

Dubai Residential Market Review



Q2 2025

A quarterly review of key trends and the performance of Dubai's residential market

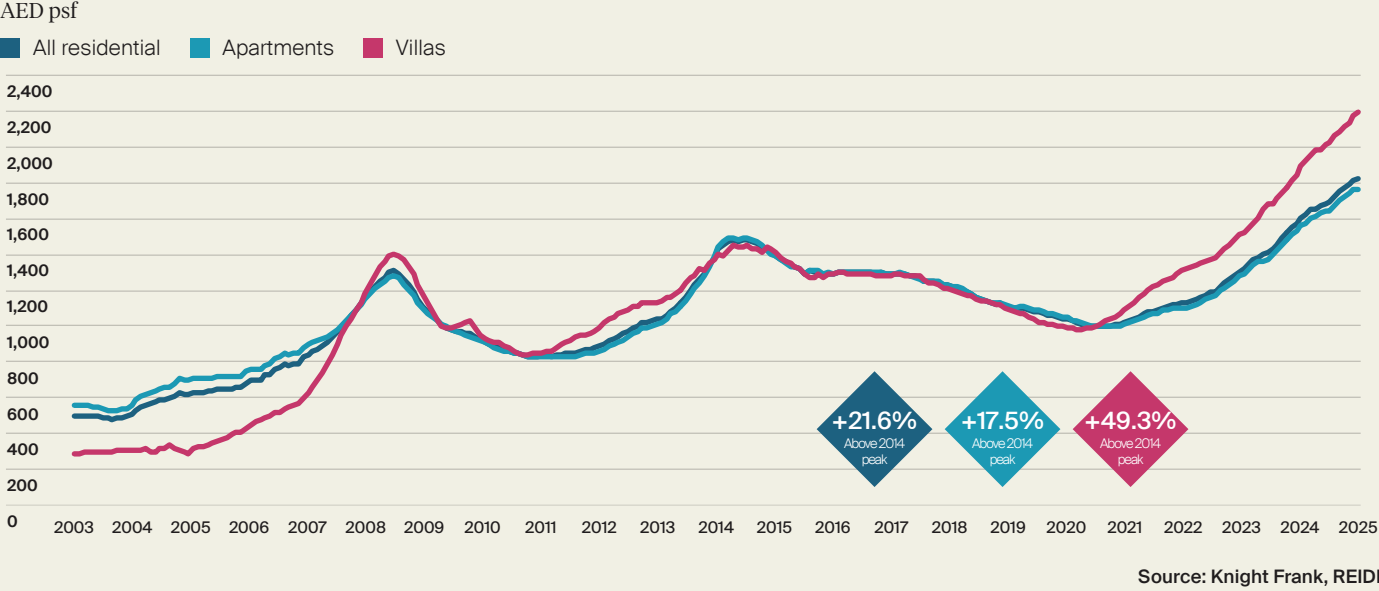
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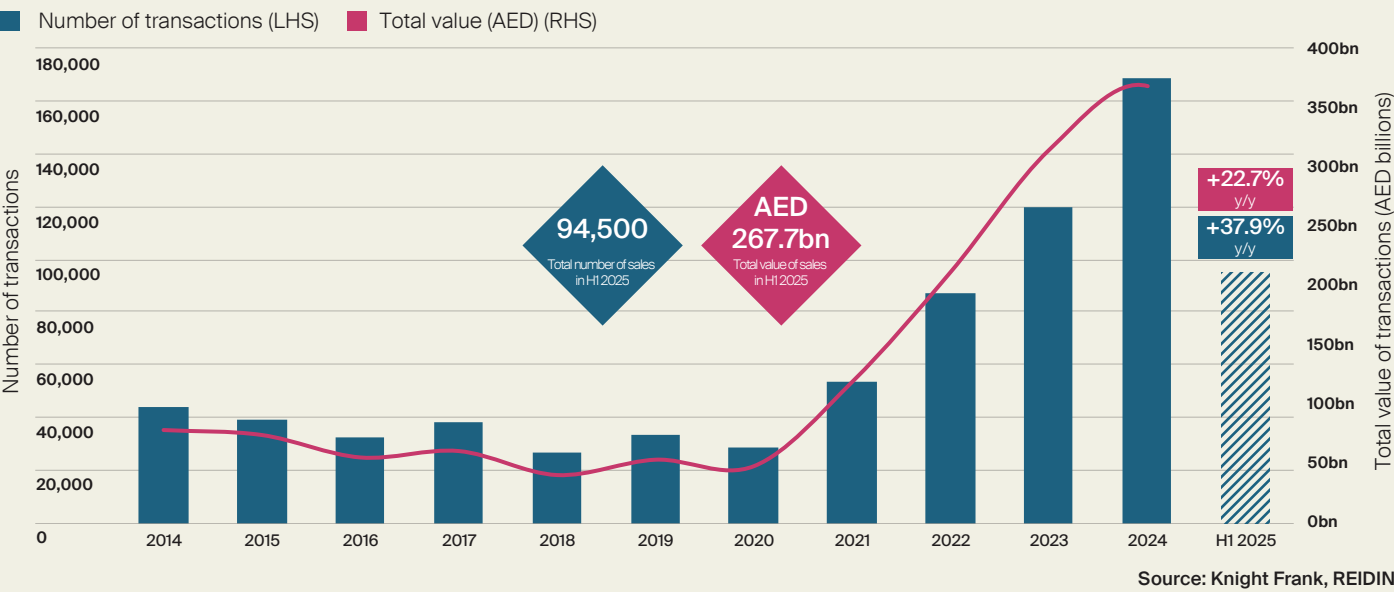
WHAT YOU NEED TO KNOW

- Dubai’s residential market recorded a historic first half of the year, driven by an exceptional Q2 performance. For the first time on record, quarterly sales volumes surpassed 50,000 transactions. As a result, H1 2025 saw a total of almost 94,500 residential transactions – up 27% compared to H1 2024, while the total sales value surged to AED 267.7bn, marking a 41% year-on-year increase.
- Citywide residential prices increased by 3.4% in Q2 2025, reaching AED 1,809 psf – now standing 21.6% above the previous market peak in 2014.
- Villas continue to outperform, with values climbing to AED 2,172 psf – a 4% quarterly gain and a remarkable 49.3% jump since 2014.
- The market continues to be dominated by off-plan sales, which accounted for almost 70% of all transactions.
- Prime residential values, which cover 10 key luxury communities, rose by 16% over the last 12 months, with average prime transacted prices standing at AED 3,850 psf.
- Dubai’s luxury segment continues to scale new heights, with sales of US\$ 10 million homes reaching a record AED 9.5bn – the highest quarterly figure ever recorded. There were 143 luxury deals in Q2 2025. Notably, for the first time since Q2 2023, apartments outpaced villas in the US\$ 10 million+ segment, with 80 apartment sales, compared to 63 villas.

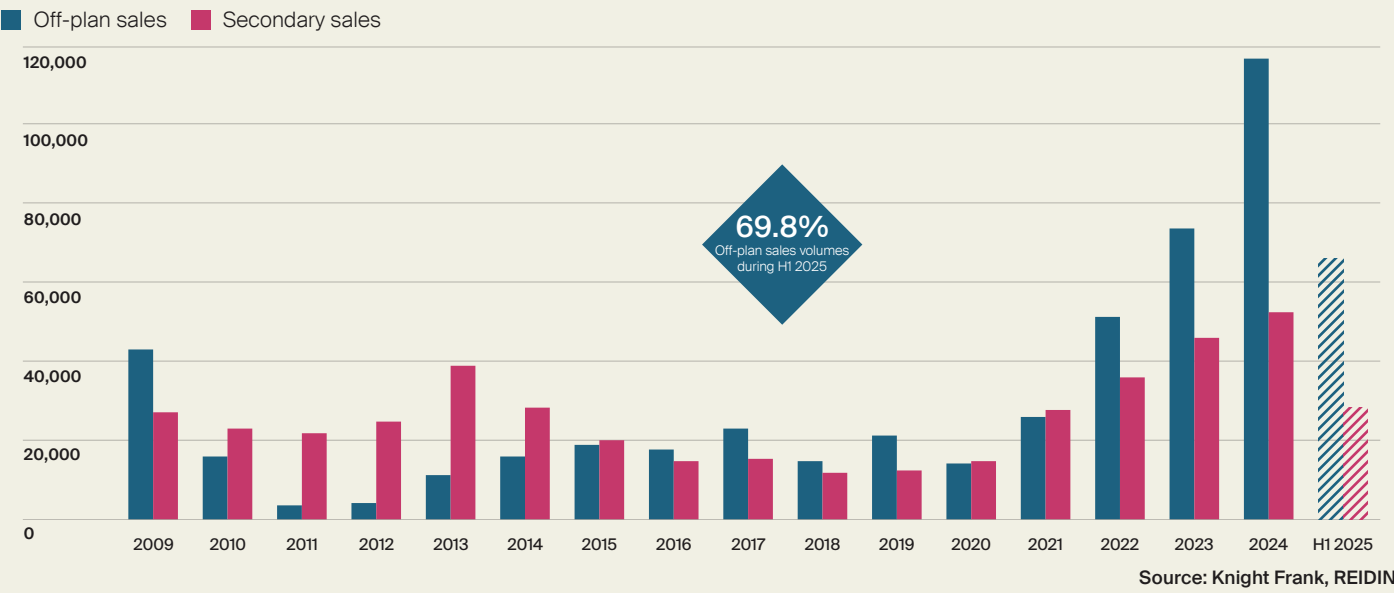
Sales price trend



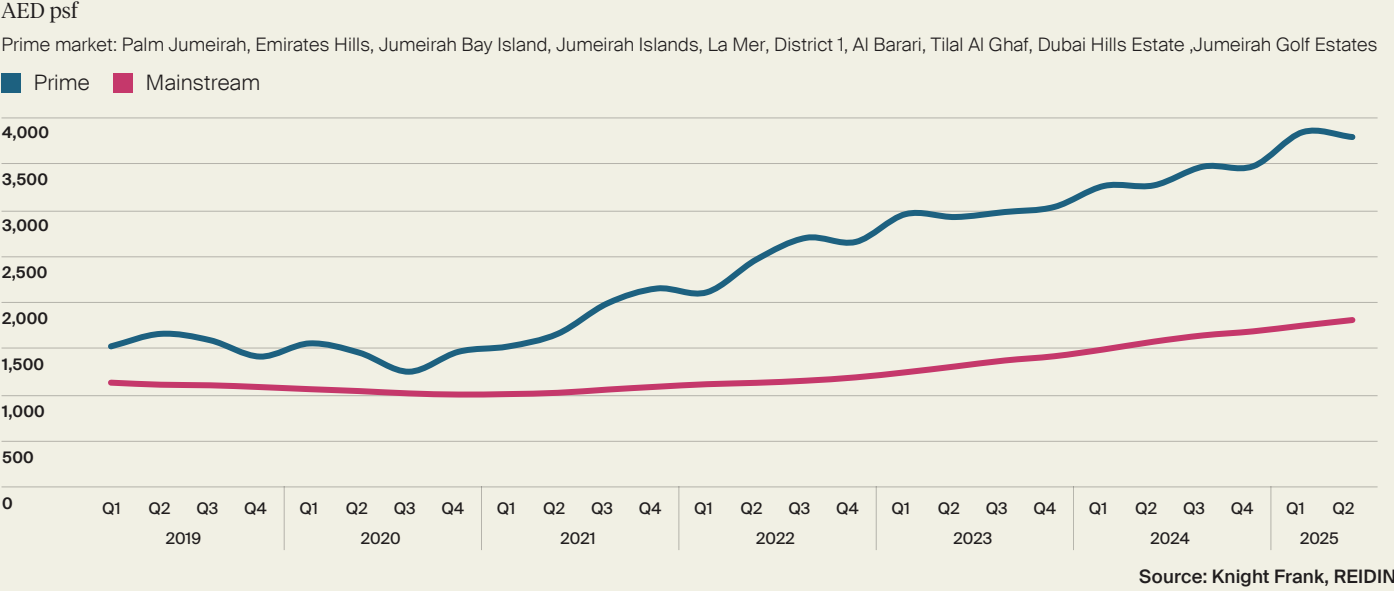
Total value and number of residential transactions in Dubai



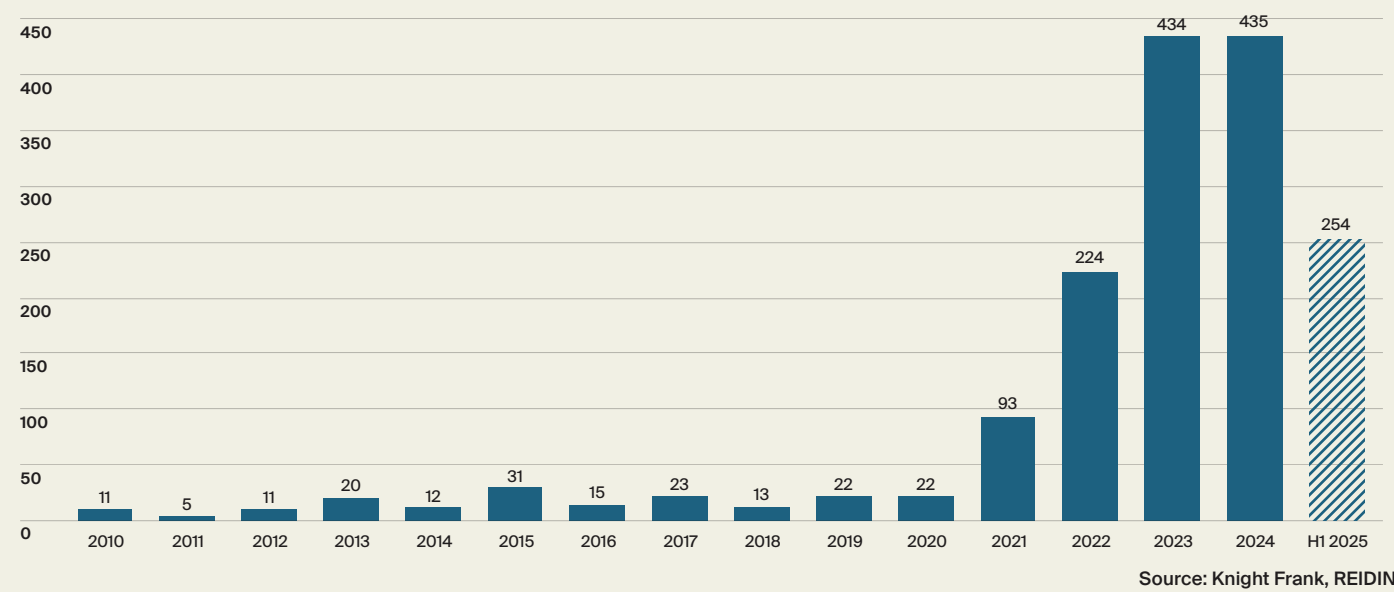
Dubai residential off-plan vs. secondary sales (number of transactions)



Performance of sales prices



Number of US\$10 million+ transactions



RESIDENTIAL VALUES IN DUBAI

Average AED psf

Al Barari <table><tr><td></td><td>Q2 2025 Average</td><td>Y/Y Change</td></tr><tr><td></td><td>1,932</td><td>9%</td></tr><tr><td></td><td>2,178</td><td>34%</td></tr></table>		Q2 2025 Average	Y/Y Change		1,932	9%		2,178	34%	Al Furjan <table><tr><td></td><td>Q2 2025 Average</td><td>Y/Y Change</td></tr><tr><td></td><td>1,322</td><td>16%</td></tr><tr><td></td><td>1,535</td><td>28%</td></tr></table>		Q2 2025 Average	Y/Y Change		1,322	16%		1,535	28%	Arabian Ranches <table><tr><td></td><td>Q2 2025 Average</td><td>Y/Y Change</td></tr><tr><td></td><td>2,116</td><td>26%</td></tr><tr><td></td><td></td><td></td></tr></table>		Q2 2025 Average	Y/Y Change		2,116	26%			
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Jumeirah Lake Towers <table><tr><td></td><td>Q2 2025 Average</td><td>Y/Y Change</td></tr><tr><td></td><td>1,574</td><td>9%</td></tr><tr><td></td><td></td><td></td></tr></table>		Q2 2025 Average	Y/Y Change		1,574	9%				Dubai Sports City <table><tr><td></td><td>Q2 2025 Averagea</td><td>Y/Y Change</td></tr><tr><td></td><td>1,085</td><td>20%</td></tr><tr><td></td><td></td><td></td></tr></table>		Q2 2025 Averagea	Y/Y Change		1,085	20%				Jumeirah Village Circle <table><tr><td></td><td>Q2 2025 Average</td><td>Y/Y Change</td></tr><tr><td></td><td>1,359</td><td>14%</td></tr><tr><td></td><td>1,123</td><td>14%</td></tr></table>		Q2 2025 Average	Y/Y Change		1,359	14%		1,123	14%
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Meydan City <table><tr><td></td><td>Q2 2025 Average</td><td>Y/Y Change</td></tr><tr><td></td><td>1,765</td><td>15%</td></tr><tr><td></td><td>1,918</td><td>16%</td></tr></table>		Q2 2025 Average	Y/Y Change		1,765	15%		1,918	16%	Palm Jumeirah <table><tr><td></td><td>Q2 2025 Average</td><td>Y/Y Change</td></tr><tr><td></td><td>3,234</td><td>17%</td></tr><tr><td></td><td>5,940</td><td>16%</td></tr></table>		Q2 2025 Average	Y/Y Change		3,234	17%		5,940	16%										
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 Apartments

 Villas

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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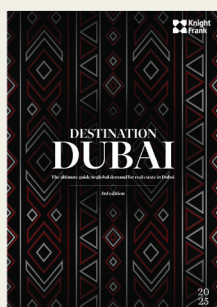
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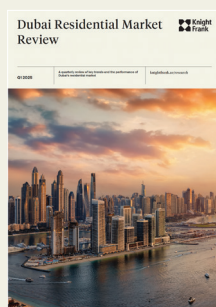
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