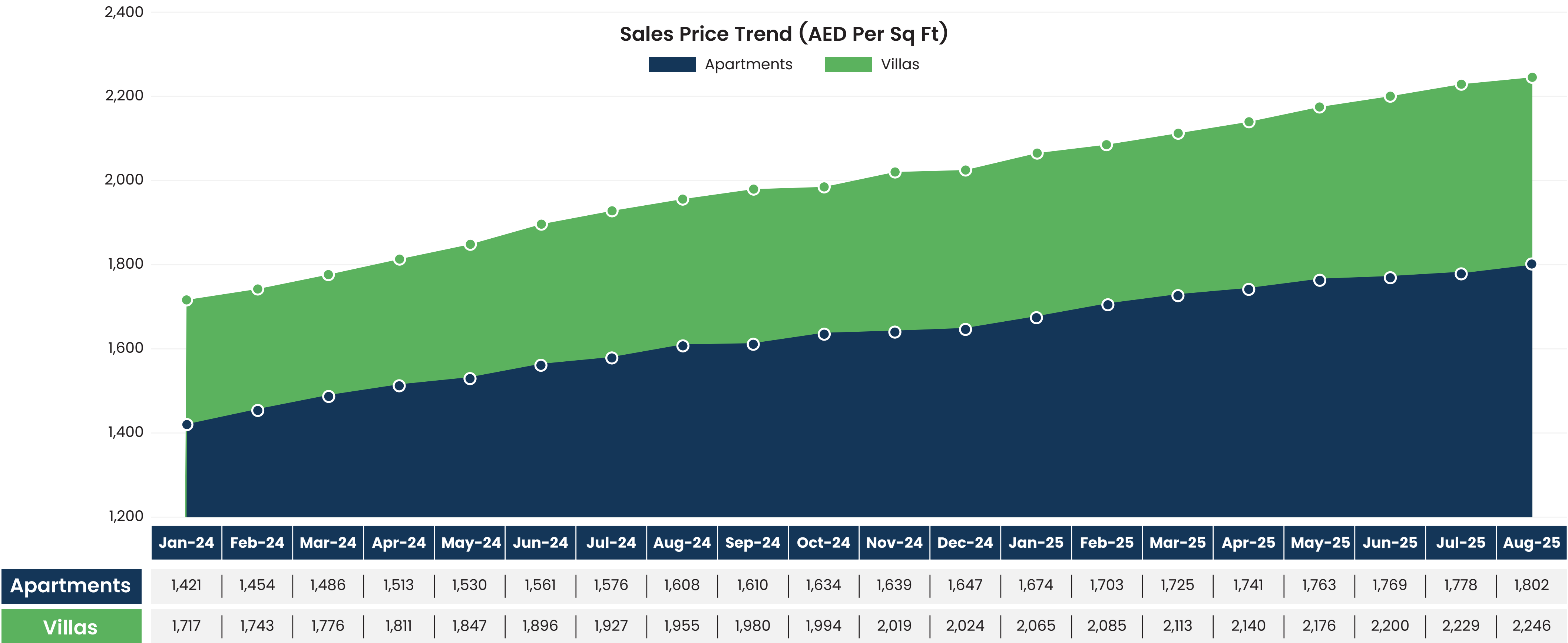
KEY HIGHLIGHTS

- Dubai's residential market saw a moderate slowdown in August after July's steady performance, shaped by seasonal factors and fewer large-scale launches. The market nonetheless maintained pricing resilience and depth across key segments, with total sales reaching AED 41.9 billion from 17,850 transactions, compared to AED 52.3 billion and 19,392 transactions in July, reflecting a 20% drop in value and 8% in volume.
- Apartments continued to dominate activity with 15,784 transactions worth AED 29.9 billion, while villas accounted for 2,065 transactions valued at AED 12 billion. Despite this pullback in activity, average prices remained resilient, inching higher to AED 1,802 per sq ft for apartments (+1.3% MoM) and AED 2,246 per sq ft for villas (+0.8% MoM). This widened the apartment–villa premium to AED 444 per sq ft, confirming the ongoing lifestyle premium attached to villa communities.
- Pricing power remained intact despite lower activity. Average apartment prices rose to AED 1,802 per sq ft (+1.3% MoM from 1,778), while villas inched up to AED 2,246 per sq ft (+0.8% MoM from 2,229). This lifted the apartment–villa premium to AED 444 per sq ft, underscoring Dubai's continued tilt toward lifestyle-led villa living.
- Sub-market dynamics were mixed. Downtown Dubai (+2.7%), DIFC (+2.3%) and Palm Jumeirah (+2.1%) apartments saw strong gains after softness in July, reflecting renewed investor focus on central and mixed-use hubs. Conversely, Jumeirah Beach Residence slipped -0.9%. Among villas, Jumeirah Golf Estates (+4.0%), Meadows (+3.7%) and MBR City (+2.9%) led demand, while Emirates Hills (-3.5%) and Palm Jumeirah (-1.8%) corrected from July highs.

KEY HIGHLIGHTS

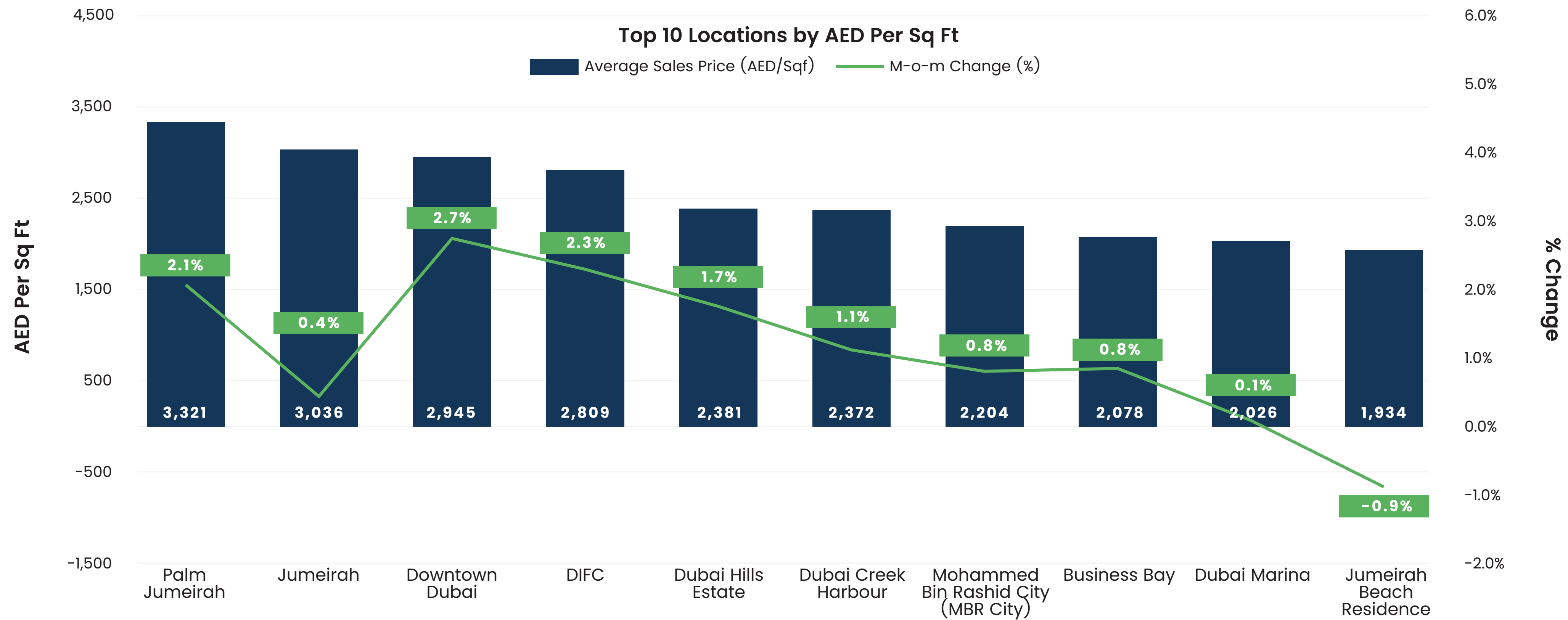
- The luxury bracket (\geq AED 10 million) cooled but remained headline-worthy. Luxury sales halved to AED 7.54 billion across 355 deals, down from July's AED 13.27 billion across 641 deals. Off-plan retained the lion's share (61% of value), with villas comprising 56% of luxury volume. Notable trophy transactions included Meraas' AED 350 million Asora Bay mansion at La Mer and Omniyat's AED 81 million Orla apartment on Palm Jumeirah.
- Demand segmentation reflected duality. Apartments in the AED 1–2 million range drove mass-market momentum (9.54 billion value; 6,914 deals), while the $>$ AED 10 million villa segment surged to AED 4.45 billion across 197 deals, highlighting resilience among high-net-worth investors.
- Supply-side pressures remained muted in August 2025. 3,550 units were completed across JVC, Sobha Hartland, and Business Bay. However, the Q4 2025 pipeline is significant, with over 51,000 units under construction across hubs like Business Bay, Jumeirah Lake Towers, and JVC. This sets up a potential supply bulge later in the year, which will test absorption capacity but also create more choice for buyers.
- In August 2025, the Dubai Land Department (DLD) advanced its blockchain-based transaction platform, expanding tokenization and digital transfer frameworks that were first announced in July. These measures aim to streamline ownership transfers, reduce transaction costs, and broaden access for international investors. Combined with the ongoing First-Time Home Buyer Programme, these initiatives are part of Dubai's larger strategy to anchor demand across both local end-users and global wealth inflows.

REIDIN RESIDENTIAL CITY-WIDE SALES PRICE TREND



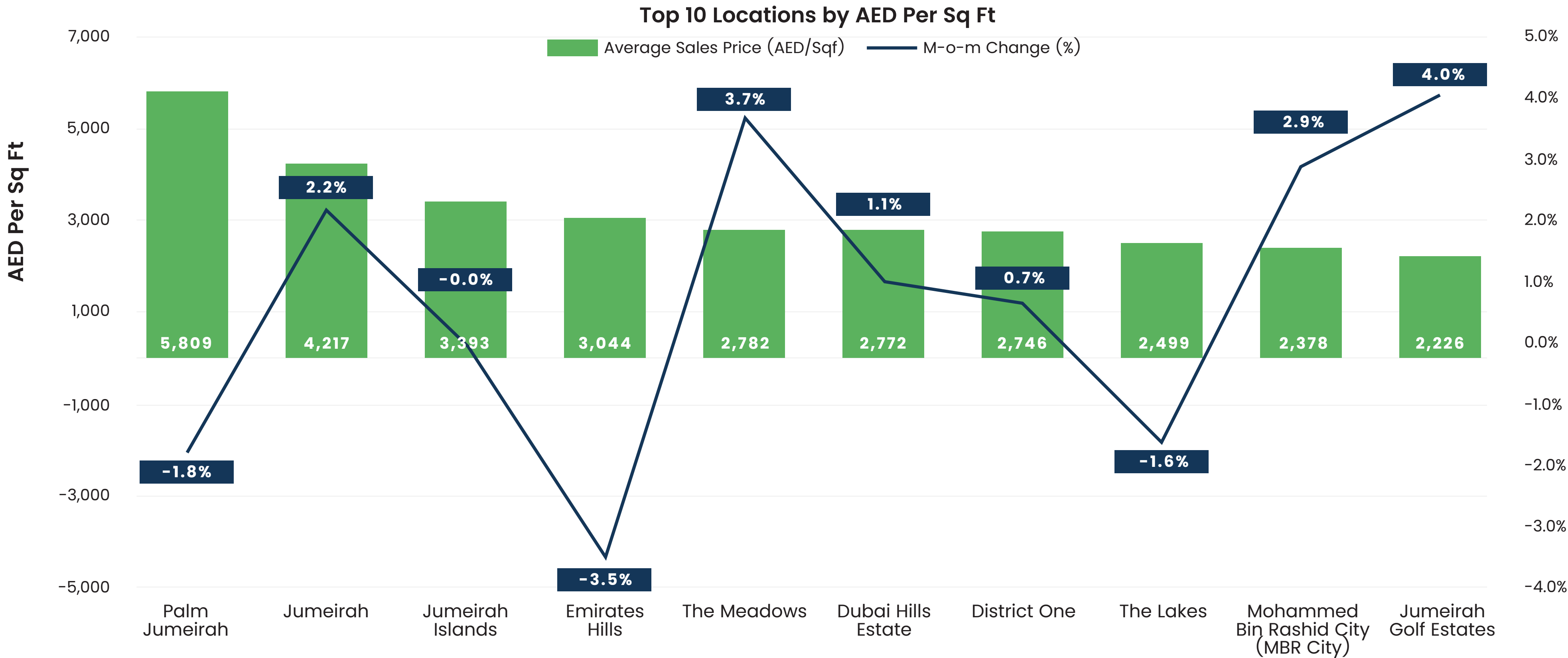
- Both apartments and villas have shown consistent month-on-month appreciation since early 2024, reflecting strong investor confidence and demand depth.
- Apartment prices rose from AED 1,421 psf (Jan-24) to AED 1,802 psf (Aug-25), a +27% increase. Growth was steady with limited volatility, showing broad-based absorption across mid-tier and prime apartment communities.
- Villa prices jumped from AED 1,717 psf (Jan-24) to AED 2,246 psf (Aug-25), a +31% increase. Gains were sharper than apartments, highlighting a structural tilt toward spacious, lifestyle-led living.
- The apartment–villa premium expanded from AED 296 psf in Jan-24 to AED 444 psf in Aug-25 with scarcity effect fueling the price premium.

APARTMENTS SALES PRICE TREND



- Palm Jumeirah remained the most expensive apartment sub-market at AED 3,231 psf, up +2.1% MoM, showing that prime waterfront living still commands a premium.
- Downtown Dubai (+2.7%) and DIFC (+2.3%) rebounded strongly after July’s corrections, reaffirming investor appetite for core business and lifestyle districts.
- Dubai Hills Estate (+1.7%), Dubai Creek Harbour (+1.1%), and MBR City (+0.8%) registered steady gains, driven by ongoing handovers and new off-plan launches.
- Business Bay (+0.8%) stayed on a positive track, balancing mid-market affordability with central connectivity.
- Jumeirah Beach Residence (-0.9%) dipped, while Dubai Marina (+0.1%) flattened suggesting saturation after sustained appreciation.

VILLAS SALES PRICE TREND



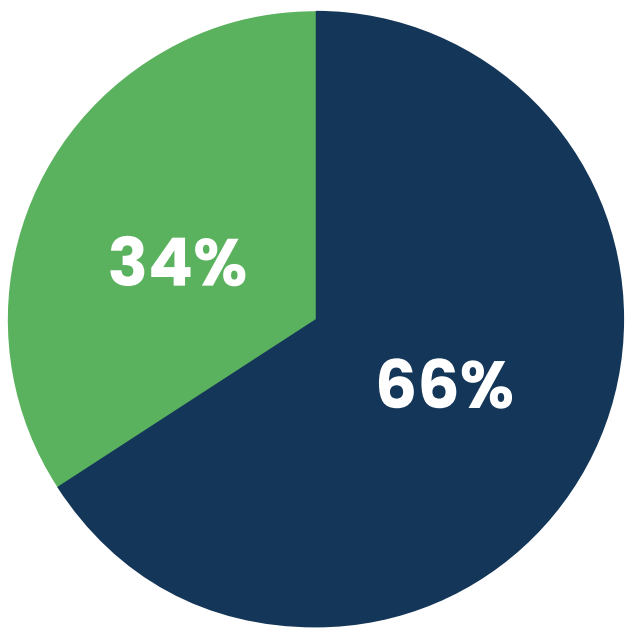
- Palm Jumeirah villas, still the most expensive at AED 5,899 psf, slipped -1.8% MoM, and Emirates Hills corrected -3.5%, signalling some resistance at the ultra-luxury end after July highs.
- The Meadows (+3.7%) and Jumeirah Golf Estates (+4.0%) posted the strongest gains, highlighting rising demand in established, community-driven villa enclaves.
- Jumeirah (+2.2%), MBR City (+2.9%), Dubai Hills Estate (+1.1%), and District One (+0.7%) all saw healthy price increases, underscoring broad-based absorption across mid- to upper-tier villa markets.
- The Lakes (-1.6%) and Jumeirah Islands (flat at 0.0%) reflect temporary cooling, likely due to stock mix and seasonal dynamics.

SALES TRANSACTIONS

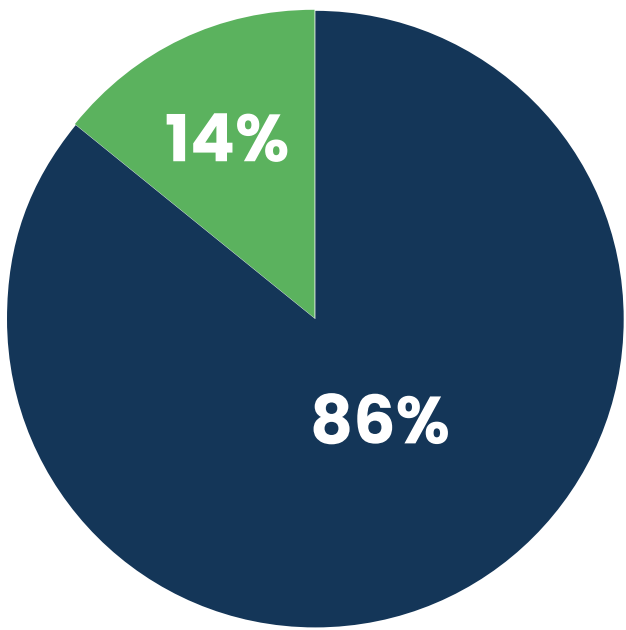
Total Volume & Value

Sales Transactions	Total Value (AED Bn)	Total Volume
Apartment Sales	29.9 Bn	15,784
Villa Sales	12.0 Bn	2,066
Grand Total	41.9 Bn	17850

Total Value(AED Bn)



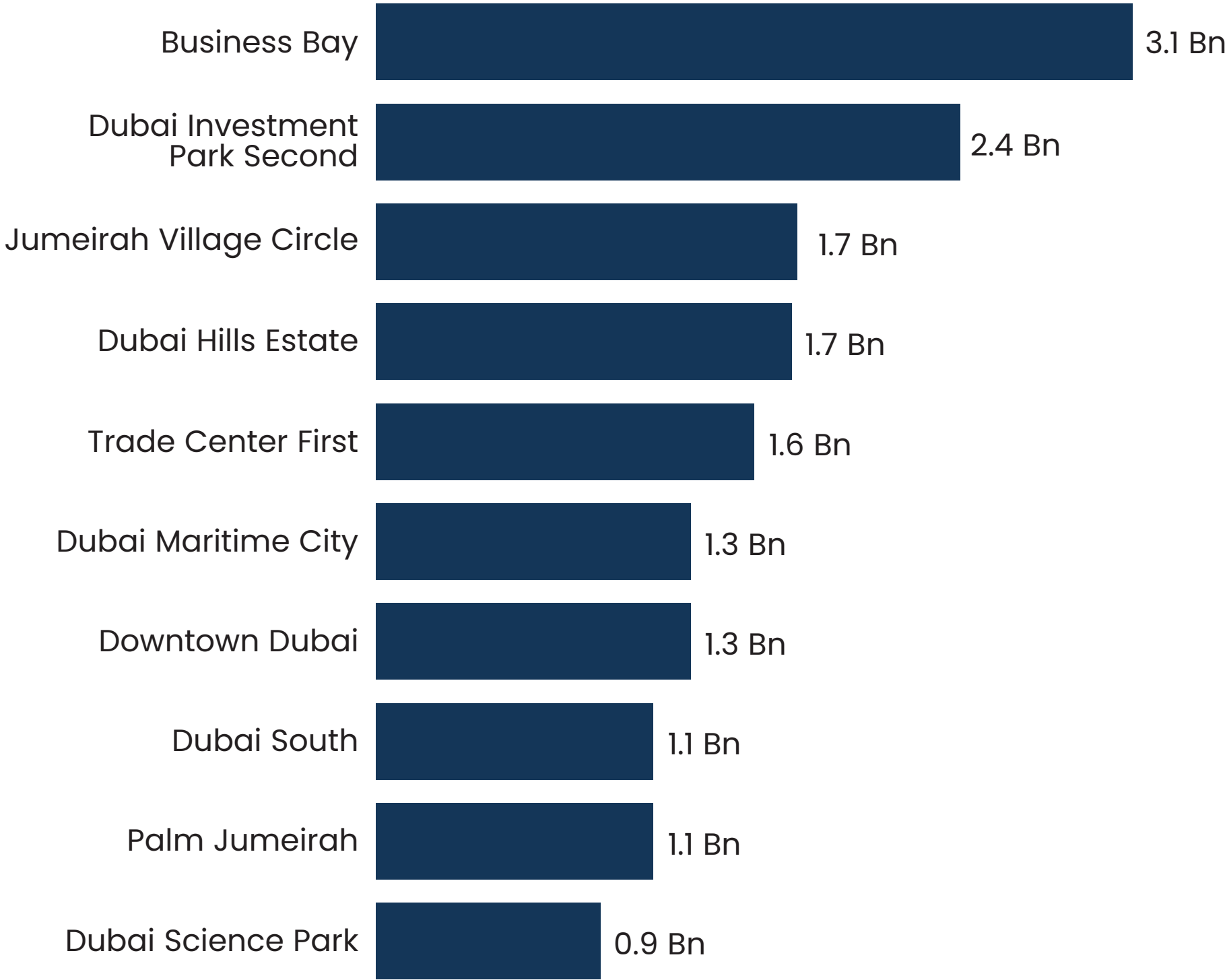
Total Volume



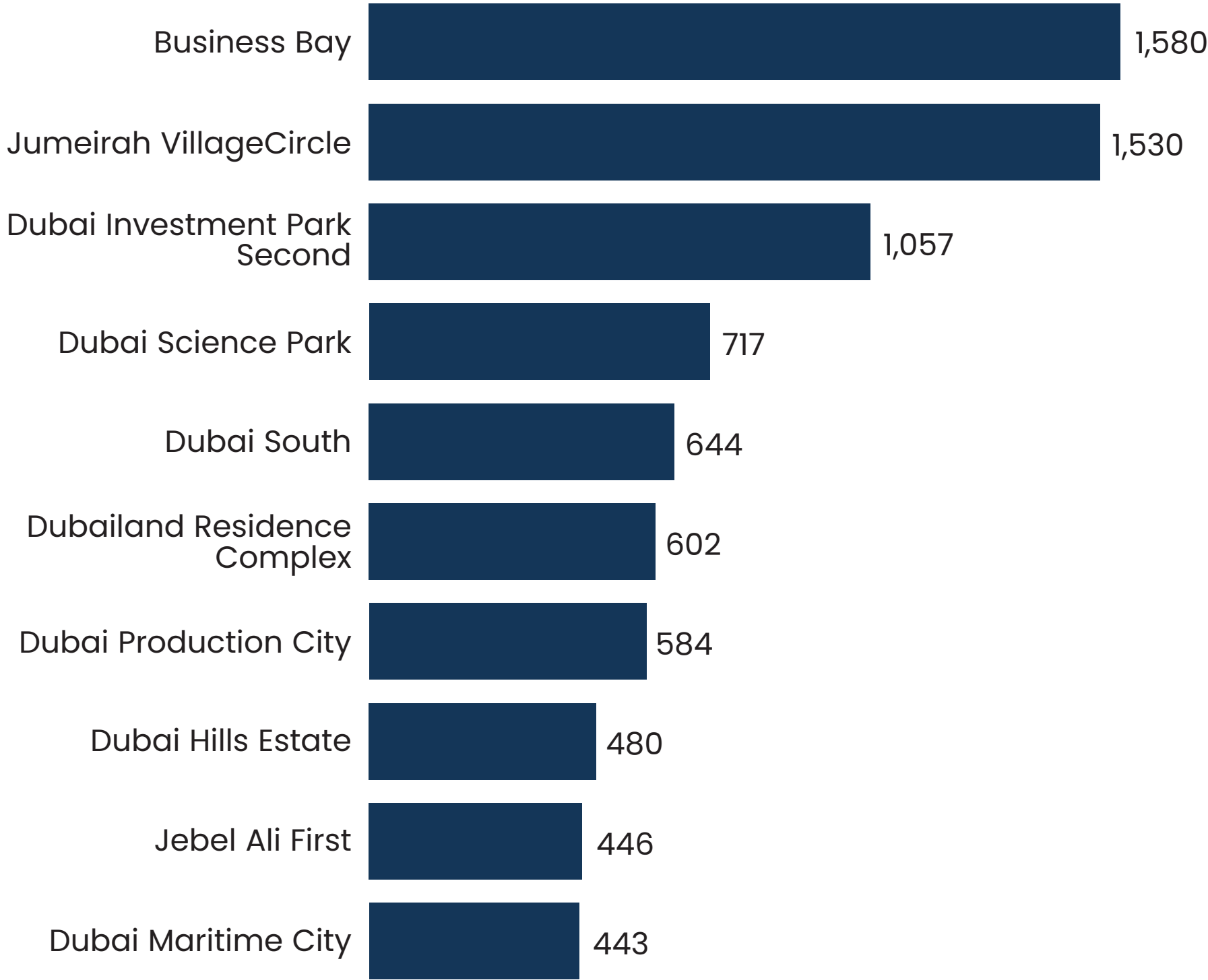
■ Apartments
■ Villas

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

Top 10 Locations by Value (AED Bn)



Top 10 Locations by Voume

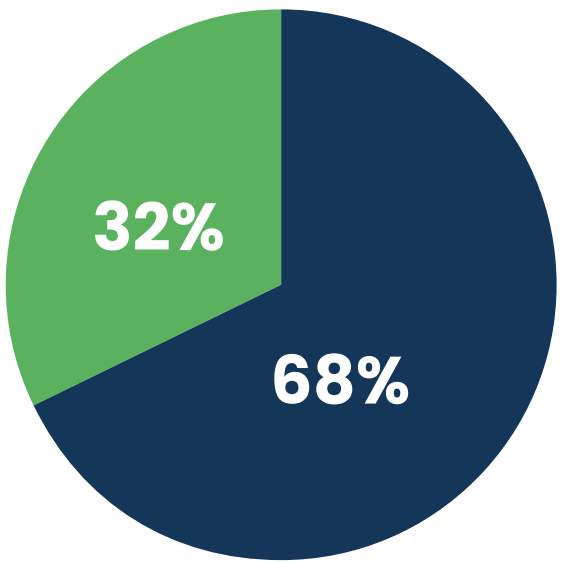


SALES SEQUENCE: PRIMARY VS SECONDARY

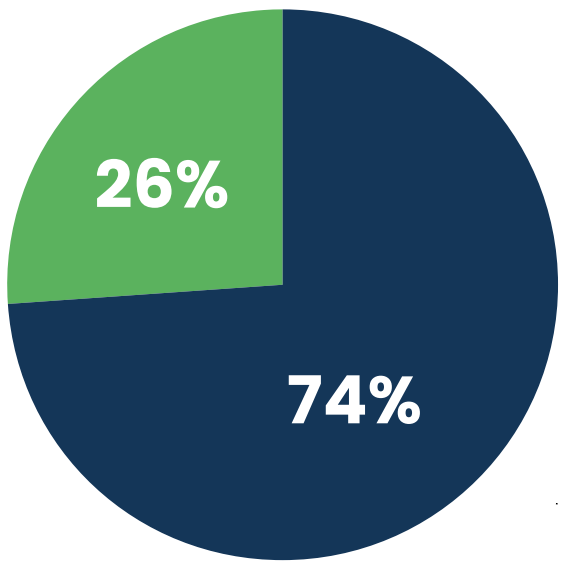
Primary and Secondary Sales Split

Sales Sequence	Total Value (AED Bn)	Total Volume
Primary Sales	28.6 Bn	13,173
Secondary Sales	13.3 Bn	4,677
Grand Total	41.9 Bn	17,850

Total Value(AED Bn)



Total Volume

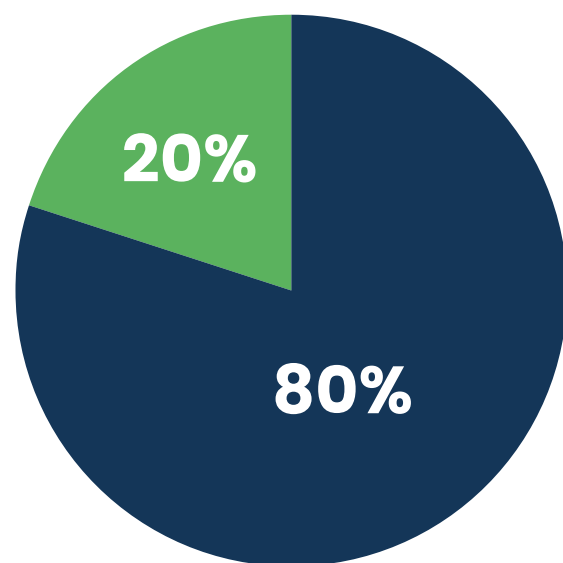


■ Apartments
■ Villas

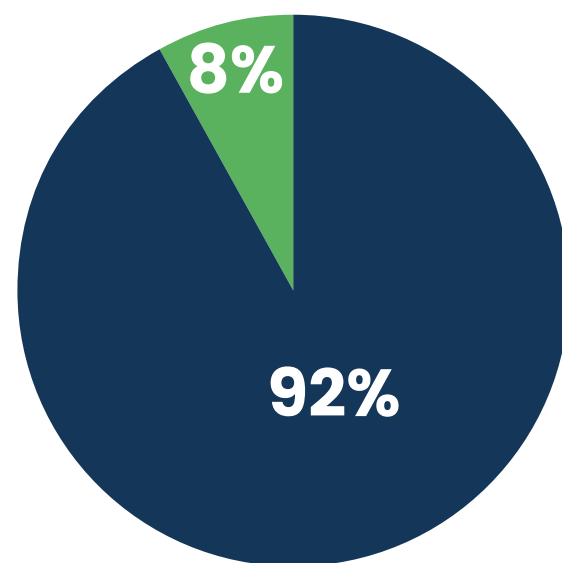
Primary Sales Split By Property type

Property Type	Total Value (AED Bn)	Total Volume
Apartment Sales	22.9 Bn	12,154
Villa Sales	5.7 Bn	1,019
Grand Total	28.6 Bn	13,173

Total Value(AED Bn)



Total Volume

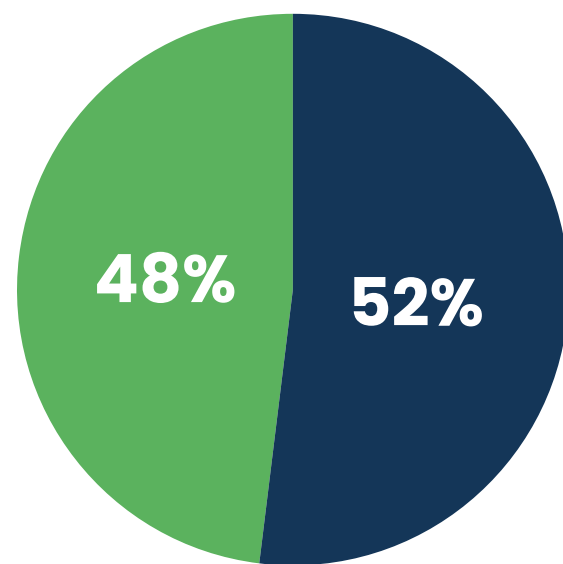


■ Apartments
■ Villas

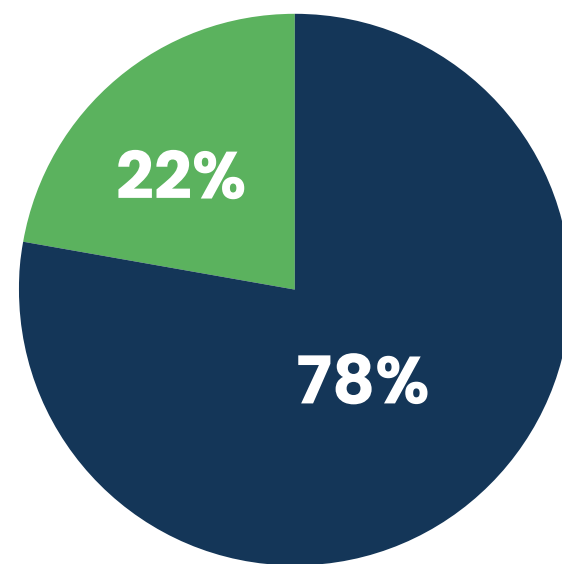
Secondary Sales Split By Property type

Property Type	Total Value (AED Bn)	Total Volume
Apartment Sales	6.9 Bn	3,630
Villa Sales	6.4 Bn	1,047
Grand Total	13.3 Bn	4,677

Total Value(AED Bn)



Total Volume



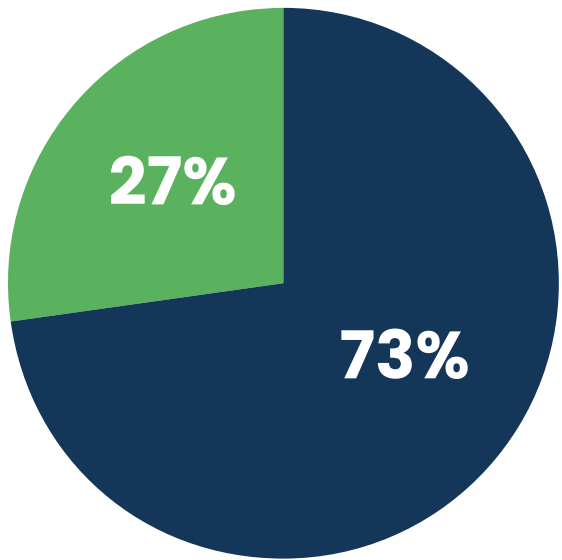
■ Apartments
■ Villas

TRANSACTION TYPE: OFF-PLAN VS READY

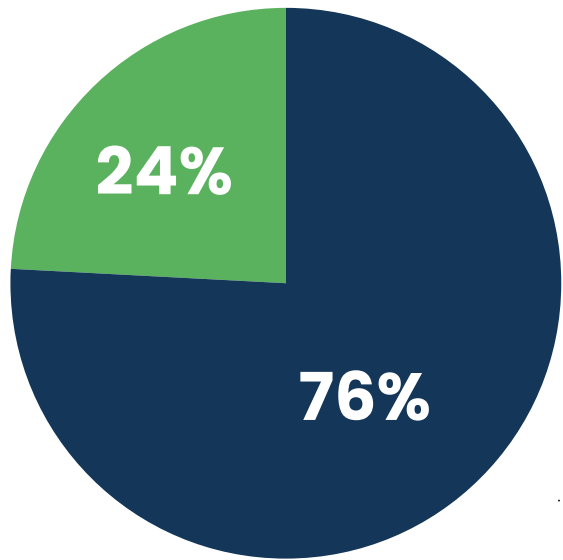
Off-Plan and Ready Sales Split

Transaction Type	Total Value (AED Bn)	Total Volume
Off-Plan Sales	30.7 Bn	13,615
Ready Sales	11.2 Bn	4,235
Grand Total	41.9 Bn	17,850

Total Value(AED Bn)



Total Volume

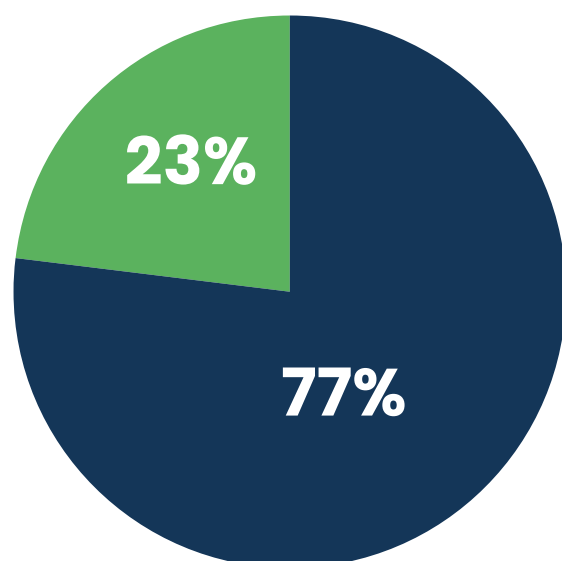


■ Apartments
■ Villas

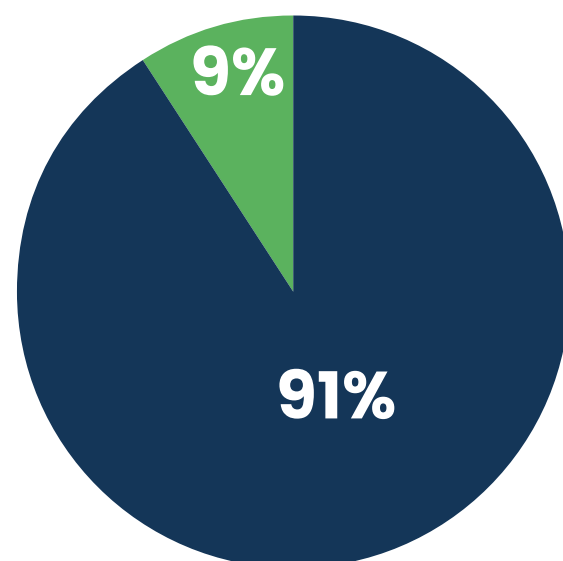
Off-Plan Sales Split By Property type

Property Type	Total Value (AED Bn)	Total Volume
Apartment Sales	23.7 Bn	12,388
Villa Sales	7.0 Bn	1,227
Grand Total	30.7 Bn	13,615

Total Value(AED Bn)



Total Volume

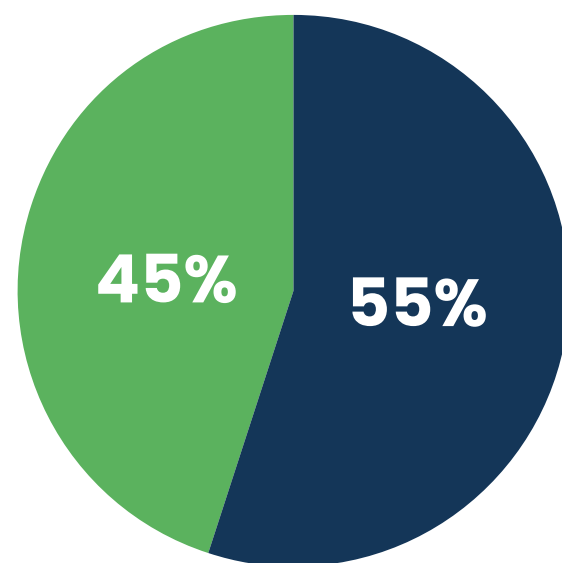


■ Apartments
■ Villas

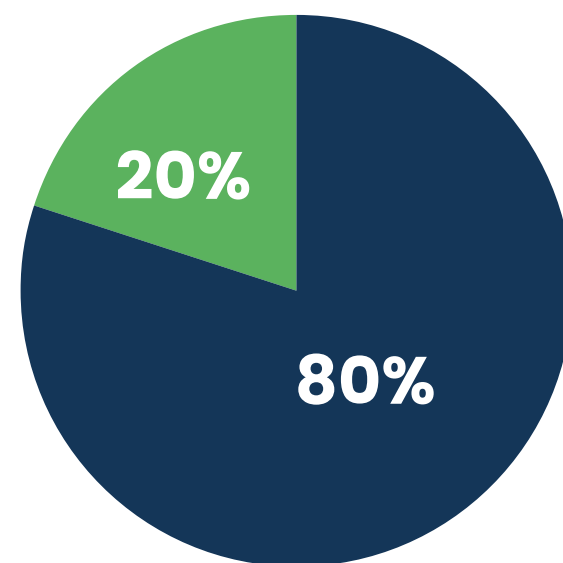
Ready Sales Split By Property type

Property Type	Total Value (AED Bn)	Total Volume
Apartment Sales	6.2 Bn	3,396
Villa Sales	5.0 Bn	839
Grand Total	11.2 Bn	4,235

Total Value(AED Bn)



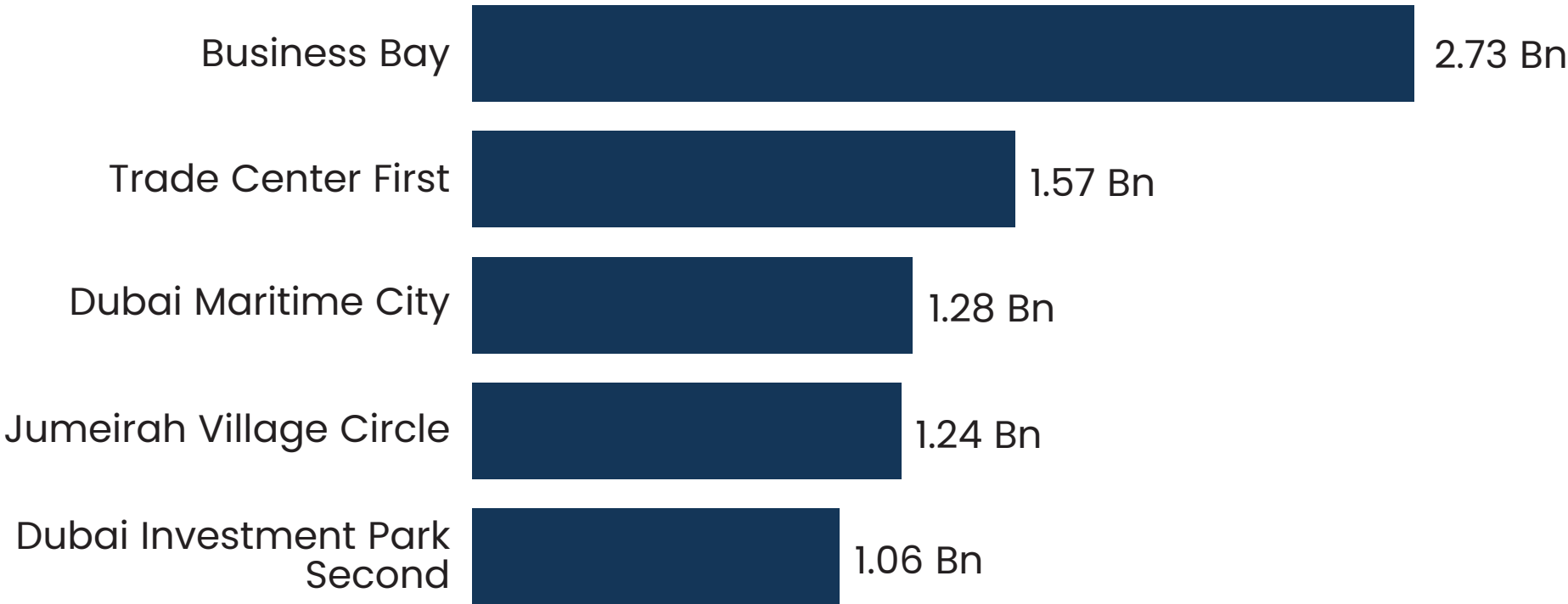
Total Volume



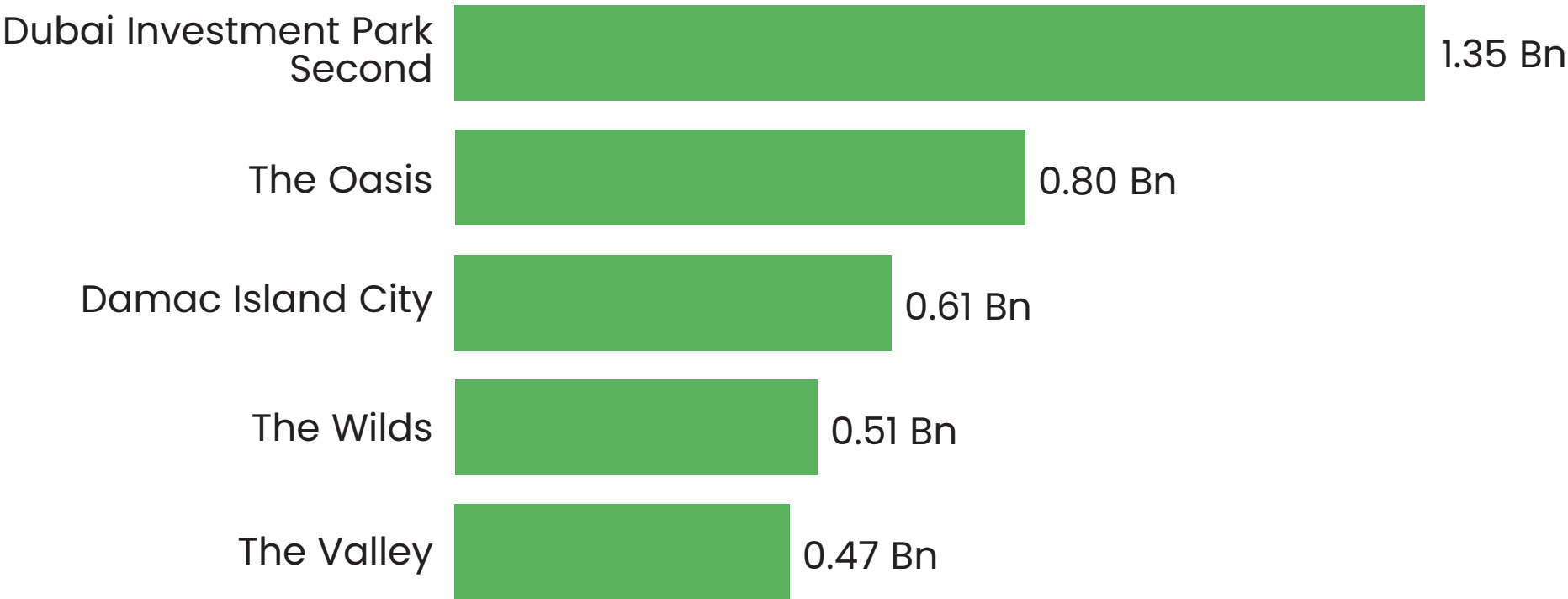
■ Apartments
■ Villas

OFF-PLAN MARKET OVERVIEW

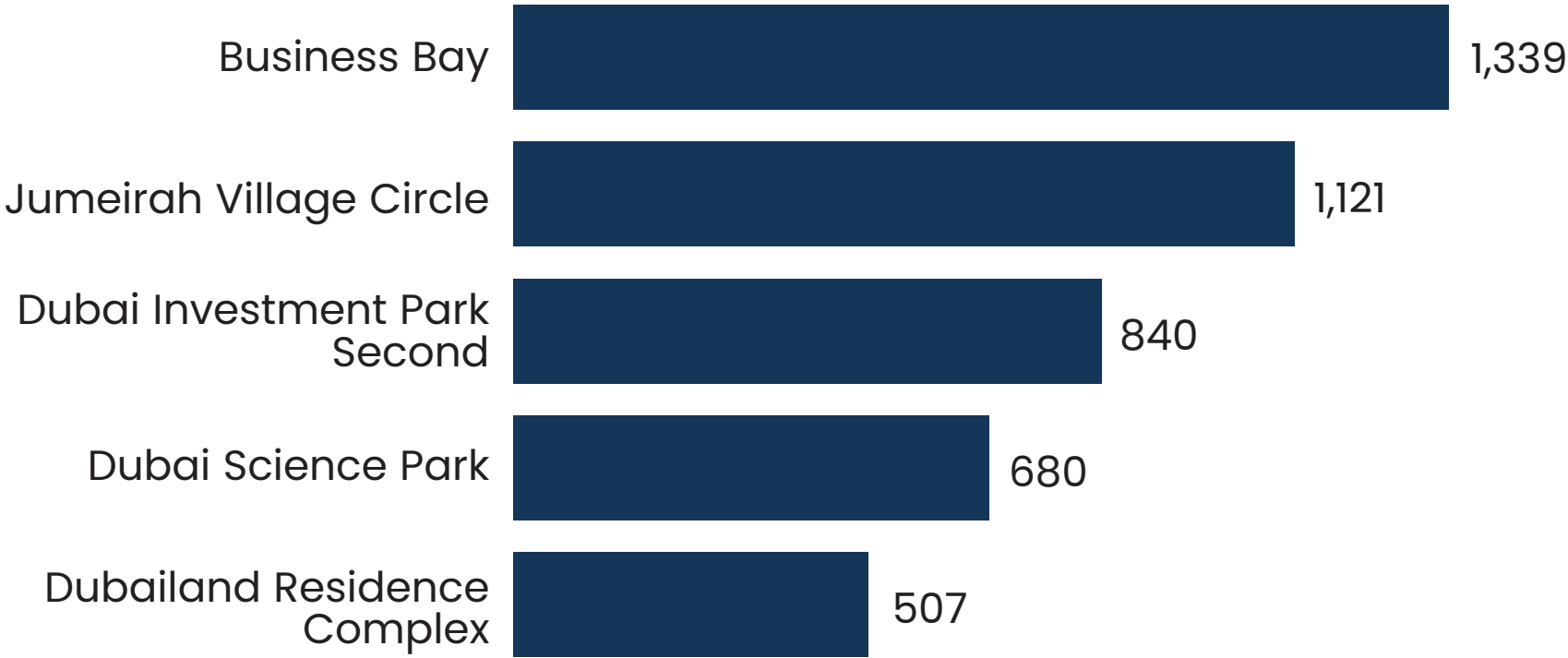
Top 5 Off-Plan Apartment Locations
by Value (AED)



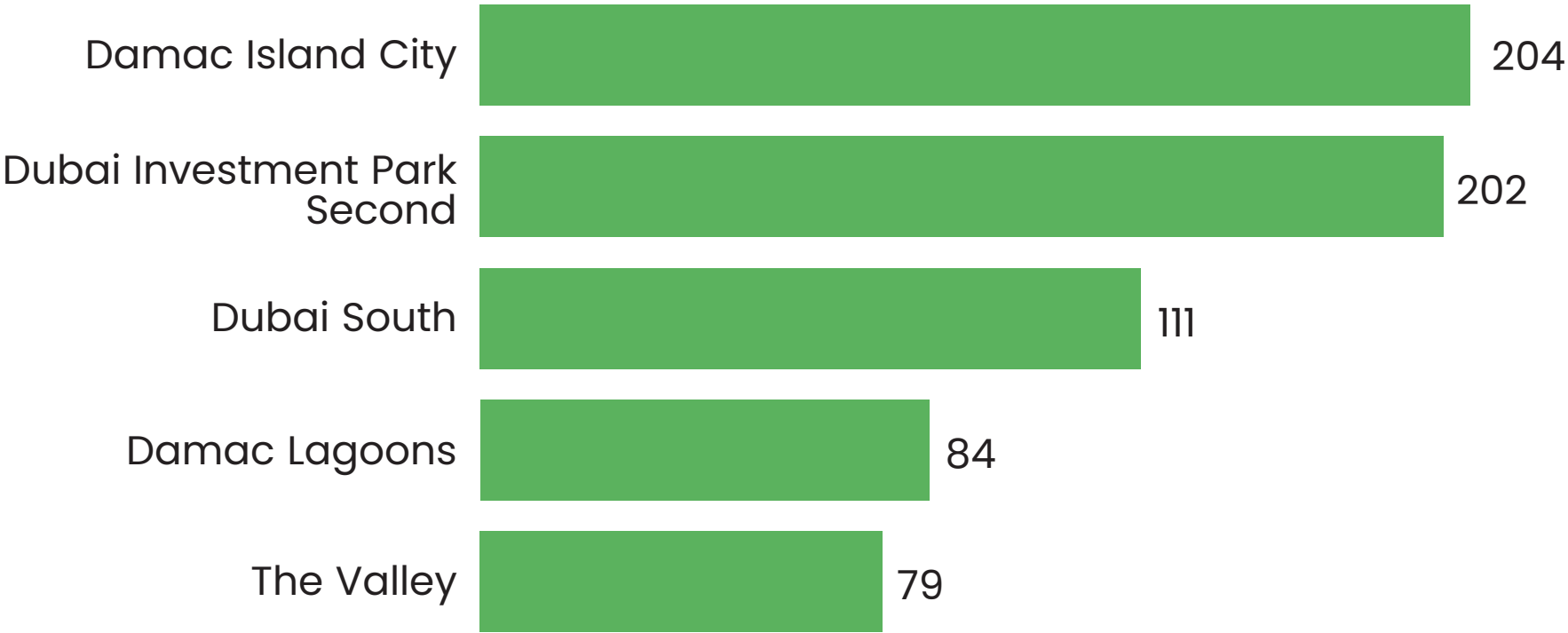
Top 5 Off-Plan Villa Locations
by Value (AED)



Top 5 Off-Plan Apartment Locations
by Volume

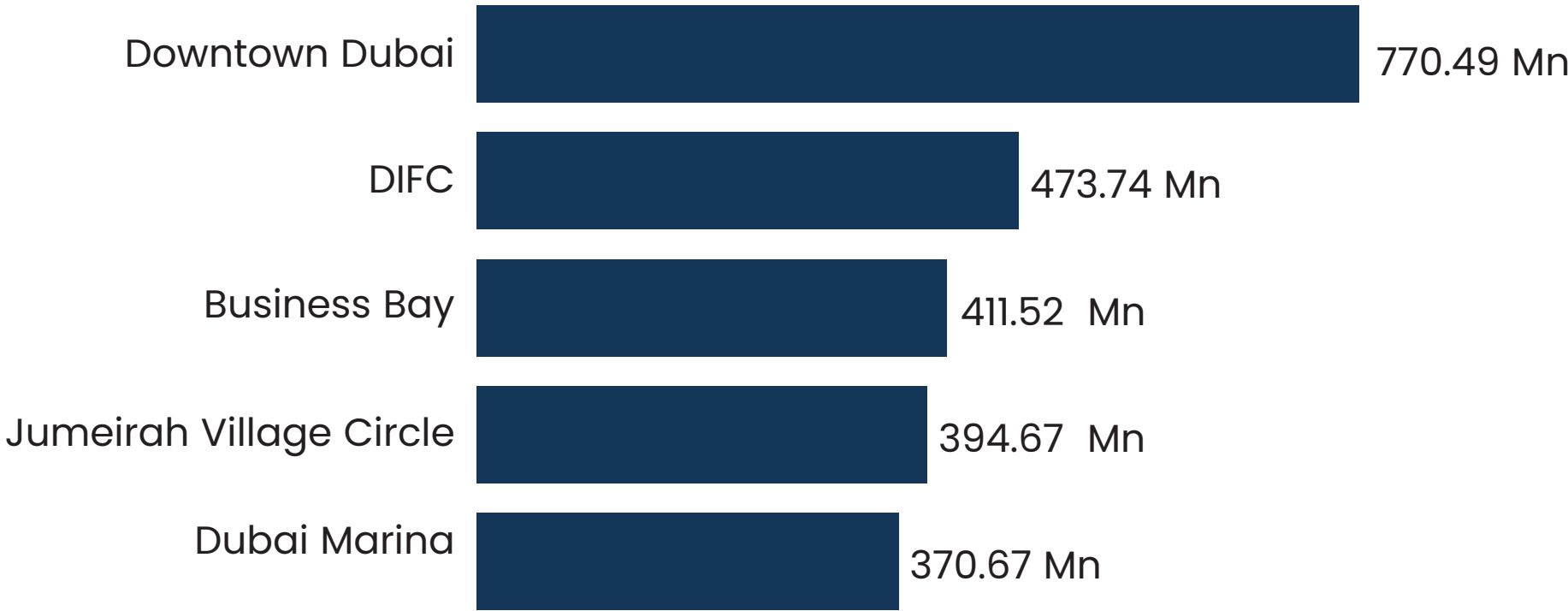


Top 5 Off-Plan Villa Locations
by Volume

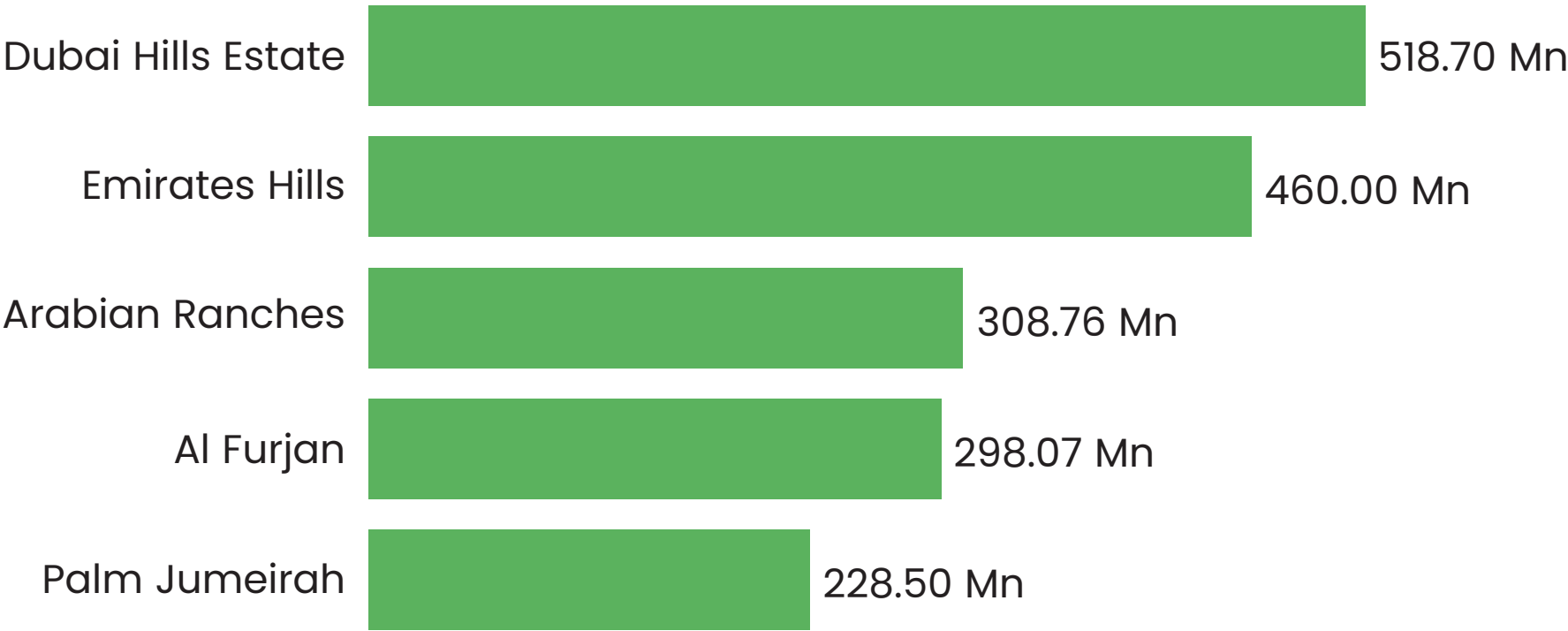


READY MARKET OVERVIEW

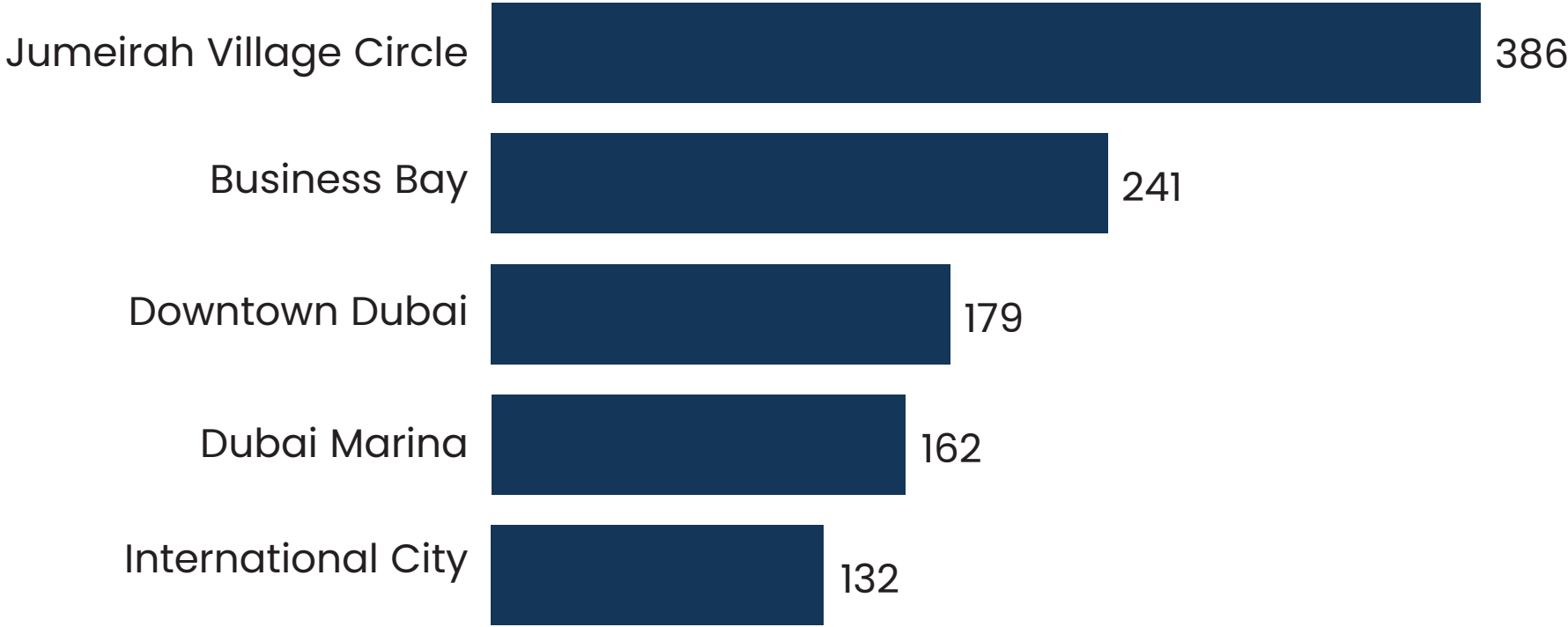
Top 5 Ready Apartment Locations
by Value (AED)



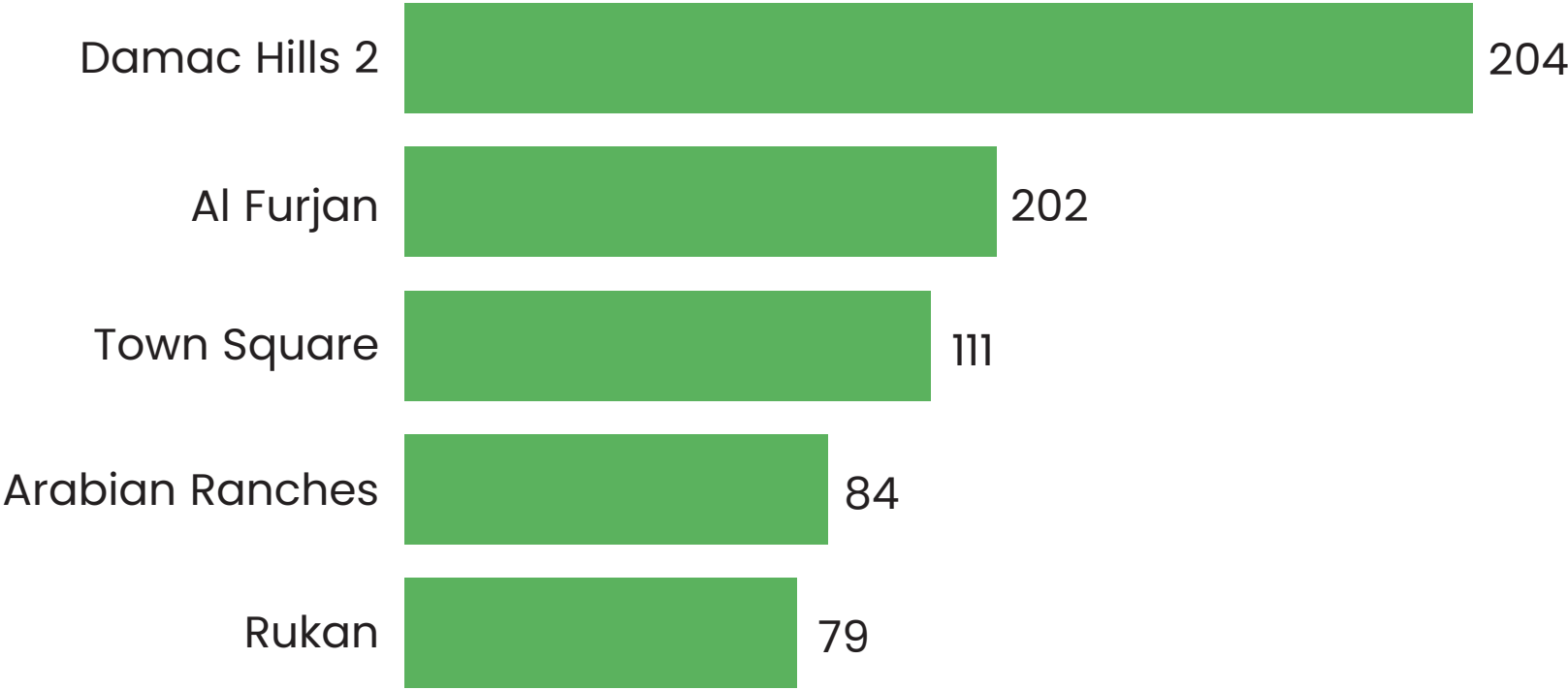
Top 5 Ready Villa Locations
by Value (AED)



Top 5 Ready Apartment Locations
by Volume



Top 5 Ready Villa Locations
by Volume



TICKET SIZE SPLIT BY TYPOLOGIES

Apartment Ticket Split

	Total Value (AED Bn)	Total Volume
< 1 Mn	3.28 Bn	4,507
1 – 2 Mn	9.54 Bn	6,914
2 – 3 Mn	5.88 Bn	2,424
3 – 5 Mn	4.94 Bn	1,311
5 – 10 Mn	3.13 Bn	470
> 10 Mn	3.09 Bn	158

- The largest concentration of transactions is in the AED 1–2 Mn bracket (AED 9.54 Bn across ~6,900 units), followed by AED 2–3 Mn.
- Affordability-led demand remains active (< AED 1 Mn), with 4,500+ units sold.

Villa Ticket Split

	Total Value (AED Bn)	Total Volume
< 1 Mn	0.05 Bn	69
1 – 2 Mn	0.29 Bn	186
2 – 3 Mn	1.26 Bn	492
3 – 5 Mn	2.16 Bn	570
5 – 10 Mn	3.78 Bn	551
> 10 Mn	4.45 Bn	197

- Villa volumes skew heavily toward the premium and luxury tiers with > AED 10 Mn segment alone accounting for AED 4.45 Bn with just 200 transactions that’s more than the entire < AED 5 Mn villa market combined.

LUXURY MARKET OVERVIEW

- The luxury segment (≥AED 10m) slowed considerably after July’s record month but still generated landmark transactions that kept Dubai on the global luxury radar.
- Total luxury sales reached AED 7.54bn across 355 deals, a sharp -43% MoM decline in value and -45% in volume compared to July’s AED 13.27bn / 641 deals.
- Despite this cooling, off-plan remained dominant, contributing 63% of luxury value (AED 4.59bn, 221 deals), led by The Oasis (AED 785 Mn, 5 deals) and Palm Jumeirah (AED 470 Mn, 11 deals). Other notable hubs included La Mer (AED 350 Mn, 1 deal), Business Bay (AED 308 Mn, 14 deals), and Al Wasl (AED 293 Mn, 14 deals).
- Ready luxury homes held 37% of sales, concentrated in Emirates Hills (AED 460 Mn, 5 deals) and Dubai Hills Estate (AED 422 Mn, 19 deals). Strong activity was also seen in Palm Jumeirah (AED 341 Mn, 14 deals), JVC (AED 194 Mn, 8 deals), and DIFC (AED 168 Mn, 8 deals).
- Villas were the clear favorite in the ready segment, comprising 77% of luxury value, while apartments held a stronger share in off-plan at 53%.
- Trophy transactions underscored resilience at the very top end. Standout deals included Meraas' Asora Bay Ocean Mansion at La Mer (AED 350m @ 12,985 psf), Emaar's Emirates Hills villa resale at AED 260m (18,489 psf), and Omniyat's Orla apartments on Palm Jumeirah, each closing above AED 79m.

Top 5 Off-Plan Luxury Communities by Value

Location	Value (AED Mn)	Volume
The Oasis	785.35 Mn	5
Palm Jumeirah	469.98 Mn	11
La Mer	350.00 Mn	1
Business Bay	307.71 Mn	14
Al Wasl	293.49 Mn	14

Deal Size 10M+

Top 5 Ready Luxury Communities by Value

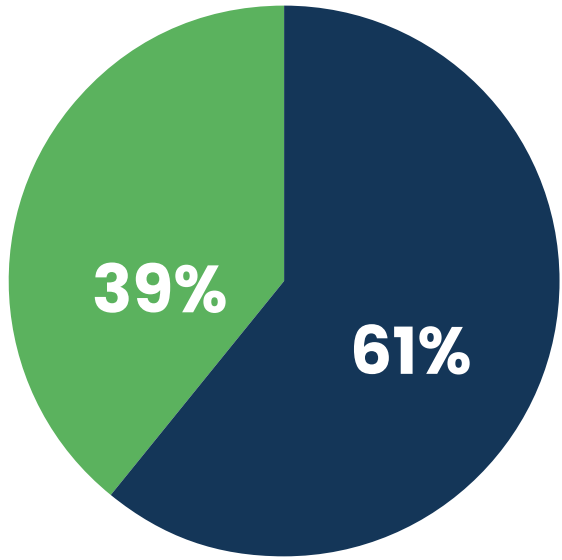
Location	Value (AED Mn)	Volume
Emirates Hills	460.00 Mn	5
Dubai Hills Estate	421.99 Mn	19
Palm Jumeirah	340.58 Mn	14
Jumeirah Village Circle	194.07 Mn	8
DIFC	168.20 Mn	8

LUXURY MARKET OVERVIEW

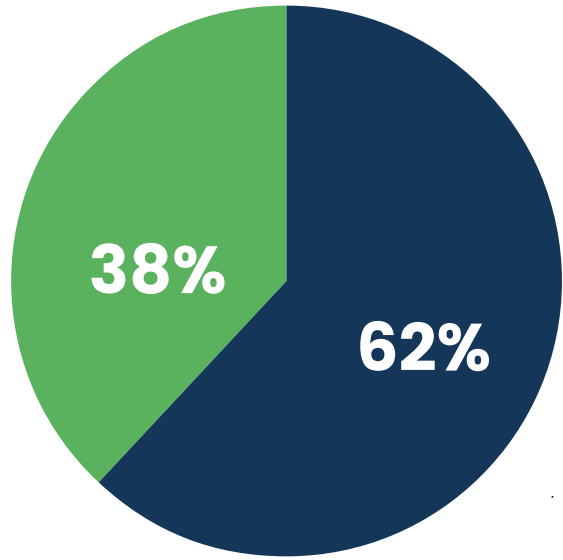
Off-Plan and Ready Sales Split

Transaction Type	Total Value (AED Bn)	Total Volume
Off-Plan Sales	4.59 Bn	221
Ready Sales	2.95 Bn	134
Grand Total	7.54 Bn	355

Total Value(AED Bn)



Total Volume

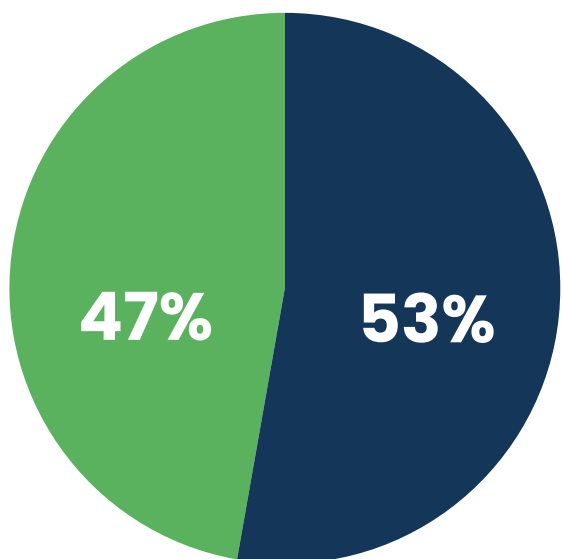


■ Apartments
■ Villas

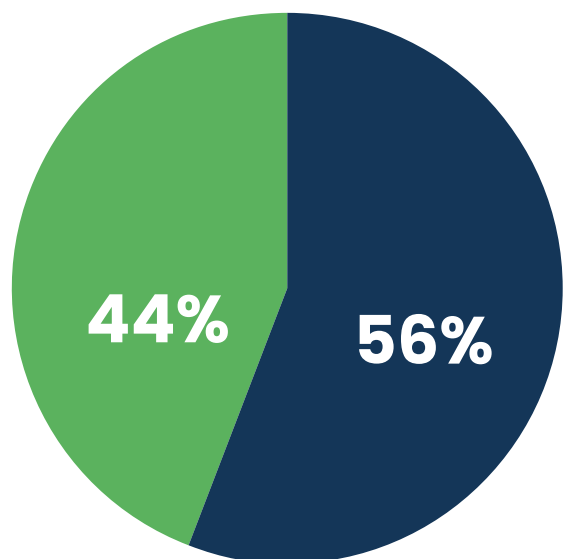
Off-Plan Sales Split By Property type

Property Type	Total Value (AED Bn)	Total Volume
Apartment Sales	2.43 Bn	124
Villa Sales	2.16 Bn	97
Grand Total	4.59 Bn	221

Total Value(AED Bn)



Total Volume

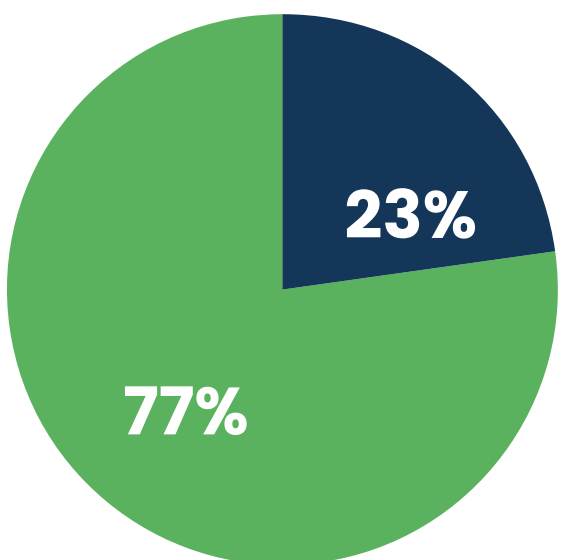


■ Apartments
■ Villas

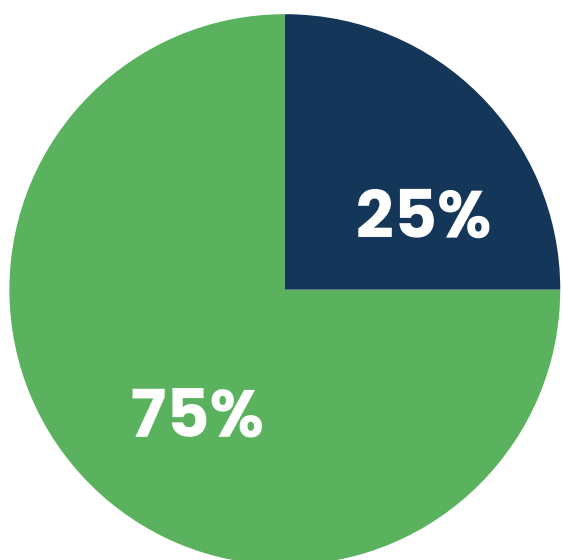
Ready Sales Split By Property type

Property Type	Total Value (AED Bn)	Total Volume
Apartment Sales	0.67 Bn	34
Villa Sales	2.29 Bn	100
Grand Total	2.95 Bn	134

Total Value(AED Bn)



Total Volume



■ Apartments
■ Villas

LUXURY MARKET OVERVIEW

5 Most Expensive Transactions – Apartments

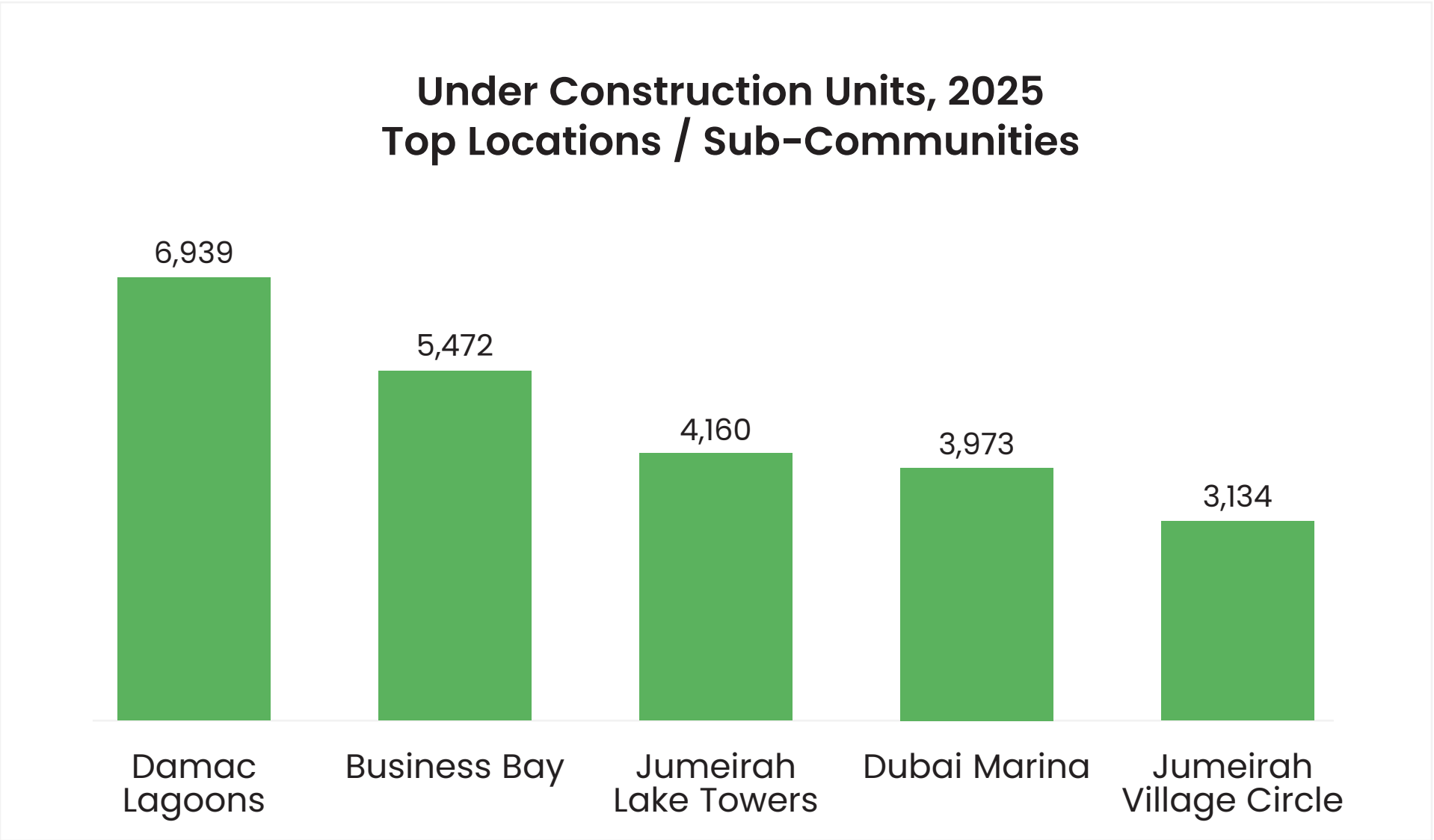
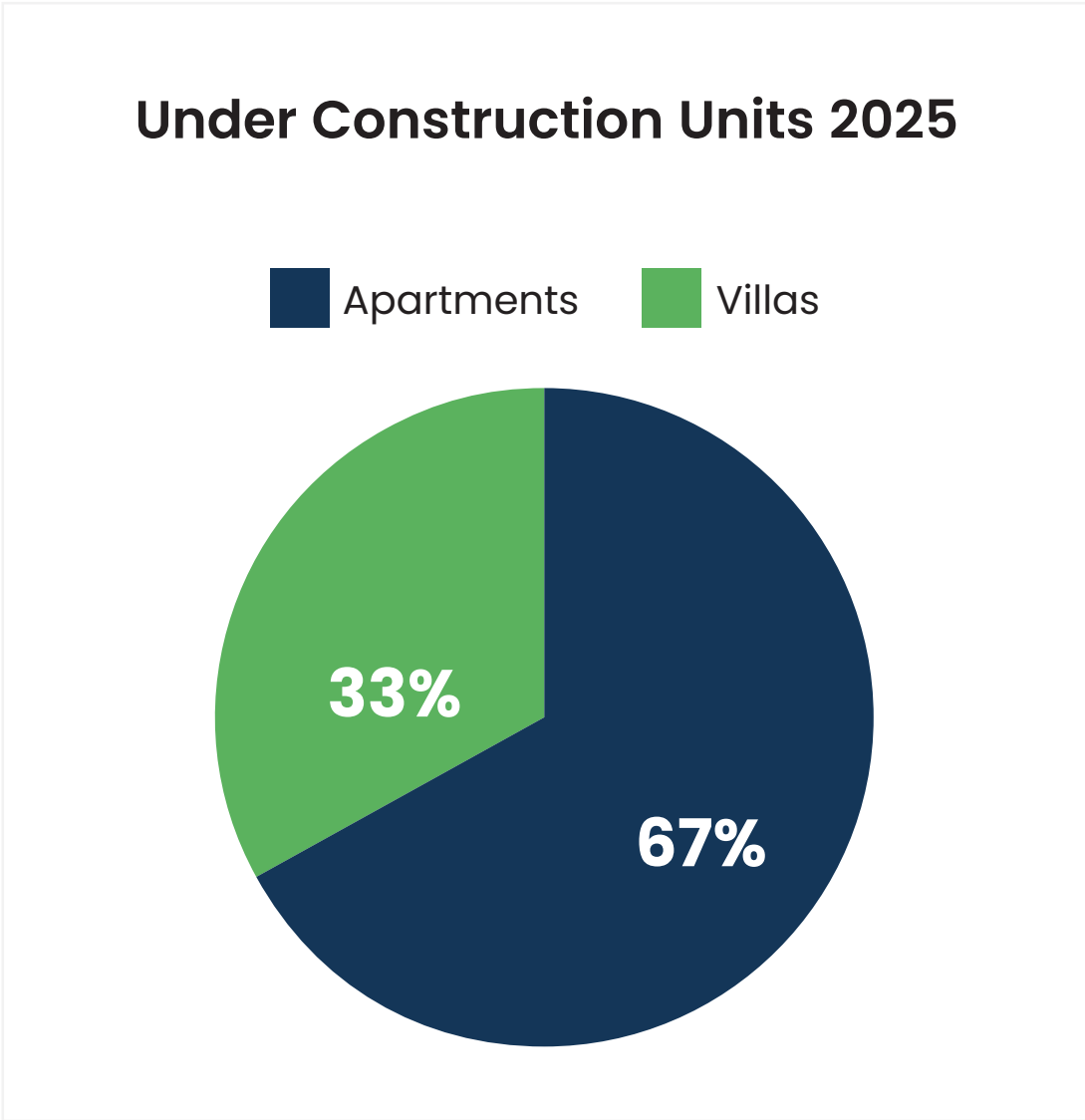
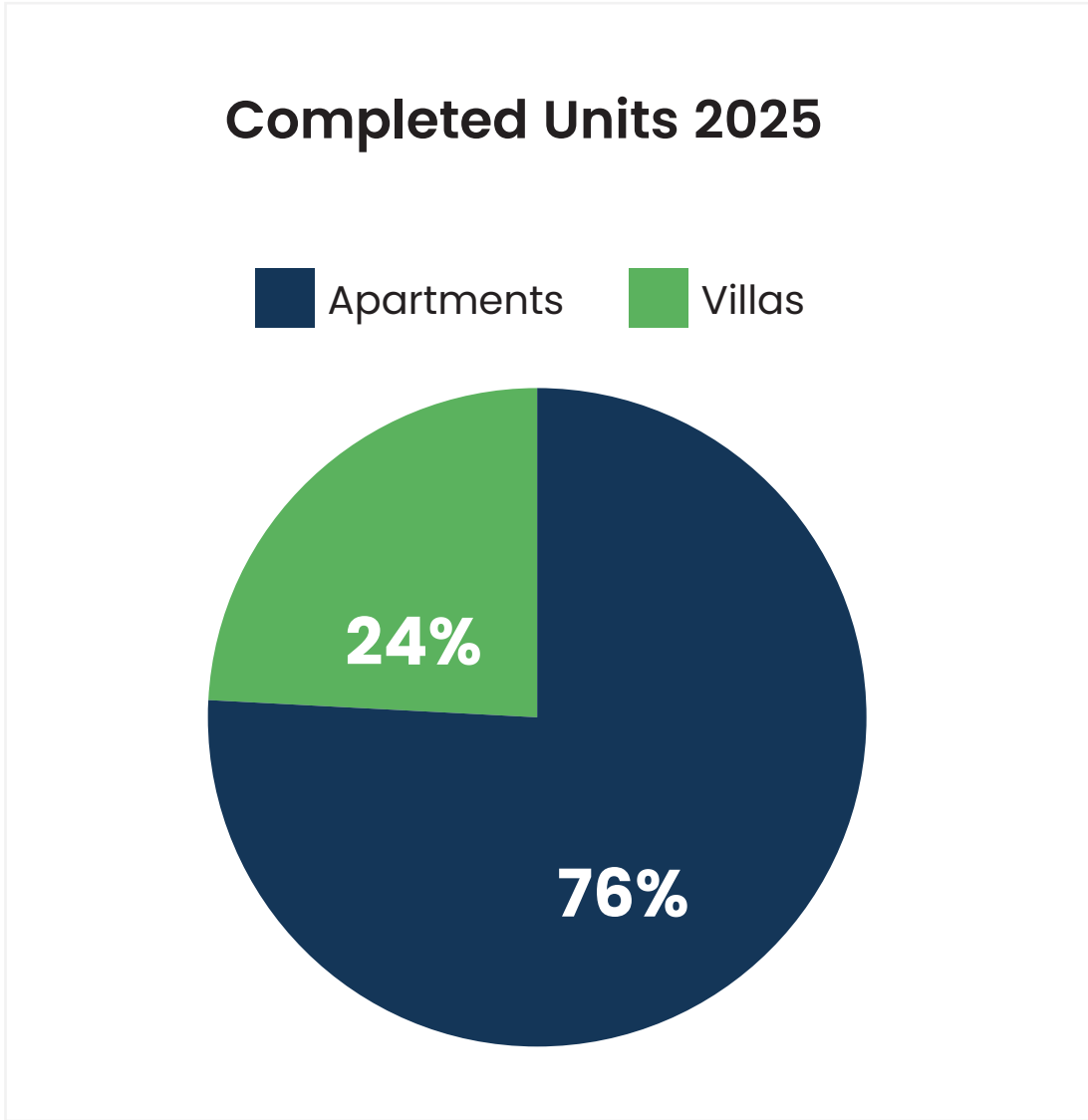
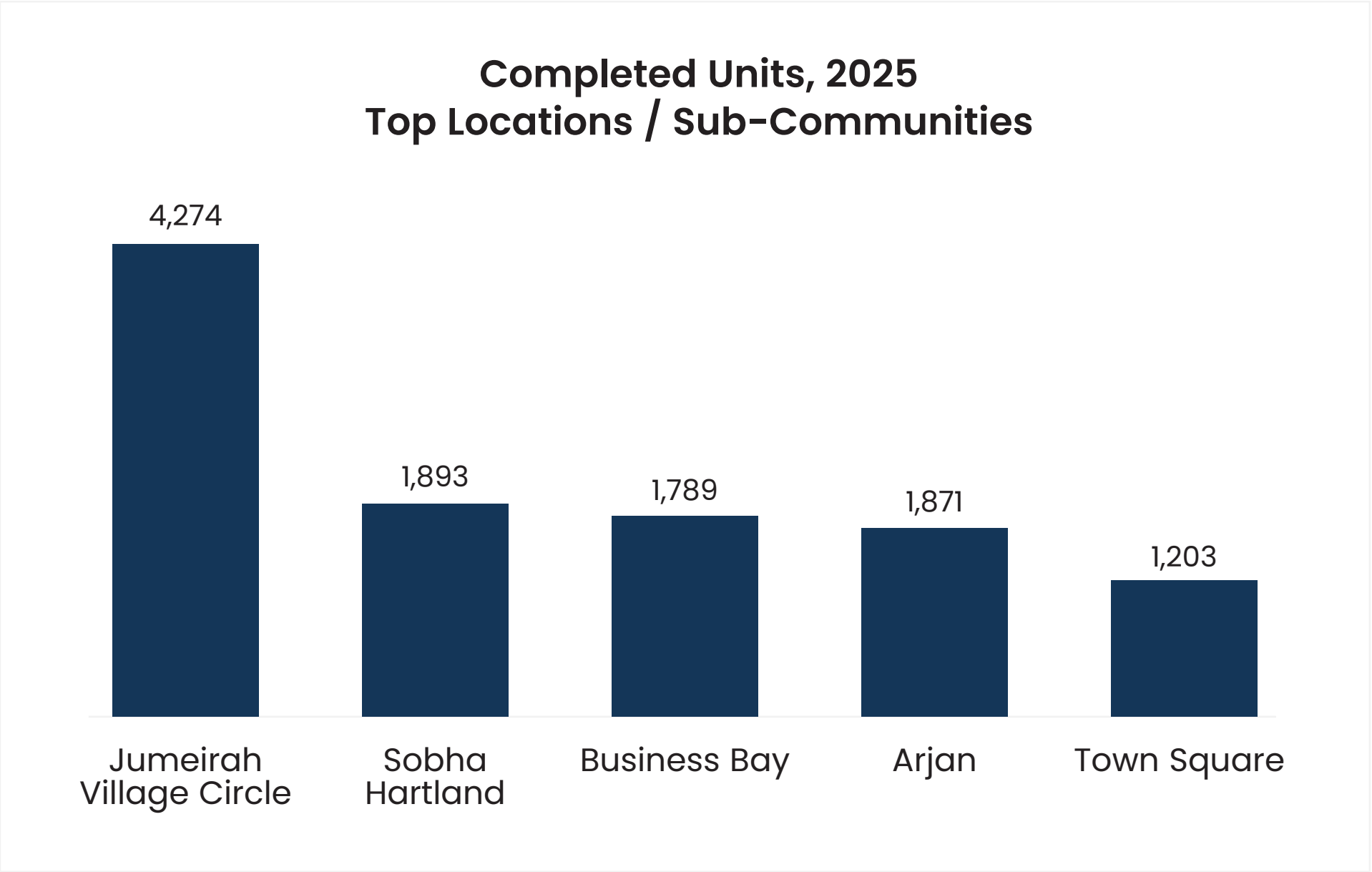
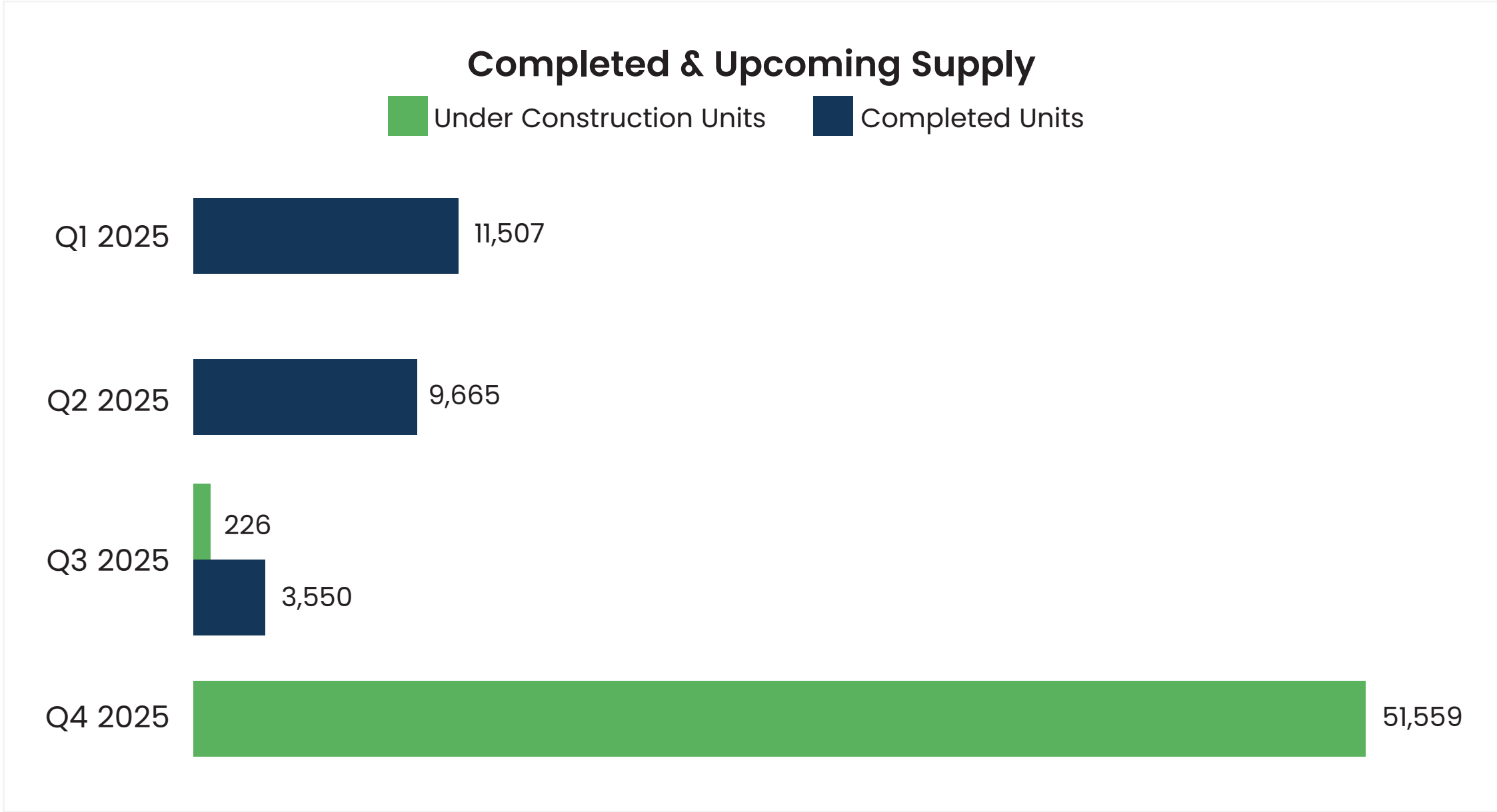
Project Name	Location / Sub-Community	Developer	Sale Value (AED)	Average Price / Sq ft	Sales Sequence	Transaction Type	Date
Orla By Omniyat	Palm Jumeirah	Omniyat Properties	81.4 Mn	7,544	Secondary	Off-Plan	20/08/2025
Orla By Omniyat	Palm Jumeirah	Omniyat Properties	79.9 Mn	6,908	Primary	Off-Plan	19/08/2025
Orla By Omniyat	Palm Jumeirah	Omniyat Properties	79.8 Mn	7,577	Primary	Off-Plan	19/08/2025
Bugatti Residences	Business Bay	Binghatti Holding	57.0 Mn	8,595	Primary	Off-Plan	14/08/2025
IL Primo	Downtown Dubai	Emaar Properties	54.5 Mn	4,809	Secondary	Ready	21/08/2025

5 Most Expensive Transactions – Villas

Project Name	Location / Sub-Community	Developer	Sale Value (AED)	Average Price / Sq ft	Sales Sequence	Transaction Type	Date
Asora Bay Ocean Mansions	La Mer	Meraas Development	350.0 Mn	12,985	Primary	Off-Plan	05/08/2025
Emirates Hills – Sector E	Emirates Hills	Emaar Properties	260.0 Mn	18,489	Secondary	Ready	06/08/2025
Emirates Hills – Sector E	Emirates Hills	Emaar Properties	100.0 Mn	8,391	Secondary	Ready	29/08/2025
Al Barari Villas	Al Barari	Al Barari Development Company	62.5 Mn	3,798	Secondary	Ready	01/08/2025
Lavita	The Oasis	Emaar Properties	60.9 Mn	2,135	Primary	Off-Plan	07/08/2025

COMPLETED & UPCOMING SUPPLY OVERVIEW

Completed & Under Construction Units



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