

A panoramic view of the Dubai skyline at dusk. The Burj Khalifa is the most prominent feature on the right side, reaching towards the top of the frame. Other skyscrapers of varying heights and architectural styles are scattered across the cityscape. The sky is a mix of soft purple, pink, and blue tones, indicating the time is either early morning or late evening. The overall atmosphere is serene and modern.

DUBAI Market Overview

Q2 2025

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OVERVIEW

Dubai's real estate market continues to demonstrate strong growth and resilience, driven by its reputation as a safe haven amid global uncertainty. Economic and demographic indicators show positive momentum, with the population reaching approximately 3.95 million by June 2025—an increase of 110,000 residents since January. This population growth supports rising demand in the property sector. Between Q4 2024 and Q2 2025, sales volume increased by 5.77%, reflecting sustained buyer confidence and healthy market liquidity. Despite seasonal slowdowns in Q4, the market showed a strong rebound by mid-2025, reinforcing Dubai's position as a dynamic and attractive investment destination.

Total Sales Volume as of Q2 2025: 53,118 (22.5% YoY)

Total Sales Value as of Q2 2025: AED 184 billion (48.6% YoY)



EXECUTIVE SUMMARY

Dubai Real Estate Market | Q2 2025

Dubai's real estate market delivered a record-breaking performance in Q2 2025, reaffirming its position as a global investment hub. Total residential transaction volumes reached over 52,000 units, marking a 22% year-on-year increase, while the total transaction value surged to AED 156.8 billion, reflecting robust demand across both off-plan and secondary segments.

Key Highlights:

- **Off-Plan Dominance:** Off-plan sales accounted for 58% of total residential transactions, underscoring continued investor confidence in Dubai's development pipeline and flexible payment structures.
- **Luxury Segment Acceleration:** Properties priced above AED 15 million saw a 113% year-on-year increase, with secondary luxury transactions outperforming off-plan by a factor of 4.5x. This trend reflects Dubai's growing appeal among ultra-high-net-worth individuals.
- **Price Appreciation:** Average residential prices rose to AED 1,823 per sq.ft, up 6% quarter-on-quarter and nearly 90% above pandemic-era lows, signaling sustained capital growth and asset resilience.





Key Highlights:

- **Villa & Townhouse Strength:** Secondary villa and townhouse sales climbed 80% year-on-year, driven by end-user demand and limited supply. Off-plan villa transactions, however, declined, indicating a shift toward ready inventory.
- **Rental Market Stability:** Over 107,000 rental contracts were recorded in Q2, with renewals comprising 60–65% of activity. Leasing demand for villas and townhouses rose sharply, reflecting a preference for spacious, family-oriented living.
- **Commercial Sector Surge:** Dubai's commercial real estate market hit AED 31 billion in Q2, a 50% year-on-year increase, led by a 93% rise in office sales and strong demand for Grade A assets in Business Bay and JLT.
- **Investor Sentiment:** The influx of global capital, particularly from Europe, North America, and Asia Pacific, continues to drive market momentum. Dubai's transparent regulatory framework, tax efficiency, and infrastructure-led growth remain key attractors.



Q2 | MARKET OVERVIEW

SALES VOLUME

53,118

↑ 16.8% QoQ

↑ 22.5% YoY

PRICE PER SQFT

AED 1,607

↑ 2.8% QoQ

↑ 6.1% YoY

SALES VALUE

AED 184B

↑ 28.9% QoQ

↑ 48.6% YoY

Note: YoY (Year-over-Year)
Comparison: Is a comparison vs. the
previous year i.e., Q2 2025 vs. Q2 2024.



Q2 | MARKET SNAPSHOT



APARTMENTS

40,453

↑ 22.7% QoQ

↑ 18.7% vs. Q2 2024

AED 10M

Sales Value



VILLAS

10,019

↓ -1.8% QoQ

↑ 38.3% vs. Q2 2024

AED 66.5B

Sales Value



COMMERCIAL

1,252

↑ 3.2% QoQ

↑ 12.5% vs. Q2 2024

AED 3.6B

Sales Value



PLOTS

1,384

↑ 27.1% QoQ

↑ 49% vs. Q2 2024

AED 32.2B

Sales Value

Dubai's property market demonstrated strong performance across core segments. Apartments saw continued momentum with over 40,000 units sold, while villas and plots experienced notable year-on-year growth, highlighting sustained demand in luxury and investment-driven categories. Commercial units remained stable, signaling confidence in income-generating assets. Overall, the data reflects a resilient and investor-aligned landscape heading into the second half of the year.



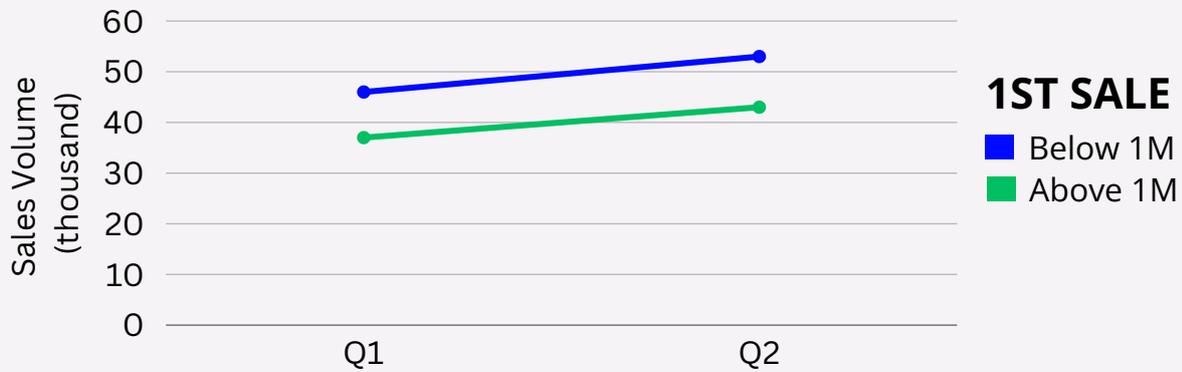
TOP PERFORMING AREAS IN DUBAI

The following highlights showcase investor behavior across high-performing districts, segmented by volume and transactional value:

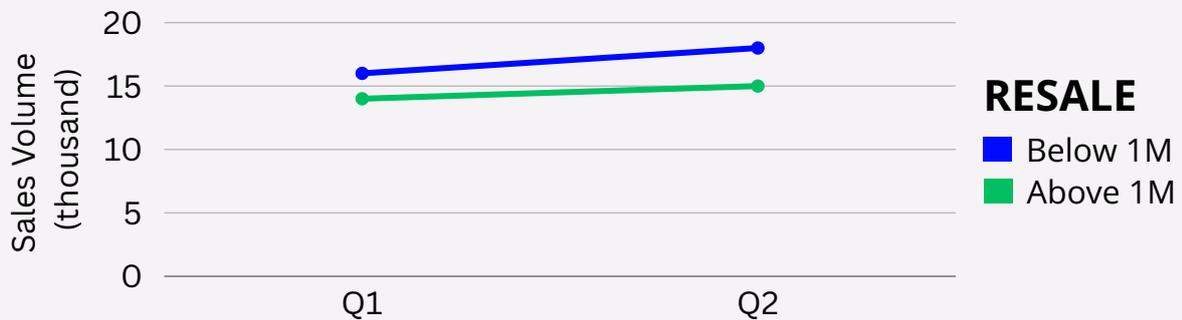
AREA	UNITS SOLD	SALES VALUE (AED M)	KEY INSIGHT
Jumeirah Village Circle	4,930	6,473	Volume-led activity signals mid-tier investor traction
Business Bay	3,143	10,055	Mixed-use appeal drives consistent high-value transactions
Al Yelayiss 1	2,867	9,083	Growth zone with strengthening developer-led confidence
Wadi Al Safa 5	2,483	4,830	Affordability and expansion potential in emerging districts
Dubai Marina	2,235	8,388	Lifestyle-driven demand sustains elite market status
Dubai Islands	1,267	7,347	Early-stage premium positioning in transformational zone
Dubai South	2,248	5,213	Rising interest in accessible, scalable investment options
Me'Aisem Second	844	14,945	Premium inventory dominates with exceptional value per unit



Q1-Q2 GROWTH IN 1ST SALE & RESALE PROPERTY TRANSACTIONS (Q1-Q2)



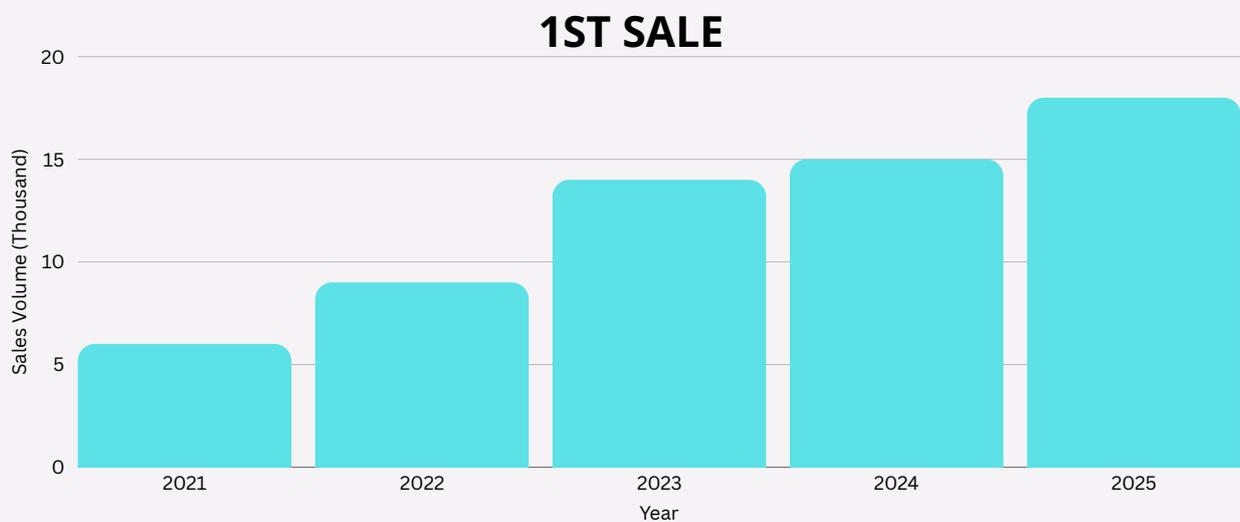
Property Value	Q1	Q2	QTQ
Below 1M:	29.6K Transactions	35.3K Transactions	19.5%
Above 1M:	22.8K Transactions	28.5K Transactions	25.18%



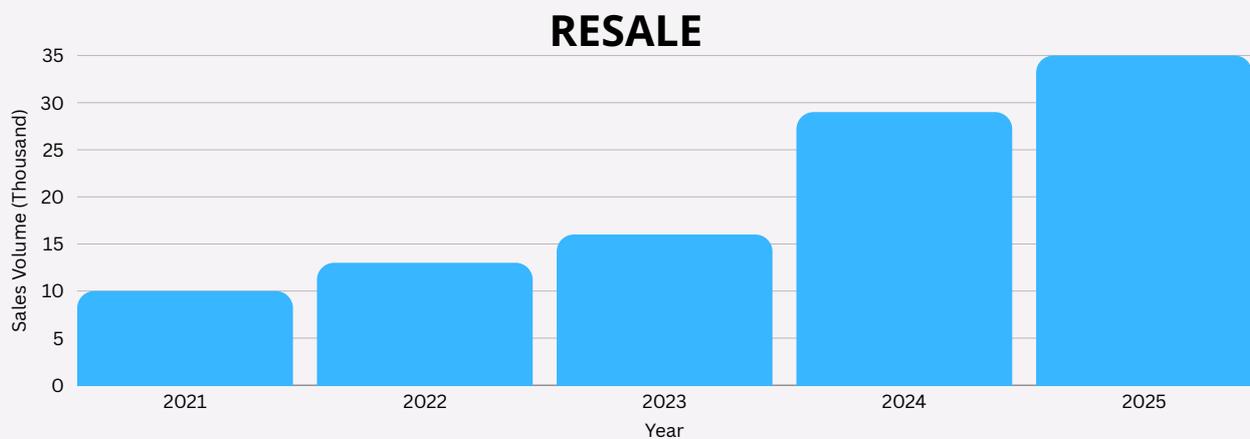
Property Value	Q1	Q2	QTQ
Below 1M:	16K Transactions	18.1K Transactions	13.19%
Above 1M:	14.6K Transactions	15K Transactions	2.84%

PROPERTY SALES VOLUME IN THE 2ND QUARTER OVER YEARS

Number of property sales transactions in Dubai over years based on the Dubai Land Department



From 2021 to 2025, Dubai's property market has experienced strong and consistent growth in Q2 sales volume. Transactions rose significantly from around 9K in 2021 to over 35K in 2025, marking nearly a 4x increase in just five years.



The continuous rise in Q2 property sales highlights Dubai's position as a dynamic and resilient real estate market. The upward trajectory is expected to continue, supported by infrastructure development, regulatory support, and investor-friendly policies. This trend presents ongoing opportunities for both local and international stakeholders in the market.

OFF-PLAN RESIDENTIAL MARKET OVERVIEW

**TOTAL DUBAI
OFF-PLAN
COMPLETED UNITS**

**VOLUME
17,013**

Q2 2025 TOP 10 DEVELOPERS (OFF-PLAN PROPERTIES)

Developer	Sales Volume	Sales Value
Emaar	7,034	AED 22.36B
Binghatti	3,500	AED 4.74B
Sobha Group	3,348	AED 6.85B
Danube Properties	2,146	AED 3.31B
Samana Developers	1,863	AED 2.01B
DAMAC Properties	1,789	AED 4.13B
Azizi	1,295	AED 1.08B
Imtiaz Developments	1,139	AED 1.62B
Beyond	1,098	AED 3.8B
Sobha Realty	1,061	AED 2.08B



Q2 PROPERTY SALES VOLUME OFF-PLAN VS. READY

Comparison of Q2 2024 and 2025



Dubai's property landscape has demonstrated sustained growth over the past year, with the off-plan segment serving as the primary driver. Notable peaks in May 2024 and May 2025 reflect heightened investment activity, while the recovery in June 2025 reinforces the market's resilience.

🔍 Key Trends Shaping Investor Confidence

- Continued strength in off-plan transactions, underscoring trust in new and branded developments
- Emergence of strategic entry windows, offering investors negotiable advantages
- Increasing appeal of branded residences, driven by lifestyle alignment and appreciation potential

💡 Core Demand Drivers

- Developer-backed payment plans that support efficient capital deployment
- Elevated rental yields and lifestyle-led demand in high-performing districts
- Anticipated supply constraints in premium segments, driving urgency for early acquisition

👛 For discerning investors, the current cycle presents more than just growth—it's a timely opportunity to acquire assets that align with global luxury standards and deliver strong long-term returns.





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I work directly with all major developers including Emaar, Nakheel, Binghatti, Sobha, Dar Global, Omniyat and more.

I provide:

- Bespoke property selection and due diligence
- Payment plan analysis and cash flow structuring
- End-to-end support, including documentation and escrow oversight
- Ongoing market updates and client reporting
- Access to off-market and launch-only projects
- Support with property management and resale

Over 20 years' experience helping HNW investors build secure, tax-free portfolios AED 2 billion+ in global property sales facilitated



LET'S CHAT

Whether you're just exploring or ready to act, I can help you:

- Structure a high-return Dubai investment
- Move your capital safely
- Unlock UAE residency
- Build long-term offshore wealth



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THANK YOU