

Abu Dhabi Residential Market Review



Winter 2024/25

A biannual review of key trends and the performance of
Abu Dhabi's real estate market

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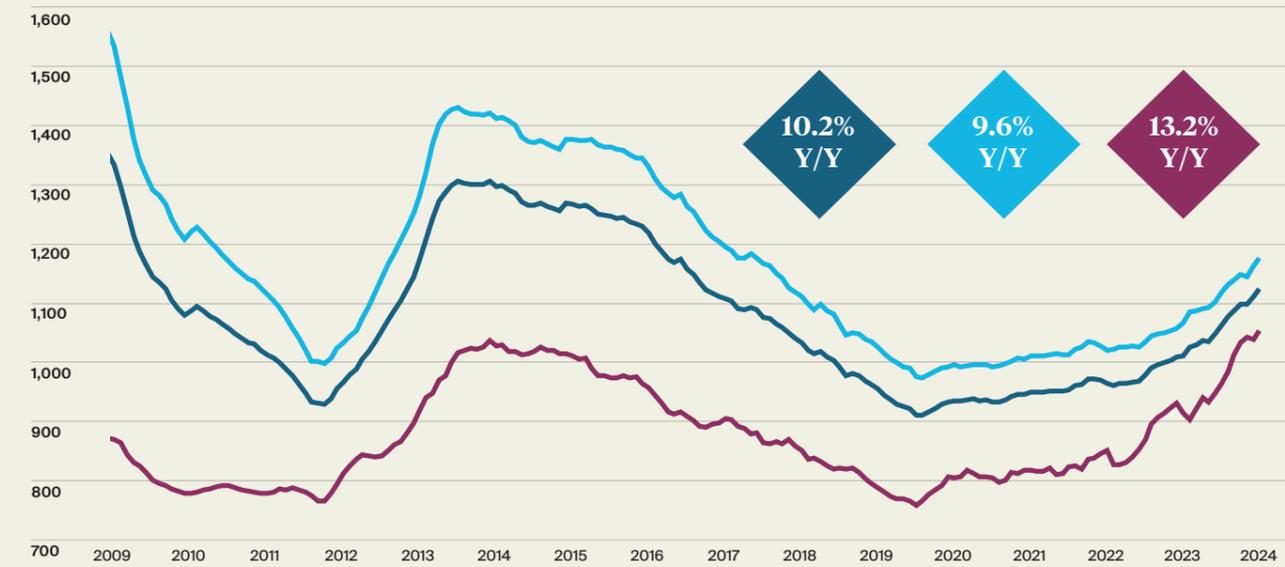
Market Overview

- Abu Dhabi's residential market continued to strengthen in Q4 2024, with average prices rising by 2.1% to reach AED 1,111 per sqft. This brings total annual growth to 10.2% and places values 18.6% above Q1 2020 levels.
- Villas remained the top-performing segment, with values increasing by 3.5% over the quarter to AED 1,045 per sqft. This marks an annual uplift of 13.2% and positions prices 31% higher than in Q1 2020.
- Apartment prices registered a 1.9% uptick in Q4, reaching AED 1,161 per sqft. Despite a 9.6% rise throughout 2024, values remain relatively modest, sitting 11% above Q1 2020 levels.

Average sales transactions value (by property type)

AED psf

■ All residential ■ Apartments ■ Villas



*Does not include transactions on Al Maryah Island

Source, Knight Frank, Quanta



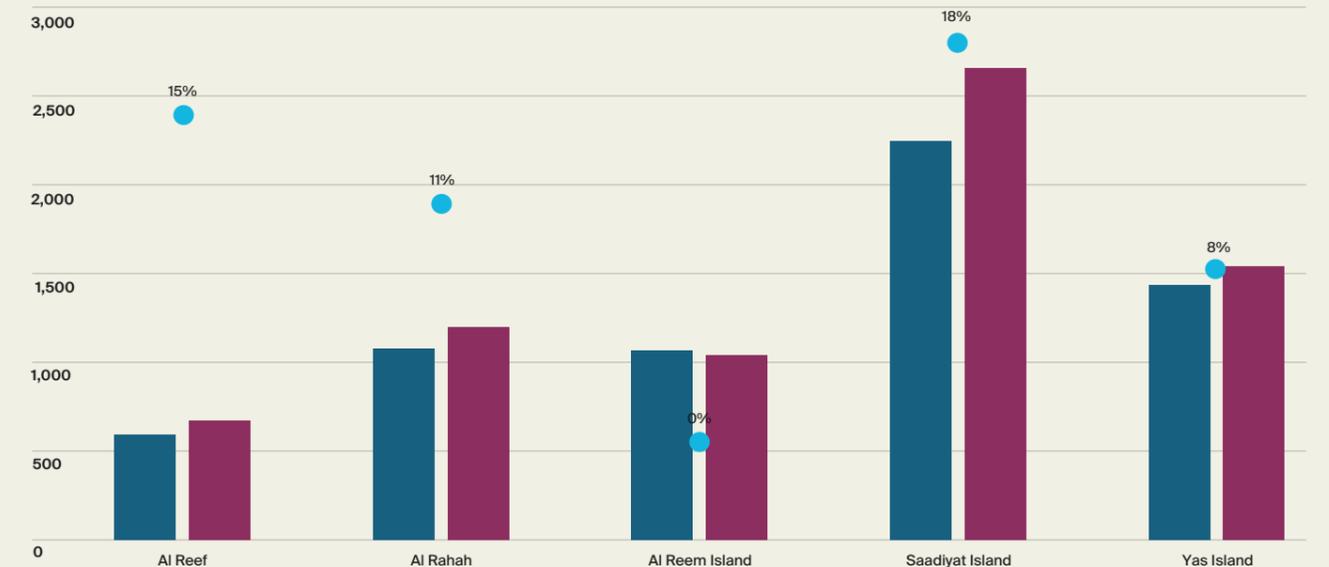
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- A total of approximately 34,638 residential units are currently under construction and are scheduled for delivery by 2029. Apartments are expected to comprise 61% of this upcoming supply pipeline.
- Saadiyat Island led annual apartment performance with price growth of 18% in 2024, followed by Al Reef at 15%.
- Among villa submarkets, Al Raha Beach saw the strongest price appreciation, up 17% year-on-year, while Saadiyat Island followed with a 12% increase in 2024.
- Residential transaction activity in Abu Dhabi reached AED 27bn during 2024, reflecting continued investor confidence in the capital's real estate market.

Average apartments sales prices

AED psf

■ 2023 ■ 2024 ■ y/y

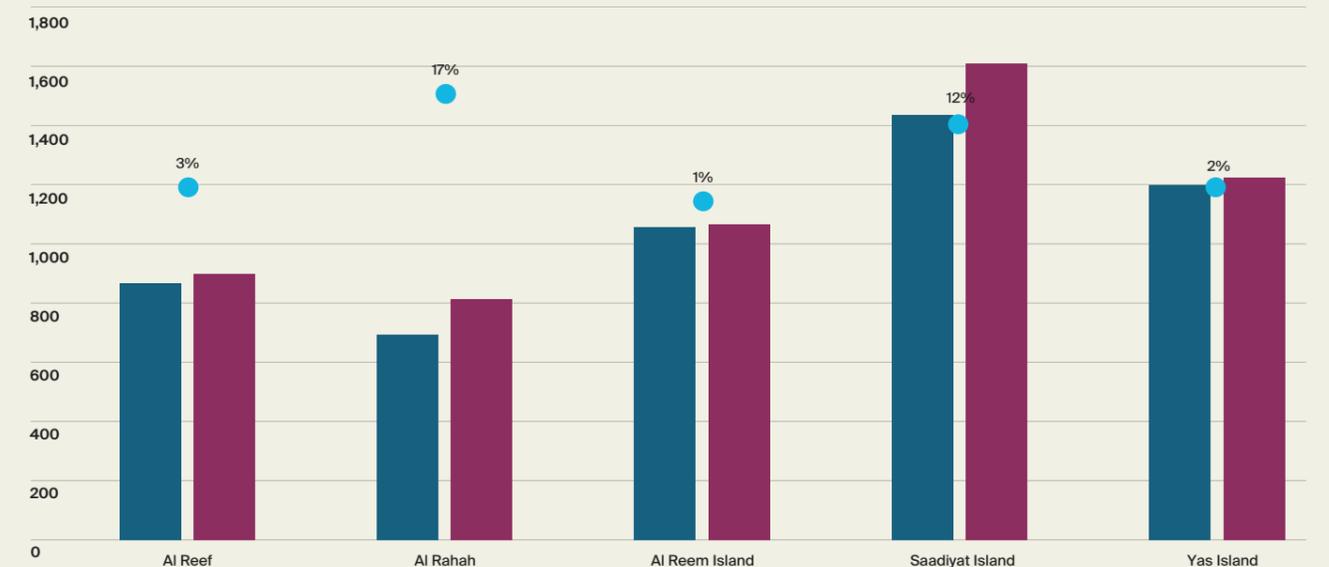


Source: Knight Frank, Quanta

Average villas sales prices

AED psf

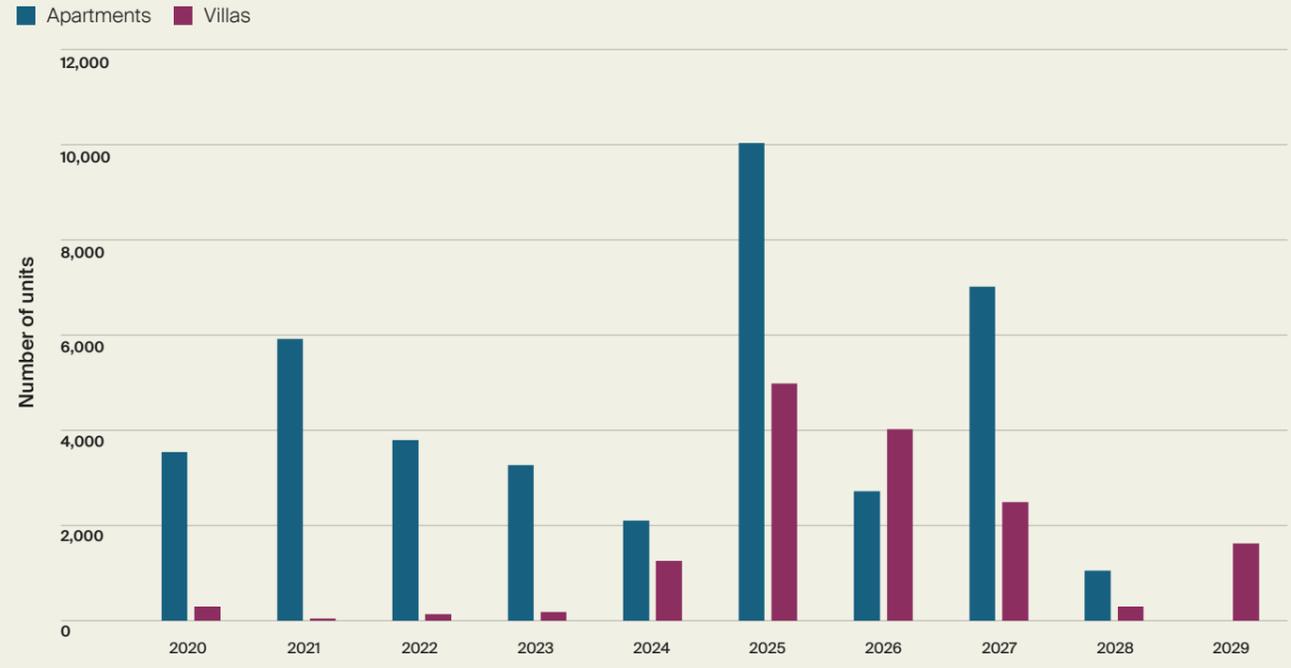
■ 2023 ■ 2024 ■ y/y



Source: Knight Frank, Quanta

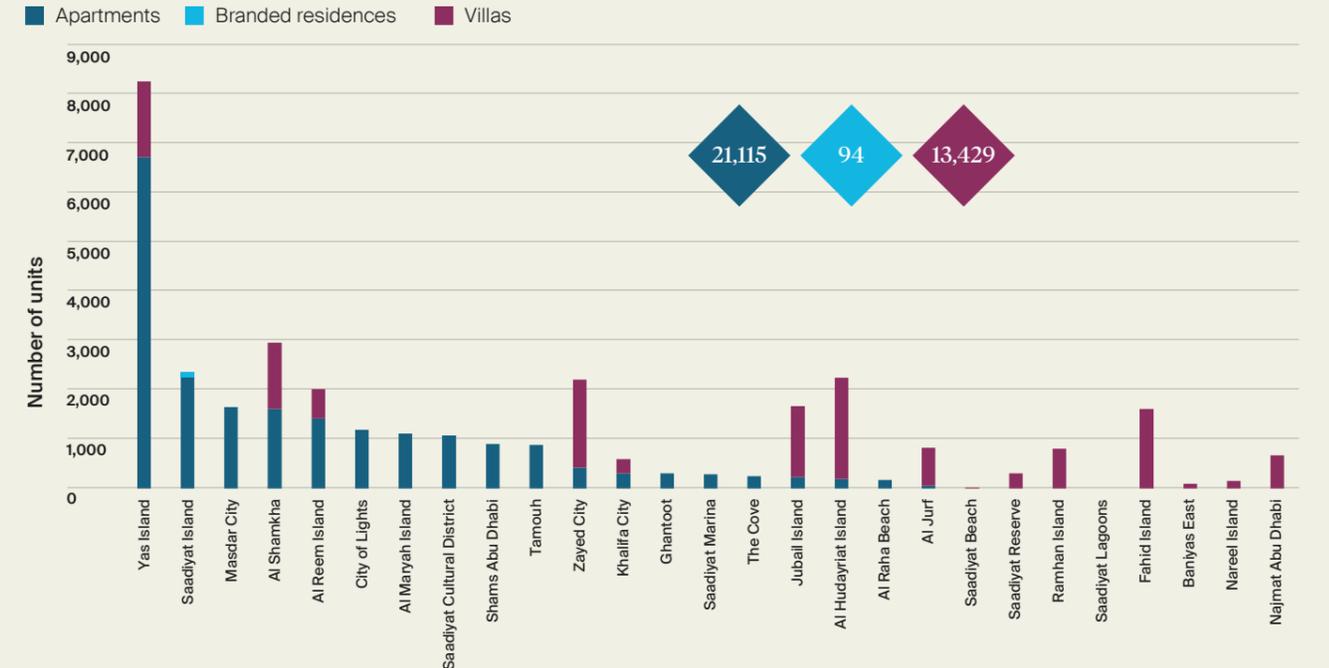
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Abu Dhabi - current and forecasted residential supply (2020 - 2029)



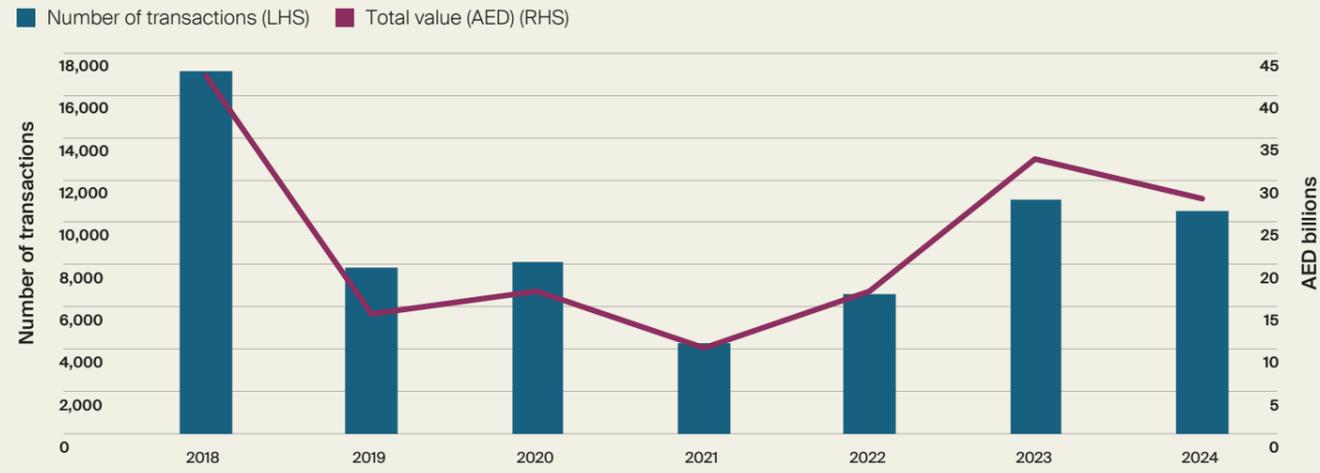
Source: Knight Frank, REIDIN

Forecasted residential supply by sub-market (2025 - 2029)



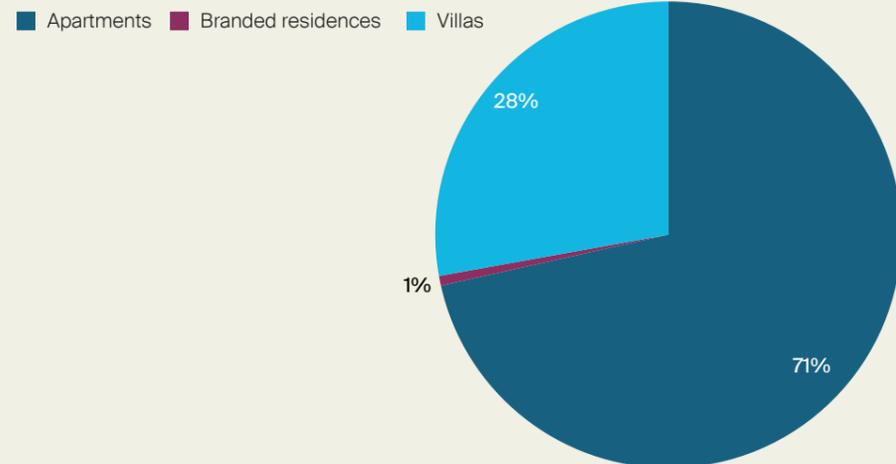
Source: Knight Frank, REIDIN

Total value and number of residential transactions in Abu Dhabi



Source: Knight Frank, Quanta

Existing supply by unit type



Source: Knight Frank, REIDIN



We like questions. If you've got one about our research, or would like some property advice, we would love to hear from you.

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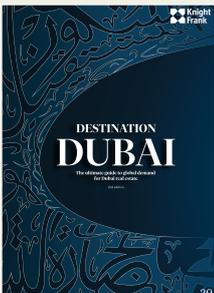
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