

ALLSOPP & ALLSOPP  
KEEP MOVING

Dubai Real Estate

# Market Snapshot

May 2025





# TOTAL DUBAI SALES TRANSACTIONS

## VALUE

₹ **53.8 BN**

↑ **11% increase**  
vs April 2025  
↑ **37% increase**  
vs May 2024

## VOLUME

**17,345**

↑ **5% increase**  
vs April 2025  
↑ **5% increase**  
vs May 2024

Dubai's real estate market showed strong performance in May, with the Dubai Land Department (DLD) reporting AED 54 billion in property sales transactions. This marks an impressive 11% increase from the previous month, reinforcing the city's continued real estate momentum. The long-term growth and capital appreciation in villa and townhouse prices stand out amongst last month's transactions.

Since May 2022, the average villa and townhouse prices have skyrocketed by a remarkable 92%, climbing from AED 3,475,523 to AED 6,682,023 in just three years. Even within the last year alone, these properties saw a significant 35% increase in sales price across various communities, as reported by the DLD. This is a clear indicator of sustained demand, limited supply, and growing investor confidence in Dubai's villa and townhouse communities.

Dubai's secondary property market is also showing remarkable strength. Last month, total sales value surged by 68% year-on-year, with average resale home prices rising by 32%. This trend confirms significant demand from both end-users and investors, as many are quickly purchasing homes upon arriving in Dubai. Furthermore, secondary market transaction volume increased by 28% year-on-year, highlighting a clear move towards homeownership for expats settling in the city.

Confidence in the off-plan sector remains exceptionally high, marked by a 13% increase in average sales price month-on-month and a 20% rise year-on-year. Buyers consistently look to Dubai as a prime destination for capital growth and long-term investment. This interest is fuelled by the city's continuous expansion, its appeal to new businesses, attractiveness to tourists and its welcoming environment for new residents.

While DLD reported a month-on-month decrease in rental renewal volume (19%) and value (17%), the market for new rental contracts has notably strengthened. DLD figures show new contract volume increased by 15% and value by 9% month-on-month. This suggests a strategic shift in tenant preference, with individuals increasingly exploring suburban areas for properties amidst ongoing rental price increases in prime locations.



With the rise in average prices across villa and townhouse communities, it's clear that established, older neighbourhoods are experiencing a strong wave of renewed interest, especially for homes that have been well-upgraded.

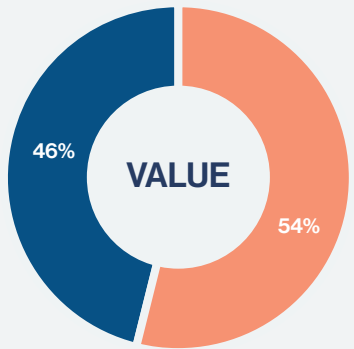
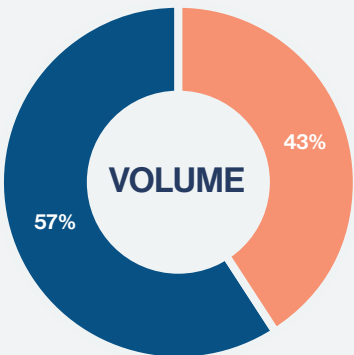
Sellers are increasingly recognising the potential in renovating older properties, as these modern homes within their community now command significant prices.

The last three years clearly show the strong value of investing in Dubai's property market, especially in the villa and townhouse segment. As Dubai keeps attracting high-net-worth individuals and long-term residents, demand remains very strong, particularly for homes that offer good space, a great lifestyle, and are ready to move into immediately.





OFF-PLAN VS SECONDARY

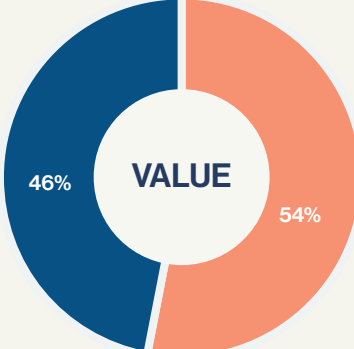
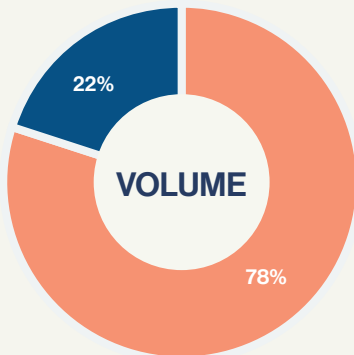
	 Off-plan	 Secondary
VOLUME	9,943	7,402
VALUE (₪)	24.5BN	29.2BN



● Off-plan      ● Secondary

PROPERTY TYPE BREAKDOWN


	 Apartment	 Villa/Townhouse
VOLUME	13,603	3,742
VALUE (₪)	28.8BN	25BN



● Villa/Townhouse      ● Apartment

NOTABLE SALES TRANSACTIONS

 **₪300,000,000**  
Crescent  
Palm Jumeirah

 **₪107,000,000**  
The Residences  
Al Barari

 **₪79,200,000**  
Zuna Island  
World Islands

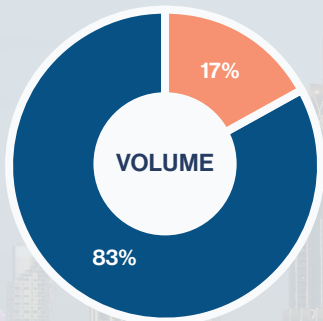


# TOTAL COMPLETED UNITS IN MAY 2025

# 1,947 units

↓ **45% decrease**  
in comparison to  
May 2024 in completed units

## TOTAL NEW OFF-PLAN UNITS IN MAY 2025



● New units launched ● Completed Units



# ALLSOPP & ALLSOPP SALES OVERVIEW

**Allsopp & Allsopp have continued their impressive momentum this year, building on record-breaking results in both February and April. May saw sustained growth, with the total value of transactions climbing by 19% year-on-year. This was largely fuelled by strong demand from international buyers, particularly from the UK, India, and France.**

The average sale price for villas rose by 37% year-on-year, with townhouses showing an even more substantial increase of 52%. Some of the month's standout transactions highlight continued demand for luxury living, including a villa in Polo Homes, Arabian Ranches, which sold for AED 60,000,000, a Jumeirah Islands villa at AED 25,100,000, and a Flame Tree Ridge villa in Jumeirah Golf Estates for AED 25,000,000.

While March and April predominantly favoured cash buyers, May saw a notable shift, with 42% of buyers purchasing with cash and 58% opting for finance. This trend suggests more tenants are transitioning into homeownership, supported by more accessible mortgage options and a maturing residential market. This movement aligns with the DLD's reported 19% drop in rental contract renewals.

Supporting this narrative is a significant 73% increase in sales of properties priced under AED 1 million, compared to the same period last year. This highlights strong demand in the more affordable segment of the market and increased activity from first-time buyers and end users.

For villas and townhouses specifically, Allsopp & Allsopp saw a 52% rise in the average sales price year-on-year, and a 60% increase in total transaction value, which is a direct result of high demand for family-friendly communities and limited new supply.

Although the DLD reported a 45% decrease in completed units handed over, this is not indicative of a slowdown. Instead, it reflects the natural development cycle in Dubai's property pipeline. As current projects reach handover, new developments are being launched, ensuring the market continues to stay active. In the villa and townhouse segment, fewer new launches mean increased scarcity and higher prices, further supporting the elevated sales prices seen in this market.

In terms of property type, May's sales volume was split 65% apartments and 35% villas and townhouses, which is a slight increase in villa and townhouse transactions compared to previous months, where apartments typically held a 70% share.

Notable Allsopp & Allsopp apartment sales in May include a luxury apartment at Six Senses Residences, Dubai Marina, which sold for AED 17,131,000, an Amara Residence unit in Tilal Al Ghaf for AED 7,600,000, and an apartment in Dubai Creek Harbour's Residence Tower, sold for AED 6,000,000.

With rising demand across both affordable and luxury segments, coupled with consistent international interest and limited supply in key areas, the Dubai property market shows no signs of slowing down.





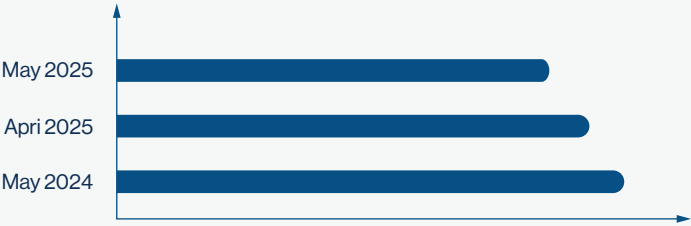
AVERAGE SALES PRICE

€4,488,214

↓ 11% decrease  
vs April 2025

↑ 37% increase  
vs May 2024

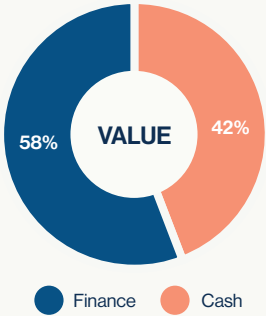
SALES TRANSACTION VOLUME



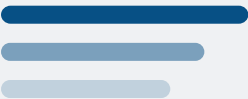
↓ 13% decrease  
vs April 2025

↓ 13% decrease  
vs May 2024

BUYERS' FINANCE SUMMARY

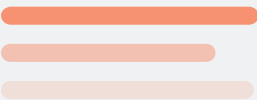


TOTAL VIEWINGS



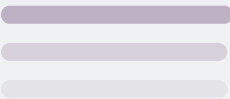
May 2025 10% ↑  
April 2025 M-O-M  
May 2024 21% ↑ Y-O-Y

CLIENT REGISTRATIONS



May 2025 16% ↑  
April 2025 M-O-M  
May 2024 1% ↑ Y-O-Y

NEW PROPERTY LISTINGS



May 2025 1% ↑  
April 2025 M-O-M  
May 2024 1% ↑ Y-O-Y

TOP 5 BUYER NATIONALITIES



25% British



12% Indian



4% French



4% Egyptian



4% Canadian



## AVERAGE VILLA/TOWNHOUSE SALES PRICE

₹ 8,706,610

↓ **23% decrease**  
vs April 2025

↑ **52% increase**  
vs May 2024

## VILLA/TOWNHOUSE SALES TRANSACTION VOLUME

↑ **2%**  
increase vs April 2025



↑ **6%**  
increase vs May 2024



## NOTABLE VILLA SALES TRANSACTIONS



₹ 60,000,000

Polo Homes  
Arabian Ranches



₹ 25,100,000

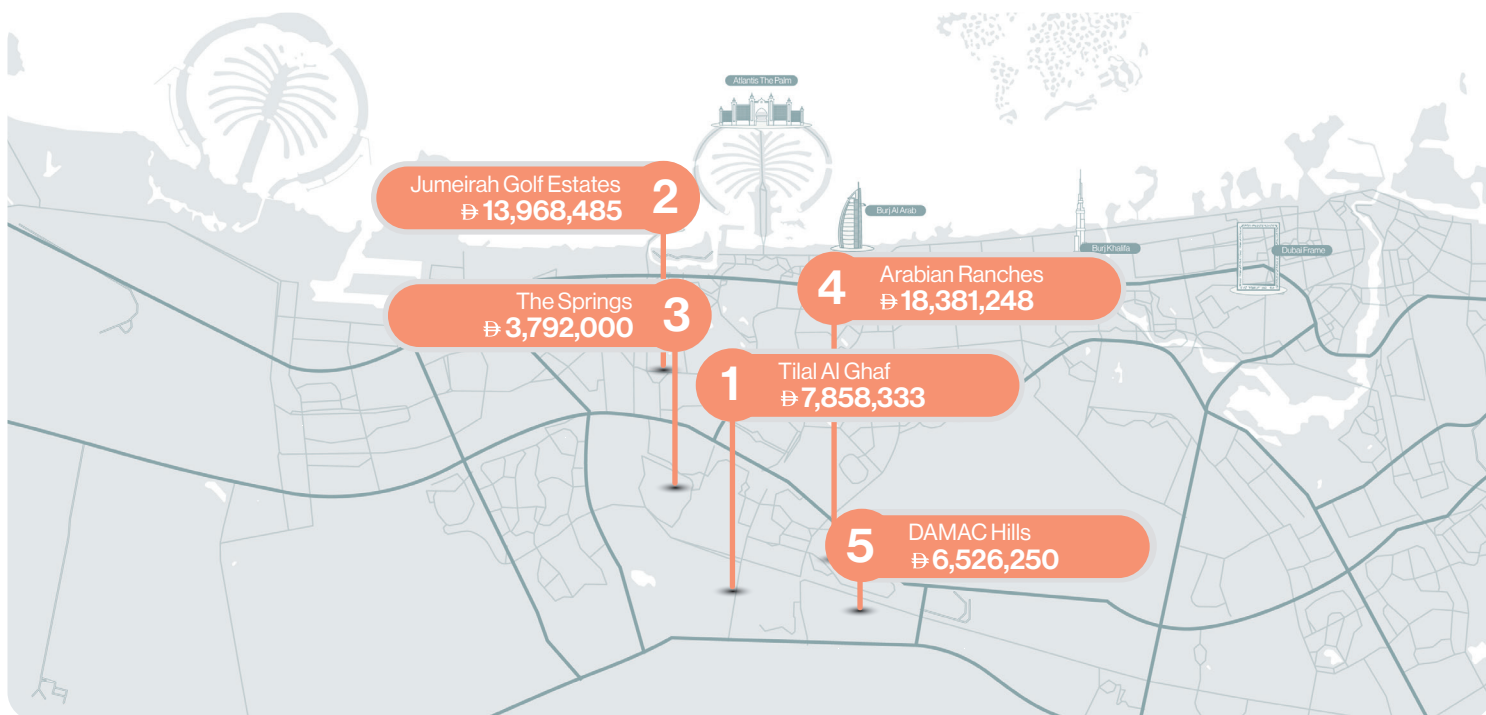
Mediterranean Cluster  
Jumeirah Islands



₹ 25,000,000

Flame Tree Ridge  
Jumeirah Golf Estates

## TOP TRANSACTING VILLA/TOWNHOUSE AREAS & AVERAGE PRICES



AVERAGE APARTMENT SALES PRICE

₹ 2,165,836

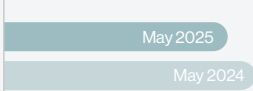
↓ 10% decrease  
vs April 2025  
↓ 3% decrease  
vs May 2024

APARTMENT SALES TRANSACTION VOLUME

↓ 20%  
decrease vs April 2025



↓ 17%  
decrease vs May 2024



NOTABLE APARTMENT SALES TRANSACTIONS

₹17,131,000  
Six Senses Residences  
Dubai Marina

₹7,600,000  
Amara Residences  
Tilal Al Ghaf

₹6,000,000  
Dubai Creek Residence Tower  
Dubai Creek Harbour

TOP TRANSACTING APARTMENT AREAS & AVERAGE PRICES





# ALLSOPP & ALLSOPP LETTINGS OVERVIEW

**Despite a dip in overall rental contract renewals as reported by the Dubai Land Department (DLD), Allsopp & Allsopp has observed a strong surge in average rental prices. Month-on-month, rental prices rose by a substantial 36%, and year-on-year they have jumped by an impressive 46%. These price hikes continue to fuel the shift towards homeownership, and encourage many tenants to purchase rather than renew their leases.**

However, the total volume of rental transactions has declined, mirroring the broader trend seen in DLD data. Allsopp & Allsopp reported an 18% decrease in rental deals month-on-month, and a 38% drop compared to the same period last year.

Among those active in the rental market, whether signing new contracts or renewing existing ones, British, Lebanese, and French nationals led the activity. Interestingly, nationalities such as Azerbaijani and Australian have entered the top eight, reflecting Dubai's growing global appeal.

Standout high-end villa rentals in May included a villa in Sanctuary Falls, Jumeirah Golf Estates for AED 1,500,000, another in the same community for AED 825,000, and a villa in Harmony 3, Tilal Al Ghaf for AED 600,000 per annum. These top-tier rental transactions highlight the level of affluence amongst new Dubai residents who are securing luxury homes while they settle themselves into the city.

Landlords are also continuing to show more flexibility with payment terms. The traditional one-cheque system is gradually being replaced with more tenant-friendly options. Currently 37% of landlords are accepting four or more cheques, while 30% still prefer one cheque, 27% are open to two cheques, and 7% are accepting three.

This shift, combined with the Smart Rental Index introduced earlier this year, gives tenants more negotiating power for both renewals and new leases, creating more balanced transactions across many areas

Encouragingly, both tenant registrations and property viewings are on the rise. Registrations increased by 13% month-on-month, while viewings grew by 15%. These figures indicate a rental market that remains active and attractive, driven by the continuous inflow of residents relocating to Dubai and the ongoing demand for move-in-ready homes.

As Dubai continues to attract a steady stream of new residents, coupled with the ongoing demand for quality homes, its rental market is set to maintain its dynamic and strong appeal.

## AVERAGE LETTING PRICE

# ₪ 276,944

↑ **36% increase**  
vs April 2025

↑ **45% increase**  
vs May 2024

## LETTINGS TRANSACTION VOLUME



↓ **18% decrease**  
vs April 2025

↓ **38% decrease**  
vs May 2024

## TENANT FINANCE SUMMARY

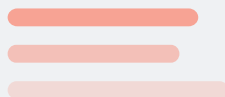
Cheques	April 2025
1	30%
2	27%
3	7%
4+	36%

## TOTAL VIEWINGS



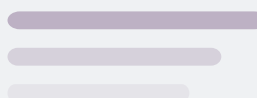
May 2025 **15% ↑**  
April 2025 M-O-M  
May 2024 **6% ↓ Y-O-Y**

## CLIENT REGISTRATIONS



May 2025 **13% ↑**  
April 2025 M-O-M  
May 2024 **21% ↓ Y-O-Y**

## NEW PROPERTY LISTINGS



May 2025 **7% ↑**  
April 2025 M-O-M  
May 2024 **17% ↑ Y-O-Y**

## TOP 5 TENANT NATIONALITIES



**17%** British



**8%** Lebanese



**4%** French



**4%** Indian



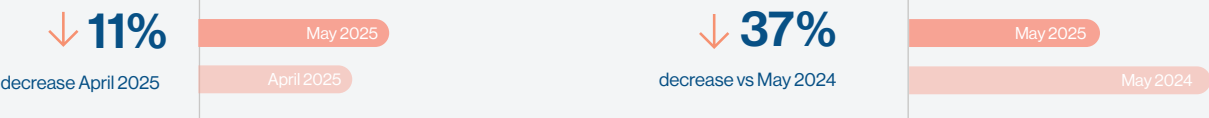
**3%** Russian



AVERAGE VILLA/TOWNHOUSE LETTING PRICE



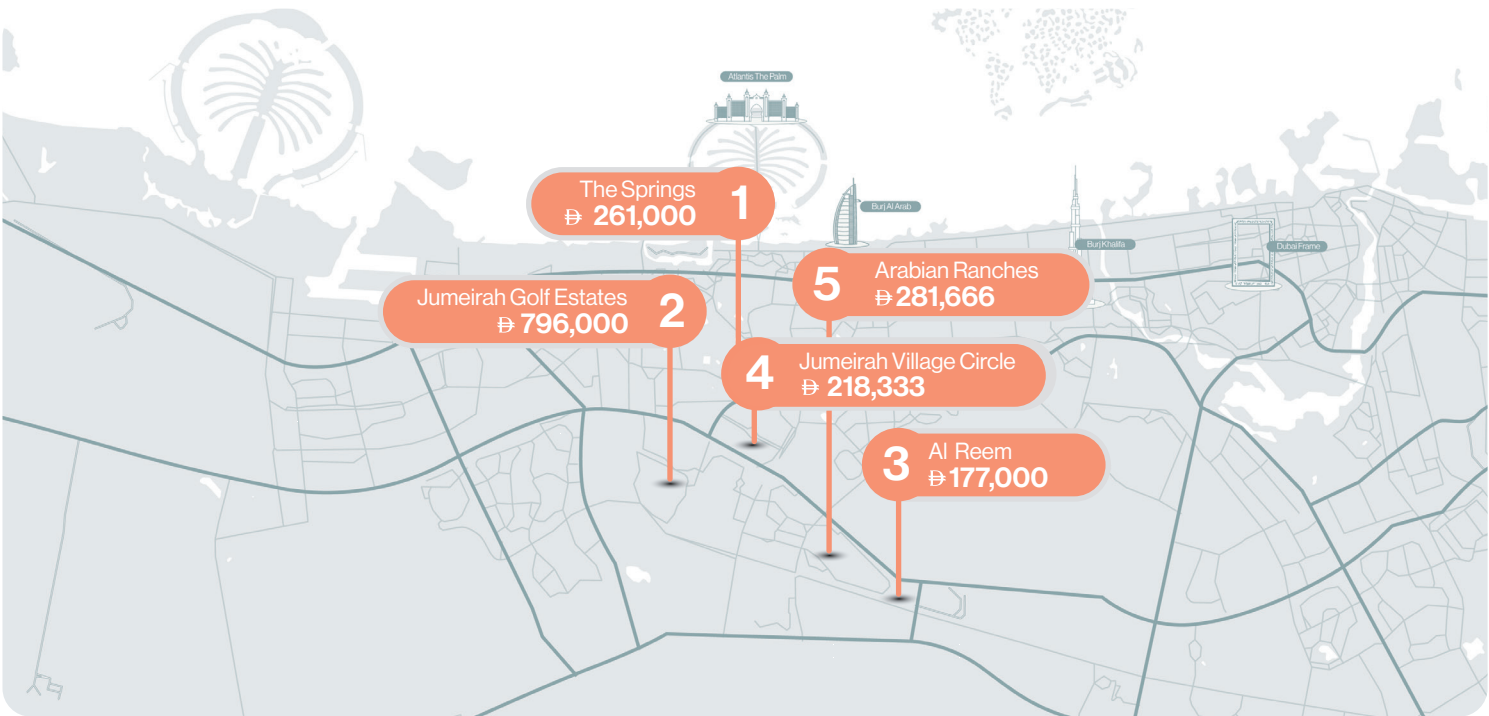
VILLA/TOWNHOUSE LETTING TRANSACTION VOLUME



NOTABLE VILLA LETTING TRANSACTIONS



TOP TRANSACTING VILLA/TOWNHOUSE AREAS & AVERAGE RENT



## PROPERTY LETTINGS & DEMAND

### AVERAGE APARTMENT LETTING PRICE

₹ 140,142

↓ 3% decrease  
vs April 2025

↓ 3% decrease  
vs May 2024

### APARTMENT LETTING TRANSACTION VOLUME

↓ 25%  
decrease vs April 2025

May 2025  
April 2025

↓ 39%  
decrease vs May 2024

May 2025  
May 2024

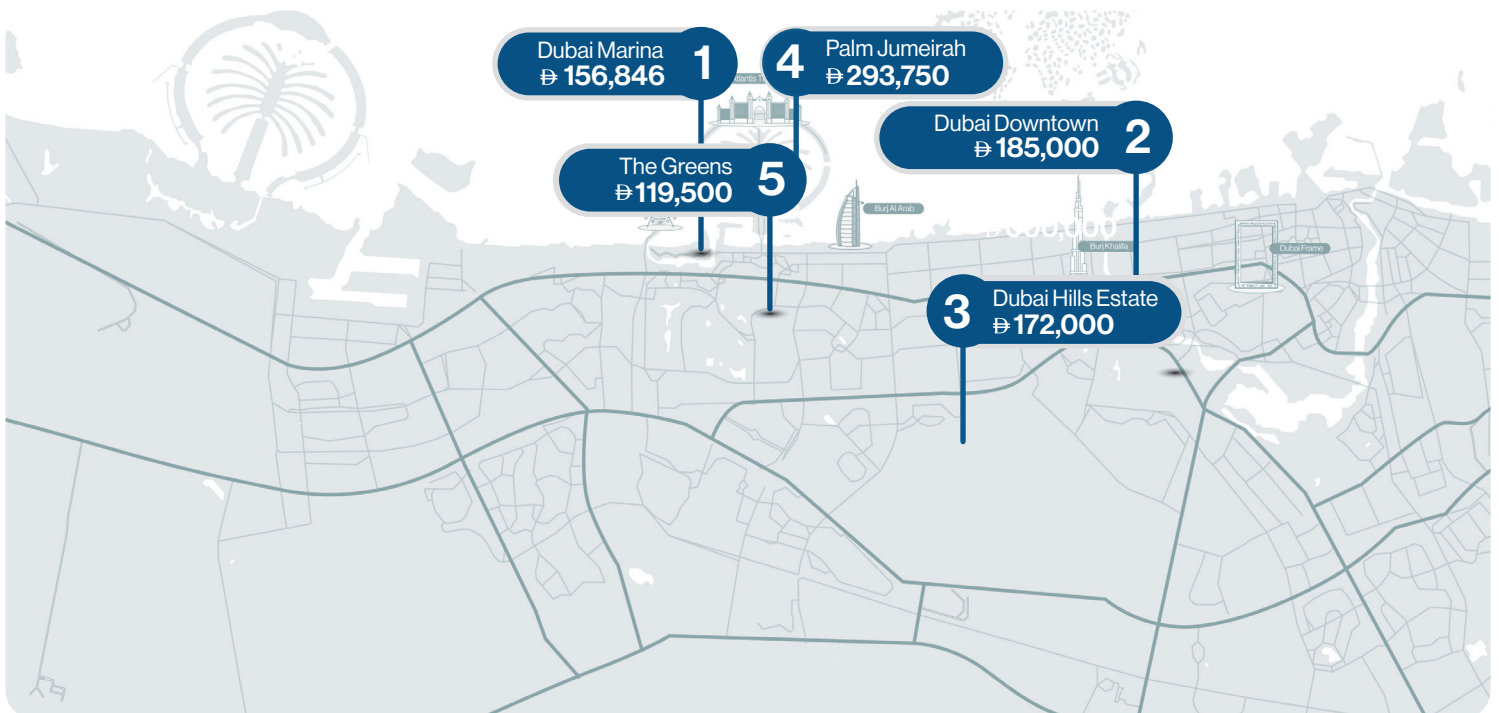
### NOTABLE APARTMENT LETTING TRANSACTIONS

₹ 400,000  
Marina Residences 6  
Palm Jumeirah

₹ 380,000  
Oceana Southern,  
Palm Jumeirah

₹ 365,000  
Mulberry,  
Dubai Hills Estate

### TOP TRANSACTING APARTMENT AREAS & AVERAGE RENT





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