

ALLSOPP & ALLSOPP

Dubai Real Estate

# MARKET SNAPSHOT



JULY 2025



# TOTAL DUBAI SALES TRANSACTIONS

## VALUE

₹ **51.6 BN**

↑ **17% increase**  
vs June 2025  
↑ **30% increase**  
vs July 2024

## VOLUME

**18,925**  
UNITS

↑ **21% increase**  
vs June 2025  
↑ **26% increase**  
vs July 2024

According to the Dubai Land Department (DLD), the total value of property sales transactions in July 2025 reached AED 51.67 billion, representing a 17% increase compared to June.

Transaction volume across both residential and commercial sectors also rose significantly, increasing by 21% month-on-month and 26% year-on-year. These figures reflect sustained confidence in the Dubai property market from both investors and end-users, despite July typically being a quieter period due to the summer season.

The off-plan market regained momentum last month, accounting for 65% of all transactions by volume and 53% by value. This marks a reversal from June, when the secondary market had taken the lead in value, with a 46% year-on-year surge. In contrast, the off-plan segment had increased by 25%.

In July, however, off-plan recorded a 46% year-on-year increase in total transaction value and a 35% jump in volume. The secondary market, while still growing, saw more moderate increases of 15% in value and 13% in volume. This shift signals growing trust in long-term investment in Dubai and increased awareness of the benefits of owning property in the city.

Apartment sales continued to show strength in July, with a 25% increase in volume and a 24% increase in value month-on-month. The average apartment sales price reached AED 1,985,641. Apartments accounted for 84% of total transactions by volume and 61% by value, pointing to growing demand from professionals and new residents relocating to Dubai ahead of the academic year and new job contracts.

Top-performing sales areas in July included Jumeirah Village Circle, DAMAC Riverside and Business Bay, all of which continue to draw high demand due to their accessibility, affordability and diverse property offerings. On the rental side, Deira, Bur Dubai and Al Qusais were the most transacted areas, retaining their long-standing popularity as established, well-connected communities with strong rental value.

In the rental market, new contracts increased by 12% month-on-month, although there was a 13% decline year-on-year. Rental renewals dropped slightly, with a 2% decrease compared to June and a 15% fall year-on-year. This may indicate a trend of residents shifting into homeownership or relocating within the city, while the spike in new contracts points to an influx of newcomers entering the rental market.

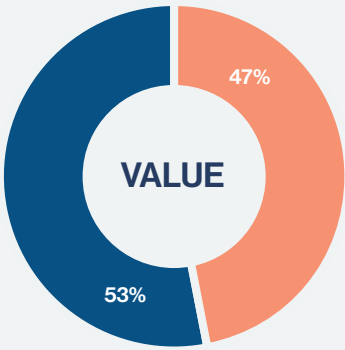
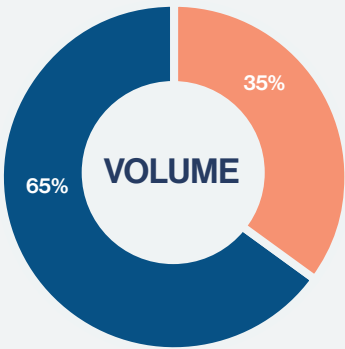
Dubai's property market continues to thrive. With strong sales performance, particularly in the off-plan segment, and an active rental market driven by new arrivals and a new academic year, the city remains a dynamic and resilient investment destination.



OFF-PLAN VS SECONDARY



	Off-plan	Secondary
VOLUME	12,357	6,568
VALUE (₪)	27BN	24BN

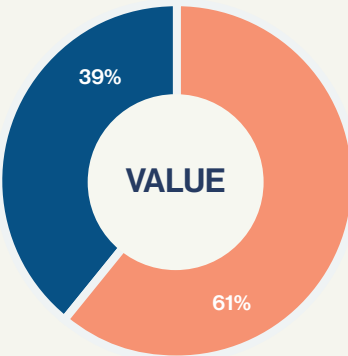
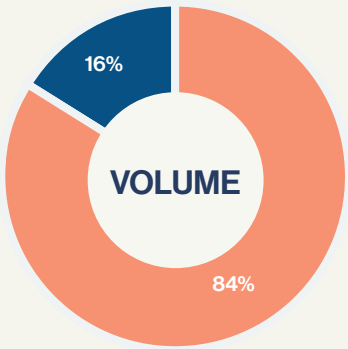


● Off-plan ● Secondary

PROPERTY TYPE BREAKDOWN



	Villa/Townhouse	Apartment
VOLUME	3,076	15,849
VALUE (₪)	20BN	31BN



● Villa/Townhouse ● Apartment

NOTABLE VILLA/TOWNHOUSE SALES TRANSACTIONS



₪82,000,000  
The Fronds  
Palm Jumeirah



₪80,000,000  
The Residences  
Al Barari



₪64,849,875  
Sobha Estates  
Sobha Hartland II

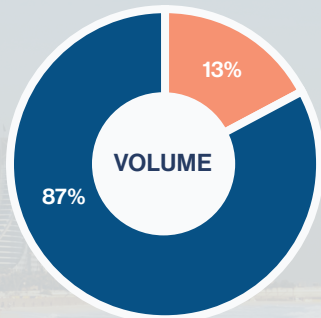


# TOTAL COMPLETED UNITS IN JULY 2025

# 1,108<sub>units</sub>

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

TOTAL NEW OFF-PLAN UNITS  
IN JULY 2025



● New units launched ● Completed units



# ALLSOPP & ALLSOPP SALES OVERVIEW

**The sales transaction value at Allsopp & Allsopp has increased significantly year-on-year by 44%, with the average sales price rising by 42% to AED 5.1 million.**

The diversity of buyers continues to grow, with British nationals leading the market, followed by Indian and Irish buyers. Notably, Irish buyers have appeared in the top ten for the first time, alongside increased interest from Canadian, Australian, Spanish, Russian, and UAE nationals, reflecting Dubai's increasingly global and dynamic property market.

While cash purchases have traditionally been high, July saw a shift with 65% of buyers opting for financing and 35% paying in cash. This balance is expected to fluctuate as many high-net-worth individuals are still arriving in the UAE and making immediate cash purchases.

Villas and townhouses have seen a remarkable year-on-year increase in transaction value by 47%, with average prices reaching AED 8.8 million, a 50% rise compared to last year. The most popular villa and townhouse communities include The Springs, favoured for its spacious homes and ideal for renovation, Jumeirah Golf Estates, a long-standing expat favourite now expanding with Phase 2 and Al Furjan, an emerging community with both established and new developments.

In terms of market volume, July's split at Allsopp & Allsopp was 67% apartments and 33% villas and townhouses. However, when looking at the sales transaction value, villas and townhouses accounted for 63%, highlighting the growing premium on larger homes. High-net-worth buyers are also becoming more prominent, with sales transactions above AED 10 million increasing by 86%, now representing 10% of the market in July.

Despite the perceived summer slowdown, viewings at Allsopp & Allsopp rose by 11% month-on-month and 23% year-on-year, underscoring Dubai's ongoing appeal to investors and homeowners. This momentum is supported by wider global trends highlighting the UAE as a leading destination for global wealth migration.

Projections suggest the UAE will see a 25% increase in its high-net-worth population between 2023 and 2028, driven by favorable tax policies, safety, and lifestyle opportunities. This inflow of affluent individuals further fuels demand and investment in Dubai's property market, confirming its status as a resilient and thriving hub for luxury real estate.

Dubai continues to defy expectations, with a steady stream of opportunities emerging for buyers and investors alike, making it one of the world's most dynamic property markets.



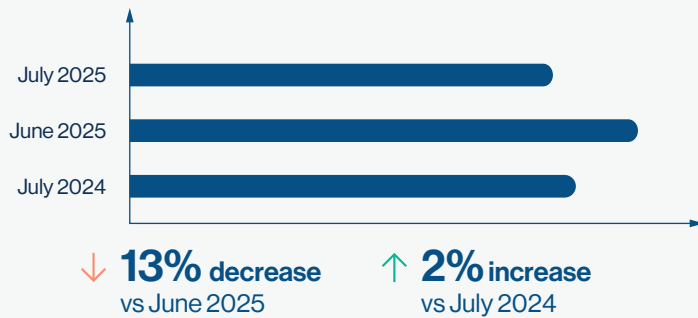
## AVERAGE SALES PRICE

# ₪5,148,196

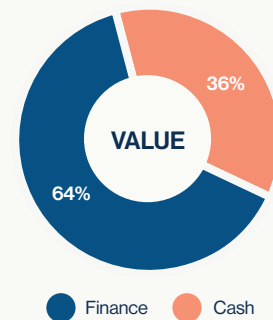
↓ **7% decrease**  
vs June 2025

↑ **42% increase**  
vs July 2024

## SALES TRANSACTION VOLUME



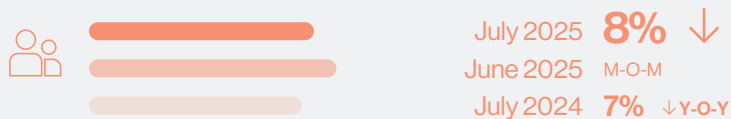
## BUYERS' FINANCE SUMMARY



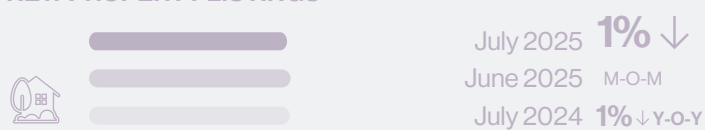
## TOTAL VIEWINGS



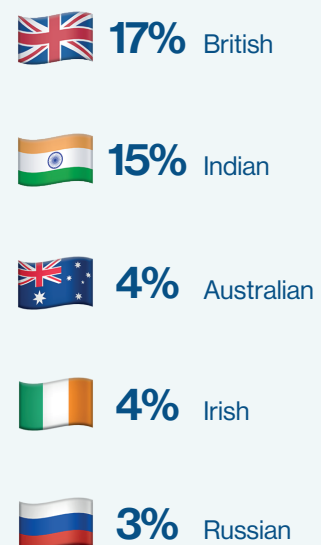
## CLIENT REGISTRATIONS



## NEW PROPERTY LISTINGS



## TOP 5 BUYER NATIONALITIES





## AVERAGE VILLA/TOWNHOUSE SALES PRICE

₹ 8,851,289

↓ **9% decrease**  
vs June 2025

↑ **50% increase**  
vs July 2024

## VILLA/TOWNHOUSE SALES TRANSACTION VOLUME

↓ **24%**  
decrease vs June 2025

July 2025

June 2025

↓ **2%**  
decrease vs July 2024

July 2025

July 2024

## NOTABLE VILLA SALES TRANSACTIONS



₹ 40,000,000

Garden Homes  
Palm Jumeirah



₹ 35,000,000

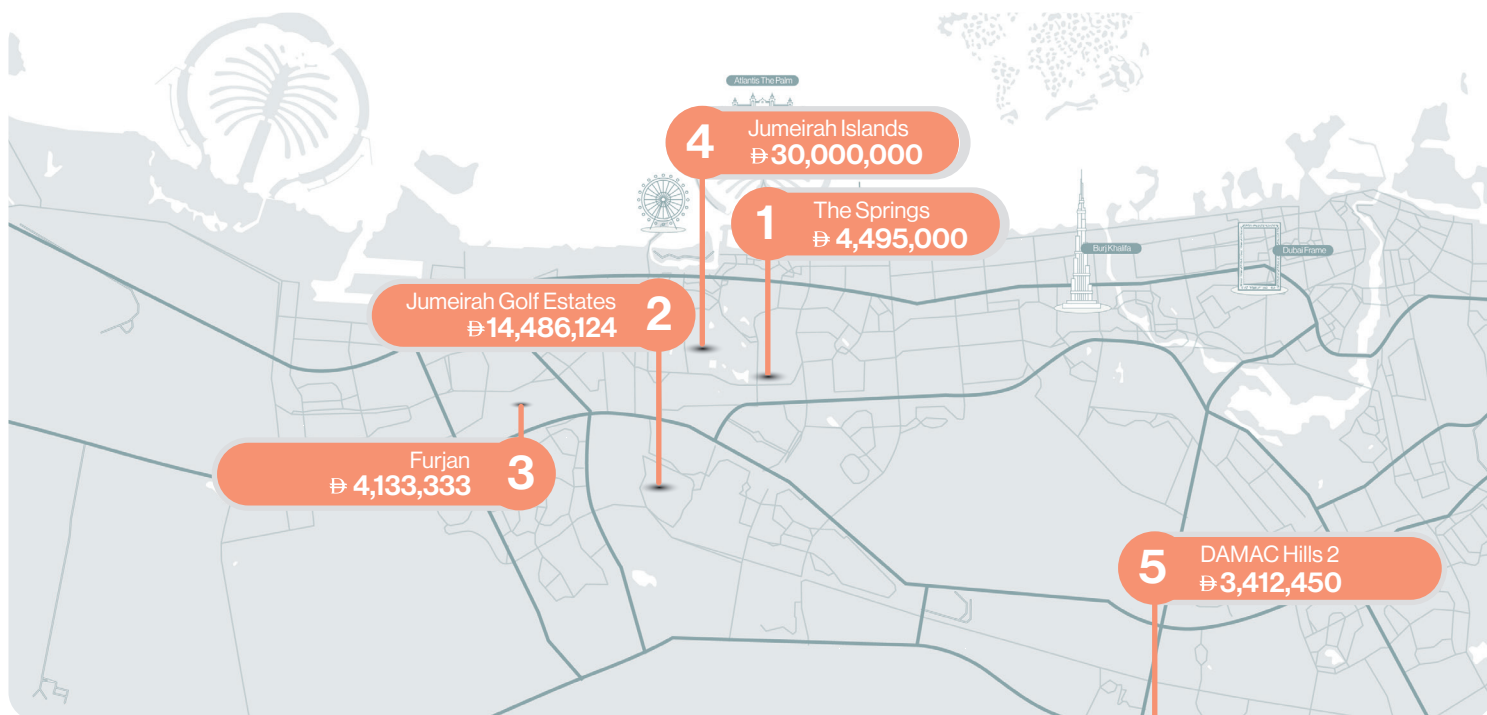
Garden Hall  
Jumeirah Islands



₹ 26,000,000

Lunaria  
Al Barari

## TOP TRANSACTING VILLA/TOWNHOUSE AREAS & AVERAGE PRICES



AVERAGE APARTMENT SALES PRICE

₹ 2,549,459

↓ 10% decrease  
vs June 2025

↑ 7% increase  
vs July 2024

APARTMENT SALES TRANSACTION VOLUME

↓ 9%  
decrease vs June 2025



↑ 6%  
increase vs July 2024



NOTABLE APARTMENT SALES TRANSACTIONS



₹12,550,000  
Akala Hotel and Residences  
DIFC

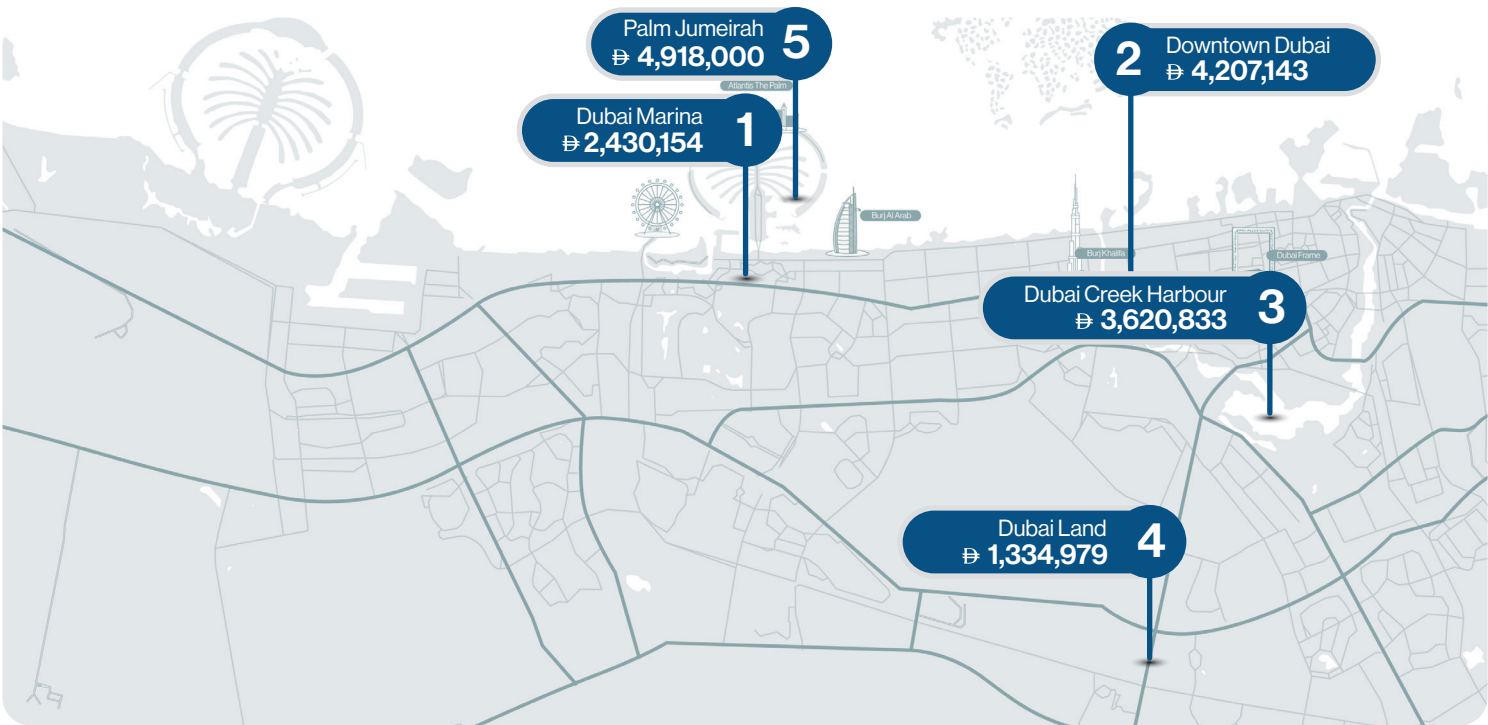


₹8,500,000  
The Address Residences  
Downtown Dubai



₹7,100,000  
Tiara Residences  
Palm Jumeirah

TOP TRANSACTING APARTMENT AREAS & AVERAGE PRICES





# ALLSOPP & ALLSOPP LETTINGS OVERVIEW

**While summer is typically seen as a quieter period for property markets, Dubai continues to challenge that perception, with July delivering a strong performance across the rental market.**

The summer months have brought a new wave of families arriving to Dubai ahead of the academic year. A 6% increase in private school student enrollment for the 2024-2025 school year has already been recorded, and with five new schools set to open in 2025, the demand for family-friendly villas and townhouses continues to grow. This influx of new residents is also directly fueling the demand for larger homes as families seek to settle in, making the rental market exceptionally active even during the traditionally slower summer months.

This surge in demand has resulted in a sharp uplift in rental activity with the DLD reporting an 12% increase in new rental contracts compared to June, with villa and townhouse rental volume rising by 8%. Allsopp & Allsopp observed even stronger figures, recording a 26% increase in villa and townhouse rental volume and a 33% year-on-year rise in the average price of these properties. This data reinforces the idea that more families are arriving in Dubai and opting to rent a villa or townhouse before purchasing.

Top transacting areas in the villa and townhouse segment included Jumeirah Golf Estates, Reem, Tilal Al Ghaf, The Springs, and Dubai Hills Estate. These communities continue to be among Dubai's most sought-after family-friendly neighbourhoods, offering a mix of villas, townhouses, and apartments, making them attractive to a wide range of residents, from families to singles and couples alike.

Apartments have also experienced a notable boost, with rental volumes increasing by 37% month-on-month, likely due to an influx of professionals such as teachers, hospitality workers and corporate employees moving to the city ahead of September.

In addition, Allsopp & Allsopp lettings team has experienced a 21% increase in new listings, a 14% rise in client registrations, and a 24% surge in viewings during July, underlining the strength of the market even during what is typically considered a seasonal lull.

In terms of rental distribution, villas and townhouses made up 33% of the total rental transactions in terms of volume, while apartments accounted for 67%. However, villas and townhouses took the lead in terms of value, representing 58% of the total rental market share, compared to 42% for apartments. This further highlights the growing premium placed on space and lifestyle by incoming residents.

Dubai's ongoing transformation into a family-oriented, globally attractive destination, driven by its infrastructure, education options and high quality of life, is continuing to fuel demand, even through the summer months.

## AVERAGE LETTING PRICE

₹ 216,031

↓ 28% decrease  
vs June 2025↑ 14% increase  
vs July 2024

## LETTINGS TRANSACTION VOLUME

↑ 36% increase  
vs July 2025↓ 22% decrease  
vs July 2024

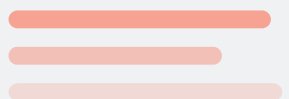
## TENANT FINANCE SUMMARY

Cheques	July 2025
1	26%
2	24%
3	14%
4+	36%

## TOTAL VIEWINGS

July 2025 24% ↑  
June 2025 M-O-M  
July 2024 1% ↑ Y-O-Y

## CLIENT REGISTRATIONS

July 2025 14% ↑  
June 2025 M-O-M  
July 2024 3% ↓ Y-O-Y

## NEW PROPERTY LISTINGS

July 2025 21% ↑  
June 2025 M-O-M  
July 2024 40% ↑ Y-O-Y

## TOP 5 TENANT NATIONALITIES



23% British



11% Indian



4% Russian



3% Canadian



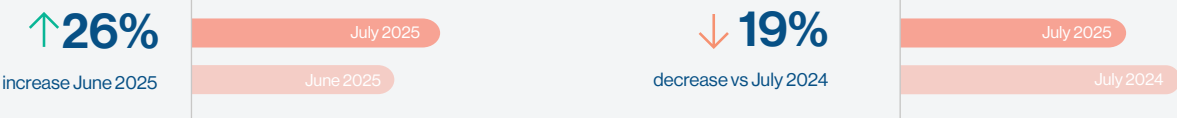
2% Lebanese



AVERAGE VILLA/TOWNHOUSE LETTING PRICE



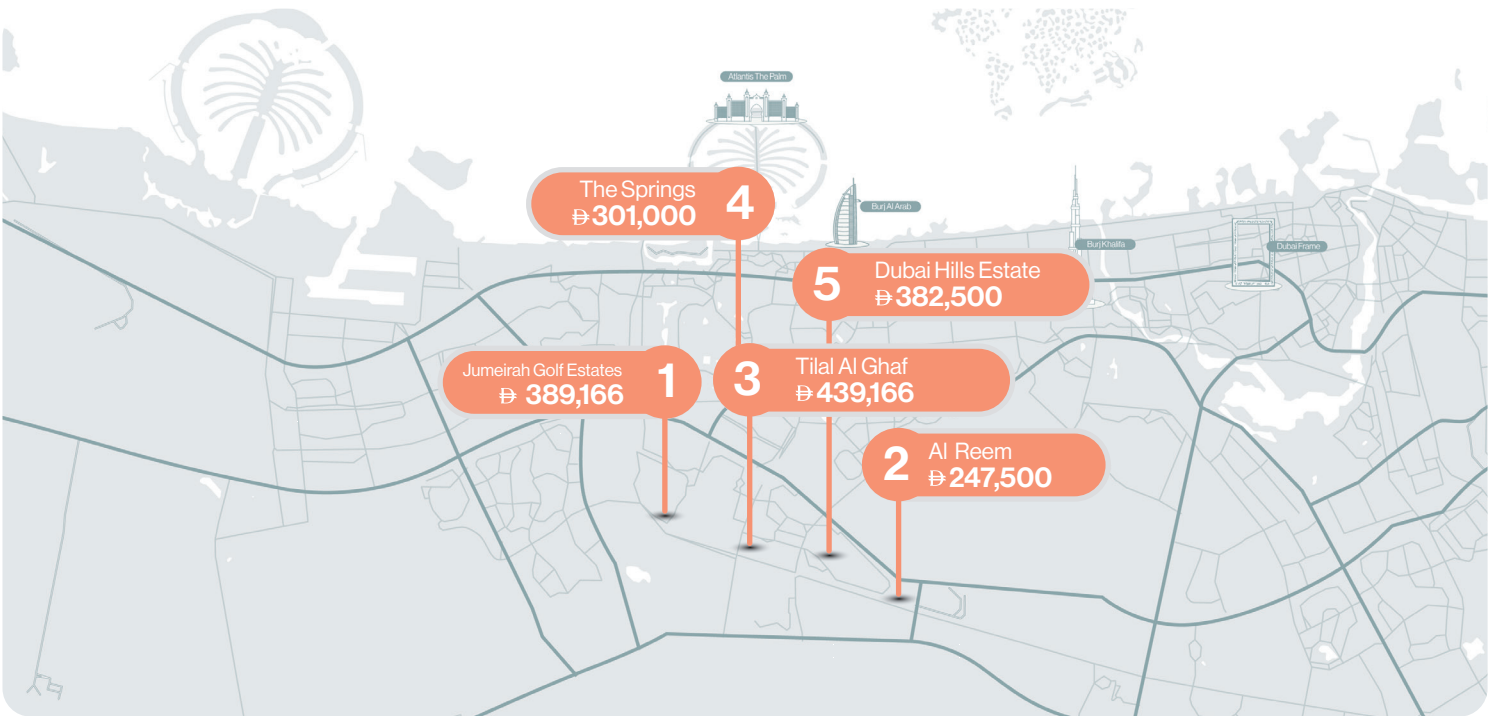
VILLA/TOWNHOUSE LETTING TRANSACTION VOLUME



NOTABLE VILLA LETTING TRANSACTIONS



TOP TRANSACTING VILLA/TOWNHOUSE AREAS & AVERAGE RENT



## PROPERTY LETTINGS & DEMAND

### AVERAGE APARTMENT LETTING PRICE

₹ 127,921

↓ 27% decrease  
vs June 2025

↓ 10% decrease  
vs July 2024

### APARTMENT LETTING TRANSACTION VOLUME

↑ 37%  
increase vs June 2025

July 2025  
June 2025

↓ 28%  
decrease vs July 2024

July 2025  
June 2024

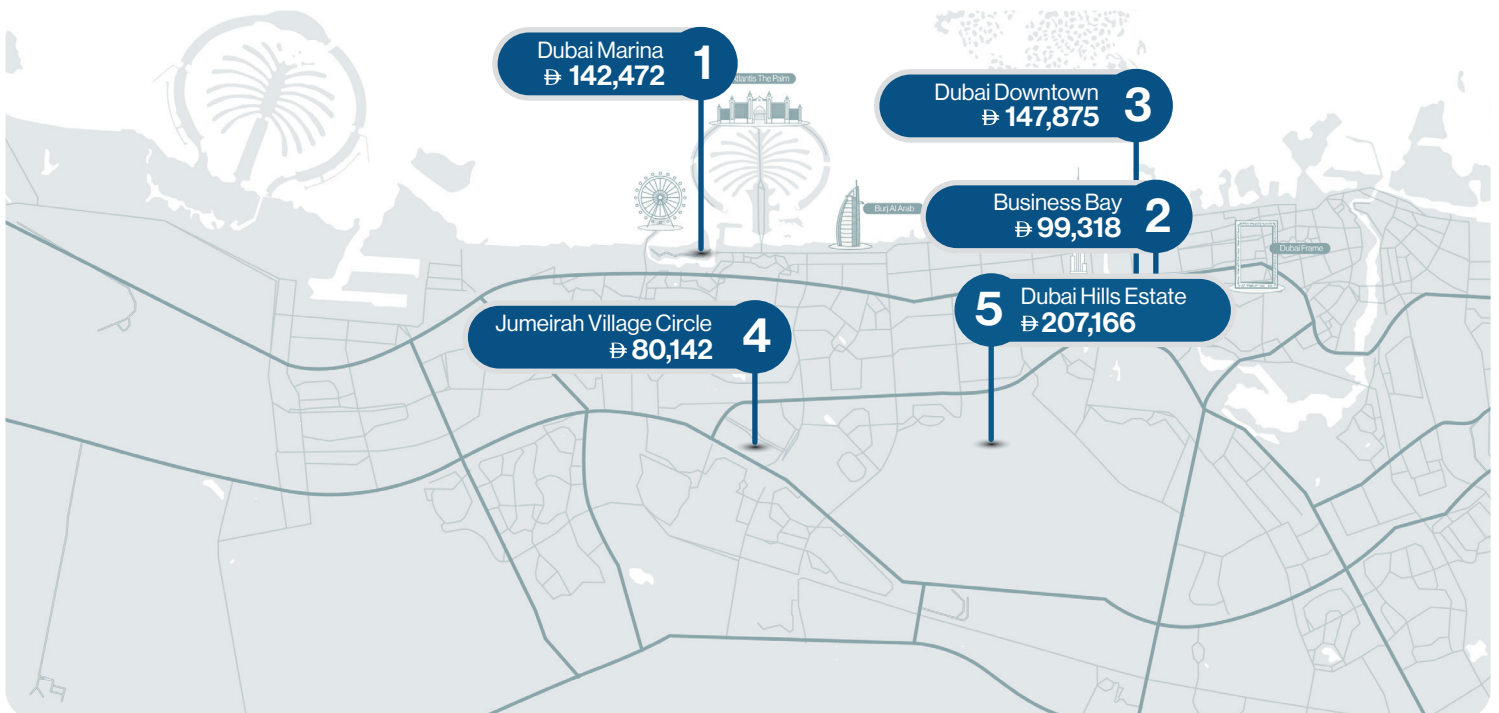
### NOTABLE APARTMENT LETTING TRANSACTIONS

₹ 510,000  
Club Villas  
Dubai Hills Estate

₹ 350,000  
Jumeirah Living Marina Gate  
Dubai Marina

₹ 250,000  
Park Ridge Tower C  
Dubai Hills Estate

### TOP TRANSACTING APARTMENT AREAS & AVERAGE RENT





# ALLSOPP & ALLSOPP

For press and media  
enquiries, please contact:

## PR & Communications

✉ [pr@allsoppandallsopp.com](mailto:pr@allsoppandallsopp.com)

☎ +971 4 429 4444

📱 +971 58 598 6637

🌐 [allsoppandallsopp.com](http://allsoppandallsopp.com)