

Dubai Residential

# Market Overview

H1 2025

20  
25

## Key Insights:

- In H1 2025 the Dubai residential real estate market continues to demonstrate remarkable resilience and growth. Transaction volumes remained robust, buoyed by sustained demand for both off-plan and ready properties. The first half of the year witnessed a 23% year-on-year increase in transaction volumes, reaching 91,897 sales transactions across both the secondary and off-plan markets.
- Notably, off-plan transactions made up 59% of all residential activity, a marginal decline from 61% in H1 2024.
- While H1 2025 recorded strong overall activity, a closer look at community-specific data suggests the market is now in a stabilisation phase of the cycle, with slightly lower levels of activity now recorded in many of Dubai's most established communities. Despite this, both rental and capital values continue to rise, indicating a shift toward long-term residency in these communities. A growing number of residents now view Dubai as a permanent base, moving beyond its past image as a short-term expat destination.
- Within the communities tracked in this report rental activity has declined slightly, largely due to more available options across Dubai, particularly as new communities are being handed over. As of H1 2025, 17,013 off-plan units have been completed, reflecting a notable increase in available rental stock. While rents have risen in these communities, the increased supply is moderating overall price growth across the wider Dubai rental market.
- There remains a distinct difference between the villa/townhouse market and the apartment segment when it comes to price appreciation. Of the 20 villa and townhouse communities tracked in this report, 19 recorded price increases, with the average rise standing at 19%. Limited supply within this segment continues to drive price appreciation.
- Average selling prices increased in 10 out of the 11 apartment communities tracked, although at a more moderate pace than H1 2024. The average increase was 8% in H1 2025 compared to 17% during the same period last year.
- The luxury segment experienced particularly strong performance, with properties priced above AED 20 million recording the largest increase in transaction activity, both year-on-year and compared to H2 2024. This reinforces the ongoing secular trend of Dubai continuing to attract global wealth. In particular, the change to the so-called 'non-dom' tax regulations in the UK has prompted many ultra-wealthy UK residents to relocate to Dubai.
- At RE/MAX, buyer activity continues to highlight Dubai's strong global appeal, with demand driven by a broad mix of international buyers. While the UK has long remained the top source of investors, we are seeing growing interest from across Europe, North America and Asia Pacific, reflecting Dubai's rising status as a long-term home for wealthy "global citizens."





# Dubai Residential Market Overview

## Total Dubai Residential Property Sales Transactions

VALUE  
**AED 262B**

- ▲ +36% increase when compared to H1 2024
- ▲ +12% increase when compared to H2 2024

VOLUME  
**91,897**

- ▲ +23% increase when compared to H1 2024
- ▼ -2% decrease when compared to H2 2024

## Total Sales Across The Secondary Market

VALUE  
**AED 140B**

- ▲ +47% increase when compared to H1 2024
- ▲ +31% increase when compared to H2 2024

VOLUME  
**37,369**

- ▲ +27% increase when compared to H1 2024
- ▲ +14% increase when compared to H2 2024

## Total Sales Across The Off-Plan Market

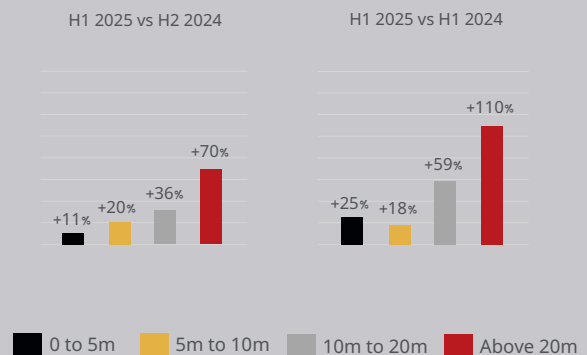
VALUE  
**AED 121B**

- ▲ +26% increase when compared to H1 2024
- ▼ -4% decrease when compared to H2 2024

VOLUME  
**54,529**

- ▲ +20% increase when compared to H1 2024
- ▼ -11% decrease when compared to H2 2024

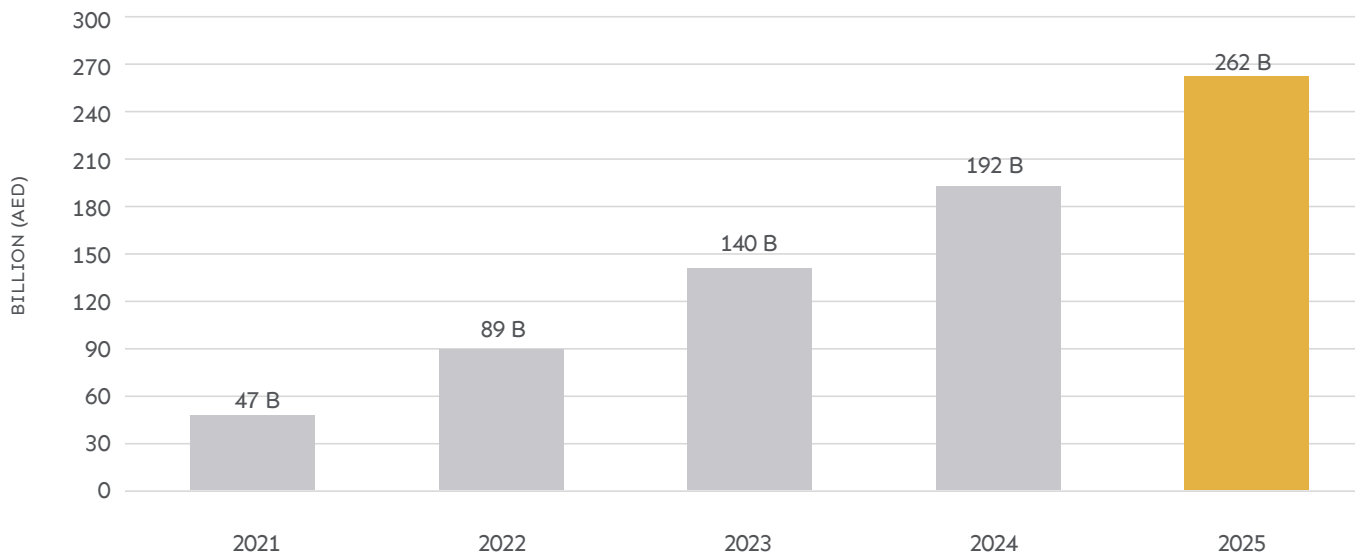
## Transaction Volume Increase Per Price Segment (AED)



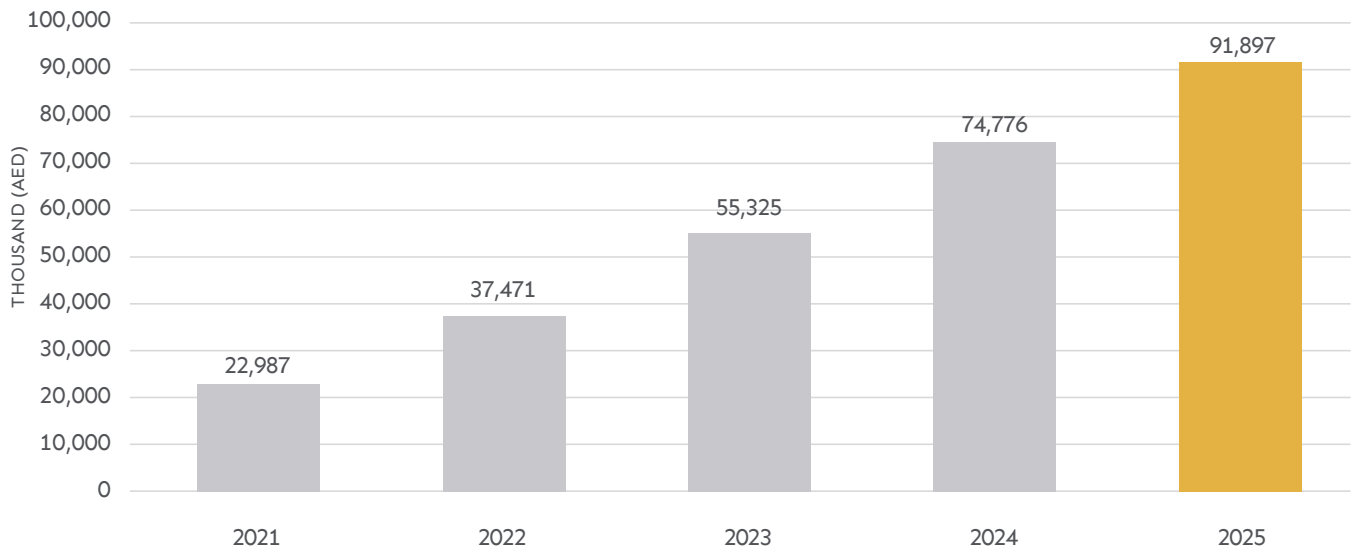
Note: This is for secondary market transactions

# Dubai Residential Market Overview

## H1 YoY TRANSACTION VALUE - 5 YEAR REVIEW



## H1 YoY TRANSACTION VOLUME - 5 YEAR REVIEW

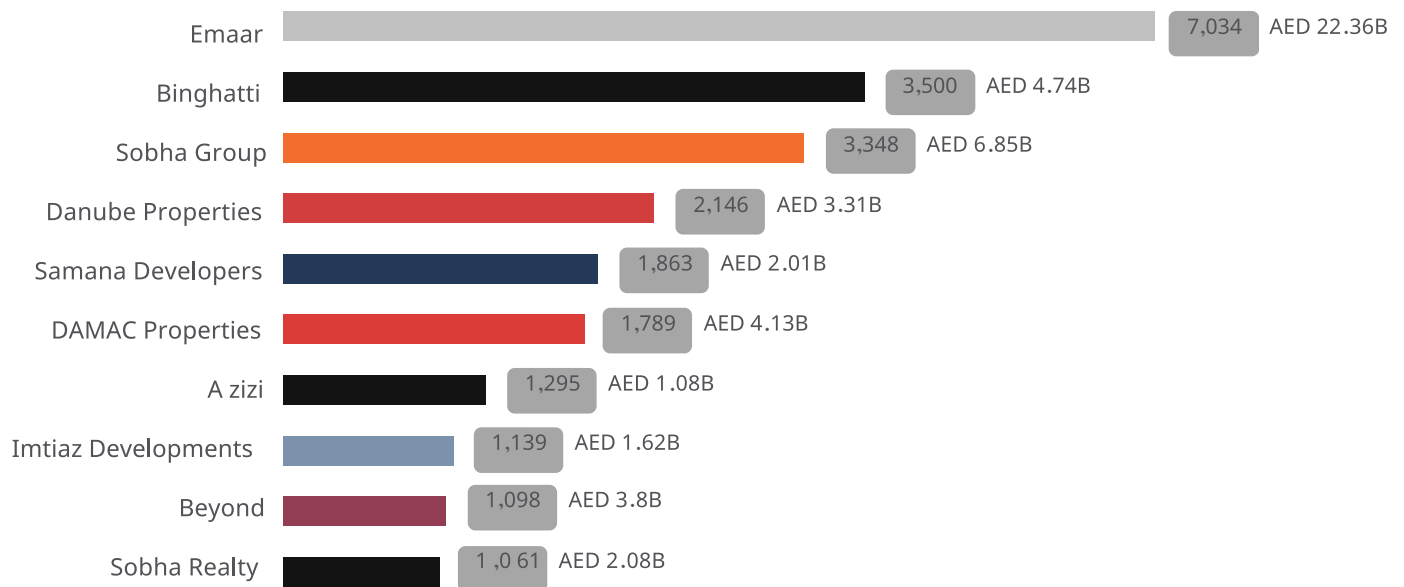




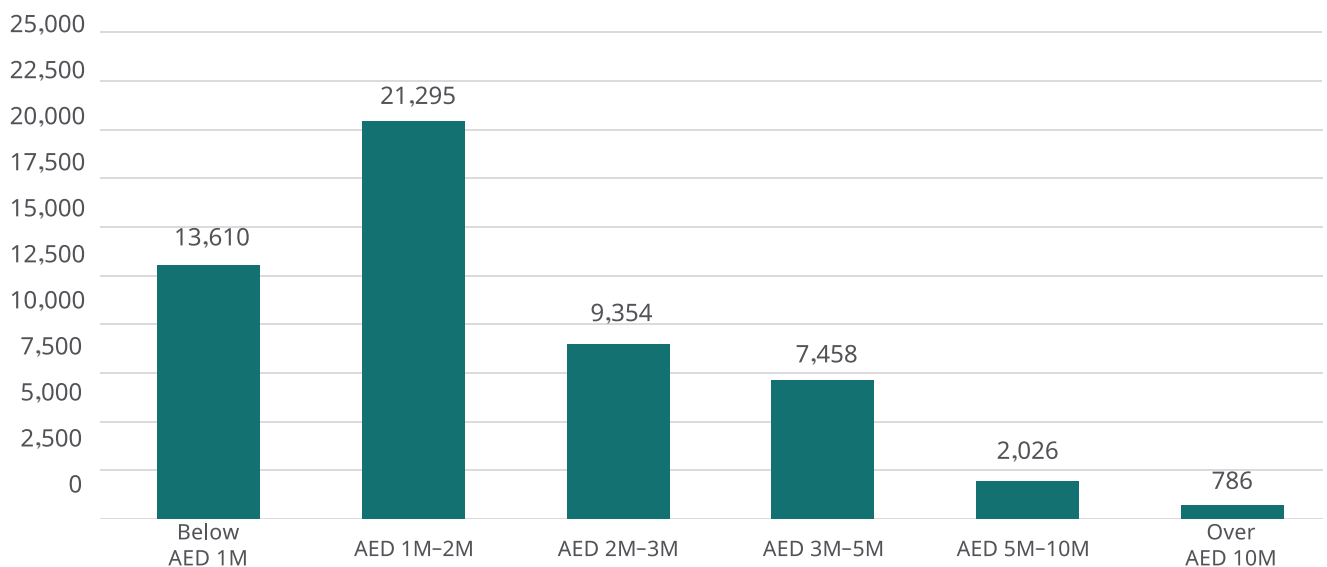
# Off-Plan Residential

## MARKET OVERVIEW

### H1 2025 TOP 10 DEVELOPERS (BY TRANSACTIONS)



### TRANSACTIONAL VOLUME BREAKDOWN BY PRICE BRACKET



# Off-Plan Residential

## H1 TOTAL COMPLETED UNITS

### VILLA/TOWNHOUSE MARKET H1 YoY TRANSACTION VOLUME/AVG. PRICE

Community	No. of Transactions			Average Sales Price		
	2024	2025	% Increase/ Decrease	2024	2025	% Increase/ Decrease
Meadows	91	79	▼ -13%	AED 8,371,588	AED 11,723,998	▲ +40%
Jumeirah Islands	50	46	▼ -8%	AED 16,430,004	AED 22,173,804	▲ +35%
Palm Jumeirah	76	67	▼ -12%	AED 37,581,617	AED 38,418,792	▲ +2%
Jumeirah Park	134	95	▼ -29%	AED 7,986,910	AED 8,945,319	▲ +12%
Jumeirah Golf Estates	140	235	▲ +68%	AED 9,725,777	AED 11,557,968	▲ +19%
Springs	226	237	▲ +5%	AED 3,531,007	AED 4,335,395	▲ +23%
Arabian Ranches	219	170	▼ -22%	AED 6,768,976	AED 8,503,089	▲ +26%
Arabian Ranches 2	103	90	▼ -13%	AED 5,197,711	AED 6,420,488	▲ +24%
Emirates Hills	22	23	▲ +5%	AED 44,427,500	AED 64,269,174	▲ +45%
Lakes	50	23	▼ -54%	AED 8,196,320	AED 9,314,304	▲ +14%
Victory Heights	75	44	▼ -41%	AED 5,826,983	AED 8,387,116	▲ +44%
Dubai Hills	285	206	▼ -28%	AED 12,946,639	AED 15,333,978	▲ +18%
Green Community	41	46	▲ +12%	AED 5,327,335	AED 6,430,092	▲ +21%
Town Square	196	128	▼ -35%	AED 2,375,268	AED 2,689,119	▲ +13%
Al Furjan	349	371	▲ +6%	AED 4,127,907	AED 5,215,956	▲ +26%
Damac Hills	220	240	▲ +9%	AED 5,685,078	AED 5,798,480	▲ +2%
Mira, Reem	59	69	▲ +17%	AED 2,887,830	AED 3,324,384	▲ +15%
Arabian Ranches 3	167	157	▼ -6%	AED 3,666,769	AED 3,967,903	▲ +8%
Tilal Al Ghaf	206	188	▼ -9%	AED 13,063,142	AED 11,640,960	▼ -11%
Mudon	83	94	▲ +13%	AED 3,690,524	AED 3,969,245	▲ +8%
<b>TOTAL</b>	<b>2792</b>	<b>2608</b>	<b>▼ -7%</b>			



# Villa/Townhouse Sales

## DUBAI'S SECONDARY MARKET

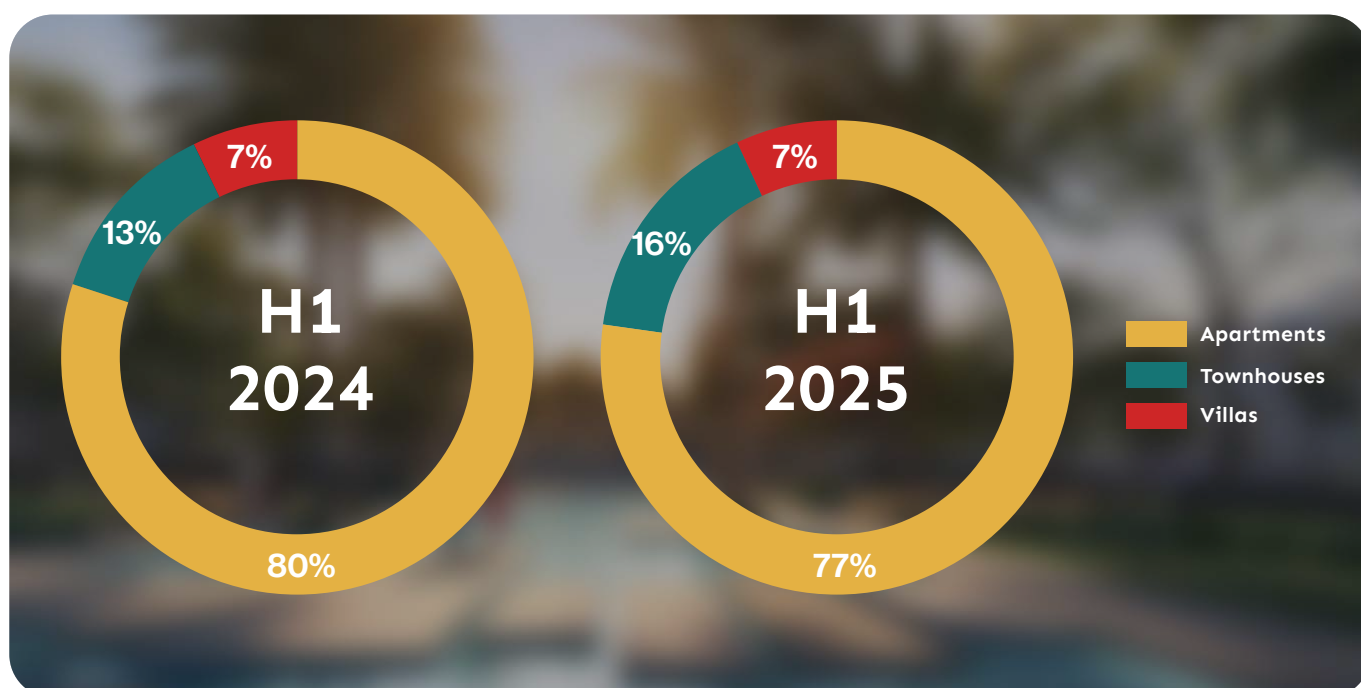
### Total Dubai Off-Plan Completed Units

VOLUME

**17,013**

▼-1% decrease when  
compared to H1 2024

### OFF-PLAN COMPLETIONS BY PROPERTY TYPE: H1 2024 VS H1 2025



# Apartment Sales

## DUBAI'S SECONDARY MARKET

### APARTMENT MARKET H1 YoY TRANSACTION VOLUME/AVG. PRICE

Community	No. of Transactions			Average Sales Price		
	2024	2025	% Increase/ Decrease	2024	2025	% Increase/ Decrease
Views & Greens	326	341	▲ +5%	AED 1,729,444	AED 1,963,735	▲ +14%
Palm Jumeirah	502	521	▲ +4%	AED 5,569,042	AED 6,075,834	▲ +9%
Dubai Marina	1436	1410	▼ -2%	AED 2,338,922	AED 2,386,051	▲ +2%
Downtown Dubai	1144	1153	▲ +1%	AED 3,256,310	AED 3,642,678	▲ +12%
JLT	768	748	▼ -3%	AED 1,510,070	AED 1,715,890	▲ +14%
JBR	369	345	▼ -7%	AED 3,659,815	AED 3,353,512	▼ -8%
JVC	1983	2462	▲ +24%	AED 867,476	AED 973,432	▲ +12%
Emaar Beachfront	120	202	▲ +68%	AED 4,401,787	AED 5,031,312	▲ +14%
City Walk	151	104	▼ -31%	AED 4,190,628	AED 4,624,496	▲ +10%
Bluewaters Island	80	54	▼ -33%	AED 10,436,325	AED 10,961,111	▲ +5%
<b>TOTAL</b>	<b>6879</b>	<b>7340</b>	<b>▲ +7%</b>			



# Villa/Townhouse Rentals

## DUBAI RESIDENTIAL MARKET

### RENTAL H1 YoY TRANSACTION VOLUME

Community	No. of Transactions		%		
	2024	2025	% Increase/ Decrease	New contracts	Renewals
Meadows	222	177	▼-20%	▼-25%	▼-16%
Jumeirah Islands	95	84	▼-12%	▲+18%	▼-37%
Palm Jumeirah	149	140	▼-6%	▲+16%	▼-29%
Jumeirah Park	424	350	▼-17%	▼-18%	▼-17%
Jumeirah Golf Estates	157	125	▼-20%	▼-12%	▼-33%
Springs	992	884	▼-11%	▼-9%	▼-12%
Arabian Ranches	599	522	▼-13%	▼-13%	▼-13%
Arabian Ranches 2	359	293	▼-18%	▼-13%	▼-22%
Emirates Hills	23	21	▼-9%	▼-20%	▲+13%
Lakes	139	134	▼-4%	▲+20%	▼-15%
Victory Heights	131	129	▼-2%	▲+14%	▼-16%
Dubai Hills	727	605	▼-17%	▼-9%	▼-24%
Green Community	82	57	▼-30%	▼-37%	▼-26%
Town Square	936	919	▼-2%	▼-11%	▲+7%
Al Furjan	443	645	▲+46%	▲+122%	▼-14%
Damac Hills	382	511	▲+34%	▲+74%	▼-16%
Mira, Reem	434	362	▼-17%	▼-9%	▼-20%
Arabian Ranches 3	281	412	▲+47%	▲+49%	▲+42%
Tilal Al Ghaf	218	359	▲+65%	▲+35%	▲+531%
Mudon	361	305	▼-16%	▼-17%	▼-14%
<b>TOTAL</b>	<b>7154</b>	<b>7034</b>	<b>▼-2%</b>		

# Apartment Rentals

## DUBAI RESIDENTIAL MARKET

### RENTAL H1 YoY TRANSACTION VOLUME

Community	No. of Transactions		%		
	2024	2025	% Increase/ Decrease	New contracts	Renewals
Views	812	686	▼ -16%	▲ +2%	▼ -27%
Greens	907	812	▼ -10%	▼ -1%	▼ -17%
Palm Jumeirah	1908	1653	▼ -13%	▼ -10%	▼ -17%
Dubai Marina	6936	6194	▼ -11%	▼ -15%	▼ -7%
Downtown Dubai	3980	3804	▼ -4%	▼ -8%	0%
JLT	3752	3372	▼ -10%	▼ -3%	▼ -17%
JBR	1490	1347	▼ -10%	▼ -12%	▼ -8%
JVC	9086	9705	▲ +7%	▲ +19%	▼ -7%
Emaar Beachfront	273	328	▲ +20%	▲ +5%	▲ +86%
City Walk	366	364	▼ -1%	▲ +20%	▼ -12%
Bluewaters Island	118	118	0%	▲ +15%	▼ -20%
<b>TOTAL</b>	<b>29628</b>	<b>28383</b>	▼ -4%		



# Average Rental Price

## H1 YoY COMPARISON

### VILLA/TOWNHOUSE COMMUNITIES

Community	2024	2025	% Increase/ Decrease
Meadows	AED 351,153	AED 390,931	▲+11%
Jumeirah Islands	AED 530,296	AED 630,386	▲+19%
Palm Jumeirah	AED 1,146,968	AED 1,394,382	▲+22%
Jumeirah Park	AED 305,859	AED 349,678	▲+14%
Jumeirah Golf Estates	AED 547,789	AED 633,491	▲+16%
Springs	AED 167,381	AED 186,545	▲+11%
Arabian Ranches	AED 258,311	AED 302,178	▲+17%
Arabian Ranches 2	AED 237,508	AED 262,167	▲+10%
Emirates Hills	AED 1,255,727	AED 1,782,086	▲+42%
Lakes	AED 260,395	AED 344,312	▲+32%
Victory Heights	AED 295,162	AED 382,927	▲+30%
Dubai Hills	AED 351,037	AED 425,461	▲+21%
Green Community	AED 260,189	AED 280,253	▲+8%
Town Square	AED 130,846	AED 143,888	▲+10%
Al Furjan	AED 179,381	AED 226,696	▲+26%
Damac Hills	AED 226,055	AED 247,544	▲+10%
Mira, Reem	AED 144,748	AED 161,865	▲+12%
Arabian Ranches 3	AED 159,664	AED 178,327	▲+12%
Tilal Al Ghaf	AED 227,899	AED 327,640	▲+44%
Mudon	AED 176,207	AED 189,127	▲+7%

# Average Rental Price

## H1 YoY COMPARISON

### APARTMENT COMMUNITIES

Community	2024	2025	% Increase/ Decrease
Views	AED 118,530	AED 129,163	▲+9%
Greens	AED 93,603	AED 102,612	▲+10%
Palm Jumeirah	AED 220,187	AED 232,062	▲+5%
Dubai Marina	AED 121,916	AED 128,810	▲+6%
Downtown Dubai	AED 155,638	AED 171,611	▲+10%
JLT	AED 86,907	AED 93,634	▲+8%
JBR	AED 150,029	AED 155,695	▲+4%
JVC	AED 62,277	AED 68,539	▲+10%
Emaar Beachfront	AED 239,770	AED 230,060	▼-4%
City Walk	AED 199,447	AED 231,798	▲+16%
Bluewaters Island	AED 454,132	AED 479,116	▲+6%



# RE/MAX Precision Realty

## Sales Market Overview



NEW PROPERTY LISTINGS

**159%** *increase*

▲ when compared to H1 2024



BUYER REGISTRATIONS

**45%** *increase*

▲ when compared to H1 2024



MORTGAGE LEADS GENERATED

**8%** *decrease*

▼ when compared to H1 2024



PRICE REDUCTIONS

**147%** *increase*

▲ when compared to H1 2024



NUMBER OF VIEWINGS

**14,420**

▲ 43% increase when compared to H1 2024












AVERAGE SALES PRICE

**6,547,988** AED

▼ -3% decrease when compared to H1 2024

TOP NATIONALITIES

-  United Kingdom
-  India
-  France
-  Russian Federation
-  Turkey
-  Netherlands
-  Lebanon
-  Canada
-  United Arab Emirates
-  Australia

# RE/MAX

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