

ALLSOPP & ALLSOPP

Dubai Real Estate

Market Snapshot

AUGUST 2025



TOTAL DUBAI SALES TRANSACTIONS

VALUE

↓ **21% decrease**
vs July 2025
↑ **6% increase**
vs August 2024

₹ **40.5 BN**

VOLUME

↓ **10% decrease**
vs July 2025
↑ **14% increase**
vs August 2024

17,111
UNITS

Dubai's real estate market once again showcased its remarkable resilience in August, with apartments driving strong activity across both sales and rentals. Despite the perceived slower summer months, confidence in Dubai real estate remains strong, reflecting the city's continued growth and appeal to investors, residents, and business owners.

The Dubai Land Department (DLD) reported a total sales value of AED 40.45 billion for August. While this was a 22% decrease compared to July, the adjustment was anticipated with the warmer weather and seasonal travel. Importantly, sales still posted a 6% year-on-year increase, reinforcing the upward trajectory of Dubai's wider economic market. This is further underpinned by the government's announcement that the emirate's population has now reached four million, a rise of 60% over the last decade cementing demand across the city.

Apartments dominated the market in August, accounting for 89% of sales transactions by volume and 71% by value, overtaking villas and townhouses, which had claimed a larger market share in July. Compared to August 2024, DLD data recorded a 26% increase in apartment sales value, while Allsopp & Allsopp reported an even stronger 31% surge, highlighting a robust buyer appetite. These purchases are largely driven by new residents and savvy investors targeting rental and holiday home opportunities. Price trends further reinforced this momentum, with the DLD reporting the average apartment price at AED 1.9 million.



Off-plan properties continued to lead activity, making up 73% of transactions by volume and 61% by value which was slightly higher than July's share, demonstrating sustained confidence in Dubai's development pipeline. The contrast between new launches and completions also underscores this shift with 6,175 units launched in August, representing 81% of total activity, compared to just 1,415 completed units. This highlights the depth of buyer demand for off-plan properties, with investors drawn to flexible payment plans, anticipated capital appreciation, and the opportunity to secure properties in Dubai's rapidly expanding communities.

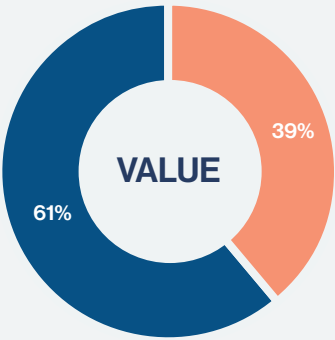
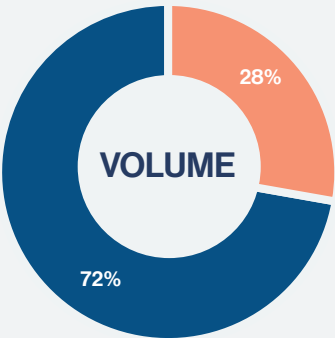
Meanwhile, villas and townhouses recorded an average sales price of AED 5.9 million, reflecting a 22% year-on-year increase. Despite this growth in value, August saw a predictable slowdown in transaction volume and total value, in line with seasonal market patterns. The most active communities for sales transactions in August included DAMAC Riverside, Business Bay, Jumeirah Village Circle (JVC), and Dubai Science Park. This distribution highlights healthy demand across both emerging developments and more established districts.

On the rental side, new contracts rose by 12% in volume and 13% in value compared to July. Apartments in particular recorded a 3% month-on-month increase in rental values. DLD named Deira, Bur Dubai, JVC, and Al Nahda as the top four rental areas for the month. With JVC appearing as a leader for both sales and rentals, the community continues to strengthen its position as one of Dubai's most in-demand destinations for residents and investors alike.

Overall, August reaffirmed Dubai's position as one of the world's most dynamic and resilient real estate markets, underpinned by strong investor confidence, a diverse range of opportunities, and a long-term trajectory of growth.



OFF-PLAN VS SECONDARY

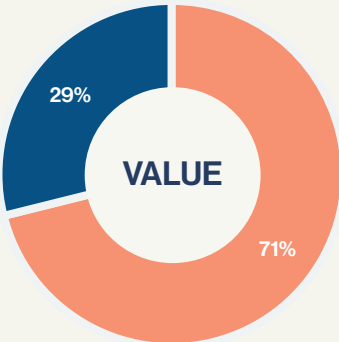
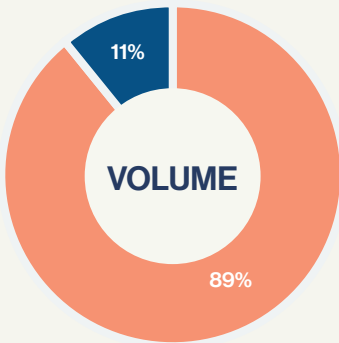
	 Off-plan	 Secondary
VOLUME	12,375	4,736
VALUE (₹)	24BN	15BN



● Off-plan ● Secondary

PROPERTY TYPE BREAKDOWN

	 Villa/Townhouse	 Apartment
VOLUME	1,957	15,154
VALUE (₹)	11BN	28BN



● Villa/Townhouse ● Apartment

NOTABLE VILLA/TOWNHOUSE SALES TRANSACTIONS



₹260,000,000
Emirates Hills
Emirates Living



₹161,000,000
Fronde
Palm Jumeirah



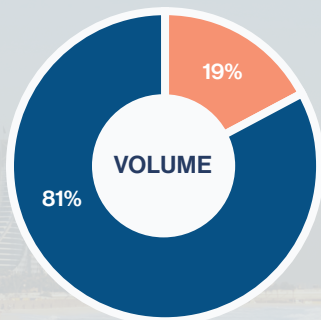
₹100,000,000
Emirates Hills
Emirates Living

TOTAL COMPLETED UNITS IN AUGUST 2025

1,415_{units}

↓ **67% decrease**
in comparison to completed units in
August 2024

TOTAL NEW OFF-PLAN UNITS
IN AUGUST 2025



● New units launched ● Completed units

ALLSOPP & ALLSOPP SALES OVERVIEW

Allsopp & Allsopp recorded a 7% increase in the average sales transaction price, reaching AED 4.2 million, further cementing confidence in Dubai's property market. This growth, combined with rising interest from international buyers from South Korea, South Africa, Australia, and Canada, reinforces Dubai's status as a secure and attractive global investment hub.

Buyer finance data highlights this confidence, with 56% of buyers opting for finance and 44% purchasing with cash. This reflects the continued influx of high-net-worth individuals entering Dubai's market while showcasing the diversity of investor profiles. Notably, the cash to finance split also marked a shift from July, when transactions stood at 36% cash and 64% finance.

Apartments continued to perform strongly, recording an average price of AED 2.6 million which is a 26% increase year-on-year. Activity was not limited to the premium segment, however, with transactions for apartments priced below AED 1 million rising by 25% month-on-month, this demonstrates the market's depth, attracting both luxury buyers and those seeking accessible entry points.

Villas and townhouses experienced a quieter month, with transaction volumes down 14% and total value dipping 25% month-on-month. Despite this, demand for high-quality properties remains evident, with standout sales including a villa in Jumeirah Golf Estates' Wildflower community for AED 35.5 million, a Redwood Avenue property at AED 30 million, and a home in Flame Tree Ridge for AED 22 million. These landmark transactions underscore the appetite for premium villas in Dubai's most exclusive communities.

The market also reflected strong activity across different price brackets. Properties under AED 1 million saw a 25% month-on-month rise in transactions, highlighting the growing appeal of accessible investment opportunities. At the other end of the spectrum, homes priced above AED 10 million surged by 71% year-on-year, underlining Dubai's ability to attract high-net-worth buyers. This balance of entry-level and luxury demand showcases not only the diversity of wealth entering the market but also the broad international mix of investors.

The rental market mirrored sales momentum, as Allsopp & Allsopp reported a 43% increase in total apartment rental value and a 48% rise in rental transactions month-on-month. Demand was strongest in Downtown Dubai, Dubai Marina, Business Bay, Town Square, and JLT, with leasing registrations up 34%. Encouragingly, nearly half of landlords (49%) are now accepting four or more cheques, reflecting growing flexibility and the continued evolution of Dubai as a tenant-friendly market.

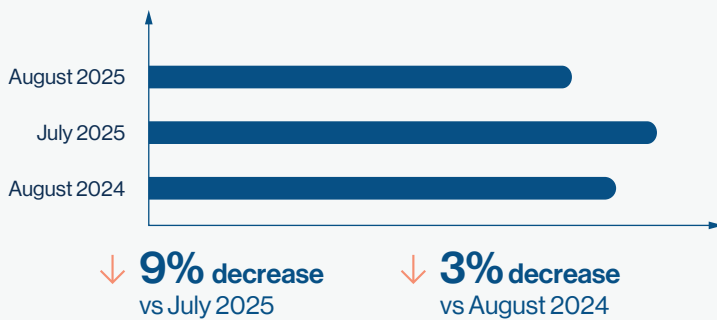
Overall, Dubai's property market continues to demonstrate resilience and depth, with demand spanning entry-level apartments to ultra-luxury villas. The combination of rising international interest, diverse buyer profiles, and a robust rental market reinforces Dubai's position as one of the world's most diverse and secure real estate markets.

AVERAGE SALES PRICE

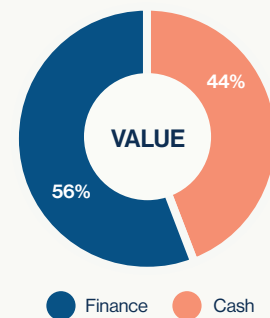
₪4,296,022

↓ 17% decrease
vs July 2025↑ 6% increase
vs August 2025

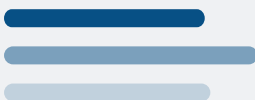
SALES TRANSACTION VOLUME



BUYERS' FINANCE SUMMARY

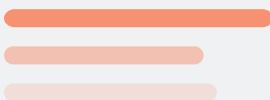


TOTAL VIEWINGS



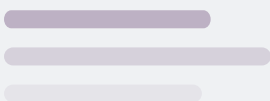
August 2025 17% ↓
July 2025 M-O-M
August 2024 1% ↓ Y-O-Y

CLIENT REGISTRATIONS



August 2025 17% ↑
July 2025 M-O-M
August 2024 15% ↑ Y-O-Y

NEW PROPERTY LISTINGS



August 2025 11% ↓
July 2025 M-O-M
August 2024 2% ↑ Y-O-Y

TOP 5 BUYER NATIONALITIES



23% British



12% Indian



3% Canadian



3% Australian



3% South African

AVERAGE VILLA/TOWNHOUSE SALES PRICE

₹7,672,142

↓ **13% decrease**
vs July 2025

↓ **1% decrease**
vs August 2024

VILLA/TOWNHOUSE SALES TRANSACTION VOLUME

↓ **14%**
decrease vs July 2025

August 2025

July 2025

↓ **14%**
decrease vs August 2024

August 2025

August 2024

NOTABLE VILLA SALES TRANSACTIONS



₹35,500,000

Wildflower
Jumeirah Golf Estates



₹30,000,000

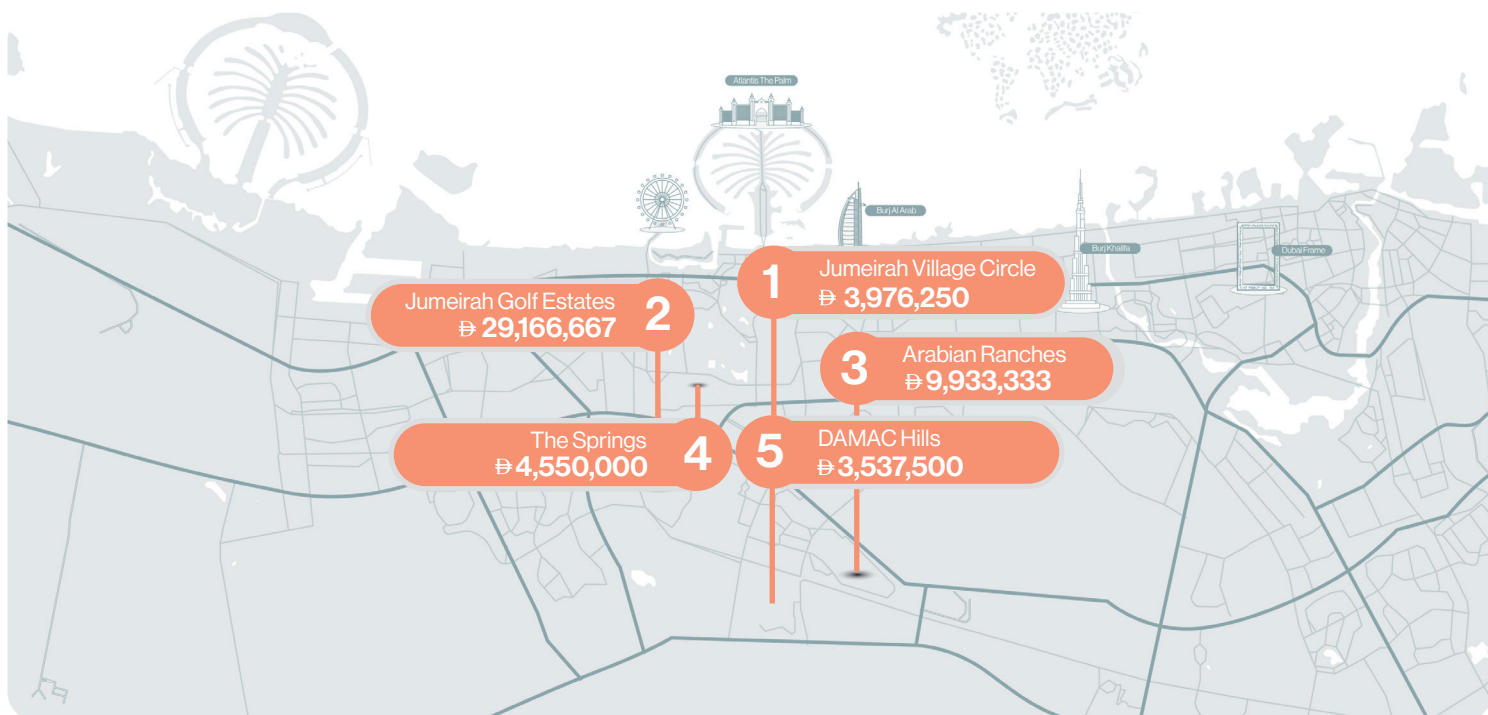
Redwood Avenue
Jumeirah Golf Estates



₹22,000,000

Flame Tree Ridge
Jumeirah Golf Estates

TOP TRANSACTING VILLA/TOWNHOUSE AREAS & AVERAGE PRICES



AVERAGE APARTMENT SALES PRICE

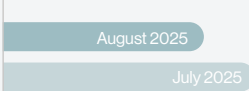
₹ 2,599,198

↑ 2% increase
vs July 2025

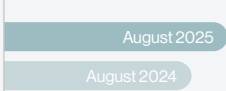
↑ 26% increase
vs August 2024

APARTMENT SALES TRANSACTION VOLUME

↓ 7%
decrease vs July 2025



↑ 4%
increase vs August 2024



NOTABLE APARTMENT SALES TRANSACTIONS



₹14,400,000
The Acres
Dubai Land

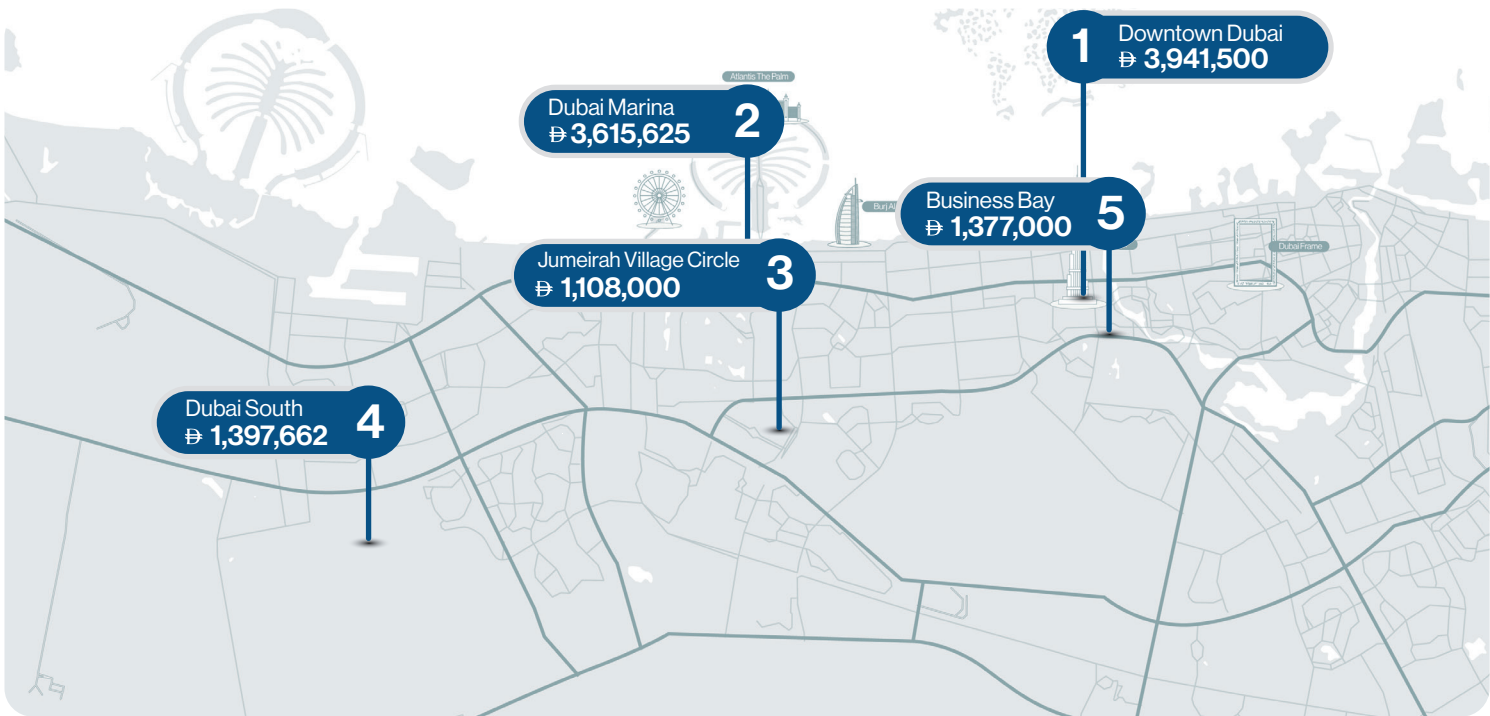


₹11,800,000
Sadaf
Jumeirah Beach Residence



₹10,000,000
Rehan - Old Town
Downtown Dubai

TOP TRANSACTING APARTMENT AREAS & AVERAGE PRICES



ALLSOPP & ALLSOPP LETTINGS OVERVIEW

The Allsopp & Allsopp lettings team enjoyed a hugely successful summer, recording some of the highest transaction volumes seen this year.

Rental transactions surged in August, with a 27% increase in volume and a 28% rise in value month-on-month, outperforming even the traditionally busy July period. Villas and townhouses accounted for 75% of this activity, underlining how family-friendly communities remain a top priority for many tenants in Dubai.

Average villa and townhouse rental prices rose by 31% month-on-month, while the total value of transactions climbed by 28%. This sharp increase highlights the ongoing imbalance between supply and demand in this market. Many families relocating to Dubai continue to seek larger homes with more space, meaning that despite higher prices, competition for well-located villas remains strong. The Springs (average: AED 239,166), Jumeirah Golf Estates (average: AED 732,000), and Mudon (average: AED 288,000) were the top three villa/townhouse rental communities, reflecting demand across both established and luxury neighbourhoods.

Apartments, however, stole the spotlight in August for both DLD and Allsopp & Allsopp. The lettings team recorded a 43% increase in rental transaction value and a 48% rise in transaction volume month-on-month. This surge reflects the mobility of residents who often choose apartments when relocating, particularly singles and young professionals without families, attracted by convenience, location, and lifestyle amenities.

A noteworthy trend was the diversification of tenant demographics. New nationalities such as Romanian, Turkish, and Iranian entered the top ten renters list, joining established groups from the UK, India, Russia, and Egypt. This shift signals Dubai's growing global appeal and the city's reputation as a welcoming destination for professionals from across the world. Renting continues to be the first step for many of these expatriates before making the move to purchase, showing confidence in Dubai's long-term prospects.

The most active apartment rental communities included Downtown Dubai, Dubai Marina, and Business Bay consistent favourites offering prime locations and lifestyle appeal. However, Town Square's inclusion in the top five was a standout, showcasing how newer, affordable master-planned communities are fast becoming popular choices for Dubai residents, alongside established hubs like JLT.

August reinforced the resilience and diversity of Dubai's rental market. From luxury villas attracting families to apartments catering to international professionals, demand is spreading across both premium and emerging communities. Combined with rising interest from new nationalities and continued supply pressures, the outlook for Dubai's rental market remains strong, reaffirming the city's position as one of the world's most dynamic real estate destinations.

AVERAGE LETTING PRICE

₪ 216,634

↑ 1% increase
vs July 2025↑ 3% increase
vs August 2024

LETTINGS TRANSACTION VOLUME

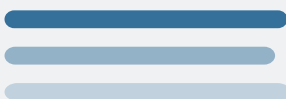
↑ 27% increase
vs July 2025↓ 8% decrease
vs August 2024

TENANT FINANCE SUMMARY

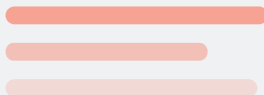


Cheques	August 2025
1	22%
2	23%
3	7%
4+	49%

TOTAL VIEWINGS

August 2025 1% ↓
July 2025 M-O-M
August 2024 2% ↑ Y-O-Y

CLIENT REGISTRATIONS

August 2025 34% ↑
July 2025 M-O-M
August 2024 2% ↓ Y-O-Y

NEW PROPERTY LISTINGS

August 2025 32% ↓
July 2025 M-O-M
August 2024 3% ↑ Y-O-Y

TOP 5 TENANT NATIONALITIES



22% British

6% Indian

5% Russian

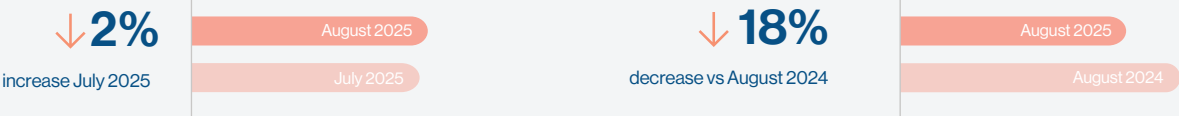
3% Egyptian

3% Turkish

AVERAGE VILLA/TOWNHOUSE LETTING PRICE



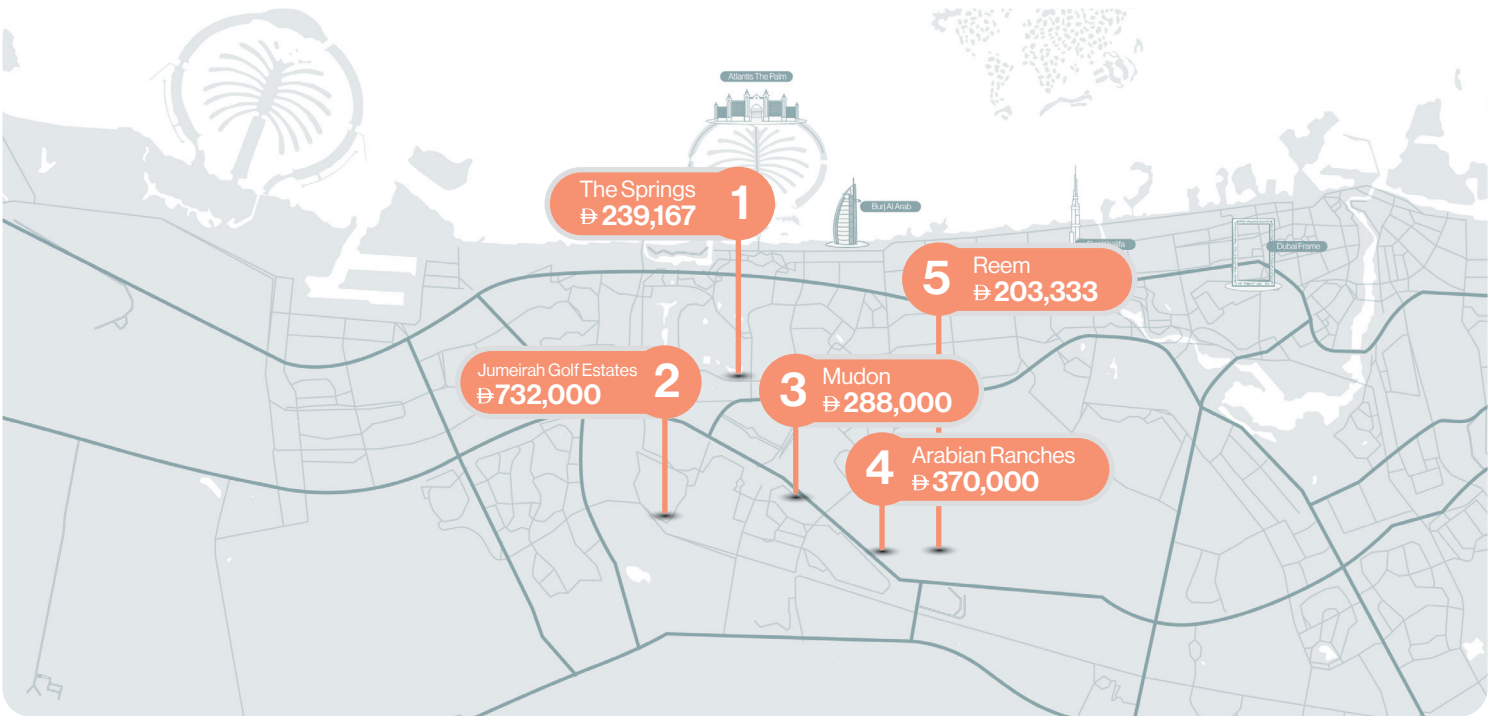
VILLA/TOWNHOUSE LETTING TRANSACTION VOLUME



NOTABLE VILLA LETTING TRANSACTIONS



TOP TRANSACTING VILLA/TOWNHOUSE AREAS & AVERAGE RENT



PROPERTY LETTINGS & DEMAND

AVERAGE APARTMENT LETTING PRICE

₹ **124,250**

↓ **3% decrease**
vs July 2025

↓ **21% decrease**
vs August 2024

APARTMENT LETTING TRANSACTION VOLUME

↑ **48%**
increase vs July 2025

August 2025
July 2025

↓ **4%**
decrease vs August 2024

August 2025
August 2024

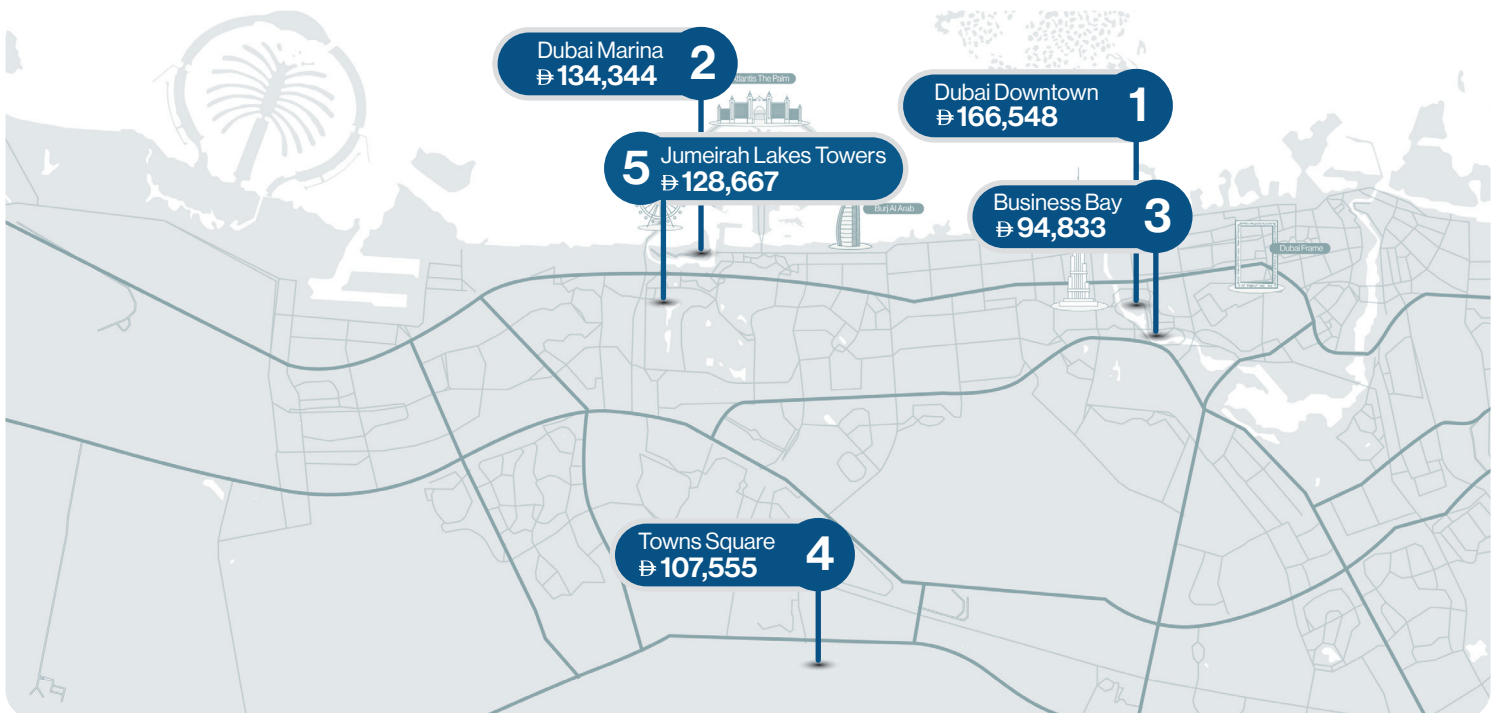
NOTABLE APARTMENT LETTING TRANSACTIONS

₹ **380,000**
Opera District
Downtown Dubai

₹ **350,000**
02 Residence
Jumeirah Lake Towers

₹ **295,000**
Al Majara
Dubai Marina

TOP TRANSACTING APARTMENT AREAS & AVERAGE RENT



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