

MARKET WATCH

RESIDENTIAL REAL ESTATE REPORT

ABU DHABI & DUBAI

Q2 2020



propertyfinder.ae

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A. Market Performance

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Real GDP Growth and Inflation in the UAE (%)	2022	2023	2024 (estimated)	2025 (forecast)	2026 (forecast)
Overall GDP	7.5	3.6	3.9	4.7	5.7
Non- hydrocarbon GDP	7.1	6.2	4.6	5.1	4.8
Hydrocarbon GDP	8.5	-3.1	1.6	3.6	8.5
Headline Inflation	4.8	1.6	1.7	2	2.1

Source: Central Bank of United Arab Emirates (CBUAE)

The UAE’s real GDP is estimated to have grown by 3.9% in 2024, supported by strong momentum in the non-hydrocarbon sector and a gradual recovery in hydrocarbon activities. According to the Central Bank of the UAE (CBUAE), real GDP growth is projected to accelerate to 4.7% in 2025, driven by improved performance across both sectors. The energy sector is set to benefit from the anticipated easing of production cuts starting in Q2 2025, while the non-hydrocarbon sector continues to thrive on the back of government-led initiatives promoting foreign investment and economic diversification. These dynamics, along with higher oil and gas output, are expected to boost GDP growth further to 5.7% in 2026.

According to the Statistic Center of Abu Dhabi (SCAD), Abu Dhabi’s non-oil economy continued its strong momentum through Q4 2024, recording a 4.4% year-on-year real growth rate. This performance capped a robust 2024, during which the non-oil sector expanded by an average of 4.6% across the four quarters (2024).

Dubai’s non-oil sector remained a key engine of growth for the first three quarters of 2024, bolstered by strategic investments in infrastructure and the emirate’s growing global appeal as a tourism, trade, and aviation hub. The wholesale and retail trade sector maintained its leadership as the largest contributor to each, reaching around 24% of Dubai’s GDP, while Real estate activities and construction jointly contributed 14%, underscoring the strength of property development and urban expansion, particularly around Dubai South and upcoming mega-projects by Emaar and Nakheel.





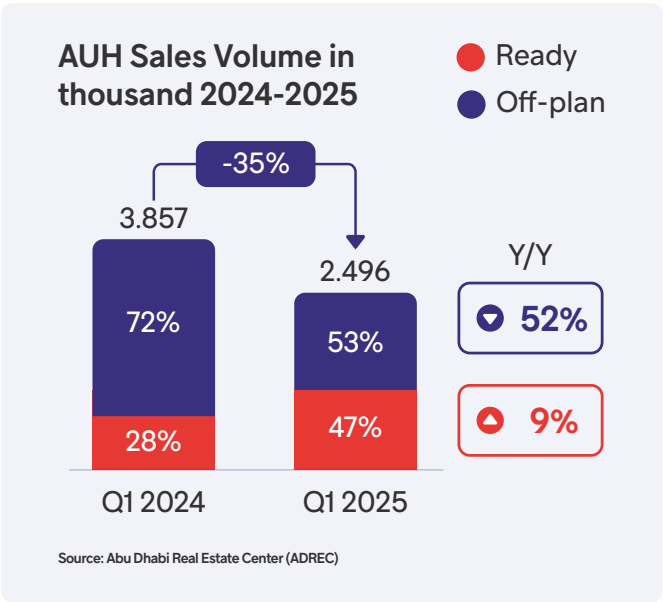
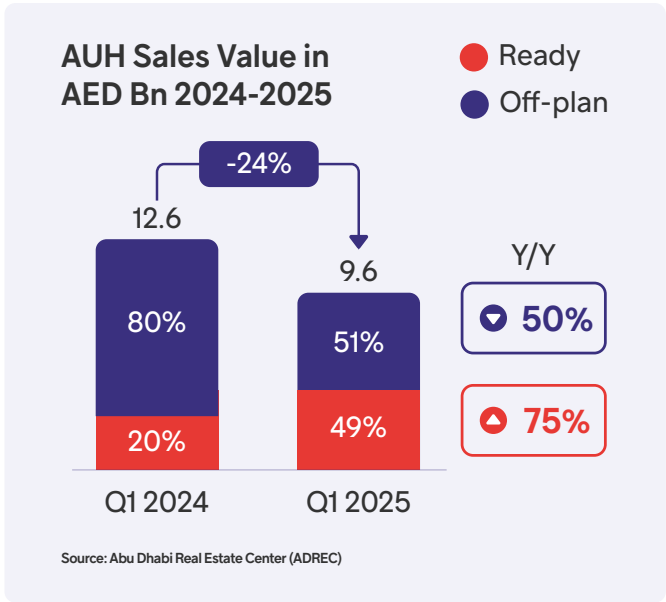
Abu Dhabi

Real Estate Performance

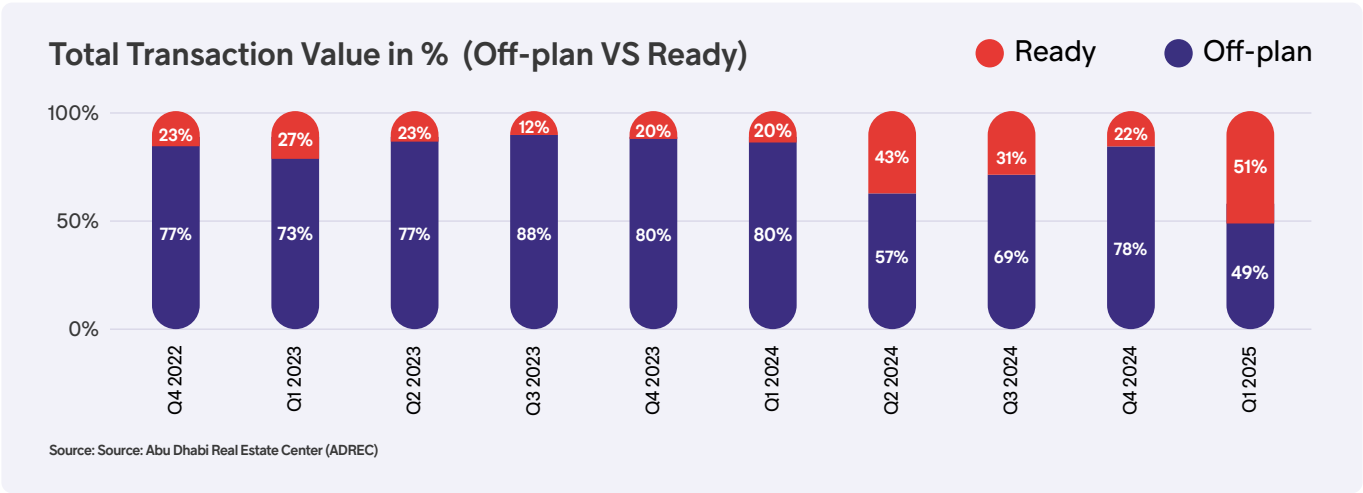
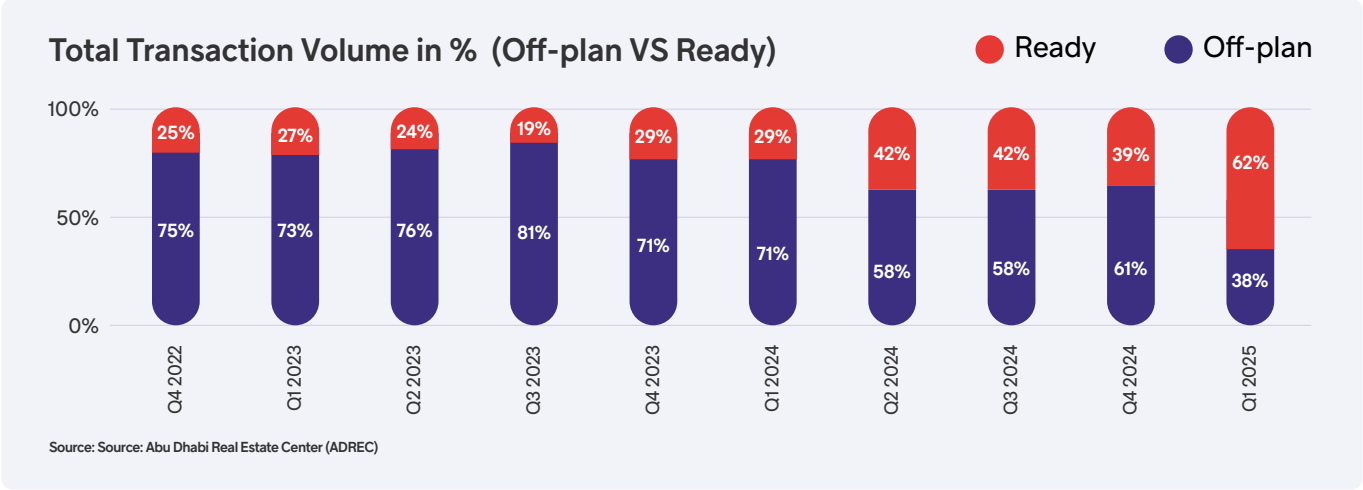
Total Sales Transactions Q1 2025

Abu Dhabi’s real estate market saw a notable slowdown in Q1 2025, with total sales transactions falling by 35% in volume and 24% in value year-on-year. The downturn was primarily driven by a sharp contraction in Off-plan sales, which dropped by 52% in volume and 50% in value compared to the same period last year — likely reflecting fewer project launches.

Total ready sales transactions continued to show healthy growth in Q1 2025, with value increasing by 75% year-on-year, supported by a more modest 9% rise in volume. The wide gap between volume and value suggests the presence of large commercial deals. Even excluding these, the residential ready market performed well, posting a 33% increase in value alongside a 5% rise in volume — potentially indicating upward pressure on prices.



Total Residential Sales Transactions Q1 2025

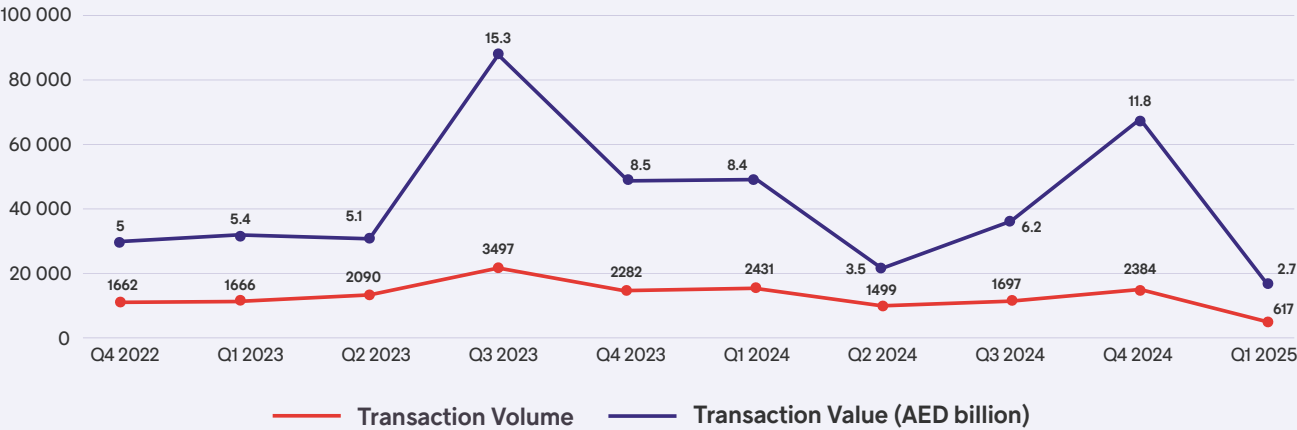


Off-plan Transactions Q1 2025

The off-plan market in Q1 2025 registered approximately 1,332 off-plan sales transactions, reflecting a sharp 52% decline in volume compared to 2,791 transactions in Q1 2024. The value of these transactions also decreased by 50%, reaching AED 4.9 bn, down from AED 9.9 bn. Despite the overall slowdown, off-plan transactions accounted for 53% of total transactions during the quarter.

Residential off-plan transactions recorded only 617 transactions, representing 46% of total off-plan transactions, while the remaining 54% were for commercial and other uses. Residential off-plan transactions saw a steep year-on-year decline of 75% in volume and 68% in value, with AED 2.7 bn recorded in Q1 2025 compared to AED 8.4 bn in Q1 2024. This significant drop was likely due to the limited number of new project launches and the seasonal impact of the holy month of Ramadan.

Residential Off-Plan Sales Transactions Performance



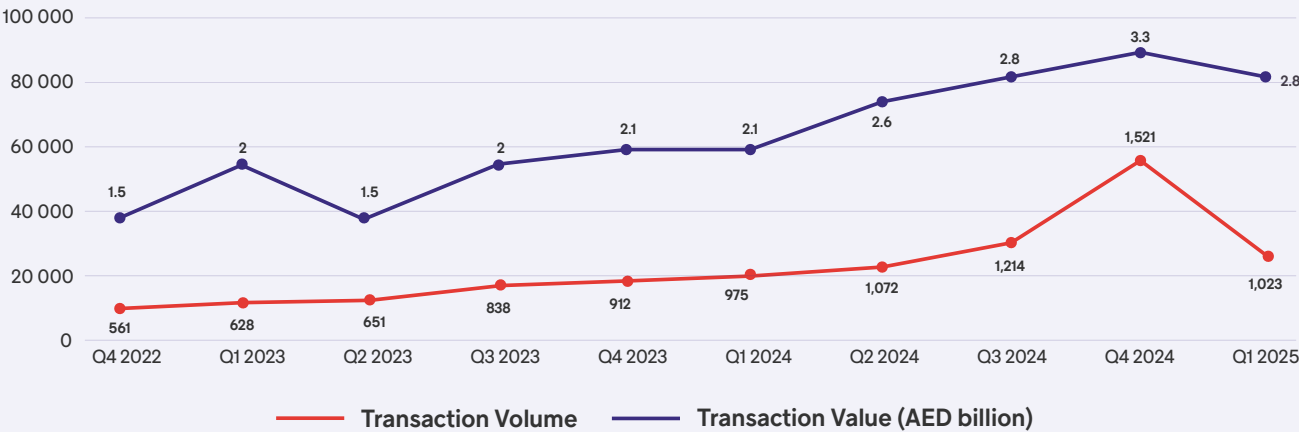
Existing/Ready Sales Transactions Q1 2025

The existing/ready market in Q1 2025 recorded 1,164 transactions, accounting for approximately 47% of total transactions, compared to 1,066 transactions in Q1 2024. This segment contributed to 49% of the total transaction value, reflecting a notable growth of 9% in volume and a significant 75% increase in value compared to the same period last year.

Residential existing/ready transactions made up 88% of the total existing market volume and 60% of its total value in Q1 2025, with the remaining share

attributed to commercial and other uses. Compared to Q1 2024, residential-ready transactions saw a 5% increase in volume and a 33% rise in value. This growth was driven by an increase in property prices, as the median asking price for apartments rose by 23%, likely fueled by notable price increase for smaller units such as studios and one-bedroom apartments. Similarly, villa prices increased by 18%, indicating sustained demand for completed properties.

Residential Existing / Ready Sales Transactions Performance



Abu Dhabi Market Trends in Q1 2025

In this section, we will identify the top five areas in demand based on Property Finder's most searched areas. These top locations are determined according to the listings on our search engine, categorized by residential apartments and villas/townhouses, whether for sale or rent. We will also examine and discuss the price movements for each location area.

The Return on Capital Gains (ROCG) is calculated by comparing median sales asking price of properties in Q1 2024 to their current value in Q1 2025. The Return on Investment (ROI) is calculated by dividing the annual return on a rental (Asking Rental Price) property by the sales asking price in Q1 2025.

Property Finder's proprietary data revealed that Al Raha Beach, Al Reem Island, Masdar City, Saadiyat Island and Yas Island were the top preferred choices for those who wanted to own an apartment, while Al Reef, Al Reem Island, Khalifa City, Saadiyat Island, and Yas Island were the top preferred areas for villas, either for investment or residence purposes, in Q1 2025.



Top areas for sale in Q1 2025

Apartments

- 1. Al Raha Beach
- 2. Al Reem Island
- 3. Masdar City
- 4. Saadiyat Island
- 5. Yas Island

Villas & Townhouses

- 1. Al Reef
- 2. Al Reem Island
- 3. Khalifa City
- 4. Saadiyat Island
- 5. Yas Island





Yas
Island



Al Reef



Al Raha
Beach



Masdar
City



Khalifa
City



Sales Market Trends for Apartments - Q1 2025

The median asking price for apartments in Abu Dhabi recorded a notable 23% increase in Q1 2025 compared to Q1 2024, driven primarily by significant price growth in smaller units. Studio apartments experienced the highest surge, rising by 33%, while one-bedroom apartments saw a 29% increase. Two-bedroom apartments also recorded strong growth, with average listing prices climbing by 22%. Meanwhile, three-bedroom apartments registered a solid 14% increase in average sales prices.

Across the top five areas in Abu Dhabi, the overall trend from Q1 2024 to Q1 2025 reflects a consistent increase in average property prices for one-, two-, and three-bedroom apartments. The average Return on Capital Gains (ROCG) indicates a strong and healthy market performance, with gains particularly concentrated in premium and investment-focused zones such as Yas Island and Saadiyat Island.

Saadiyat Island maintained its position as the top-performing area, recording a substantial 60.8% ROCG for two-bedroom units and nearly 30% for three-bedroom apartments. Similarly, Yas Island showed strong momentum, particularly in the one-bedroom segment with a 30.0% ROCG, highlighting continued demand for both investment and lifestyle-oriented housing.

Studio	Q1 2024 Median Price	Q1 2025 Median Price	ROCG
Al Raha Beach	950,000	990,000	4%
Al Reem Island	600,000	750,000	25%
Masdar City	550,000	610,000	11%
Saadiyat Island	540,000	620,000	15%
Yas Island	800,000	950,00	19%
Market Median Price	700,000	930,000	33%

One Bedrooms	Q1 2024 Median Price	Q1 2025 Median Price	ROCG
Al Raha Beach	1,200,000	1,340,000	12%
Al Reem Island	880,000	1,000,000	14%
Masdar City	600,000	620,000	3%
Saadiyat Island	2,410,000	3,090,000	28%
Yas Island	1,000,000	1,300,000	30%
Market Median Price	970,000	1,250,000	29%

Two Bedrooms	Q1 2024 Median Price	Q1 2025 Median Price	ROCG
Al Raha Beach	1,800,000	1,900,000	6%
Al Reem Island	1,500,000	1,710,000	14%
Masdar City	840,000	1,110,000	32%
Saadiyat Island	4,820,000	7,750,000	61%
Yas Island	1,750,000	1,950,000	11%
Market Median Price	1,640,000	2,000,000	22%

Three Bedrooms	Q1 2024 Median Price	Q1 2025 Median Price	ROCG
Al Raha Beach	2,600,000	2,750,000	6%
Al Reem Island	2,150,000	2,500,000	16%
Masdar City	1,700,000	1,780,000	5%
Saadiyat Island	8,500,000	11,030,000	30%
Yas Island	2,090,000	2,200,000	5%
Market Median Price	2,230,000	2,550,000	14%

Sales Market Trends for Villas - Q1 2025

According to Property Finder’s proprietary data, the median asking price for villas in Q1 2025 increased by 18% compared to Q1 2024, driven largely by a surge in asking prices for three- and four-bedroom villas. As for affordable and luxury villa or townhouse options, The data reveals that median sales prices climbed from three- bedroom villas/townhouses by 21%, while the four- bedroom villas increased by 19%

Despite the overall increase in villa prices across Abu Dhabi, performance varied significantly by location and unit size. Saadiyat Island continued to demonstrate strong growth, with three-bedroom villas increasing by 20% and four-bedroom villas by 23%, reflecting sustained demand for premium properties. Yas Island also showed robust momentum, with three-bedroom villa prices rising by 10%, four-bedroom units by 19%, and five-bedroom villas by 9%, highlighting its growing appeal among buyers. Al Reem Island posted moderate gains, with a 1% increase for three-bedroom villas and a 5% rise for four-bedroom units, indicating stable market conditions. Khalifa City recorded a 7% increase in five-bedroom villas, while three-bedroom prices increased by 1%. In the affordable segment, Al Reef saw a slight growth of 6% for three-bedroom villas and 1% for four-bedroom units, although five-bedroom villas registered a minor decline of 2%. These trends underline a maturing villa market in Abu Dhabi, where pricing is increasingly differentiated by community, property size, and level of amenity development.

Three Bedrooms	Q1 2024 Median Price	Q1 2025 Median Price	ROCG
Al Reef	1,600,000	1,700,000	6%
Al Reem Island	3,950,000	4,000,000	1%
Khalifa City	3,600,000	3,650,000	1%
Saadiyat Island	7,500,000	9,000,000	20%
Yas Island	3,000,000	3,300,000	10%
Market Median Price	2,800,000	3,400,000	21%

Four Bedrooms	Q1 2024 Median Price	Q1 2025 Median Price	ROCG
Al Reef	2,230,000	2,250,000	1%
Al Reem Island	5,000,000	5,260,000	5%
Khalifa City	4,200,000	NA	NA
Saadiyat Island	8,520,000	10,500,000	23%
Yas Island	5,890,000	7,000,000	19%
Market Median Price	4,450,000	5,300,000	19%

Five Bedrooms	Q1 2024 Median Price	Q1 2025 Median Price	ROCG
Al Reef	2,500,000	2,450,000	-2%
Al Reem Island	14,000,000	13,700,000	-2%
Khalifa City	6,550,000	6,980,000	7%
Saadiyat Island	12,440,000	13,000,000	5%
Yas Island	6,500,000	7,475,000	9%
Market Median Price	7,500,000	8,600,000	15%



Top areas for rent in Q1 2025

Apartments

1. Al Khalidiya
2. Al Raha Beach
3. Al Reem Island
4. Corniche Road
5. Khalifa City

Villas & Townhouses

1. Khalifa City
2. Mohamed Bin Zayed City
3. Yas Island
4. Madinat Al Riyad
5. Shakhbout City





Yas Island



Al Reef



Al Raha
Beach



Khalifa
City



Mohamed
Bin Zayed
City



Rental Market Trends for Apartments - Q1 2025

Abu Dhabi rental market saw notable momentum, with median rental prices increasing by 18% year-on-year, largely fueled by rising demand in key lifestyle-centric communities.

Abu Dhabi’s apartment rental market in Q1 2025 experienced significant growth, particularly in one- and two-bedroom units, with rising asking rents and strong ROI in prime locations like Al Reem Island, Al Raha Beach, and Corniche Road. Tenant demand continues to favor well-connected, amenity-rich communities, while suburban areas like Khalifa City saw a softer performance, especially for larger units.

In Q1 2025, Abu Dhabi’s rental market for apartments showed strong growth, driven primarily by increased demand for studios, one-bedroom, and two-bedroom units. According to Property Finder’s proprietary data, the median asking rent prices rose across all segments, with studios increasing by 7%, one-bedroom apartments by 25%, two-bedroom units by 29%, and three-bedroom units by 23% compared to Q1 2024. Al Reem Island consistently outperformed other areas, recording the highest rental growth across almost all unit sizes, with studio rents up by 35%, one-bedroom by 31%, and two-bedroom by 34%, reflecting strong tenant demand and a robust return on investment of around 7–9%. Al Raha Beach also showed remarkable growth, particularly for studio units, which saw a 54% increase in rents. In contrast, Khalifa City, while still maintaining steady tenant interest for smaller units, experienced a rental decline for three-bedroom apartments by -4%, signaling a shift in tenant preference toward more centrally located or newer communities. Overall, the data highlights a tightening rental market characterized by significant upward pressure on rents, especially in well-established and highly sought-after areas like Al Reem Island and Al Raha Beach.

Studio	Q1 2024 Median Rent	Q1 2025 Median Rent	ROI	Price Change
Al Raha Beach	46,000	71,000	NA	54%
Al Khalidiya	39,000	48,000	NA	23%
Al Reem Island	52,000	70,000	9%	35%
Corniche Road	67,000	70,000	NA	4%
Khalifa City	30,000	35,000	NA	17%
Market Median Rent	30,000	32,000		7%

One Bedroom	Q1 2024 Median Rent	Q1 2025 Median Rent	ROI	Price Change
Al Raha Beach	75,000	95,000	NA	27%
Al Khalidiya	60,000	65,000	NA	8%
Al Reem Island	65,000	85,000	9%	31%
Corniche Road	90,000	100,000	NA	11%
Khalifa City	45,000	49,000	NA	9%
Market Median Rent	63,000	79,000		25%

Two Bedrooms	Q1 2024 Median Rent	Q1 2025 Median Rent	ROI	Price Change
Al Raha Beach	115,000	140,000	NA	22%
Al Khalidiya	85,000	96,000	NA	13%
Al Reem Island	97,000	130,000	8%	34%
Corniche Road	125,000	137,000	9%	10%
Khalifa City	70,000	80,000	6%	14%
Market Median Rent	95,000	123,000		29%

Three Bedrooms	Q1 2024 Median Rent	Q1 2025 Median Rent	ROI	Price Change
Al Raha Beach	165,000	190,000	NA	15%
Al Khalidiya	100,000	125,000	NA	25%
Al Reem Island	140,000	175,000	7%	25%
Corniche Road	160,000	180,000	NA	13%
Khalifa City	107,000	103,000	3%	-4%
Market Median Rent	130,000	160,000		23%

Rental Market Trends for Villas - Q1 2025

The villa rental market witnessed strong upward momentum, with median rents increasing by 24% compared to Q1 2024. This growth was primarily driven by the rental prices of the three-bedroom villas, which rose by 17%, while four-bedroom villas increased by 39%, and five-bedroom villas surged by 43%, highlighting growing demand for larger family homes.

Despite the overall rise, performance varied across communities and villa sizes. Al Reef led ROI returns in all categories, peaking at 6.8% for three-bedroom villas, followed by 6.7% and 6.4% for four- and five-bedroom units, respectively—underscoring its strong positioning in the affordable segment. Khalifa City remained a preferred mid-market location, achieving the highest ROI in the four-bedroom category at 7.6%, while five-bedroom units also saw steady rent growth. Saadiyat Island, known for its upscale offerings, recorded a dramatic rental increase for three-bedroom villas—from AED 200,000 to AED 450,000—translating to a solid 6.0% ROI, and also topped five-bedroom villa rents at AED 650,000. Meanwhile, Yas Island experienced rent softening for larger units but continued to deliver ROIs between 4% and 5%, indicating sustained tenant demand. In Mohamed Bin Zayed City, although rent growth was more modest, it continues to attract long-term tenants seeking budget-friendly, spacious homes.

Three Bedrooms	Q1 2024 Median Rent	Q1 2025 Median Rent	ROI	Price Change
Al Reef	105,000	115,000	7%	10%
Khalifa City	135,000	156,000	4%	16%
Mohamed Bin Zayed City	105,000	110,000	3%	5%
Saadiyat Island	200,000	450,000	6%	125%
Yas Island	195,000	180,000	5%	-8%
Market Median Rent	150,000	175,000	5%	17%

Four Bedroom	Q1 2024 Median Rent	Q1 2025 Median Rent	ROI	Price Change
Al Reef	134,000	147,000	7%	10%
Khalifa City	178,000	193,000	8%	8%
Mohamed Bin Zayed City	125,000	140,000	NA	12%
Saadiyat Island	465,000	500,000	5%	8%
Yas Island	300,000	240,000	5%	-20%
Market Median Rent	165,000	230,000	6%	39%

Five Bedrooms	Q1 2024 Median Rent	Q1 2025 Median Rent	ROI	Price Change
Al Reef	150,000	158,000	6%	5%
Khalifa City	206,000	232,000	3%	13%
Mohamed Bin Zayed City	155,000	170,000	NA	10%
Saadiyat Island	600,000	650,000	4%	8%
Yas Island	378,000	300,000	4%	-21%
Market Median Rent	175,000	250,000	5%	43%





Dubai

Real Estate Performance

Dubai Market Performance Q1 2025

Dubai’s real estate market maintained its growth momentum in Q1 2025, with total transactions increasing by 22% year-on-year to reach 45,474 deals. Transaction value also rose by 30%, totalling AED 142.7 bn. The strong performance was driven by both off-plan and ready property sales, reflecting sustained demand from both investors and end-users.

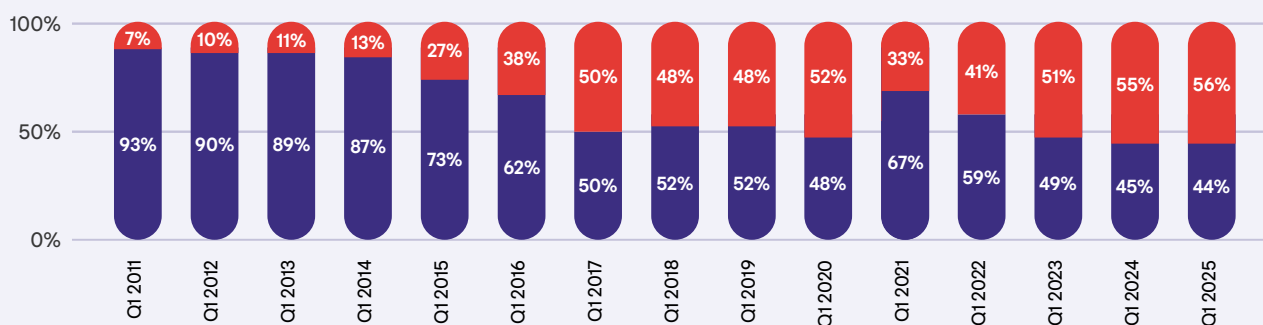




Dubai Market Performance Q1 2025

Total Transaction Volume in % (Off-plan VS Ready)

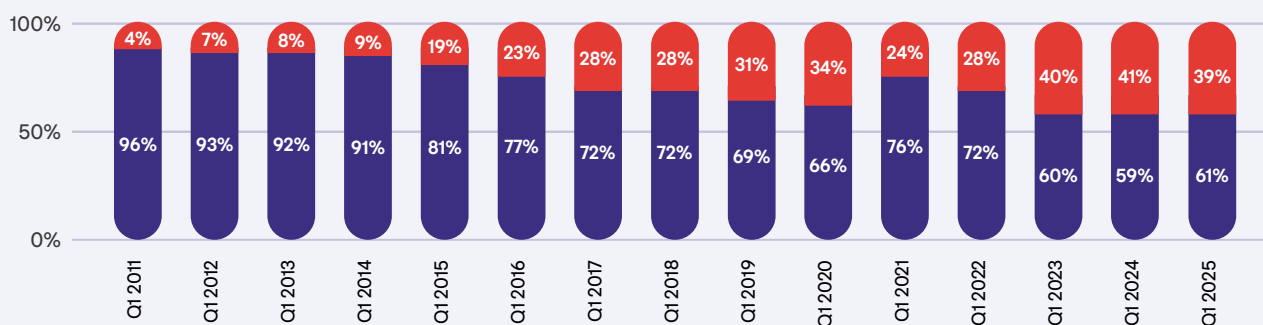
● Off-plan ● Ready



Source: Dubai Land Department

Total Transaction Value in % (off-plan VS Ready)

● Off-plan ● Ready



Source: Dubai Land Department

Dubai Market Performance Q1 2025

In Q1 2025, the Dubai real estate market concentrated around the top 10 areas, which collectively accounted for 49% of total transaction volume. Dubai Land emerged as the leading community in terms of both volume and value, contributing approximately 12% of total transactions and 9% of total transaction value. The area moved up from 14th place in Q1 2024 to first place in Q1 2025, driven by its strategic appeal for long-term investment.

Among the top 10 areas, Jumeirah Village Circle (JVC), which was the top performing community in Q1 2024,

recorded a decline of 12% in transaction volume and 6% in value. This drop was influenced by the drop of the off-plan transaction volume by 18% and transaction value by 4%. Additionally, The Valley witnessed notable growth, climbing from 31st place in Q1 2024 to 7th place in Q1 2025 in terms of volume, while in terms of transaction value, it jumped from 26th place to 4th place, ranking just after Dubai Land, Business Bay, and Palm Jabel Ali.

Top 10 Communities for Sales Transactions in Q1 2025

Top 10 areas	Share of total Volume %	Share off-plan trx volume %	Share ready trx volume %	Q1 25 Vs Q1 24 Growth %
Dubai Land *	12%	10%	14%	253%
Jumeirah Village Circle	8%	9%	7%	-12%
Business Bay	6%	6%	6%	-6%
Dubai Land Residence Complex	4%	6%	2%	283%
Dubai Marina	4%	4%	4%	75%
Dubai South (Dubai World Central)	4%	5%	2%	133%
The Valley	3%	3%	3%	319%
Damac Hills 2 (Akoya)	3%	0%	6%	59%
Jumeirah Lakes Towers	3%	2%	3%	-2%
Al Furjan	2%	2%	3%	3%
Top 10	49%	49%	49%	55%

*Al Waha, Athlon by Aldar, Cherrywoods, Damac Islands, Damac Sun City, Dubai Land, Haven By Aldar, Liwan, Majan, Remraam, Rukan, Serena, The Acres, The Palmarosa, Villanova



Top 10 Communities for Sales Transactions Value in Q1 2025

Top 10 areas	Share of total Value %	Share off-plan trx Value %	Share ready trx Value %	Q1 25 Vs Q1 24 Growth %
Dubai Land *	9%	11%	8%	485%
Business Bay	5%	7%	4%	19%
Palm Jebel Ali	5%	0%	8%	195%
The Valley	5%	5%	4%	312%
Dubai South (Dubai World Central)	4%	5%	4%	422%
Downtown Dubai	4%	3%	5%	27%
Palm Jumeirah	3%	3%	4%	-3%
Jumeirah Village Circle	3%	5%	2%	-6%
Dubai Marina	3%	4%	3%	104%
Dubai Hills Estate	3%	3%	3%	-16%
Top 10	45%	45%	45%	83%

*Al Waha, Athlon by Aldar, Cherrywoods, Damac Islands, Damac Sun City, Dubai Land, Haven By Aldar, Liwan, Majan, Remraam, Rukan, Serena, The Acres, The Palmarosa, Villanova

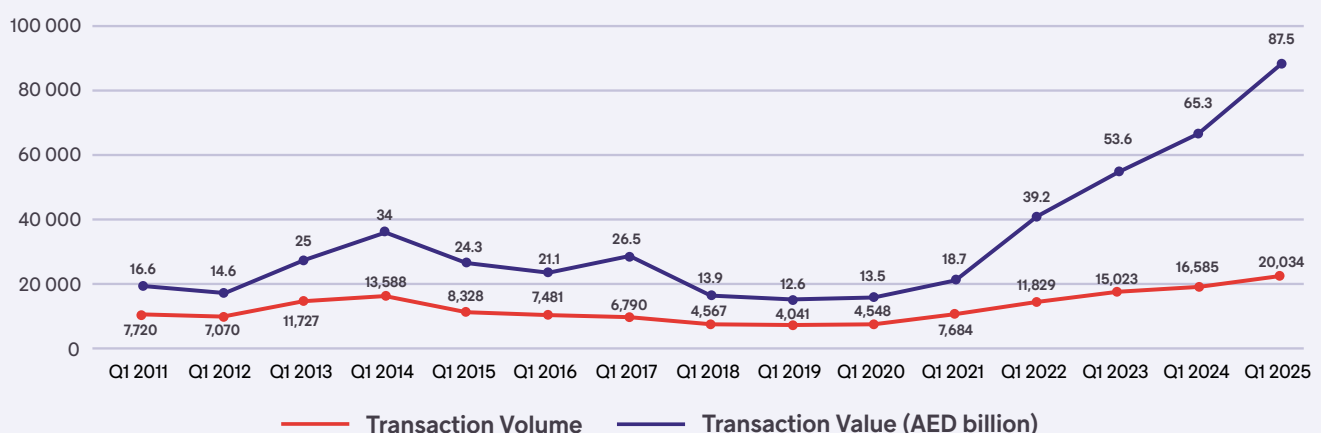


Existing / Ready Sales Transaction Q1 2025

Despite the strong contribution of off-plan transactions to the Dubai real estate market, the existing/ready segment also achieved a new milestone in Q1 2025, recording its highest quarterly performance in over a decade. The ready market registered approximately 20,034 transactions with a total value of AED 87.5 bn.

This represents a 21% year-on-year increase in volume, contributing 44% to the total sales transaction volume, while the transaction value surged by 34%, compared to AED 65.3 bn in Q1 2024.

Existing/Ready Transactions Performance



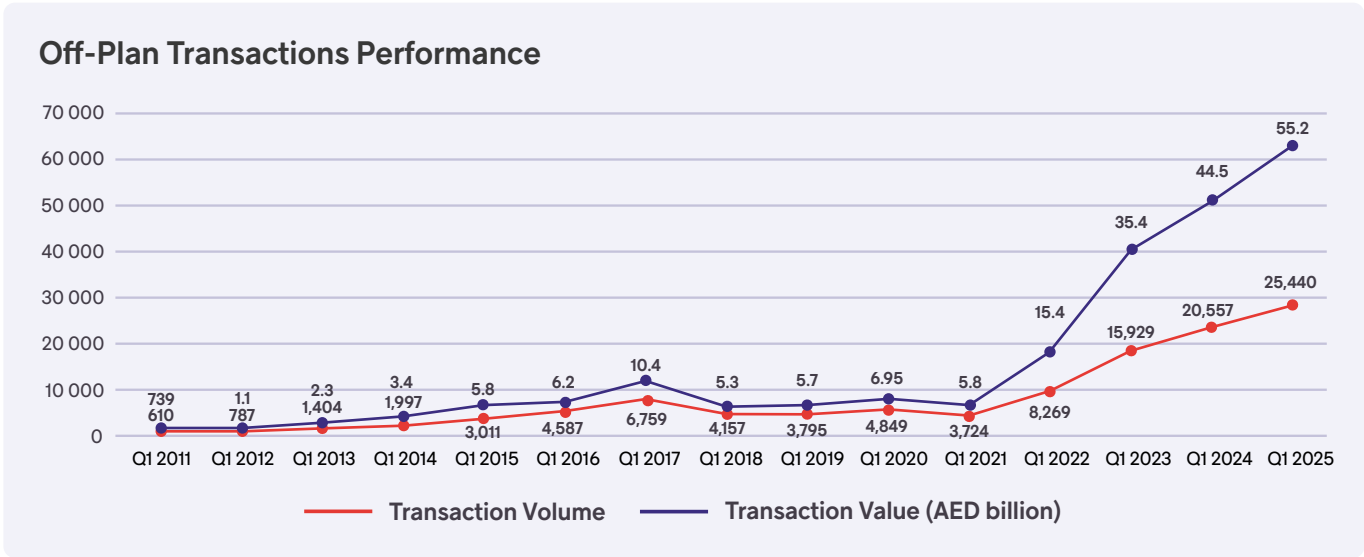
Off-plan Sales Transactions Q1 2025

Off-plan properties continue to perform strongly in Q1 2025 with both transaction volume and value rising by 24% year-on-year, reaching approximately 25,440 transactions totalling AED 55.2 bn. The sustained momentum reflects continued confidence in Dubai’s real estate market, underpinned by investor optimism around long-term capital appreciation and future growth potential.

The market maintained its positive momentum, with Q1 2025 performance exceeding the quarterly average transactions for both volume and value in 2024. Notably,

the transaction value in Q1 2025 was 9% higher than the average quarterly value recorded in 2024, underscoring the market’s ongoing strength and investor confidence.

The long-term investment appeal was evident in emerging areas such as Dubai Harbour, which captured around 5% of the total off-plan transaction value, amounting to approximately AED 3.2 billion. Dubai Harbour continued to gain strong momentum in Q1 2025, driven by its luxury waterfront offerings and consistent price growth, attracting significant interest from both buyers and investors.



Dubai Market Trends in Q1 2025

In this section, we will identify the top five most demanded areas as determined by Property Finder's most searched areas. These top locations are classified in our search engine by residential apartments and villas/townhouses, whether for sale or rent. We will also examine the price movement for each location.

The Return on Capital Gains (ROCG) is calculated by comparing median sales asking price of properties in Q1 2024 to their current value in Q1 2025. The Return on Investment (ROI) is calculated by dividing the annual return on a rental (Asking Rental Price) property by the sales asking price in Q1 2025.

Property Finder's proprietary data revealed that Business Bay, Downtown Dubai, Dubai Marina, Jumeirah Village Circle and Palm Jumeirah were the top preferred choices for those who wanted to own an apartment, while Al Furjan, Damac Hills 2, Dubai Hills Estate, Palm Jumeirah, and Dubai land were the top preferred areas for villas, either for investment or residence purposes, in Q1 2025.



Dubai Market Trends in Q1 2025

Dubai's residential real estate market in Q1 2025 demonstrated strong and consistent growth across both sales and rental segments, driven by rising demand for larger units and expanding interest in outer communities. Median sales prices for apartments and villas increased by 12% and 8%, respectively while median rental prices for apartments didn't change, the villas witnessed 9% increase highlighting sustained end-user and investor confidence.

Premium areas like Downtown Dubai and Palm Jumeirah continued to command high capital gains (asset appreciation), while more affordable and emerging districts such as JVC, Al Furjan, and Damac Hills 2 delivered attractive ROIs (Rental yield), often exceeding 6%. The data also reveals a shift in tenant and buyer preferences toward master-planned communities offering more space, better value, and strong infrastructure, underscoring Dubai's maturing, diversified, and opportunity-rich real estate landscape.

Key Takeaways

01

Apartments and villas recorded robust year-on-year price increases, with median asking sales prices for apartments rising by 12% and for villas by 8%.

02

The median apartment rents remained stable this quarter with no change, villa rents rose by 9% year-on-year.



Top areas for sale in Q1 2025

Apartments

1. Business Bay
2. Downtown Dubai
3. Dubai Marina
4. Jumeirah Village Circle (JVC)
5. Palm Jumeirah

Villas & Townhouses

1. Al Furjan
2. Damac Hills 2
3. Dubai Hills Estate
4. Palm Jumeirah
5. Dubai Land





Business Bay

Downtown Dubai

Dubai Hills Estate

JVC

Arabian Ranches

Dubai Land

Damac Hills 2



Sales Market Trends for Apartments - Q1 2025

Dubai's real estate market continues to offer a dynamic mix of investment opportunities, balancing luxury and affordability across key communities. In Q1 2025, the median asking sales price for apartments increased by 12% compared to Q1 2024. This overall rise was largely driven by strong gains in larger units, with two-bedroom apartments increasing by 17% and three-bedroom apartments by 10%, highlighting growing demand from end-users and families seeking spacious living.

Jumeirah Village Circle (JVC) stood out in the one-bedroom category, posting the highest ROCG at 16% as one of the top demanded areas in Q1 2025, signaling robust interest in affordable, master-planned developments. Downtown Dubai led the luxury market with the highest ROCG for three-bedroom apartments at 19%, and an impressive 18% gain for two-bedrooms, reflecting sustained demand for prime city living.

Three Bedrooms	Q1 2024 Median Price	Q1 2025 Median Price	ROCG
Business Bay	3,650,000	4,170,000	14%
Downtown Dubai	6,300,000	7,520,000	19%
Dubai Marina	4,000,000	4,250,000	6%
Jumeirah Village Circle	2,290,000	2,564,800	12%
Palm Jumeirah	8,000,000	8,730,000	9%
Market Median Price	3,600,000	3,970,000	10%

Studio	Q1 2024 Median Price	Q1 2025 Median Price	ROCG
Business Bay	1,050,000	1,060,000	1%
Downtown Dubai	1,350,000	1,490,000	10%
Dubai Marina	1,370,000	1,410,000	3%
Jumeirah Village Circle	620,000	690,000	11%
Palm Jumeirah	1,560,000	1,700,400	9%
Market Median Price	630,000	700,000	11%

One Bedrooms	Q1 2024 Median Price	Q1 2025 Median Price	ROCG
Business Bay	1,650,000	1,730,000	5%
Downtown Dubai	2,100,000	2,380,000	13%
Dubai Marina	1,600,000	1,700,000	6%
Jumeirah Village Circle	950,000	1,100,000	16%
Palm Jumeirah	2,800,000	3,050,000	9%
Market Median Price	1,160,000	1,280,000	10%

Two Bedrooms	Q1 2024 Median Price	Q1 2025 Median Price	ROCG
Business Bay	2,600,000	2,808,000	8%
Downtown Dubai	3,800,000	4,500,000	18%
Dubai Marina	2,690,000	2,750,000	2%
Jumeirah Village Circle	1,470,000	1,650,000	12%
Palm Jumeirah	5,000,000	5,500,000	10%
Market Median Price	1,850,000	2,170,000	17%

Sales Market Trends for Villas - Q1 2025

Dubai’s villa market in Q1 2025 is being reshaped by strong demand for larger homes in premium and maturing communities. The sharp rise in three- and four-bedroom villa prices drove overall market appreciation. The median asking price for villas in Dubai increased by 8% compared to Q1 2024. Due to an 18% increase in the median asking price for three-bedroom villas and an 8% increase for five-bedroom villas, reflecting heightened demand for mid- to large-sized homes across the city.

The villa segment demonstrated robust growth. Al Furjan led the top searched areas with an extraordinary 26% Return on Capital Gains (ROCG) in the three-bedroom segment and a solid 24% increase in five-bedroom villas, affirming its position as a top-tier investment destination. Similarly, Dubai Hills Estate showed strong performance with three-, four-, and five-bedroom units rising by 14%, 15%, and 26%, respectively—fueled by its premium amenities and strategic location.

Three Bedrooms	Q1 2024 Median Price	Q1 2025 Median Price	ROCG
Al Furjan	3,250,000	4,100,000	26%
Damac Hills 2	1,500,000	1,700,000	13%
Dubai Hills Estate	6,600,000	7,550,000	14%
Palm Jumeirah	14,260,000	16,420,000	15%
Dubai Land	NA	1,890,000	NA
Market Median Price	2,450,000	2,900,000	18%

Four Bedrooms	Q1 2024 Median Price	Q1 2025 Median Price	ROCG
Al Furjan	4,500,000	5,130,000	14%
Damac Hills 2	1,790,000	1,960,000	9%
Dubai Hills Estate	7,730,000	8,900,000	15%
Palm Jumeirah	28,500,000	30,000,000	5%
Dubai Land	NA	2,250,000	NA
Market Median Price	3,650,000	3,900,000	7%

Five Bedrooms	Q1 2024 Median Price	Q1 2025 Median Price	ROCG
Al Furjan	6,850,000	8,500,000	24%
Damac Hills 2	2,750,000	3,052,500	11%
Dubai Hills Estate	14,900,000	18,750,000	26%
Palm Jumeirah	45,000,000	49,750,000	11%
Dubai Lan	NA	4,380,000	NA
Market Median Price	12,580,000	13,540,000	8%



Top areas for rent in Q1 2025

Apartments

1. Business Bay
2. Deira
3. Downtown Dubai
4. Dubai Marina
5. Jumeirah Village Circle

Villas & Townhouses

1. Al Furjan
2. Damac Hills 2
3. Dubai Hills Estate
4. Jumeirah
5. Dubai Land





Jumeirah

Business Bay

Downtown Dubai

Deira

Dubai Hills Estate

Dubai Land

DAMAC Hills 2



Rental Market Trends for Apartments - Q1 2025

In Q1 2025, Dubai’s rental market showed signs of stabilization, which didn’t record a notable growth compared to Q1 2024. However, the performance across the top searched communities tells a more detailed story: rental trends varied significantly depending on location and unit size. Studios generally led the rental growth, with Deira and Jumeirah Village Circle (JVC) seeing notable increases of 19% and 10%, respectively. In contrast, Business Bay studios saw a slight decline of 4%.

One-bedroom units across the top communities recorded a slight to moderate rise in rental prices, led by Deira with 18% for one bedroom apartment and Downtown Dubai with 8%, although the broader market median remained flat, indicating stabilization at the city level. For two- and three-bedroom apartments, rental prices diverged: areas like Deira and Downtown Dubai recorded healthy gains by 18% each for two bedrooms,, while Dubai Marina witnessed declines for larger units.

Studio	Q1 2024 Median Rent	Q1 2025 Median Rent	ROI	Price Change
Business Bay	78,000	75,000	7%	-4%
Deira	36,000	43,000	4%	19%
Downtown Dubai	85,000	85,000	6%	0%
Dubai Marina	78,000	80,000	6%	3%
Jumeirah Village Circle	50,000	55,000	8%	10%
Market Median Rent	49,000	55,000	-	12%

One Bedroom	Q1 2024 Median Rent	Q1 2025 Median Rent	ROI	Price Change
Business Bay	105,000	110,000	6%	5%
Deira	55,000	65,000	5%	18%
Downtown Dubai	130,000	140,000	6%	8%
Dubai Marina	110,000	110,000	6%	0%
Jumeirah Village Circle	75,000	78,000	7%	4%
Market Median Rent	85,000	85,000	-	0%

Two Bedrooms	Q1 2024 Median Rent	Q1 2025 Median Rent	ROI	Price Change
Business Bay	150,000	160,000	6%	7%
Deira	78,000	92,040	4%	18%
Downtown Dubai	200,000	235,000	5%	18%
Dubai Marina	170,000	160,000	6%	-6%
Jumeirah Village Circle	110,000	120,000	7%	9%
Market Median Rent	110,000	140,000	-	-7%

Three Bedrooms	Q1 2024 Median Rent	Q1 2025 Median Rent	ROI	Price Change
Business Bay	229,000	305,000	5%	33%
Deira	128,000	125,000	4%	-2%
Downtown Dubai	330,000	395,000	5%	20%
Dubai Marina	260,000	250,000	6%	-4%
Jumeirah Village Circle	140,000	160,000	8%	14%
Market Median Rent	245,000	230,000	-	6%

Rental Market Trends for Villas - Q1 2025

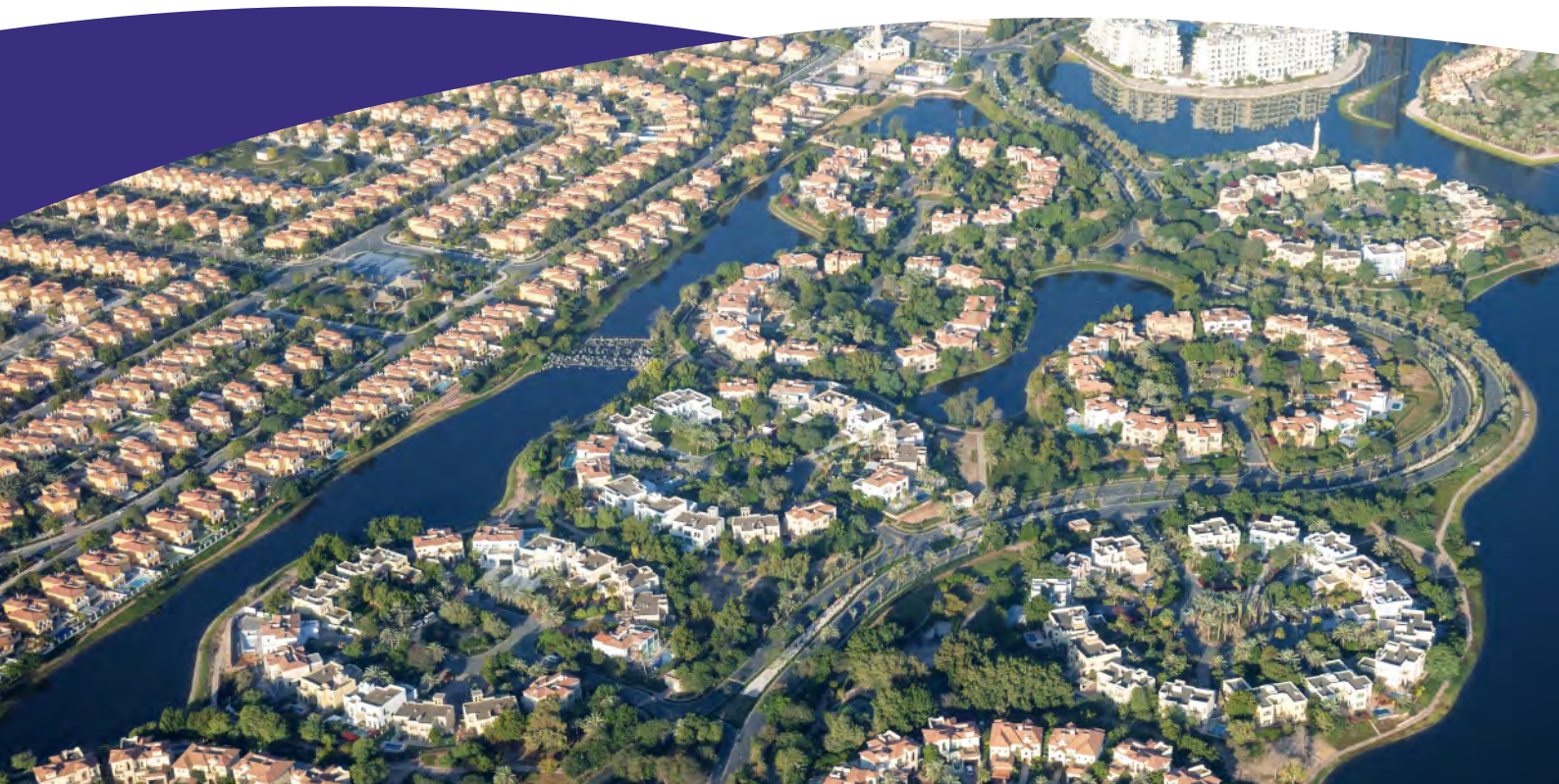
In Q1 2025, Dubai’s villa rental market maintained strong momentum, with the median villa rent across the emirates increasing by 9% compared to Q1 2024. This growth was fueled by rising demand for larger homes, driven by tenants seeking more space and upgraded community living.

Among the top-performing communities, Dubai Hills Estate led the surge, witnessing exceptional rental growth across all categories – with three-bedroom villas seeing a 30% increase, four-bedroom villas rising by 15%, and five-bedroom villas soaring by 47%. Al Furjan also showed notable strength, particularly for larger units, as four- and five-bedroom villas recorded rental increases of 32% and 38%, respectively. Dubai Land sustained its appeal among more affordable villa seekers, with rents rising by 13% for three-bedroom villas and 11% for four-bedroom villas.

Three Bedrooms	Q1 2024 Median Rent	Q1 2025 Median Rent	ROI	Price Change
Al Furjan	230,000	239,000	6%	4%
Damac Hills 2	100,000	105,000	6%	5%
Dubai Hills Estate	285,000	370,000	5%	30%
Jumeirah	262,200	270,000	NA	3%
Dubai Land	159,000	180,000	10%	13%
Market Median Rent	160,000	190,000	-	19%

Four Bedrooms	Q1 2024 Median Rent	Q1 2025 Median Rent	ROI	Price Change
Al Furjan	250,000	330,000	6%	32%
Damac Hills 2	112,000	125,000	6%	12%
Dubai Hills Estate	388,000	446,000	4%	15%
Jumeirah	350,000	350,000	NA	-
Dubai Land	190,000	210,000	9%	11%
Market Median Rent	250,000	310,000	-	24%

Five Bedrooms	Q1 2024 Median Rent	Q1 2025 Median Rent	ROI	Price Change
Al Furjan	340,000	470,000	6%	38%
Damac Hills 2	140,000	150,000	6%	7%
Dubai Hills Estate	522,000	765,000	4%	47%
Jumeirah	661,000	607,000	NA	-8%
Dubai Land	NA	220,000	8%	NA
Market Median Rent	400,000	450,000	-	13%



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