

ALLSOPP & ALLSOPP

Dubai Real Estate

Market Snapshot

OCTOBER 2025



VALUE

₹ 46.5 BN

▲ **4% increase**
vs September 2025

▼ **7% decrease**
vs October 2024

Dubai's real estate market is celebrating another powerful performance, with AED 46 billion in total sales transactions recorded in October, a steady 4% growth from September, according to Dubai Land Department (DLD) data.

The standout trend is the exceptional growth of the secondary (resale) market, which saw its total sales value soar by 20% and its transaction volume increase by 13% month-on-month. This exceptional momentum underscores a growing preference, with both end users and investors increasingly prioritising completed, ready-to-move-in properties that offer immediate benefits such as instant rental income or lifestyle improvements.

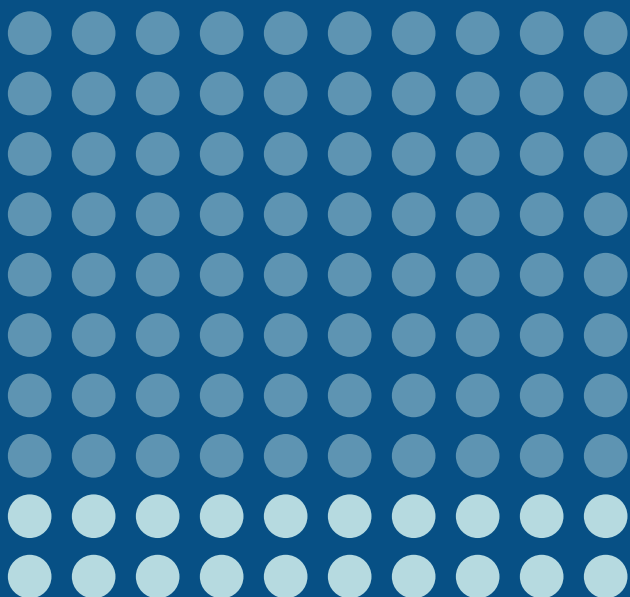
The health of the market is evident across the entire price spectrum. The average secondary market sales price now stands at AED 3.5 million, closely aligned with Allsopp & Allsopp's internal data. The AED 1 to 3 million bracket expanded by 18% month-on-month, now accounting for 45% of all transactions. Notably, sales in the AED 0 to 1 million segment surged by a massive 58%. This trend clearly shows that entering the Dubai property market is now more accessible than many international buyers assume, fueling strong interest from first-time buyers and yield-seeking investors.

When evaluated against off-plan, the secondary market accounted for 43% of the total market value in October, despite making up 31% of total transactions. This significant value share highlights the depth, strong liquidity, and increasing maturity of Dubai's resale sector. Year-on-year, the appreciation in the secondary market is notable, villa sales prices are up 13% and apartment prices have risen 7%. Established communities like Jumeirah Village Circle, Business Bay, and Jumeirah Village Triangle remain powerhouses for both sales and rentals.

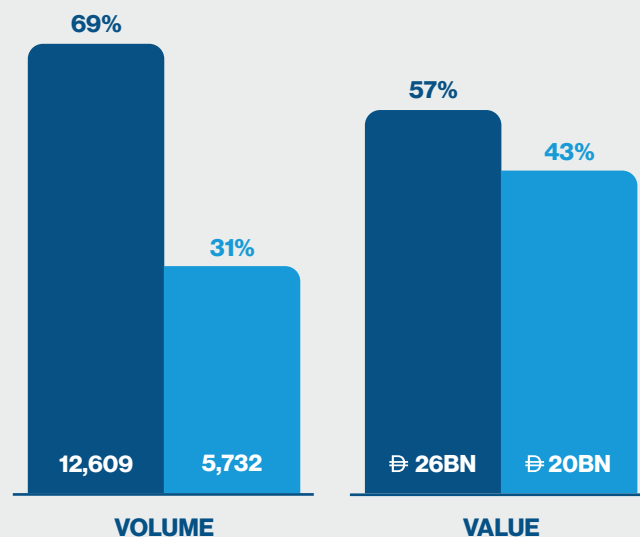
While the rental market saw a slight cooling in volumes, new contracts down 6% and renewals down 15% month-on-month, rental prices continue their upward trajectory. Apartment rents increased by 8%, while villa and townhouse rents rose by a significant 17%, fuelled by limited supply in family communities and the ongoing influx of expat families. This combination of rising rents and soaring resale activity indicates a crucial market evolution. Many long-term tenants are now actively transitioning into buyers, finding resale properties an increasingly attractive alternative to high rental costs.

20%

▲ increase in secondary market total transaction value



OFF-PLAN VS SECONDARY



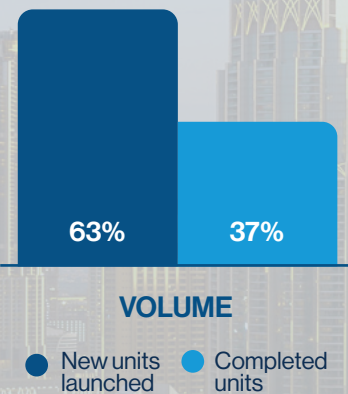
Overall, Dubai's property market continues to demonstrate resilience and growth, with total transaction value increasing by 4% month-on-month, reinforcing the city's position as a growing and attractive investment destination for both end users and investors alike.

TOTAL COMPLETED UNITS IN OCTOBER 2025

4,598 units

↑ **172% increase**
in comparison to completed units in
October 2024

TOTAL NEW OFF-PLAN UNITS IN OCTOBER 2025



Despite a surge in new project launches, Dubai is experiencing a widening gap between launched units and actual completions, with only around 22% of units delivered in both 2024 and 2025 year-to-date. In 2025, 89% of new launches have been apartments, while villas and townhouses account for just 11%, creating a potential oversupply of apartments alongside a shortage of family-friendly homes.

An increase in apartment supply isn't inherently negative; it plays a key role in maintaining a balanced market. Apartments provide accessible options for singles, couples, young families, first-time buyers, and investors, keeping entry points into Dubai real estate attainable, and a strong, well-priced apartment pipeline supports rental stability and affordability, yet the supply of villas and townhouses is still struggling to meet growing demand.

AVERAGE SALES PRICE

₹5,162,067

Allsopp & Allsopp continues to grow and break records, driving significant activity in Dubai’s property market and contributing to the wider emirate’s sustained growth. Average sales prices across the market have risen by 23% year-on-year, while total sales transaction value increased by 21% over the same period.

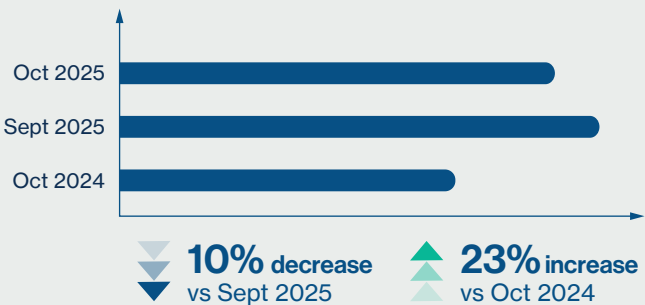
The finance versus cash split for buyers in October remained balanced, with 54% of transactions financed and 46% completed in cash, closely mirroring September’s figures. Notably, the proportion of cash buyers has increased slightly, reflecting the influx of wealth into Dubai and international buyers sell properties in their home countries before relocating and establishing themselves in the emirate.

BUYER’S FINANCE SUMMARY



This data highlights the underlying strength of the market, driven by both local and international demand, and underscores how Dubai remains an attractive destination for investors seeking both residential opportunities and long-term capital growth. With strong buyer appetite across the board, from entry-level homes to ultra-luxury villas, the market shows no signs of slowing, confirming Dubai’s position as a highly sought-after property hub across all affordabilities.

AVERAGE SALE PRICE



The top nationalities of buyers in Dubai continue to reflect the city’s strong appeal to both traditional and emerging investor bases. British buyers remain the largest group at 21%, followed by Indian nationals at 13%, reflecting long-standing ties and confidence in Dubai’s real estate market. Turkey, France and Germany are also making up a growing proportion of investors, highlighting a notable increase in European interest. While British and Indian buyers have historically dominated the market, the rising presence of both Arabs and Europeans signals Dubai’s growing reputation as a truly global investment destination, attracting a diverse mix of residents seeking both lifestyle and long-term wealth opportunities.

TOP 5 BUYER NATIONALITIES



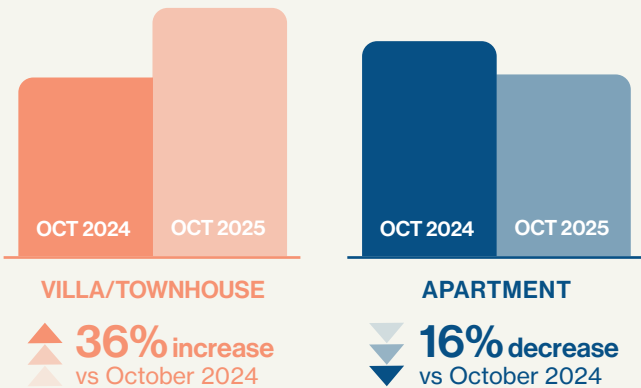
AVERAGE VILLA/TOWNHOUSE SALES PRICE



₹ 9,873,492

The health of the market is evident across the entire price spectrum. The average secondary market sales price for Allsopp & Allsopp now stands at AED 3.5 million, which is slightly higher than the market average of AED 2.5 million. The AED 1 to 3 million bracket rose by 18% month-on-month, now accounting for 45% of all transactions. Notably, sales in the AED 0 to 1 million segment surged by a huge 58%. This trend clearly shows that entering the Dubai property market is now more accessible than many international buyers assume, fueling strong interest from first-time buyers and yield-seeking investors.

SALES TRANSACTION VOLUME



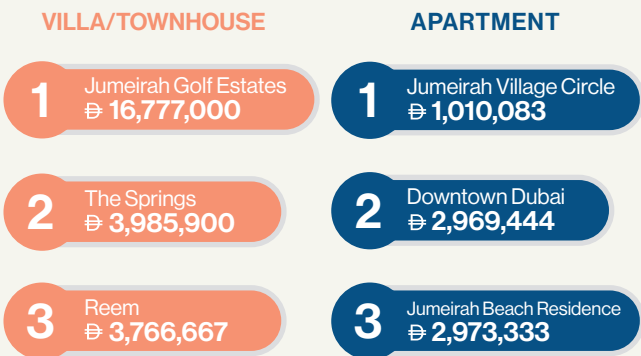
At the luxury end, demand is equally robust. October saw Allsopp & Allsopp complete several ultra-high-value resale transactions, including a Signature Villa on Palm Jumeirah for AED 80 million, a villa in Sanctuary Falls, Jumeirah Golf Estates, for AED 32 million, and a property in Lime Tree Valley for AED 25.75 million. These landmark deals cement Dubai's status as a top global ultra-prime destination where high-net-worth (HNW) individuals view luxury real estate as a critical long-term wealth asset.

AVERAGE APARTMENT SALES PRICE



₹ 2,106,939

TOP TRANSACTING AREAS & AVERAGE PRICES



The most sought-after apartment areas this month reflect Dubai's affordable segment, attracting both first-time buyers and yield-focused investors. Leading the list is Jumeirah Village Circle, followed by Downtown Dubai and Jumeirah Beach Residence. These communities continue to offer strong demand due to their accessibility, lifestyle amenities, and attractive price points, making them ideal entry points into the Dubai property market.

AVERAGE LETTING PRICE

AED 182,145

9% decrease
vs September 20258% increase
vs October 2024

Dubai's rental market saw a natural correction in October, with the Dubai Land Department (DLD) reporting an 11% month-on-month decline in total rental contracts. New rental agreements fell by 6%, while renewals dropped by 15%. This softening follows an exceptionally active summer period when rental demand surged due to an influx of new families and residents relocating to Dubai. The recent slowdown was therefore expected as the market normalises after months of heightened activity.

17%

▲ increase in the average villa/TH rental price vs. October 2024

Breaking down by property type, villa and townhouse rentals fell by 18%, while apartment rentals dropped 8% month-on-month. However, this decline in volume doesn't signal reduced demand, rather, it reflects seasonal adjustment and the limited availability of stock, particularly for larger family homes.

Allsopp & Allsopp's internal data mirrors this broader trend. Although total rental volumes dipped, average rental prices continue to rise, increasing 8% year-on-year to AED 182,145 annually. Villa and townhouse rents saw a particularly sharp rise of 17% year-on-year, now averaging AED 300,000 per year, as families and long-term residents compete for limited supply in established communities. Supporting this, villa and townhouse rental transactions actually rose 10% month-on-month, reinforcing the ongoing strength of this segment.

TOP 5 TENANT NATIONALITIES



28%

British

7%

Russian

6%

Indian

4%

Iranian

2%

Lebanese

Apartment rentals also showed resilience, with volume up by 3% month-on-month and several notable high-value leases underscoring Dubai's appeal among affluent tenants. Prime examples include luxury apartments in Downtown Dubai and Burj Khalifa area leasing at AED 500,000, Dubai Creek Harbour at AED 500,000, and DAMAC Hills at AED 430,000, illustrating the premium that tenants are willing to pay for convenience, views, and lifestyle.

AVERAGE APARTMENT LETTING PRICE



₹ 138,108

TOP TRANSACTING APARTMENT AREAS AND AVERAGE RENT



1 Dubai Marina
₹ 133,125

2 Downtown Dubai
₹ 145,558

3 Jumeirah Village Circle
₹ 92,471

4 Business Bay
₹ 89,900

5 Dubai Creek Harbour
₹ 289,167

AVERAGE VILLA/TOWNHOUSE LETTING PRICE



₹ 300,047

NOTABLE VILLA/TOWNHOUSE LETTING TRANSACTIONS



₹ 1,950,000

Flame Tree Ridge

Jumeirah Golf Estates

₹ 1,200,000

District 6

Jumeirah Park

₹ 600,000

Canal Cove Villas

Palm Jumeirah

Across the city, the most transacted rental communities remain a blend of central and suburban neighbourhoods that cater to Dubai's diverse tenant base. Dubai Marina recorded an average rental price of AED 133,125, even with its increase in popularity it still attracts many buyers and tenants. Downtown Dubai averaged AED 145,557, and Jumeirah Village Circle (JVC) offered more affordable options at an average of AED 92,470. These areas continue to attract both new arrivals and long-term residents, reflecting Dubai's growing population and its ability to offer something for every lifestyle and budget.

Overall, despite the minor month-on-month decline in volumes, the rental market remains strong and underpinned by demand. With average prices still rising and tenant competition intensifying in key communities, Dubai's rental sector continues to demonstrate resilience and long-term growth potential.

TENANT FINANCE SUMMARY

Cheques	1	2	3	4+
October 2025	24%	16%	9%	50%

Tenants are experiencing a far more flexible rental market, with landlords increasingly open to varied payment structures. The growing trend of landlords accepting four or more payments has surged in popularity, up from 33% at the same time last year and 48% in September, reflecting a market that's adapting to tenant needs and promoting greater financial accessibility.

ALLSOPP & ALLSOPP

For press and media
enquiries, please contact:

PR & Communications

✉ e.bates@allsoppandallsopp.com

☎ +971 4 429 4444

📱 +971 58 598 6637

🌐 allsoppandallsopp.com