

ALLSOPP & ALLSOPP

Dubai Real Estate

MARKET SNAPSHOT



H1 2025

TOTAL DUBAI SALES TRANSACTIONS

VALUE

₹ **260 BN**

↑ **11% increase**
vs H2 2024

↑ **35% increase**
vs H1 2024

VOLUME

90,969
UNITS

↓ **3% decrease**
vs H2 2024

↑ **22% increase**
vs H1 2024

Dubai's real estate market has recorded a strong first half of the year, with AED 260 billion worth of sales transactions completed.

This marks a 35% increase in the total sales transaction value compared to the same period in 2024, highlighting continued confidence in the city's property market. However, the standout performer has been the secondary market, which has significantly outpaced the off-plan segment across key indicators.

Sales transaction value in the secondary market surged by 46% year-on-year, compared to a 25% increase in the off-plan segment. Average sales prices in the secondary market rose by 15%, while off-plan prices increased by just 5%. This trend reflects a shift in buyer demand towards ready, quality stock, and is being driven primarily by the ongoing shortage of available villas and townhouses across Dubai.



In the first six months of 2025, the Dubai Land Department (DLD) reported a 55% increase in total villa and townhouse sales transaction value, compared to a 22% increase for apartments. This trend was also reflected in Allsopp & Allsopp data, which recorded a 79% rise in total transaction value for villas and townhouses, and a 30% increase for apartments. While apartments accounted for 78% of all secondary market transactions by volume and villas and townhouses made up 22%, villas and townhouses significantly outperformed in terms of price growth and value contribution. This reflects strong buyer appetite for family homes and the limited supply available in the market.

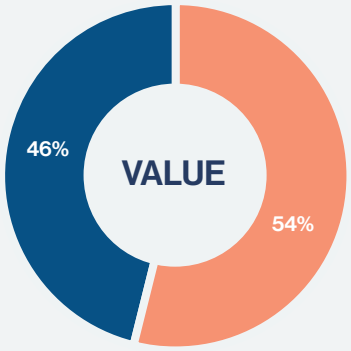
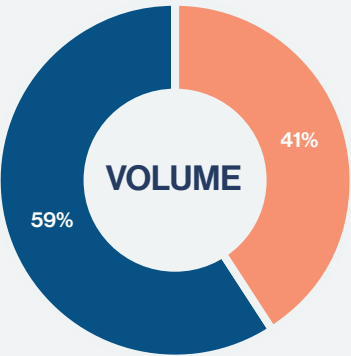
The average sales price across the market has increased by 11% year-on-year, a strong indicator of the market's continued resilience and upward trajectory. This growth reflects not only increased buyer confidence but also a shift in demand towards higher-quality, well-located properties, particularly in the villa and townhouse segments, where supply remains limited.

Rising average prices also suggest that Dubai's property market is attracting more end users and long-term investors contributing to a more stable and sustainable growth cycle. For existing homeowners, this trend signals capital appreciation and stronger return on investment, while for developers, it reinforces the demand for premium, ready-to-move-in stock.

Overall, the increase in average sales price underscores the view that Dubai remains a globally competitive real estate market, offering both lifestyle appeal and solid financial performance.



OFF-PLAN VS SECONDARY

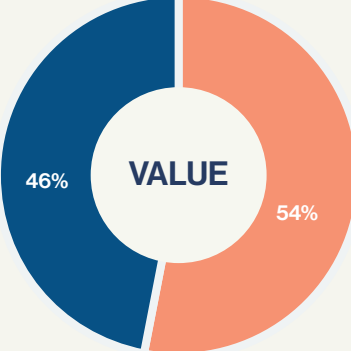
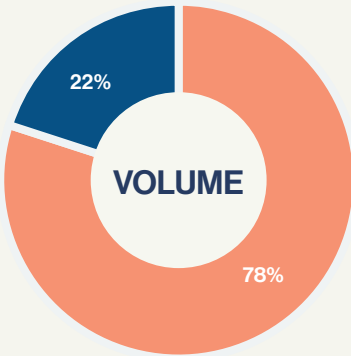
	 Off-plan	 Secondary
VOLUME	53,805	37,164
VALUE (₹)	120BN	139BN



● Off-plan ● Secondary

PROPERTY TYPE BREAKDOWN

	 Villa/Townhouse	 Apartment
VOLUME	19,877	71,092
VALUE (₹)	119BN	140BN



● Villa/Townhouse ● Apartment

NOTABLE VILLA/TOWNHOUSE SALES TRANSACTIONS

 **₹425,000,000**
Emirates Hills
Emirates Living

 **₹330,000,000**
Jumeirah Bay Island

 **₹300,000,000**
The Crescent,
Palm Jumeirah

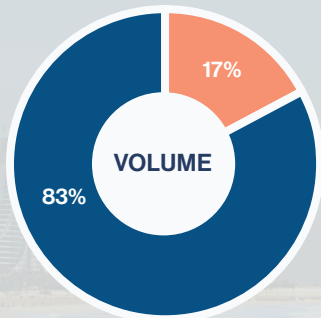


TOTAL COMPLETED UNITS IN H1 2025

16,744_{units}

↓ **2% decrease**
in comparison to completed units in
H2 2024

TOTAL NEW OFF-PLAN UNITS
IN H1 2025



● New units launched ● Completed units



ALLSOPP & ALLSOPP SALES OVERVIEW

The Dubai real estate market has continued its strong upward trajectory in the first half of 2025, with several key indicators showing robust year-on-year growth. The average sales price has risen by 39%, while the total value of transactions has increased by 54%. Total sales volume is also up by 11%, reflecting sustained confidence in the market across buyer groups.

A notable shift in buyer demographics has been observed, with more European clients entering the market. British, Italian, German and French nationals are now among the top ten nationalities served by our sales team, a trend mirrored in the rental segment as well.

In terms of transaction type, the cash versus finance split has remained relatively balanced. So far in 2025, 48% of purchases have been made in cash and 52% via finance. This ratio has been consistent over the past year, with the second half of 2024 showing a 46% cash and 53% finance breakdown. This balance reflects the growing wealth entering the country, with many buyers now able to purchase properties outright.

Villa and townhouse prices have seen a significant 49% increase year-on-year, with the current average price standing at AED 10 million. This growth has been fuelled by strong demand for turnkey homes, with buyers seeking high quality, ready to move in options in prime locations.

The luxury segment continues to thrive, driven by high-net-worth-individuals relocating to Dubai, with the top three transactions for the first half of 2025 being recorded by Allsopp & Allsopp Private Office. These include a villa in The Reserve, Al Barari sold for AED 121 million, a property in The Collection, Al Barari at AED 107 million, and a home in Polo Homes, Arabian Ranches for AED 60 million. These sales highlight the increasing demand for custom built luxury homes that are ready to move in.

Further underscoring this trend, property sales over AED 10 million have risen by 114% year-on-year, while transactions between AED 5 million and AED 10 million have grown by 51%. This is a clear indication of the continued influx of high-net-worth-individuals into the country.

Apartment sales have also shown positive momentum with the total sales value for apartments increasing by 30% year-on-year, while volume has risen by 12%. Demand is being driven by both investors, who are returning to the market in search of strong rental yields, and end-users who are shifting towards homeownership in response to the continued rise in rental prices.

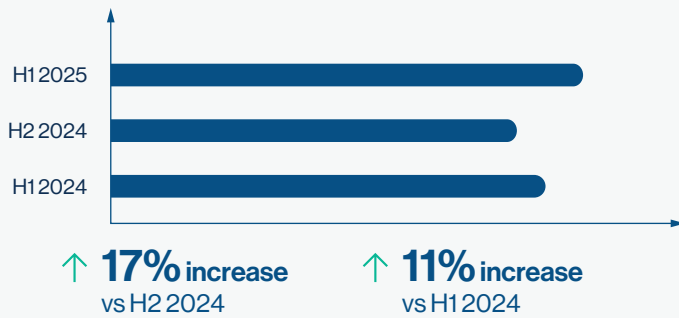
The top three areas for apartment transactions in the first half of the year were Dubai Marina, Downtown Dubai and Jumeirah Village Circle. Dubai Marina remains a long standing favourite among both investors and end users, offering proximity to the beach, marina, major transport hubs and key road networks. Downtown Dubai continues to attract strong interest due to its central location near DIFC and Business Bay and Jumeirah Village Circle has grown in popularity over recent years, offering a more affordable alternative for investors and tenants while still providing good access to the city's main attractions and roads.

AVERAGE SALES PRICE

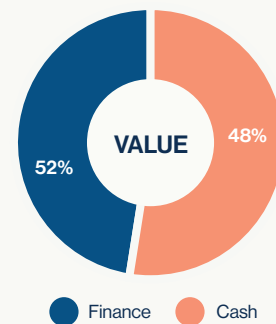
₹5,231,960

↑ 26% increase
vs H2 2024↑ 39% increase
vs H1 2024

SALES TRANSACTION VOLUME



BUYERS' FINANCE SUMMARY



TOTAL VIEWINGS



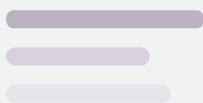
H1 2025 14% ↑
H2 2024 H-O-H
H1 2024 7% ↑ Y-O-Y

CLIENT REGISTRATIONS



H1 2025 18% ↑
H2 2024 M-O-M
H1 2024 12% ↓ Y-O-Y

NEW PROPERTY LISTINGS



May 2025 22% ↑
April 2025 M-O-M
May 2024 12% ↑ Y-O-Y

TOP 5 BUYER NATIONALITIES



25% British



11% Indian



4% Lebanese



4% Canadian



4% French

AVERAGE VILLA/TOWNHOUSE SALES PRICE

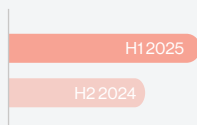
₹10,140,066

↑ **37% increase**
vs H2 2024

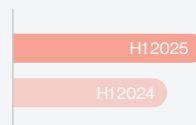
↑ **49% increase**
vs H1 2024

VILLA/TOWNHOUSE SALES TRANSACTION VOLUME

↑ **34%**
increase vs H2 2024



↑ **20%**
increase vs H1 2024



NOTABLE VILLA SALES TRANSACTIONS



₹121,200,000

The Reserve
Al Barari



₹107,000,000

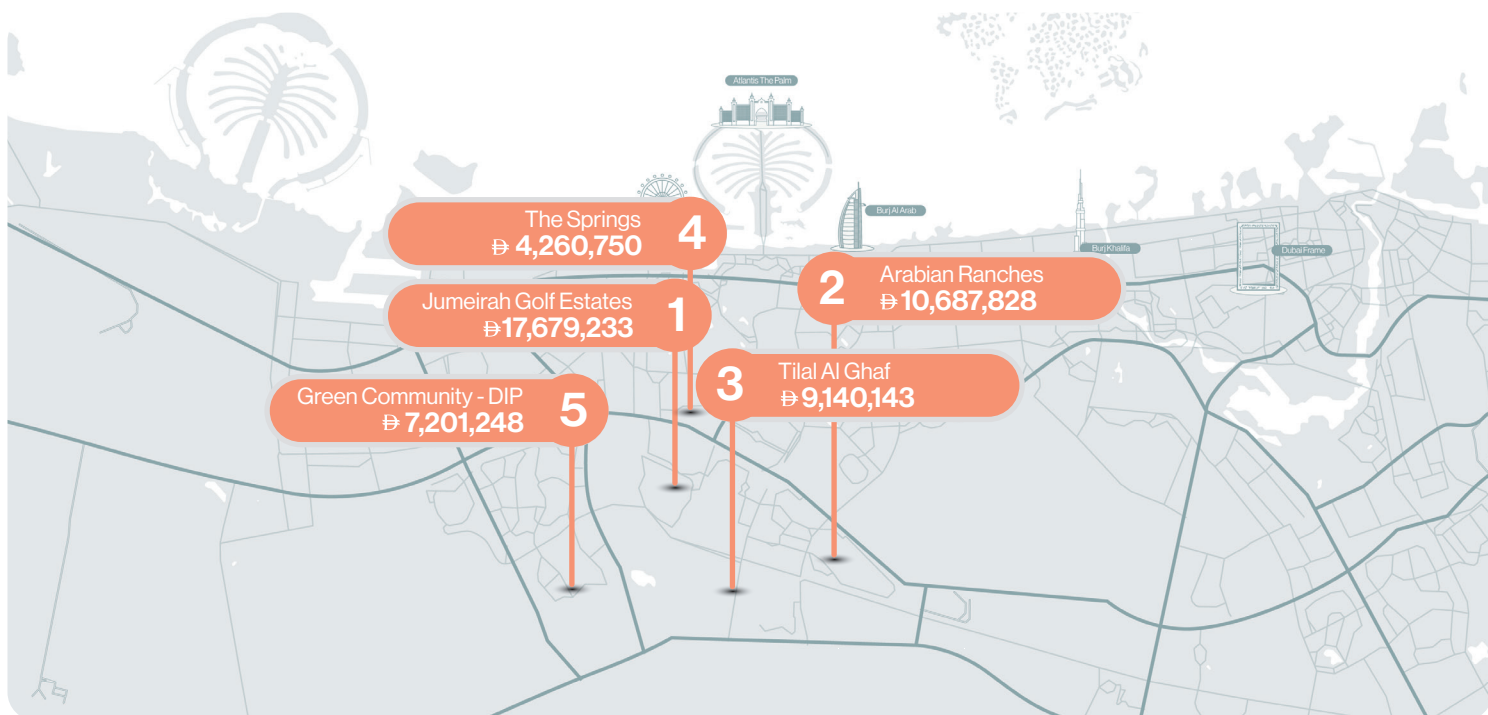
The Collection
Al Barari



₹60,000,000

Polo Homes
Arabian Ranches

TOP TRANSACTING VILLA/TOWNHOUSE AREAS & AVERAGE PRICES



AVERAGE APARTMENT SALES PRICE

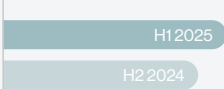
₹ 2,430,323

↓ 8% decrease
vs H2 2024

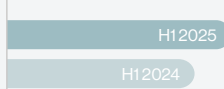
↑ 16% increase
vs H2 2024

APARTMENT SALES TRANSACTION VOLUME

↑ 13%
increase vs H1 2025



↑ 12%
increase vs H1 2024



NOTABLE APARTMENT SALES TRANSACTIONS



₹28,500,000
Balqis Residence
Palm Jumeirah

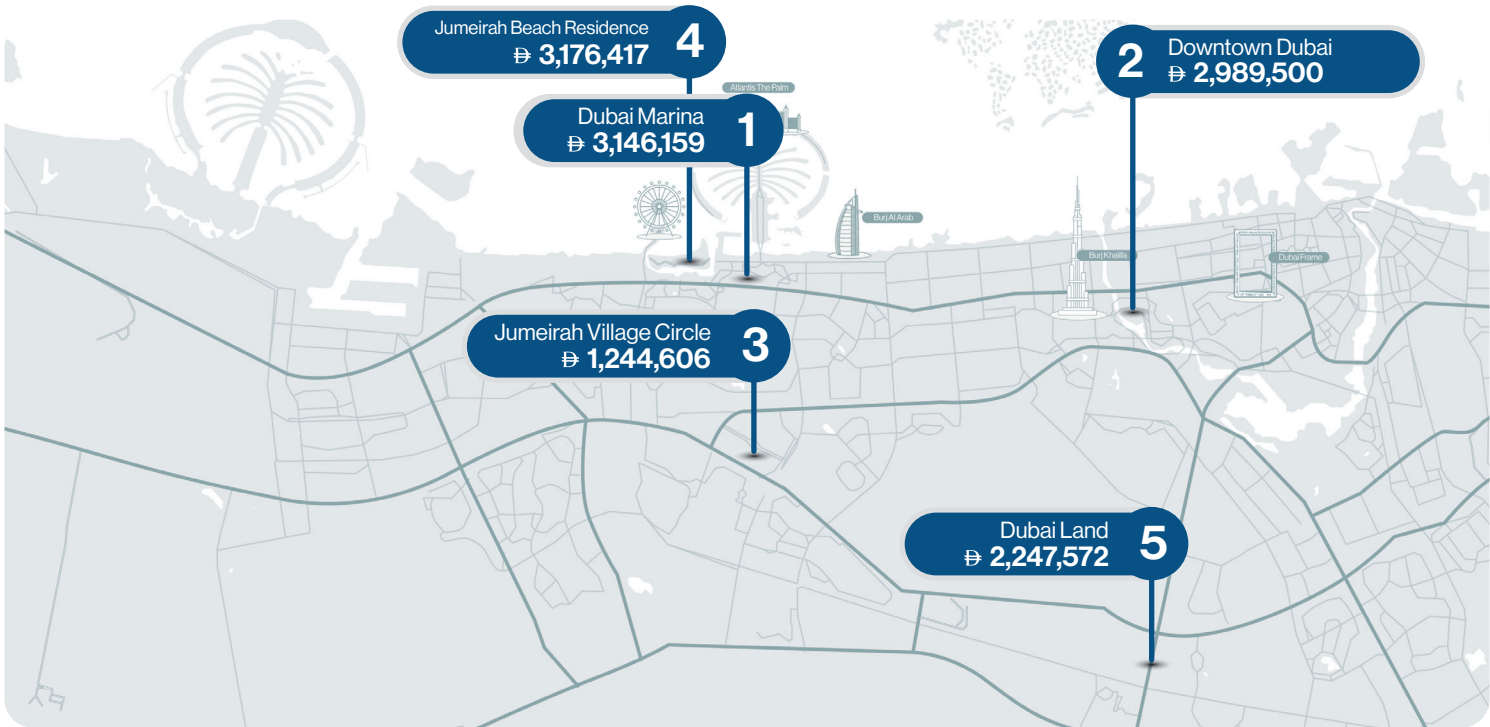


₹20,750,000
The Residences
Downtown Dubai



₹17,131,000
Six Senses Residences
Dubai Marina

TOP TRANSACTING APARTMENT AREAS & AVERAGE PRICES



ALLSOPP & ALLSOPP LETTINGS OVERVIEW

Allsopp & Allsopp rental data shows a 15% year-on-year increase in the average rental price across residential properties in Dubai. This rise can be attributed to the continued influx of new residents to the country, with over 90,000 people arriving in the first quarter of 2025 alone.

The sustained population growth is placing a rise on rental values, particularly in well-connected and desirable neighbourhoods, as demand remains strong across both the apartment and villa segments.

Villa and townhouse rental prices have seen even stronger growth, with a 24% increase in the first half of 2025 compared to Q2 2024. The most notable rental transactions in this segment include a villa in Polo Homes, Arabian Ranches rented for AED 3,300,000, a villa in Redwood Avenue at AED 2,950,000, and a Signature Villa on Frond E, Palm Jumeirah for AED 2,300,000. These significant rental values highlight the premium tenants are willing to pay for exclusive, luxury homes in Dubai's most desirable locations and the influx of wealth.

While there has been a slight dip in apartment rental contracts during the first half of 2025, this is largely due to the continued shift towards homeownership and the growing demand for villas and townhouses. Despite this, the rental market remains strong, supported by the delivery of 17,044 new residential units year to date. Tenant demand is still evident, with 78,608 new rental contracts registered in H1 2025 by the DLD, reflecting sustained interest in rental properties across the city.

The split between rental transactions by property type remains largely consistent with previous periods, with 70% of rentals in H1 2025 being apartments and 30% comprising villas and townhouses. In comparison, the second half of 2024 saw a slightly higher proportion of apartments being rented at 74% and villas and townhouses accounting for 26%. This consistent trend highlights the sheer volume of apartment stock available in the market and underscores the continued rental demand for this property type. At the same time, the gradual increase in villa and townhouse rental activity reflects growing tenant interest in more spacious, family-oriented homes particularly as more residents transition to longer-term stays in Dubai.

When it comes to payment terms, tenants are increasingly opting for more flexible arrangements. Four or more cheques ranked highest in H1 2025, accounting for 33% of transactions. Interestingly, single-cheque payments remain popular at 30%, followed closely by two-cheque arrangements at 27%. This shows a growing diversity in how tenants are choosing to structure their rental payments and that landlords are accommodating.

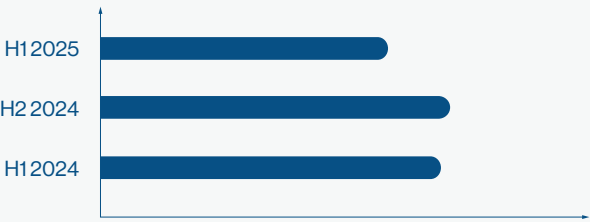
AVERAGE LETTING PRICE

₪ 236,786

↑ 26% increase
vs H2 2024

↑ 15% increase
vs H1 2024

LETTINGS TRANSACTION VOLUME



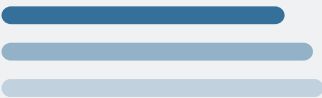
↓ 28% decrease
vs H2 2024

↓ 27% decrease
vs H1 2024

TENANT FINANCE SUMMARY

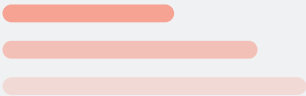
Cheques	H1 2025
1	30%
2	27%
3	10%
4+	33%

TOTAL VIEWINGS



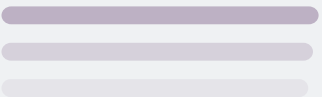
H1 2025 11% ↓
H2 2024 M-O-M
H1 2024 14% ↓ Y-O-Y

CLIENT REGISTRATIONS



H1 2025 23% ↓
H2 2024 M-O-M
H1 2024 32% ↓ Y-O-Y

NEW PROPERTY LISTINGS



H1 2025 4% ↑
H2 2024 M-O-M
H1 2024 3% ↑ Y-O-Y

TOP 5 TENANT NATIONALITIES



19% British



8% Indian



4% French



4% Russian



3% Italian

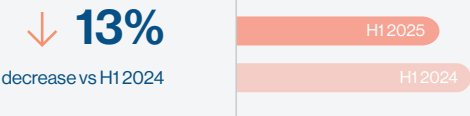
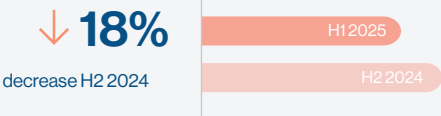
AVERAGE VILLA/TOWNHOUSE LETTING PRICE

₹ 354,063

↑ 24% increase
vs H2 2024

↑ 2% increase
vs H1 2024

VILLA/TOWNHOUSE LETTING TRANSACTION VOLUME



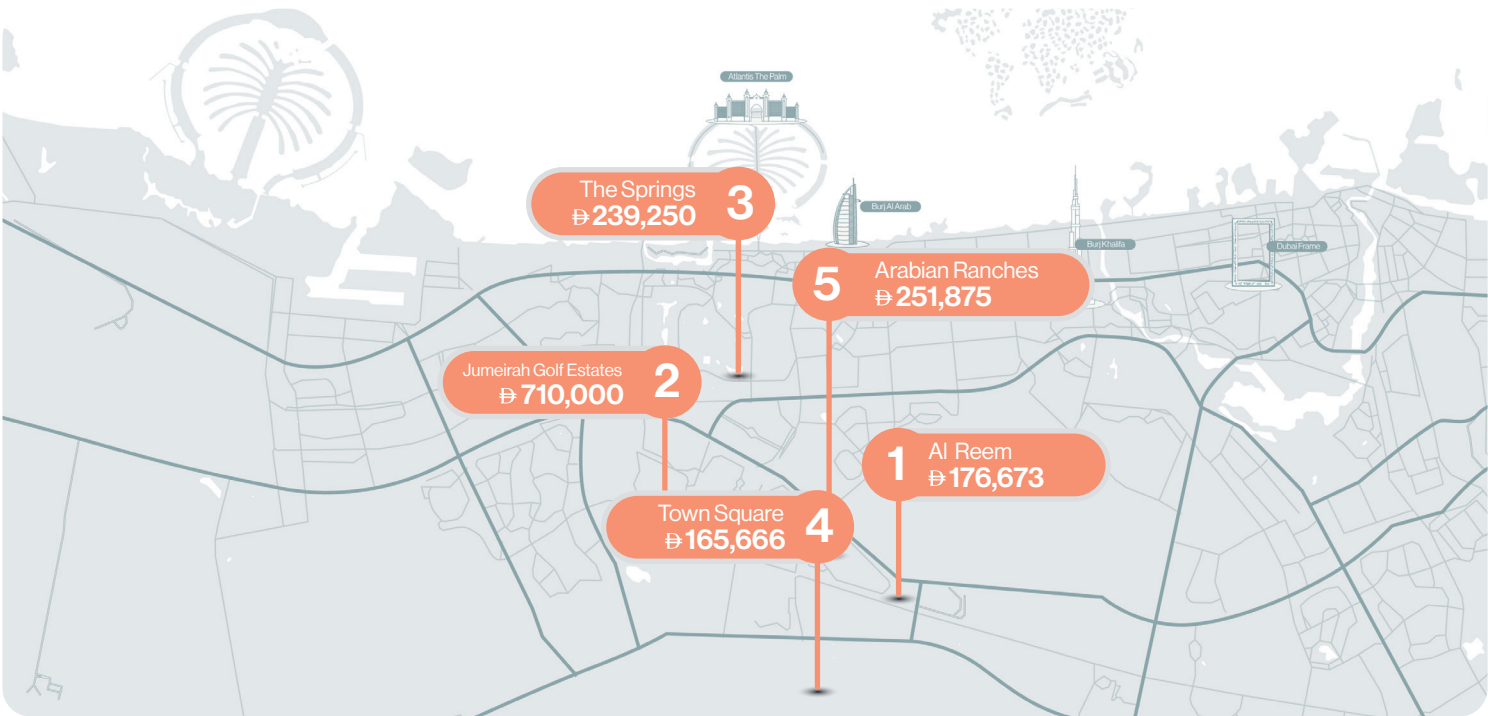
NOTABLE VILLA LETTING TRANSACTIONS

₹3,300,000
Polo Homes
Arabian Ranches

₹2,950,000
Redwood Avenue
Jumeirah Golf Estates

₹2,300,000
Signature Villas
Palm Jumeirah

TOP TRANSACTING VILLA/TOWNHOUSE AREAS & AVERAGE RENT



PROPERTY LETTINGS & DEMAND

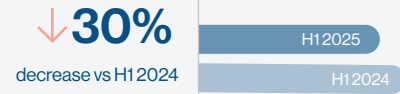
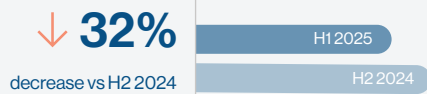
AVERAGE APARTMENT LETTING PRICE

₹ 147,957

↓ 1% decrease
vs H1 2025

↑ 2% increase
vs H2 2024

APARTMENT LETTING TRANSACTION VOLUME



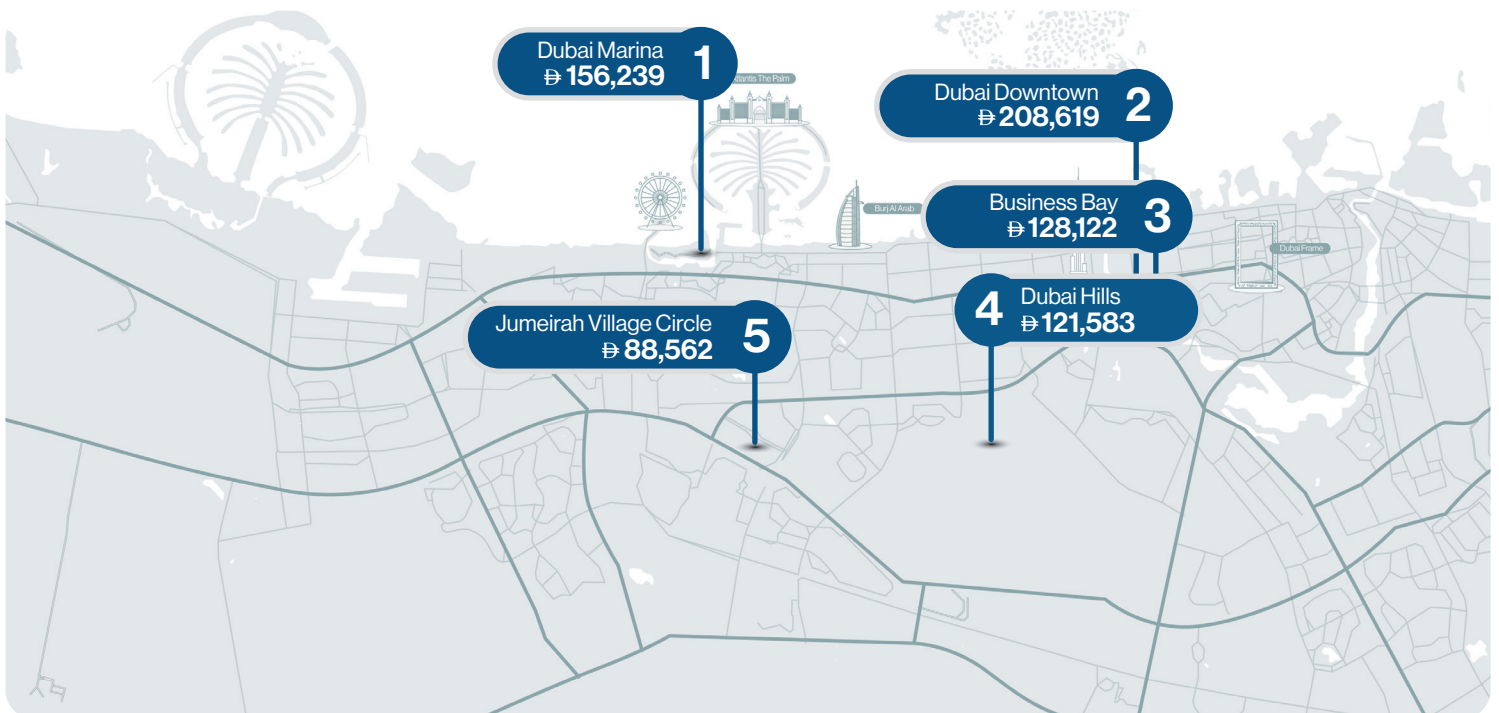
NOTABLE APARTMENT LETTING TRANSACTIONS

₹ 720,000
Heritage
Jumeirah Park

₹ 590,000
Harmony
Tilal al Ghaf

₹ 560,000
23 Marina
Dubai Marina

TOP TRANSACTING APARTMENT AREAS & AVERAGE RENT



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