

ALLSOPP & ALLSOPP

Dubai Real Estate

Market Snapshot

April 2025



TOTAL DUBAI SALES TRANSACTIONS

VALUE

₹ **46.1 BN**

↑ **23% increase**
vs March 2025

↑ **77% increase**
vs April 2024

VOLUME

15,213

↑ **7% increase**
vs March 2025

↑ **43% increase**
vs April 2024

April was another strong month for Dubai's real estate market, driven by sustained demand for off-plan properties. According to the Dubai Land Department (DLD), total transaction value reached AED 46.1 billion, a 77% increase compared to April last year, and a 23% rise from the previous month, reflecting continued market strength and resilience.

Transaction volumes also surged, rising by 43% year-on-year and 6% month-on-month. This indicates that while the market is showing signs of stabilisation, there is no slowdown in momentum.

The off-plan segment remains a key driver of growth, recording a 47% increase in transaction value and a 29% rise in volume year-on-year. This reinforces Dubai's continued appeal to international investors and those seeking newly launched developments. In April, the value split between off-plan and secondary market transactions was AED 19.9 billion and AED 26.2 billion respectively showing a near-even distribution.

Off-plan deals accounted for 59% of total transaction volume during the month, while the secondary market continued to deliver strong performance. The average property price in the secondary market rose by 23% month-on-month, with total transaction value increasing by 41%. Compared to April last year, the secondary market has grown by 111% in value and 68% in volume. Currently, 57% of total transaction value comes from the secondary market, with off-plan contributing a notable 43%, maintaining a healthy and balanced market split.

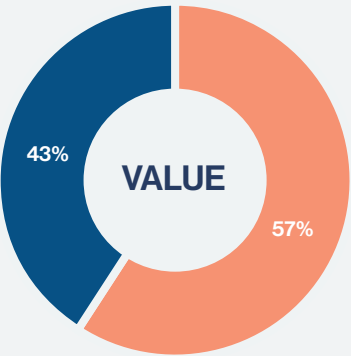
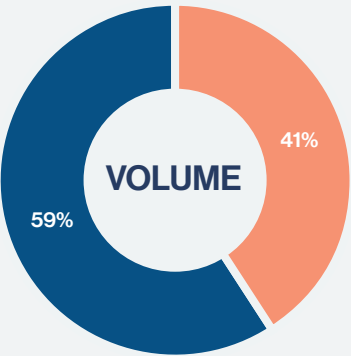
The average property price in April stood at AED 3 million, mirroring Allsopp & Allsopp data, which showed that the AED 1 to 3 million price bracket saw a 25% increase in sales compared to March 2025 and accounted for 42% of total transactions. This shift highlights how more residents are settling into Dubai's property market sooner, rather than waiting five or more years to purchase, leading to increased activity in the more affordable end of the market.

Villa and townhouse prices also saw an uptick, with the average sale price reaching AED 7.2 million. Demand continues to rise in villa and townhouse communities, although supply remains limited. With most owners only selling when relocating, resizing or upgrading, prices have naturally risen. This limited availability is fuelling increased competition in the off-plan sector, particularly for villa and townhouse developments, as investors compete for sought-after launches. Apartments continue to lead the way, making up 80% of transaction volume and 53% of the total sales transaction value.

Even if Dubai's property market were to hold steady with no further growth, those entering the market now would still be in a strong position. For anyone still on the fence about whether to take the leap into Dubai real estate, now is the time to make your move.

OFF-PLAN VS SECONDARY

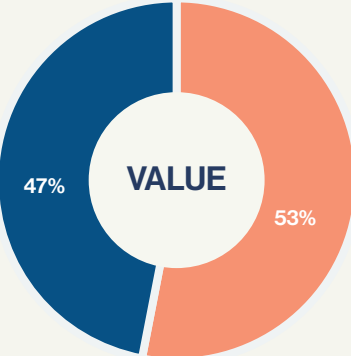
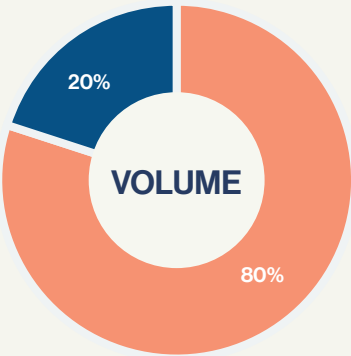
	 Off-plan	 Secondary
VOLUME	8,922	6,219
VALUE (₪)	19.9BN	26.2BN



● Off-plan ● Secondary

PROPERTY TYPE BREAKDOWN

	 Apartment	 Villa/Townhouse
VOLUME	12,190	3,023
VALUE (₪)	24.4BN	21.7BN



● Villa/Townhouse ● Apartment

NOTABLE SALES TRANSACTIONS

 **₪225,000,000**
JB-LV54
Jumeirah Bay Island

 **₪180,000,000**
The Crescent
Palm Jumeirah

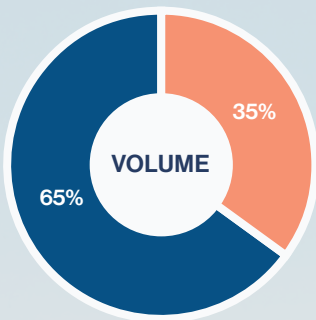
 **₪121,200,000**
The Residences
Al Barari

TOTAL COMPLETED UNITS IN APRIL 2025

1795_{units}

↓ **33% decrease**
in comparison to
April 2024 in completed units

TOTAL NEW OFF-PLAN UNITS
IN APRIL 2025



● New units launched ● Completed Units

ALLSOPP & ALLSOPP SALES OVERVIEW

Allsopp & Allsopp saw substantial growth in April, achieving a remarkable 99% year-on-year increase in sales transaction volume and an impressive 143% rise in sales value, significantly outperforming the wider market.

The average sales price for April was AED 5 million, reflecting an 8% decrease month-on-month and similarly 22% year-on-year. Despite this dip, the figure remains above the market average reported by the Dubai Land Department, highlighting continued strength in higher-value transactions.

Cash buyers continued to dominate purchasing behaviour, maintaining a consistent trend seen in both March and April 2025. In April, the split between cash and finance stood at 56% to 44% respectively, further reinforcing the growing presence of high-net-worth-individuals entering the market and securing real estate in Dubai.

The average sale price for villas and townhouses reached AED 11.2 million in April, higher than the overall market average, marking a 7% increase compared to March 2025. This uptick was driven by several high-value transactions, including a villa sale in Al Barari for AED 107,000,000, the highest transaction of the month followed by a villa on Palm Jebel Ali for AED 39,578,800 and a property in Arabian Ranches for AED 36,700,000. These notable transactions reiterate the continued success Allsopp & Allsopp commands across Dubai.

Year-on-year, Allsopp & Allsopp also recorded a significant increase in villa and townhouse performance, with a 138% rise in transaction value and 100% in volume. These results further underscore the ongoing demand for quality family homes in Dubai's most sought-after communities.

Demand for apartments remains strong, driven by the ongoing undersupply of villas and a growing number of expatriates looking to enter the property market sooner. As a result, apartment sales continue to gain popularity. In April, total sales transaction volume increased by 40%, while transaction value rose by 27%. On a year-on-year basis, the figures are particularly noteworthy, with a 197% rise in value and a 113% increase in volume in apartment sales.

The AED 1 to 3 million price bracket proved to be the most active in April, accounting for 43% of all sales transactions. Meanwhile, the AED 3 to 5 million segment recorded a significant 67% increase, aligning closely with the average sale price for Allsopp & Allsopp at AED 5 million.

Notably, in April, Allsopp & Allsopp registered a 185% surge in new client registrations, reinforcing the growing confidence in Dubai's property market. This continued momentum highlights the increasing number of investors and residents recognising the long-term benefits of building a property portfolio in the region.



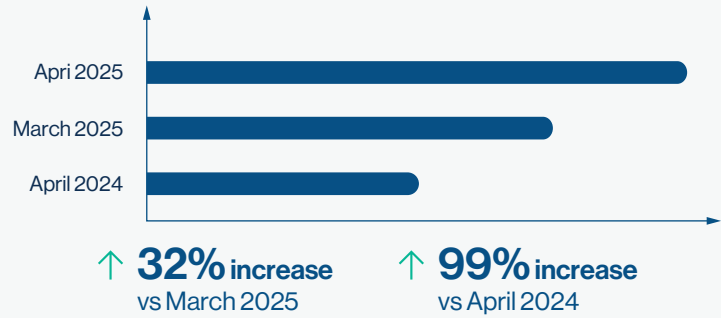
AVERAGE SALES PRICE

₹5,022,676

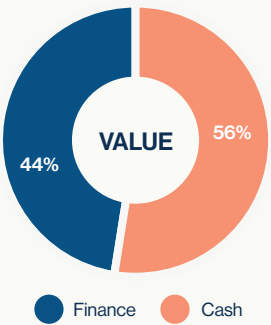
↓ 8%% increase
vs March 2025

↑ 22% increase
vs April 2024

SALES TRANSACTION VOLUME



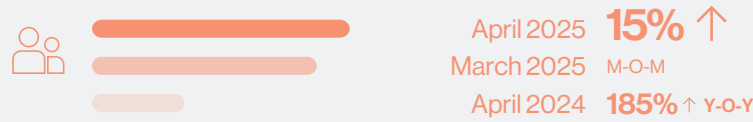
BUYERS' FINANCE SUMMARY



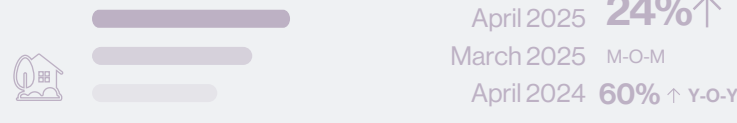
TOTAL VIEWINGS



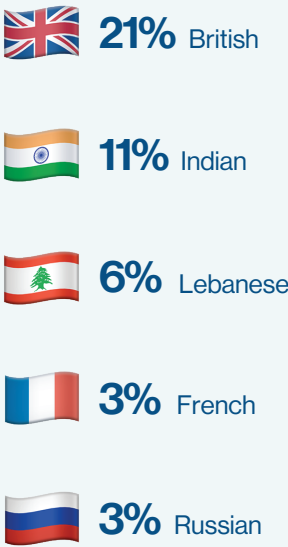
CLIENT REGISTRATIONS



NEW PROPERTY LISTINGS



TOP 5 BUYER NATIONALITIES



AVERAGE VILLA/TOWNHOUSE SALES PRICE

₹11,261,640

↑ **7% increase**
vs March 2025

↑ **19% increase**
vs April 2024

VILLA/TOWNHOUSE SALES TRANSACTION VOLUME

↑ **17%**
increase vs March 2025

April 2025

March 2025

↑ **100%**
increase vs April 2024

April 2025

April 2024

NOTABLE VILLA SALES TRANSACTIONS



₹107,000,000

The Collection
Al Barari



₹39,578,800

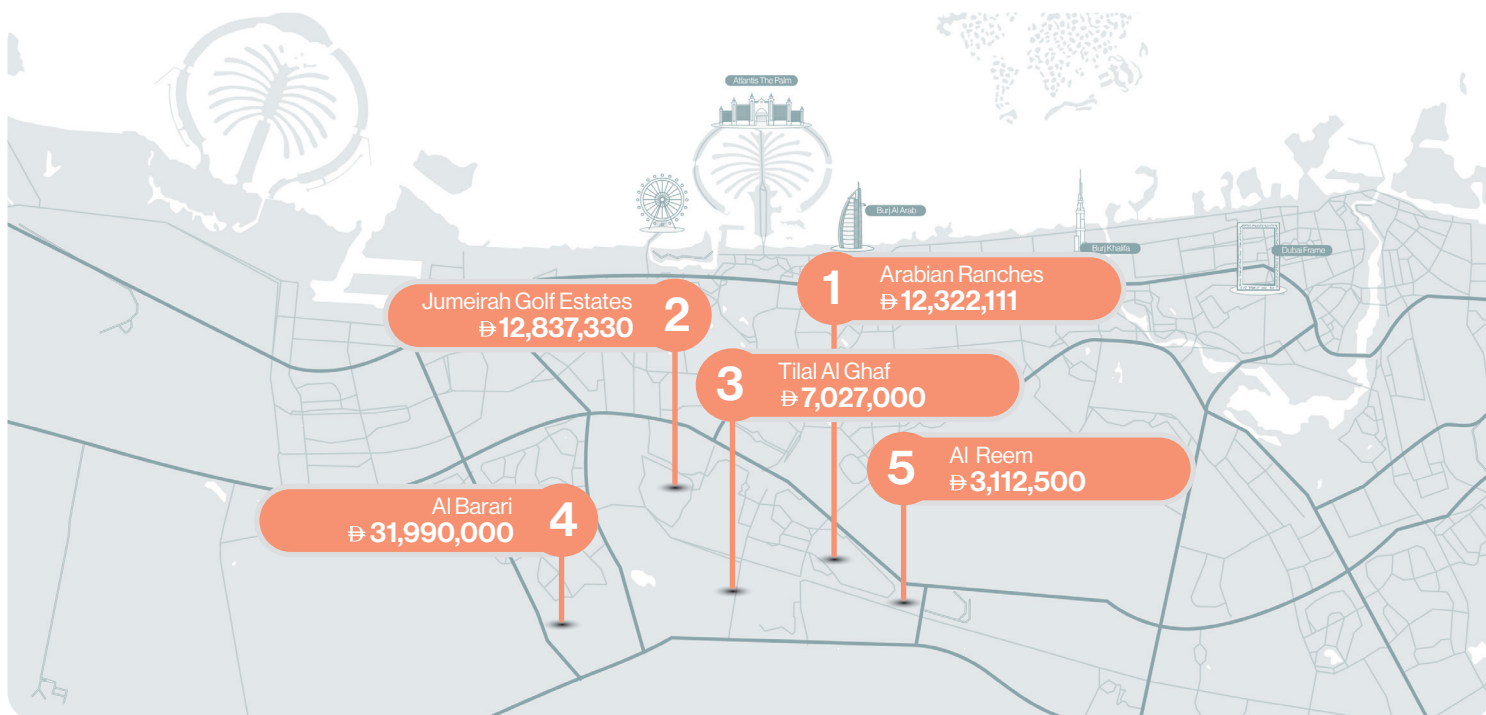
Frond N
Palm Jebel Ali



₹36,700,000

Polo Homes
Arabian Ranches

TOP TRANSACTING VILLA/TOWNHOUSE AREAS & AVERAGE PRICES



AVERAGE APARTMENT SALES PRICE

₹ 2,397,227

↓ 9% decrease
vs March 2025

↑ 39% increase
vs April 2024

APARTMENT SALES TRANSACTION VOLUME

April 2025

↑ 40%
increase vs March 2025

April 2025

March 2025

↑ 113%
increase vs April 2024

April 2025

April 2024

NOTABLE APARTMENT SALES TRANSACTIONS



₹13,072,800
Belgravia Gardens
Dubai Land

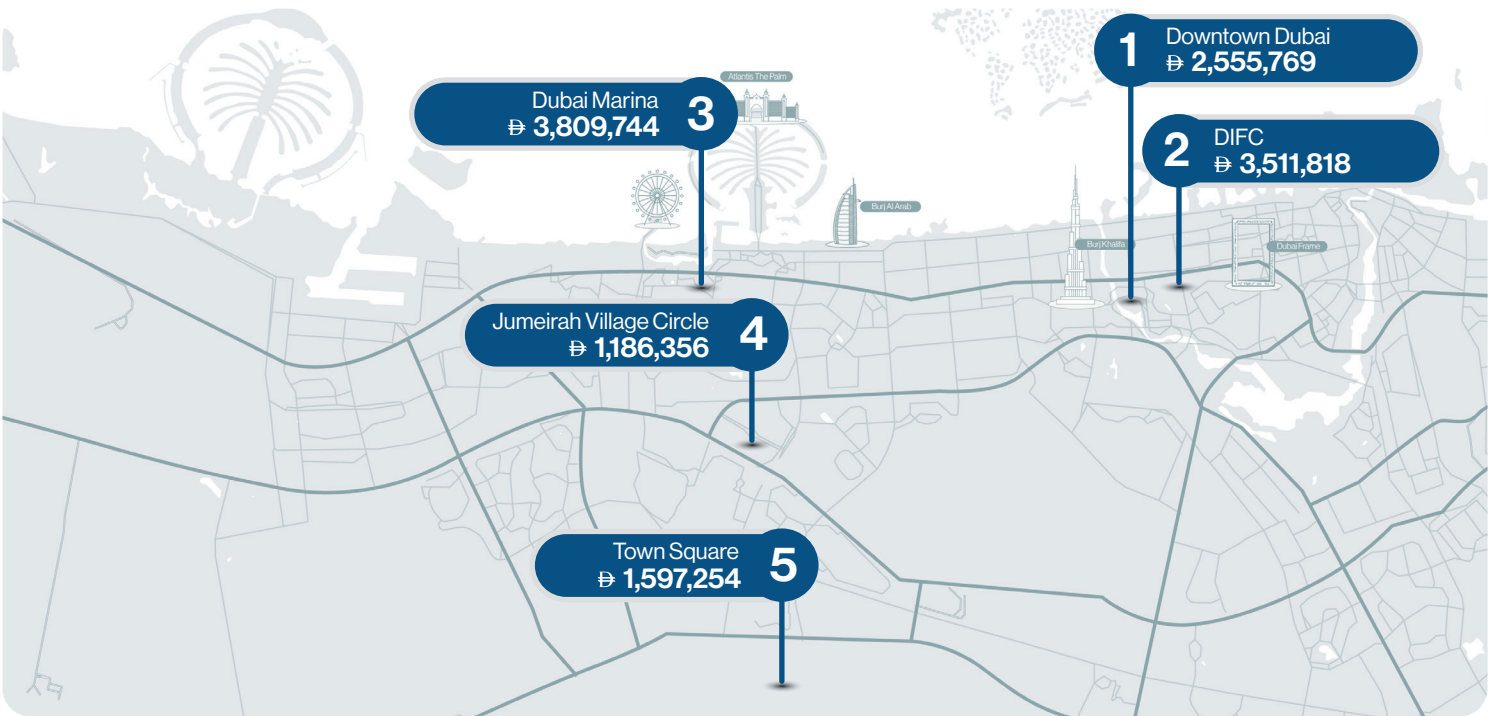


₹7,500,000
Al Murjan Tower
Dubai Marina



₹7,500,000
Marina Arcade Tower
Dubai Marina

TOP TRANSACTING APARTMENT AREAS & AVERAGE PRICES



ALLSOPP & ALLSOPP LETTINGS OVERVIEW

The rental market in Dubai continues to show signs of stabilisation, as more residents make the shift towards homeownership.

There may be some good news for tenants, as Allsopp & Allsopp recorded a 6% decline in the average rental price in April compared to March 2025, indicating the market may be readjusting after a period of considerable growth. Despite this, rental transaction volume rose slightly by 13% compared to the previous month, signalling that the rental market remains active and functional.

Reflecting on broader market trends, Allsopp & Allsopp also saw a dip in rental performance, with both volume and value decreasing by 6% year-on-year. However, this is less than the wider Dubai market, which experienced a 21% decline in value and a 28% drop in volume.

Interestingly, Australian featured among the top five nationalities renting in Dubai, accounting for 3% of rental transactions, an insight that highlights Dubai's international appeal. The last time Australians featured in the top renter demographics was in 2022, suggesting a potential rise in interest and relocation from Australian nationals to Dubai, further reinforcing the city's global appeal.

The average rental price for villas and townhouses increased by 7% month-on-month, however, compared to the same period last year, prices have dropped by 23%, suggesting the segment is stabilising after the notable price surges seen in recent years.

The top three rental communities for villas and townhouses in April 2025 were Al Reem, taking the lead, followed by Arabian Ranches and DAMAC Hills. In contrast, tenants seeking apartments are continuing to prioritise central locations and waterfront views such as Dubai Marina, followed by Business Bay and Downtown Dubai.

The average apartment rental price decreased by 10% in April, but rental volume rose by 16%. This suggests that while prices may be softening, rental activity remains strong and demand continues to exist at more accessible price points.

Flexible payment terms are also making a return since the pandemic, where one-cheque payments dominated the market making it more difficult for people to be in the rental market. In April 2025, 36% of tenants paid rent using four or more cheques, followed by 27% opting for one cheque, and 25% choosing two. This increased flexibility is giving tenants more control to be able to align rental terms with their individual financial needs, supporting those not yet ready to transition into homeownership.

Despite the shift towards buying, rental demand remains strong with Allsopp & Allsopp reporting a 241% year-on-year increase in client registrations, underlining the fact that even in a stabilising market, rental remains a key part of Dubai's property landscape.

AVERAGE LETTING PRICE

₹ 203,999

↓ **6% decrease**
vs March 2025

↓ **0.4% decrease**
vs April 2024

LETTINGS TRANSACTION VOLUME



↑ **13% increase**
vs March 2025

↓ **6% decrease**
vs April 2024

TENANT FINANCE SUMMARY



Cheques	April 2025
1	27%
2	25%
3	12%
4+	36%

TOTAL VIEWINGS



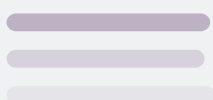
April 2025 **3% ↑**
March 2025 M-O-M
April 2024 **2% ↓** Y-O-Y

CLIENT REGISTRATIONS



April 2025 **11% ↑**
March 2025 M-O-M
April 2024 **241% ↑** Y-O-Y

NEW PROPERTY LISTINGS



April 2025 **5% ↑**
March 2025 M-O-M
April 2024 **39% ↑** Y-O-Y

TOP 5 TENANT NATIONALITIES



24% British



12% Indian



4% French



3% Australia



2% Canadian

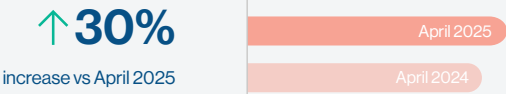
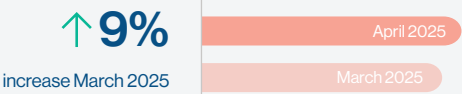
AVERAGE VILLA/TOWNHOUSE LETTING PRICE

₹ 342,886

↑ 7% increase
vs March 2025

↑ 23% decrease
vs April 2024

VILLA/TOWNHOUSE LETTING TRANSACTION VOLUME



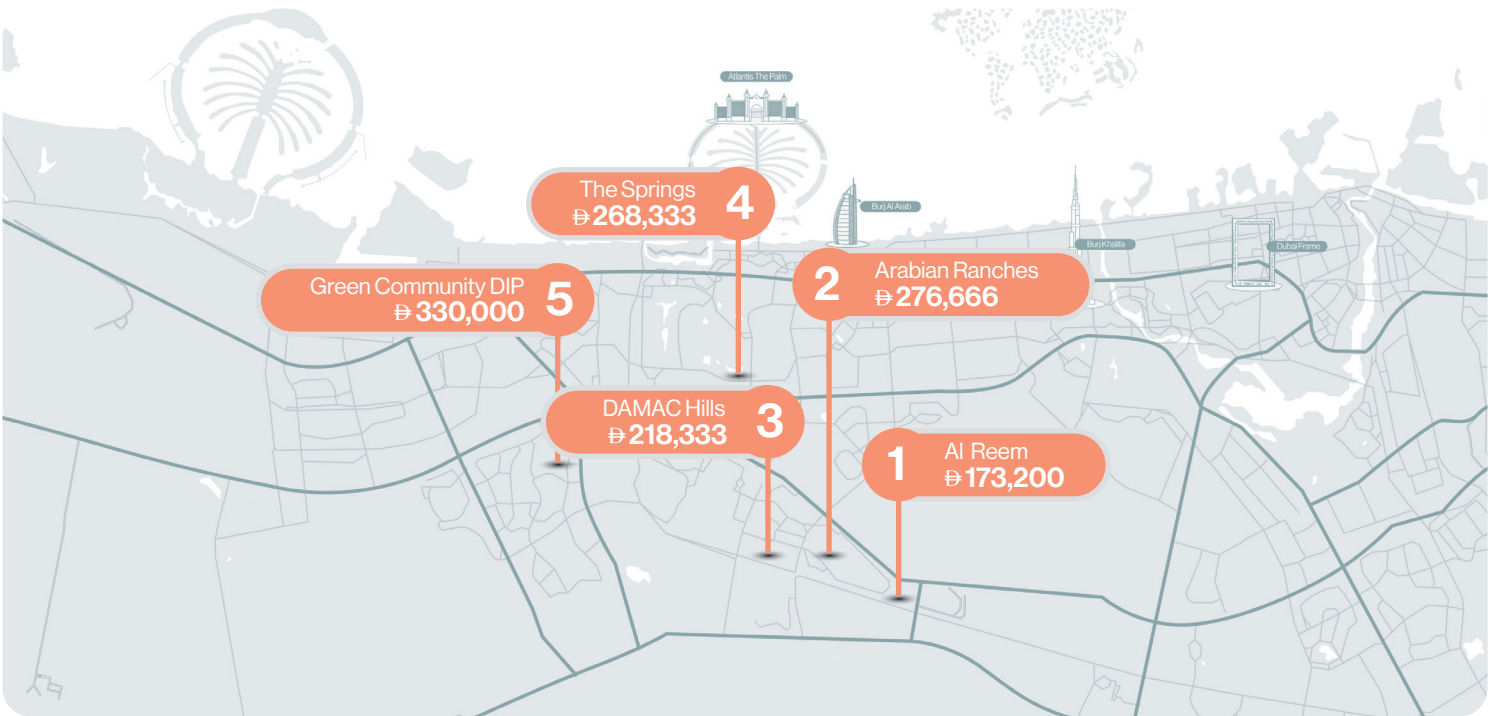
NOTABLE VILLA LETTING TRANSACTIONS

₹1,400,000
The Mansions
Jumeirah Islands

₹950,000
Sur La Mer
Jumeirah

₹700,000
Al Qouz 4
Al Quoz

TOP TRANSACTING VILLA/TOWNHOUSE AREAS & AVERAGE RENT



PROPERTY LETTINGS & DEMAND

AVERAGE APARTMENT LETTING PRICE

₹ 144,892

↓ 10% decrease
vs March 2025

↑ 3% increase
vs April 2024

APARTMENT LETTING TRANSACTION VOLUME

↑ 16%
increase vs March 2025

April 2025
March 2025

↓ 13%
decrease vs April 2024

April 2025
April 2024

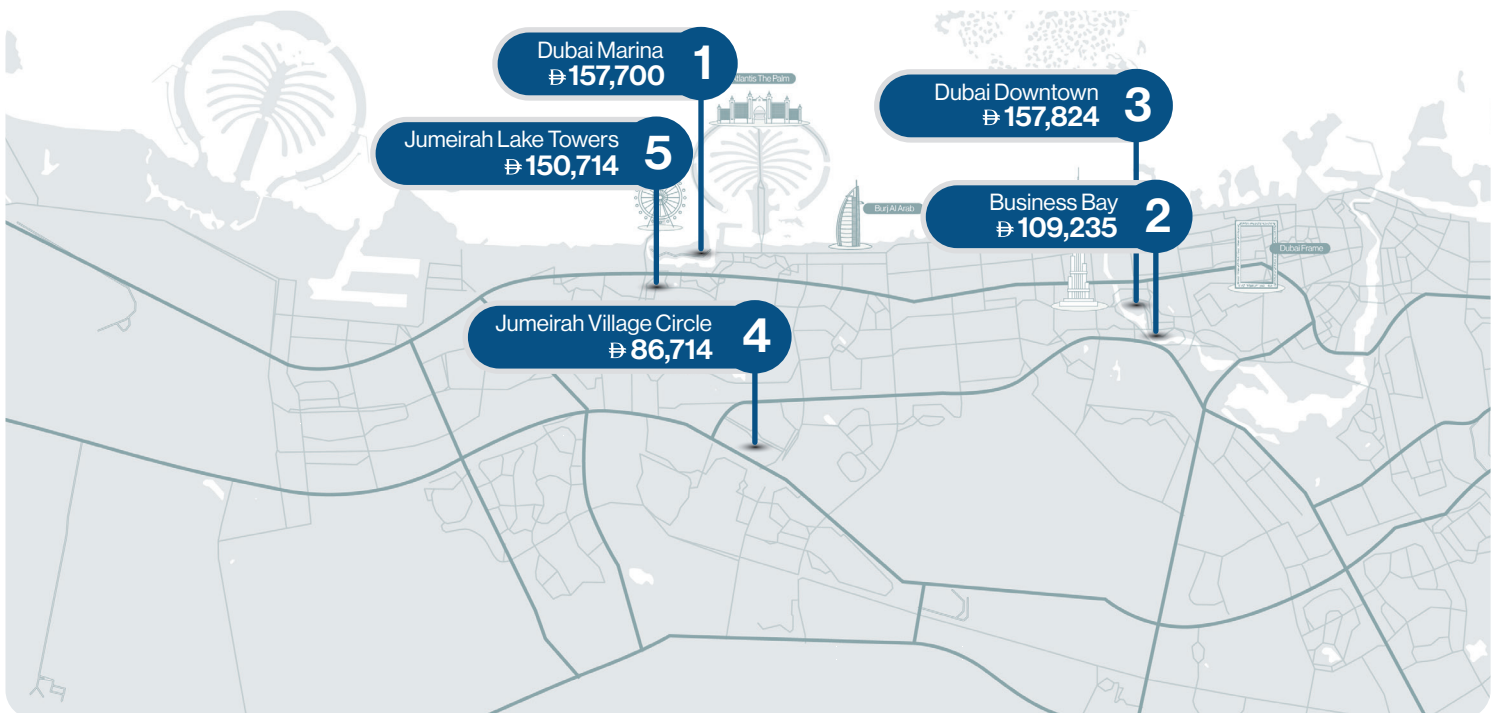
NOTABLE APARTMENT LETTING TRANSACTIONS

₹ 590,000
Harmony 3
Tilal Al Ghaf

₹ 450,000
Marina Residence
Palm Jumeirah

₹ 400,000
Bay Central 3
Dubai Marina

TOP TRANSACTING APARTMENT AREAS & AVERAGE RENT



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