

DUBAI REAL ESTATE REPORT

Q3 2025

Explore Dubai's real estate market, powered by global investor demand, off-plan dominance, and a surge in luxury waterfront living reaffirming the city's status as a global property powerhouse.



DUBAI REAL ESTATE MARKET UPDATE

AED 170.7BILLION

Total market value showcases robust real estate activity.

In Q3 2025, the Dubai real estate market achieved an impressive total value of AED 170.7 billion across 59,228 transactions. This marks a significant milestone, reflecting the ongoing demand and confidence in the local property market. Both off-plan and luxury segments saw notable growth, indicating a shift towards high-value investments as international interest continues to rise. The strategic focus on key areas has played a pivotal role in this remarkable performance.



EXECUTIVE SUMMARY

Dubai's property market remained bullish in Q3 2025, reaching the highest-ever quarterly transaction volume. Momentum continues strongly, driven by international capital, off-plan activity, and lifestyle-led demand across residential and commercial segments.

Key Metrics (Q3 2025)

Metric	Q3 2025	QoQ	YoY
Total Transactions	59,228	+10.8%	+17.2%
Total Sales Value (AED)	170.7B	+11.2%	+19.9%
Average Price / Sq Ft	AED 1,865	+2.3%	+6.9%
Population	~4.02M	+70K	N/A

AVERAGE RENTAL INDICATORS BY AREA

Area	Unit Type	Average Annual Rent (AED)
Business Bay	Studio (New)	71,000
Business Bay	Studio (Renewed)	60,000
Business Bay	1-Bedroom	92,000
Business Bay	2-Bedroom	129,800
Business Bay	Summary (Guide)	Studio – AED 95k 1-Bed – AED 145k 2-Bed – AED 170k
Dubai Marina	1-Bedroom	102,000
Dubai Marina	2-Bedroom	174,000
Dubai Marina	All Apartments Avg.	163,700

TOP 5 AREAS BY SALES VALUE (Q3 2025)

Area	Sales Volume	Total Sales Value (AED B)
Business Bay	2,968	9.62
Jumeirah Village Circle (JVC)	4,112	6.54
Dubai Marina	2,114	8.87
Dubai Islands	1,445	6.73
Al Yelayiss 1	2,021	5.96

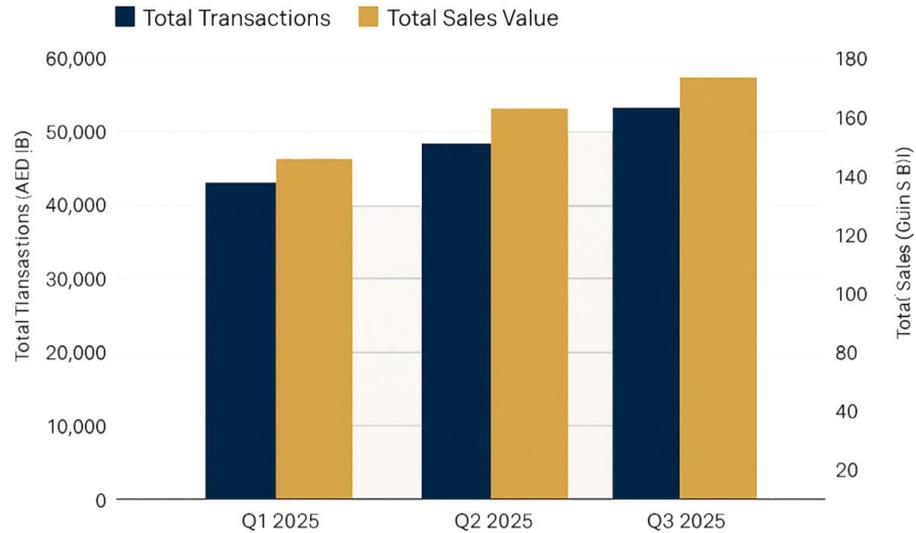
DEVELOPER PERFORMANCE - Q3 LEADERBOARD

Developer	Units Sold	Sales Value (AED B)
Emaar	6,554	21.95
Binghatti	3,102	4.28
Sobha	2,681	5.99
Danube	1,997	3.41
Omniyat	803	5.72

RESALE & FINANCE SNAPSHOT

Metric	Value
Mortgage Transactions	13,361
Financing Volume	AED 49.3 Billion (+18.2% YoY)

DUBAI REAL ESTATE MARKET PERFORMANCE (Q1-Q3 2025)



Q3 shows significant growth in transactions

59K TRANSACTIONS

Total transactions increased from 42K to 59K

The Dubai real estate market experienced remarkable growth in Q3, with total transactions rising from 42,000 to an impressive 59,000. This increase reflects heightened interest and investment in the sector, characterized by strong off-plan and luxury property sales. The market's resilience amidst global challenges underscores its attractiveness for both local and international investors, signaling a positive outlook for future quarters.

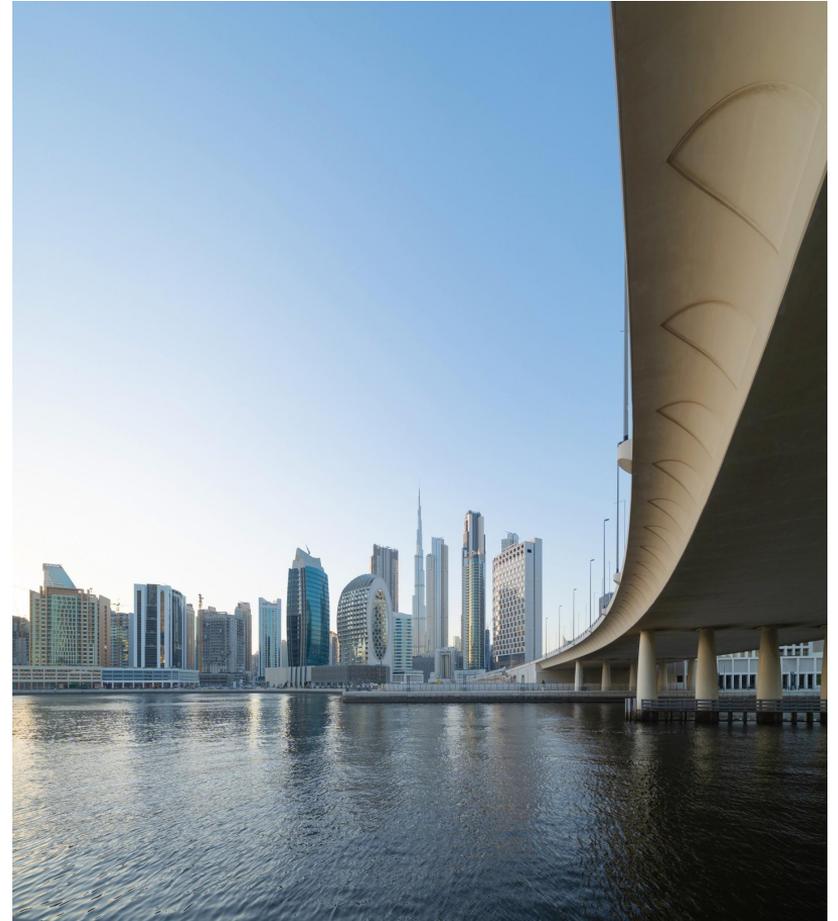


Business Bay continues to dominate sales figures.

**AED 42
BILLION**

Business Bay remains the top sales area.

In Q3 2025, Business Bay achieved an impressive AED 42 billion in sales value, solidifying its position as the leading area in Dubai's real estate market. This remarkable performance underscores the ongoing demand for urban living and the strategic development of mixed-use projects in the vicinity. Investors are particularly drawn to Business Bay for its proximity to key amenities, including business hubs, leisure facilities, and waterfront attractions, creating a vibrant community atmosphere that appeals to both residents and investors alike.



Resale & Finance Trends

Mortgage Growth

Mortgage deals reached 13,361 in Q3 2025.

Lending Insights

Total lending amounted to AED 49.3B this quarter.

Project Delays

Project delays impacted 58% of planned developments.

Market Adjustments

Market adjustments are vital for future stability.

Key Takeaways for Investors

OFF-PLAN

Off-plan properties dominate the market with significant sales.

VILLAS

Villa activity continues to attract end- users and families alike.

LUXURY

Luxury real estate remains in high demand among buyers.

COMMERCIAL

Commercial developments surge, reflecting strong business confidence.

Key Takeaways for Investors

EARLY STAGE WINS

Invest early to maximize potential returns on investments.

RENTAL SUPPORT

Invest early to maximize potential returns on investments.

LUXURY RESILIENCE

Luxury properties continue to thrive amidst market fluctuations.

GOLDEN VISA

Golden Visa attracts international buyers to Dubai's market.

Investor Strategy Guide

WATERFRONT FOCUS

Investors are prioritizing waterfront properties for higher demand.

PROVEN DEVELOPERS

Focus on **developers with a strong track record** of success.

BRAND APPEAL

Strong brands attract buyers seeking **luxury and prestige**.

GOLDEN VISA

The Golden Visa incentivizes **foreign investment opportunities in Dubai**.

Investor Strategy Guide

Waterfront & Branded First: Prioritise properties with direct water/sea-views or in waterfront master plans (like Dubai Islands, Dubai Marina, Palm Jumeirah) for maximum long-term upside.

Developer & Delivery Matter: Choose developers with strong delivery records—especially given off-plan delays.

Leverage Payment Plans: Post-handover or short-term leasebacks can help unlock yield early.

Set the Golden Visa Filter: Assets AED 2 million+ still carry residency and investment demand — useful screening tool.

Use Current Rental Benchmarks: The average rents above (Business Bay, Dubai Marina) should feed into your yield models. Confirm for each scheme though.

Mind the Premium Gap: Waterfront = premium. Entry cost is higher, but resale/rental upside justifies the delta if acquisition is early.



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