

Abu Dhabi Residential Market Review



Summer 2025/26

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

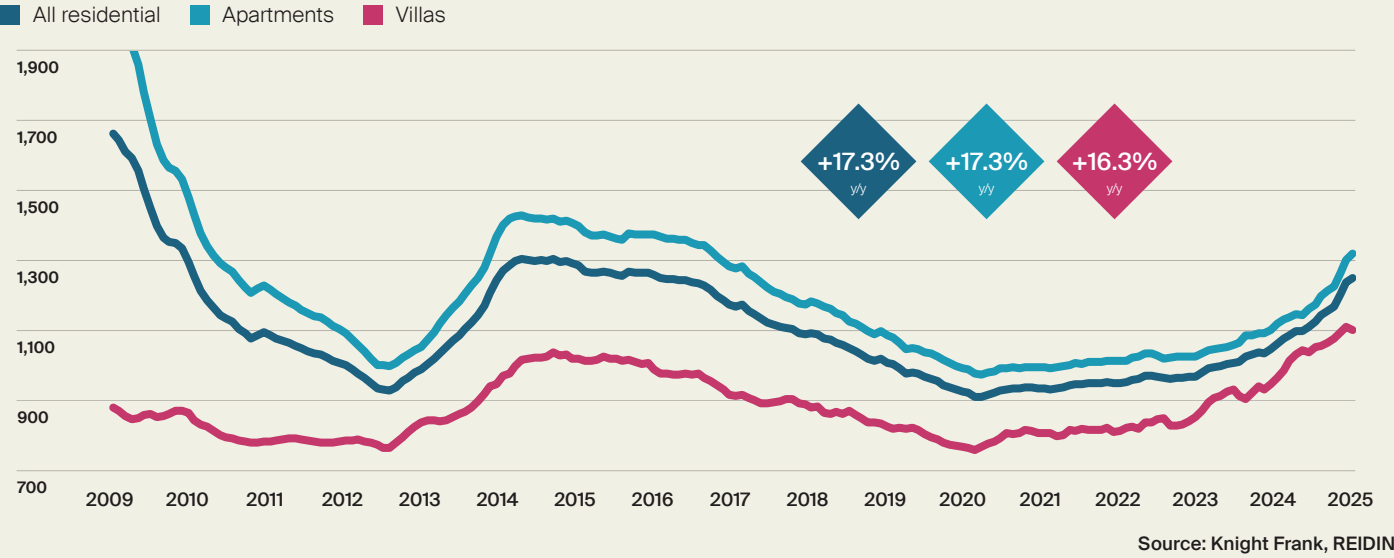
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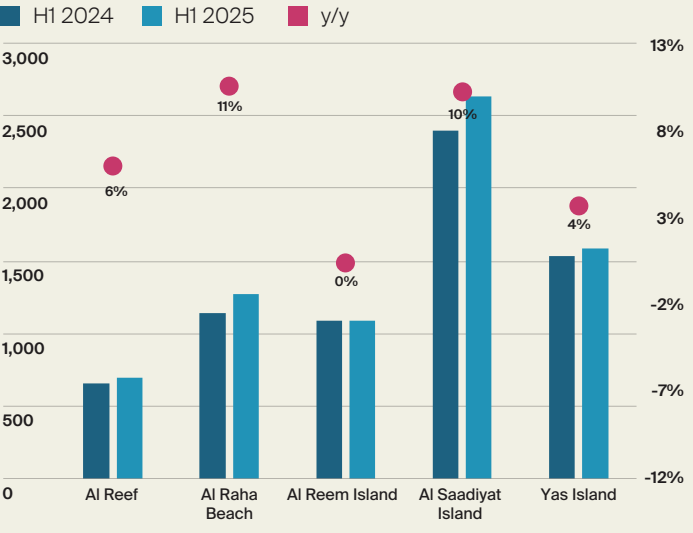
WHAT YOU NEED TO KNOW

- Abu Dhabi’s residential market continued to strengthen in Q2 2025, with average prices rising by 6.4% q/q to reach AED 1,230 psf. This brings total annual growth to 17.3% and places values 31.3% above Q1 2020 levels.
- In Q2 2025, the apartments segment was the top performer, with values increasing by 6.8% over the quarter to AED 1,296 psf. This marks a 17.3% year-on-year uplift and positions prices 28.7% above Q1 2020 levels.
- Villa prices registered a 3.4% q/q rise in Q2, reaching AED 1,103 psf. This performance is 7% above the 2014 peak and represents a 42.3% uplift from Q1 2020. Al Raha Beach led the annual apartment performance with price growth of 11% in H1 2024, followed by Al Saadiyat Island at 10%.
- In the villa submarket, Al Saadiyat Island saw the strongest price appreciation, up 28% y/y, while Yas Island followed with a 22% increase in H1 2025. Only one villa transaction was recorded in Al Reem Island during H1 2025.
- 890 residential units were delivered in H1 2025.
- We are currently tracking a further 33,074 homes that are under construction and scheduled for delivery by 2029. Apartments are expected to comprise 62% of this future supply pipeline.
- Residential transactions activity in Abu Dhabi reached AED 9 bn during H1 2025, 36% below H1 2024.
- High-end transactions (AED 10 million+) have grown significantly in both volume and value, reaching a record 25% of total transaction value in H1 2025, more than triple their 2019 share (7%), indicating rising demand in the luxury segment. In total, there were 141 homes sold for over AED 10 million during H1, matching H1 2024 and representing 41% rise on H1 2023.

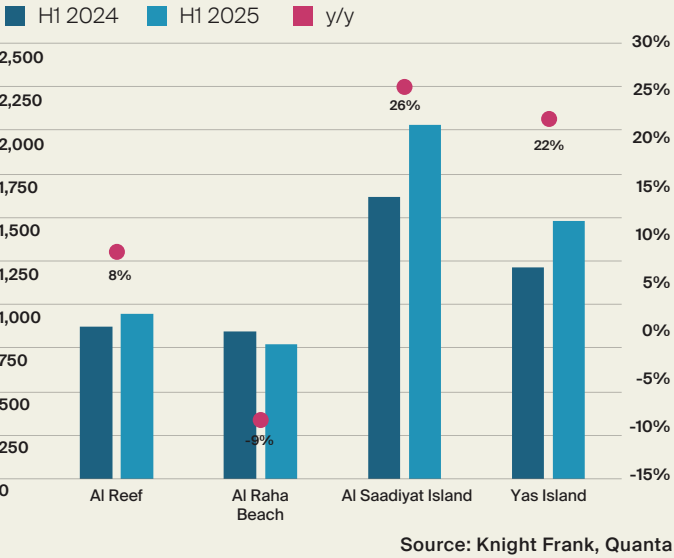
Average values of residential transactions (by property type)
AED psf



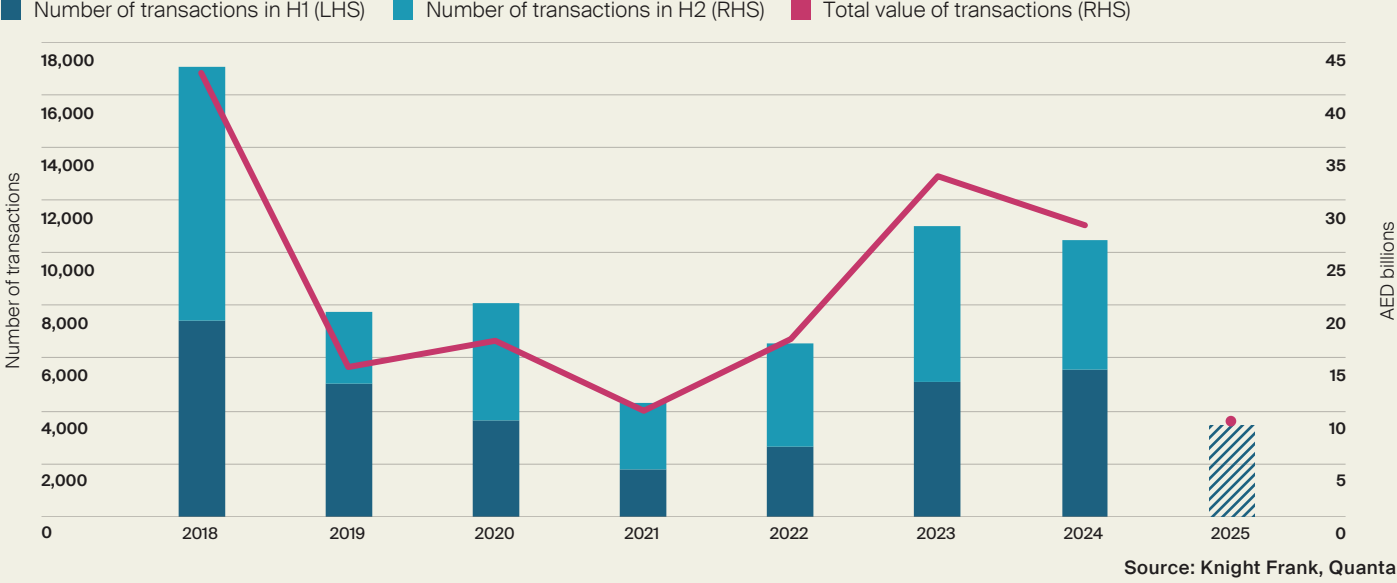
Average apartment sales prices (by submarket)
AED psf



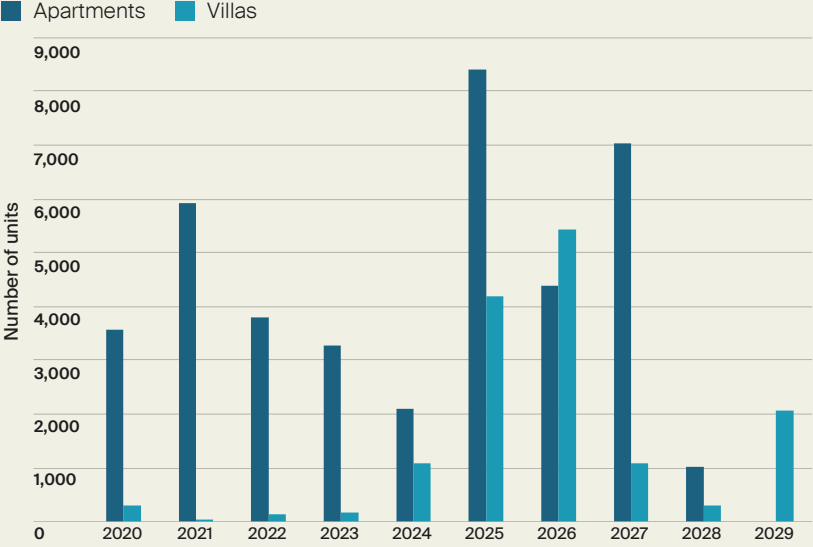
Average villa sales prices (by submarket)
AED psf



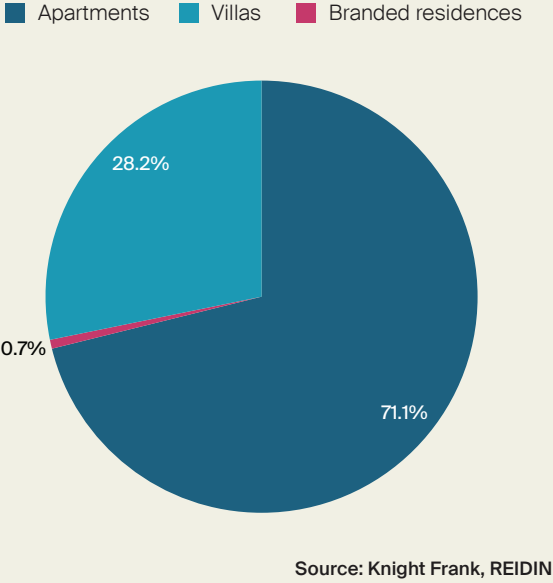
Total value and number of residential transactions in Abu Dhabi



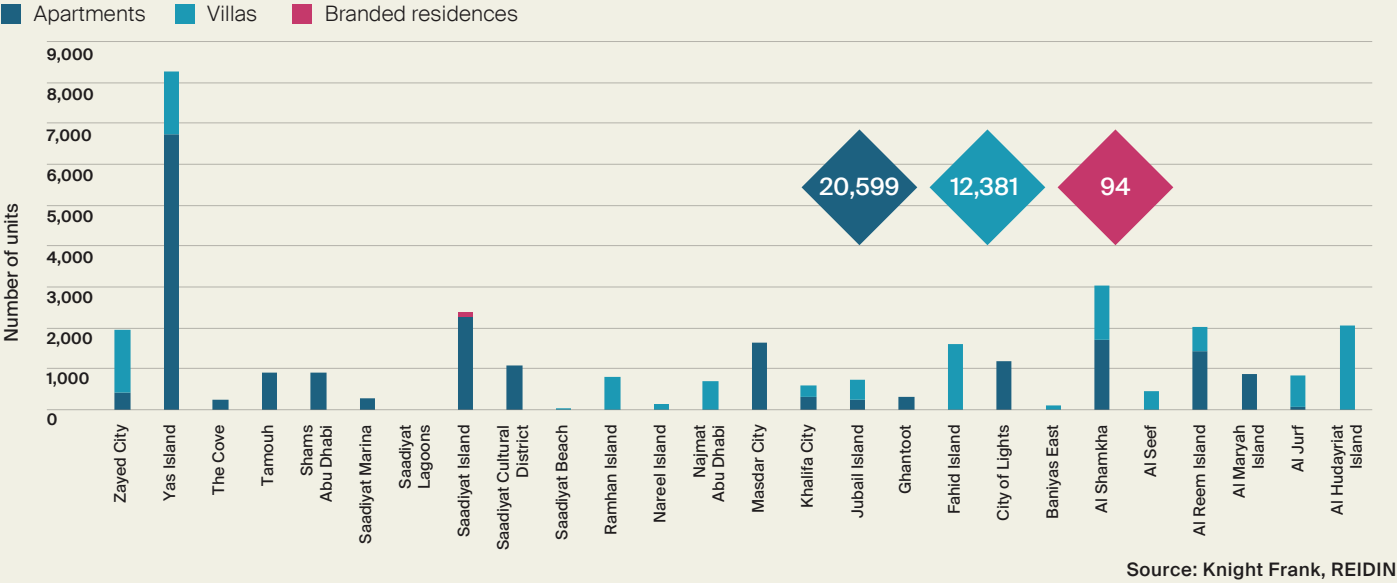
Abu Dhabi current and forecast residential supply (2020-2029)



Existing supply by unit type



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



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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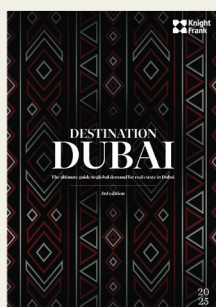
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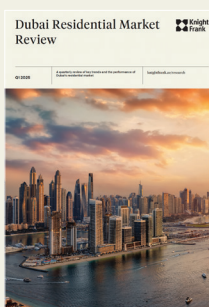
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