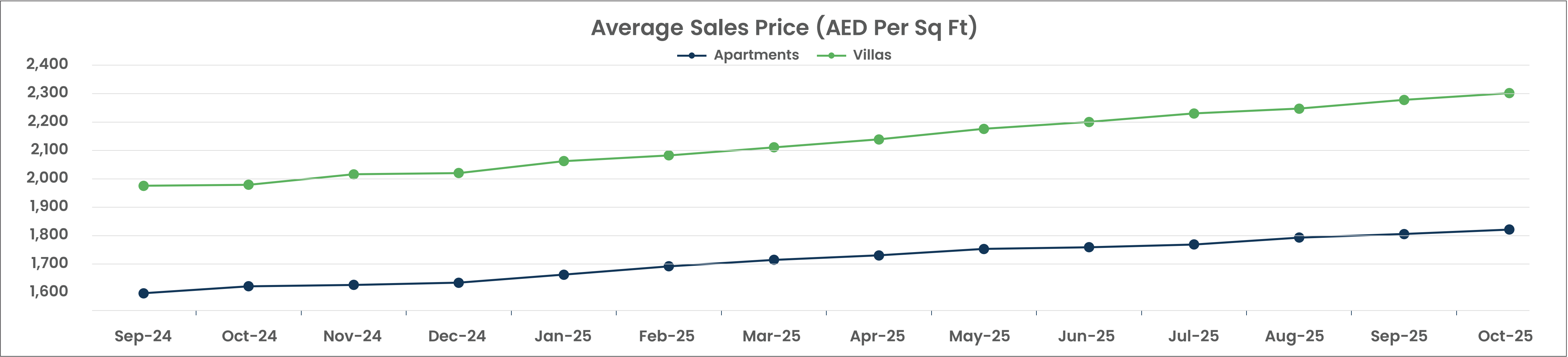


DUBAI RESIDENTIAL REAL ESTATE OCTOBER 2025 MARKET OVERVIEW

KEY HIGHLIGHTS

- Dubai's residential market showed continued price resilience in October 2025. Total transaction value increased to AED 46.9 billion, rising from AED 45.8 billion in September, while sales volumes eased slightly from 19,479 to 18,856 transactions. This reflects steady pace of activity, supported by firm pricing, consistent demand, and healthy fundamentals across both off-plan and ready segments.
- Apartment and villa prices continued to strengthen through 2025, reflecting broad-based market momentum. Average apartment values rose 13 per cent year-on-year from AED 1,610 per square foot to AED 1,830 per square foot, supported by strong investor confidence in centrally located, high-amenity projects such as Jumeirah (+2.34% MoM) and Business Bay (+2.60% MoM). Villa prices also surged 16 per cent year-over-year to around AED 2,299 per square foot, from AED 1,980 per square foot in September 2024, driven by limited luxury supply, a preference for large-format layouts, and a continued appetite for high-quality villa stock. High-performing villa sub-markets included Palm Jumeirah (+4.97%), The Meadows (+3.92%) and Al Barari (+4.14%), each supported by low resale inventory and sustained pricing momentum.
- Off-plan sales represented nearly two-thirds of total market activity. Developers such as Meraas, Damac & Emaar led in value terms, while Binghatti continued to dominate volumes with competitively positioned mid-tier launches. The mix of branded luxury projects and accessible investment stock highlights the depth and diversity of demand across buyer groups.
- The luxury residential segment priced at AED 10 million and above recorded AED 11.3 billion across 573 transactions, with off-plan sales contributing the majority share. Nad Al Shiba First led the off-plan luxury market with AED 2.0 billion in villa transactions, while Palm Jumeirah, Dubai Hills Estate and Business Bay remained among the most active ready luxury locations.
- Project completions and construction progress continued at a controlled pace through 2025, broadly reflecting market absorption trends. New completions continued to emphasise integrated communities, resort-style living and branded residential offerings.
- The Dubai Land Department advanced its digital transformation programme through a partnership with Google Cloud, introducing AI-enabled valuation tools, enhanced transaction monitoring and upgraded digital services aimed at strengthening transparency and improving the overall investor experience.

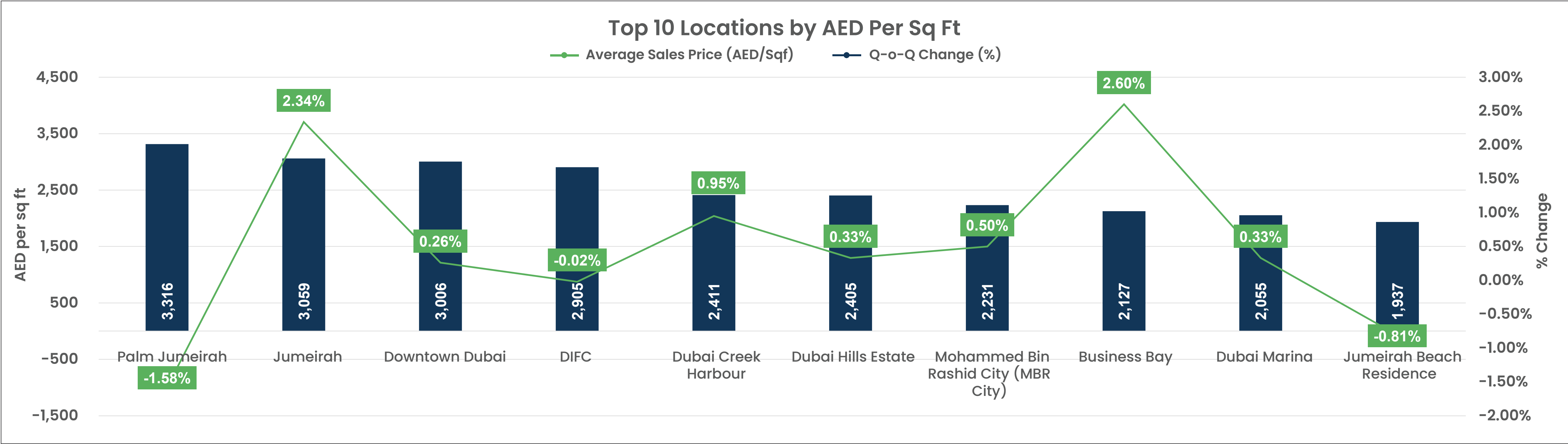
REIDIN RESIDENTIAL CITY-WIDE SALES PRICE TREND



Apartments	1,610	1,634	1,639	1,647	1,674	1,703	1,725	1,741	1,763	1,769	1,778	1,802	1,814	1,830
Villas	1,980	1,984	2,019	2,024	2,065	2,085	2,113	2,140	2,176	2,200	2,229	2,246	2,276	2,299

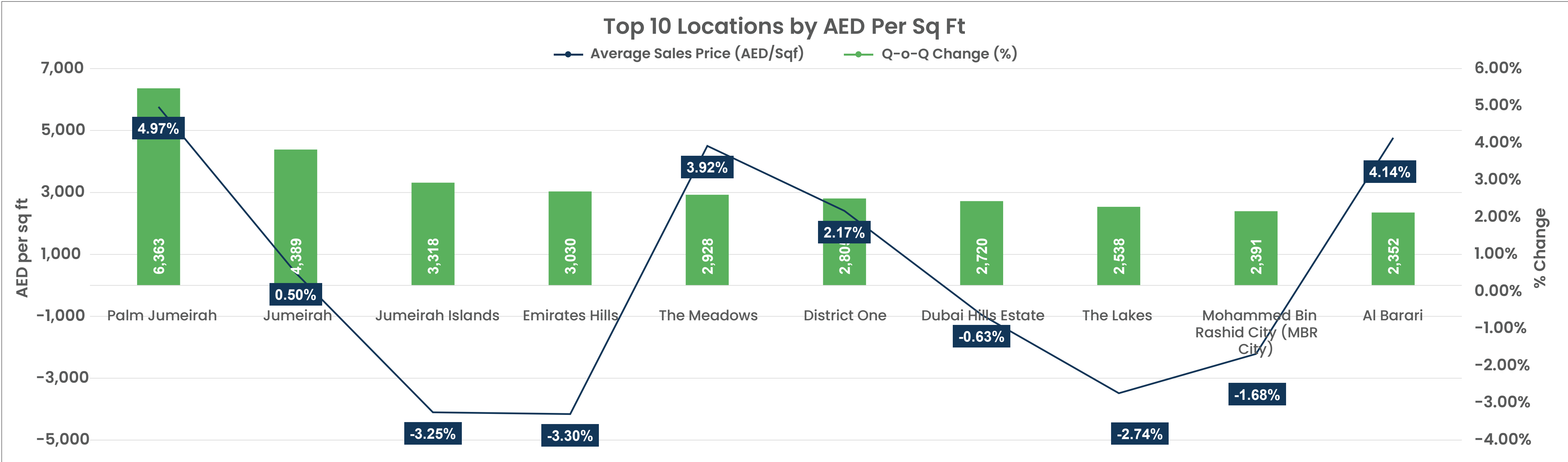
- Sales prices for both apartments and villas maintained a steady upward trajectory over the 13-month period from September 2024 to October 2025, reflecting a stable demand environment rather than short-term volatility and signaling continued confidence among end-users and investors.
- Villa prices show a notably stronger growth rate, increasing from approximately AED 1,980 psf in Sep 2024 to around AED 2,299 psf by Oct 2025. This represents an approximate 16% year-on-year increase. The consistent month-on-month uplift aligns with the ongoing preference for larger, private, and lifestyle-driven living formats.
- Apartment prices also record positive, gradual appreciation, rising from AED 1,610 psf to ~AED 1,830 psf over the same period, equating to ~13% growth. While healthy, this rate is more moderate than villas, indicating that while demand remains stable, apartments are seeing more price sensitivity.

REIDIN APARTMENT SALES PRICE TREND



- Apartment price performance varies across key sub-markets, with Palm Jumeirah, Jumeirah, and Downtown Dubai continuing to command the highest price points due to their established premium positioning and limited prime stock.
- Jumeirah (+2.34% MoM) and Business Bay (+2.60% MoM) recorded the strongest month-on-month gains, each reflecting momentum within their respective segments: premium low-density housing in Jumeirah and high-activity investment apartments in Business Bay.
- More mature markets such as Downtown Dubai, Dubai Creek Harbour, and Dubai Marina showed moderate but stable growth, indicating balanced supply-demand conditions.
- Minor price softening in Palm Jumeirah and JBR appears linked to transacted unit mix rather than any structural decline in market sentiment.

REIDIN VILLA SALES PRICE TREND



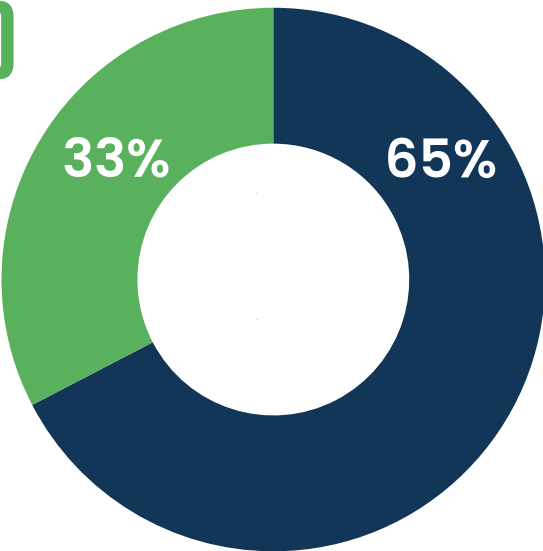
- Villa pricing remains led by Palm Jumeirah (AED ~6,563 psf) and Jumeirah (AED ~4,389 psf), reflecting sustained demand for exclusive waterfront and legacy luxury neighbourhoods.
- Strong month-on-month growth was recorded in Palm Jumeirah (+4.97%), The Meadows (+3.92%), and Al Barari (+4.14%), driven by limited resale availability and continued appeal among end-users seeking privacy and larger plot homes.
- Meanwhile, Jumeirah Islands and Emirates Hills saw moderate negative adjustments, which are likely influenced by transaction mix and selective pricing negotiations rather than a reduction in overall demand.
- Overall, the villa segment continues to outperform apartments, supported by scarcity of high-quality supply and persistent lifestyle-led buyer preferences.

TOTAL SALES TRANSACTIONS BY TYPOLOGIES

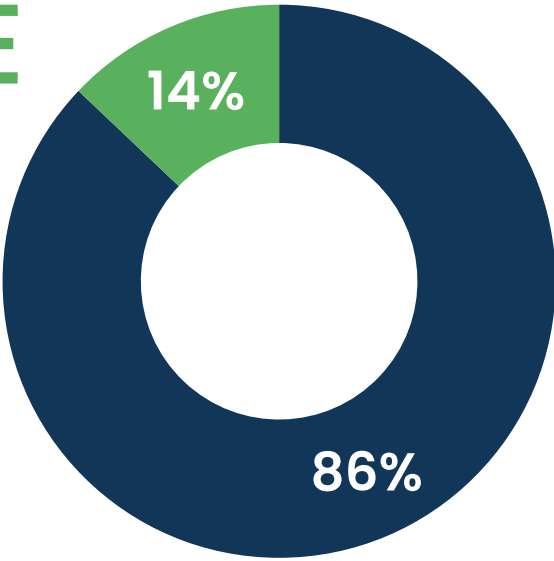
TOTAL VOLUME & VALUE

Sales Transactions	Total Value (AED Bn)	Total Volume
Apartment Sales	30.7 bn	16,213
Villa Sales	16.2 bn	2,643
Grand Total	47.0 Bn	18,856

TOTAL VALUE (AED BN)



TOTAL VOLUME



TOP 10 LOCATIONS BY VALUE

Nad Al Shiba First	2.9 Bn
Business Bay	2.7 Bn
Dubai Investment Park Second	2.5 Bn
Jumeirah Village Circle	1.8 Bn
Downtown Dubai	1.8 Bn
Palm Jumeirah	1.7 Bn
Dubai Islands	1.5 Bn
Trade Center First	1.4 Bn
The Valley	1.4 Bn
Dubai Hills Estate	1.2 Bn

TOP 10 LOCATIONS BY VOLUME

Jumeirah Village Circle	1,626
Business Bay	1,036
Jumeirah Village Triangle	956
Dubai Investment Park Second	915
Dubailand Residence Complex	878
Dubai Science Park	811
Dubai Islands	473
Downtown Dubai	441
Dubai Silicon Oasis	381
Jebel Ali First	370

SALES SEQUENCE: PRIMARY VS SECONDARY

PRIMARY AND SECONDARY SALES SPLIT

Transaction Type	Total Value (AED Bn)	Total Volume
Primary Sales	31.1 Bn	13,218
Secondary Sales	15.9 Bn	5,638
Grand Total	47.0 Bn	18,856

PRIMARY SALES SPLIT BY PROPERTY TYPE

Property Type	Total Value (AED Bn)	Total Volume
Apartment Sales	22.6 Bn	11,791
Villa Sales	8.5 Bn	1,427
Grand Total	31.1 Bn	13,218

SECONDARY SALES SPLIT BY PROPERTY TYPE

Property Type	Total Value (AED Bn)	Total Volume
Apartment Sales	8.2 Bn	4,422
Villa Sales	7.7 Bn	1,216
Grand Total	15.9 Bn	5,638

TRANSACTION TYPE : OFF-PLAN VS READY MARKET

OFF-PLAN AND READY SALES SPLIT

Transaction Type	Total Value (AED Bn)	Total Volume
Off-Plan Sales	33.1 Bn	13,468
Ready Sales	13.9 Bn	5,388
Grand Total	47.0 Bn	18,856

OFF-PLAN SALES SPLIT BY PROPERTY TYPE

Property Type	Total Value (AED Bn)	Total Volume
Apartment Sales	22.9 Bn	11,800
Villa Sales	10.2 Bn	1,668
Grand Total	33.1 Bn	13,468

READY SALES SPLIT BY PROPERTY TYPE

Property Type	Total Value (AED Bn)	Total Volume
Apartment Sales	7.8 Bn	4,413
Villa Sales	6.1 Bn	975
Grand Total	13.9 Bn	5,388

OFF-PLAN MARKET OVERVIEW

TOP OFF-PLAN APARTMENTS' LOCATIONS BY VALUE (AED)



TOP OFF-PLAN VILLAS' LOCATIONS BY VALUE (AED)



TOP OFF-PLAN APARTMENTS' LOCATIONS BY VOLUME



TOP OFF-PLAN VILLAS' LOCATIONS BY VOLUME



READY MARKET OVERVIEW

TOP READY APARTMENTS' LOCATIONS BY VALUE (AED)



TOP READY VILLAS' LOCATIONS BY VALUE (AED)



TOP READY APARTMENTS' LOCATIONS BY VOLUME



TOP READY VILLAS' LOCATIONS BY VOLUME



TICKET SIZE SPLIT BY TYPOLOGIES

TICKET SIZE SPLIT OF APARTMENT SALES

Sales Transactions	Total Value (AED Bn)	Total Volume
< 1 Mn	3.79 Bn	5,366
1 – 2 Mn	9.09 Bn	6,556
2 – 3 Mn	5.49 Bn	2,284
3 – 5 Mn	5.02 Bn	1,320
5 – 10 Mn	3.33 Bn	497
> 10 Mn	4.02 Bn	190

TICKET SIZE SPLIT OF VILLA SALES

Sales Transactions	Total Value (AED Bn)	Total Volume
< 1 Mn	0.07 Bn	89
1 – 2 Mn	0.34 Bn	222
2 – 3 Mn	1.24 Bn	474
3 – 5 Mn	3.45 Bn	913
5 – 10 Mn	3.84 Bn	562
> 10 Mn	7.28 Bn	383

LUXURY MARKET OVERVIEW

KEY TAKEAWAYS

- The luxury residential market (AED 10M+) recorded AED 11.3B across 573 transactions, with off-plan sales representing 63% of total value, indicating sustained confidence in newly launched, branded and master-planned luxury projects.
- Villas remain the dominant luxury asset class, accounting for the majority share of value in both off-plan (AED 4.4B) and ready (AED 2.9B) segments, supported by continued end-user preference for privacy, space, and resort-style living environments.
- In the off-plan luxury segment, Nad Al Shiba First leads with AED 2.0B across 126 transactions, reflecting strong absorption of large-format villa and mansion-led communities.
- Jumeirah Second, Dubai Investment Park, Trade Center First, and Palm Jumeirah also recorded notable off-plan luxury activity, though at comparatively lower volumes, indicating more selective, high-value launches in established prime zones.
- In the ready luxury market, Palm Jumeirah remains the most liquid sub-market, with AED 0.8B in transaction value across 25 deals, reaffirming its position as Dubai's leading waterfront luxury address.
- Business Bay and Dubai Hills Estate follow closely in ready luxury sales, supported by strong resale appetite for centrally located, modern, and amenity-rich developments.
- District One and Al Barari maintain a niche but resilient luxury resale market, driven by demand for low-density, lifestyle-oriented villa communities offering privacy, greenery, and larger plot formats.

* Luxury ≥ AED 10M

LUXURY MARKET OVERVIEW

OFF-PLAN AND READY SALES SPLIT

Transaction Type	Total Value (AED Bn)	Total Volume
Off-Plan Sales	7.1 bn	386
Ready Sales	4.2 bn	187
Grand Total	11.3 bn	573

OFF-PLAN SALES SPLIT BY PROPERTY TYPE

Property Type	Total Value (AED Bn)	Total Volume
Apartment Sales	2.7 bn	131
Villa Sales	4.4 bn	255
Grand Total	7.1 bn	386

READY SALES SPLIT BY PROPERTY TYPE

Property Type	Total Value (AED Bn)	Total Volume
Apartment Sales	1.3 bn	59
Villa Sales	2.9 bn	128
Grand Total	4.2 bn	187

* Luxury ≥ AED 10M

LUXURY MARKET OVERVIEW

TOP 5 EXPENSIVE TRANSACTIONS--APARTMENTS

Project Name	Location	Developer	Sale Value (AED)	Average Price/ Sq ft	Transaction Type
Bulgari Lighthouse Dubai	Jumeirah Bay Island	Meraas	155.0 Mn	13,296.9	Off-Plan
Jumeirah Residences Asora Bay	La Mer	Meraas	100.0 Mn	8,703.0	Off-Plan
Volante 2	Business Bay	Xtreme Vision	86.6 Mn	4,141.5	Ready
Peninsula Dubai Residences Tower 2	Jumeirah Second	H&H	71.4 Mn	6,522.8	Off-Plan
Peninsula Dubai Residences Tower 2	Jumeirah Second	H&H	71.3 Mn	8,441.4	Off-Plan

TOP 5 EXPENSIVE TRANSACTIONS -- VILLAS

Project Name	Location	Developer	Sale Value (AED)	Average Price/ Sq ft	Transaction Type
Rosewood Residences Dubai	Jumeirah Second	Agarwood	220.0 Mn	8,611.3	Off-Plan
Garden Homes Frond L (Al Fara)	Palm Jumeirah	Nakheel	95.0 Mn	18,999.7	Ready
Emirates Hills – Sector L	Emirates Hills	Emaar	90.0 Mn	2,284.3	Ready
Al Barari The Nest	Al Barari	Al Barari Development Company	75.5 Mn	7,100.5	Ready
Emerald Hills	Dubai Hills Estate	Emaar	70.8 Mn	11,073.7	Ready

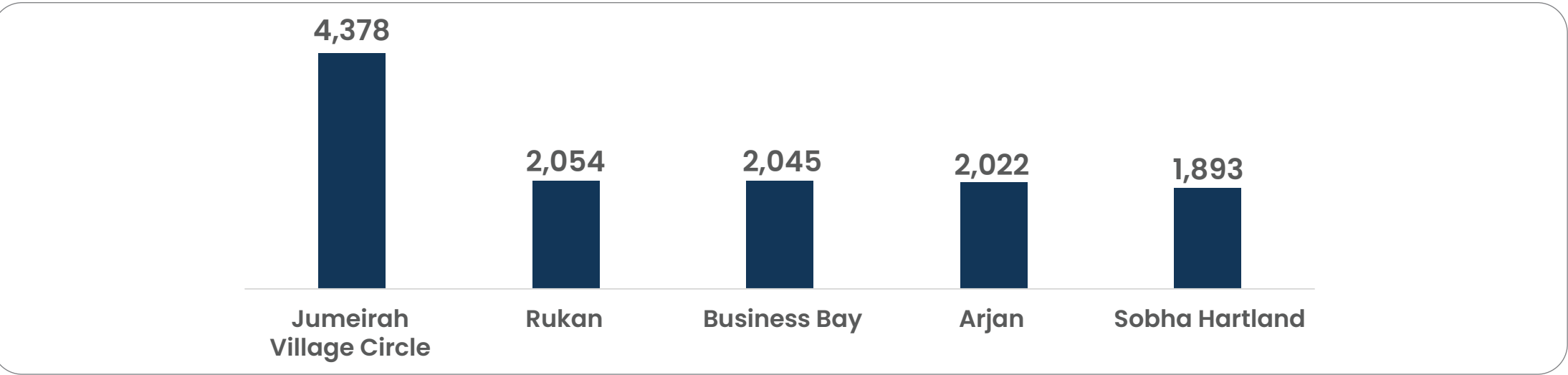
* Luxury ≥ AED 10M

COMPLETED & UPCOMING SUPPLY OVERVIEW

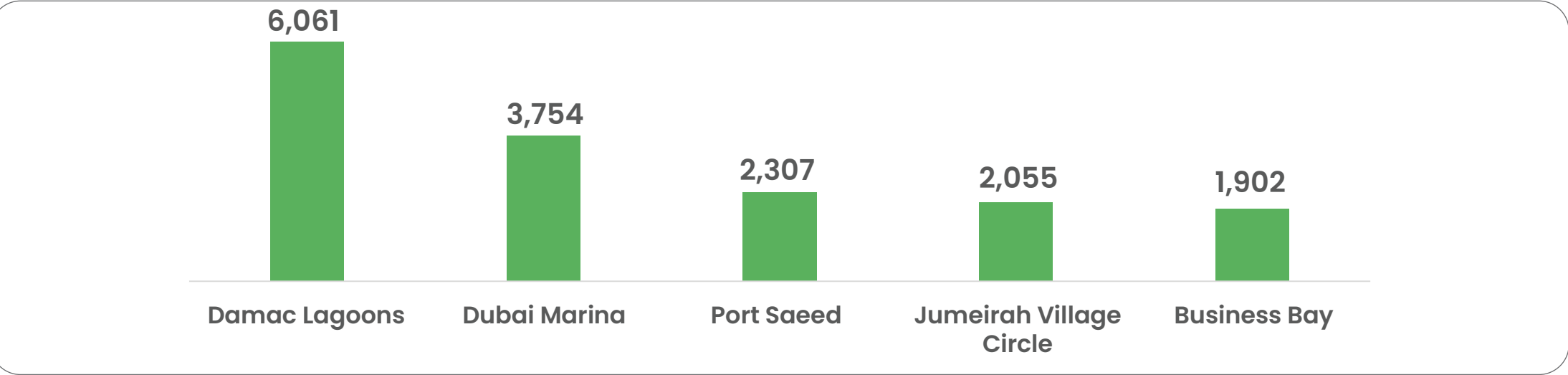
COMPLETED & UNDER CONSTRUCTION UNITS

Status	Q1 2025	Q2 2025	Q3 2025	Q4 2025
Completed Units	11,546	9,667	7,182	1,028
Under Construction Units				29,700

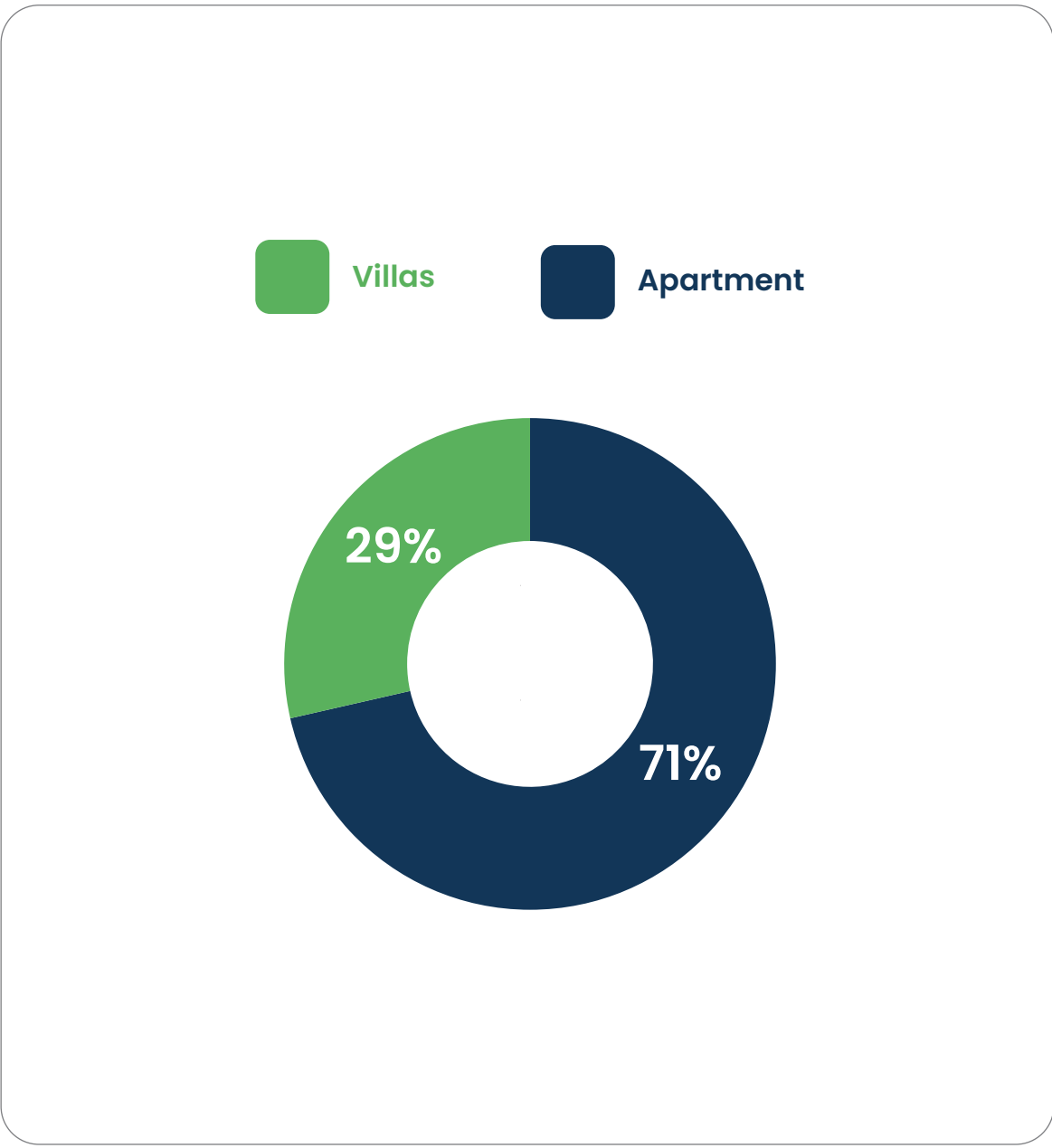
TOP COMPLETED SUPPLY LOCATIONS IN 2025



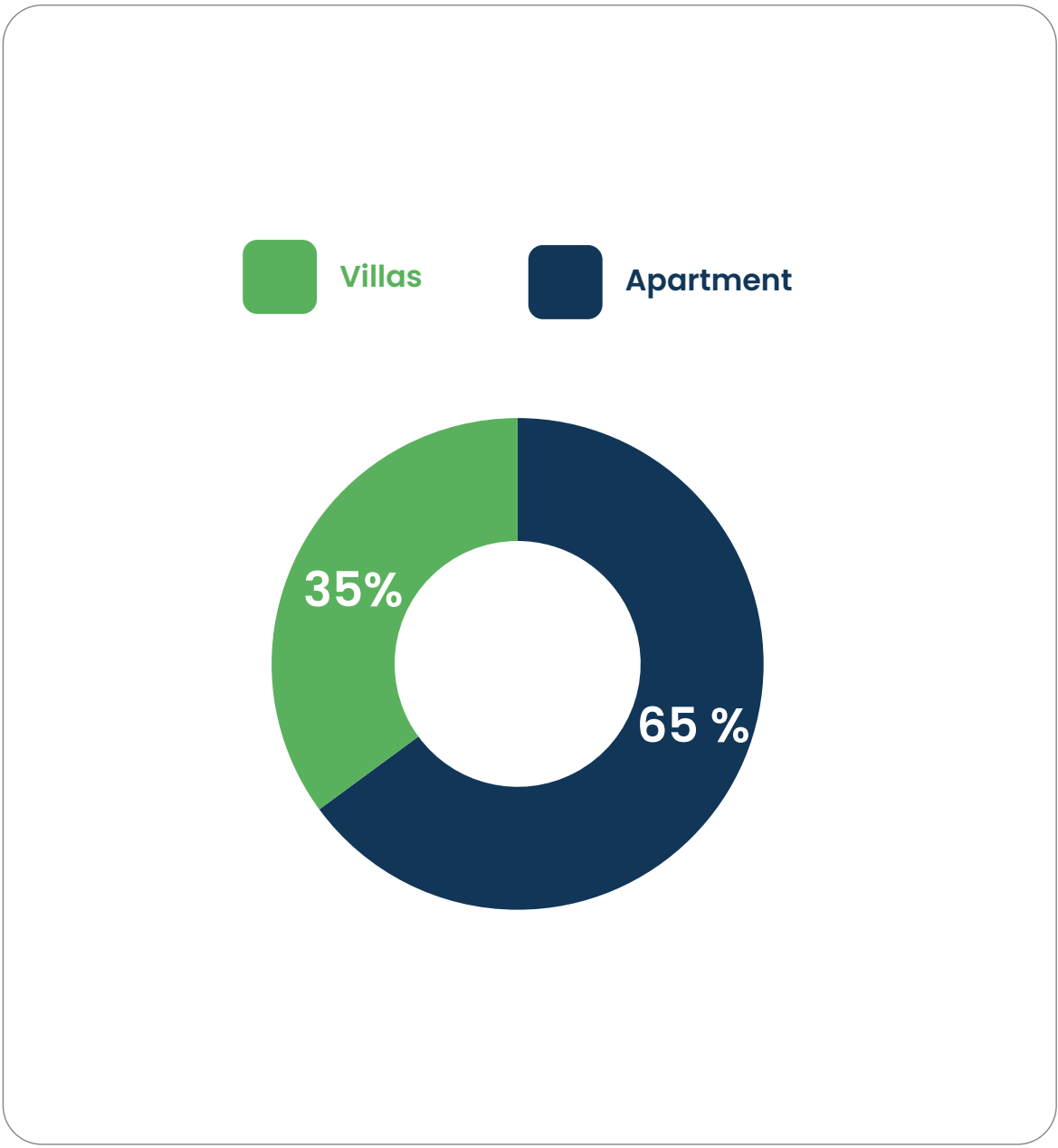
TOP UNDER CONSTRUCTION SUPPLY LOCATIONS IN 2025



COMPLETED UNITS 2025



UNDER CONSTRUCTION UNITS 2025



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