

# ENGEL & VÖLKERS



## Residential market snapshot

DUBAI | OCTOBER 2025

# Residential market snapshot



<p><b>18,530</b> Sales transactions -5.4% YOY</p>	<p><b>47.0Bn</b> Residential value sold (AED) -6.8% YOY</p>	<p><b>6.8%</b> Average gross rental yield -2.3% YOY</p>
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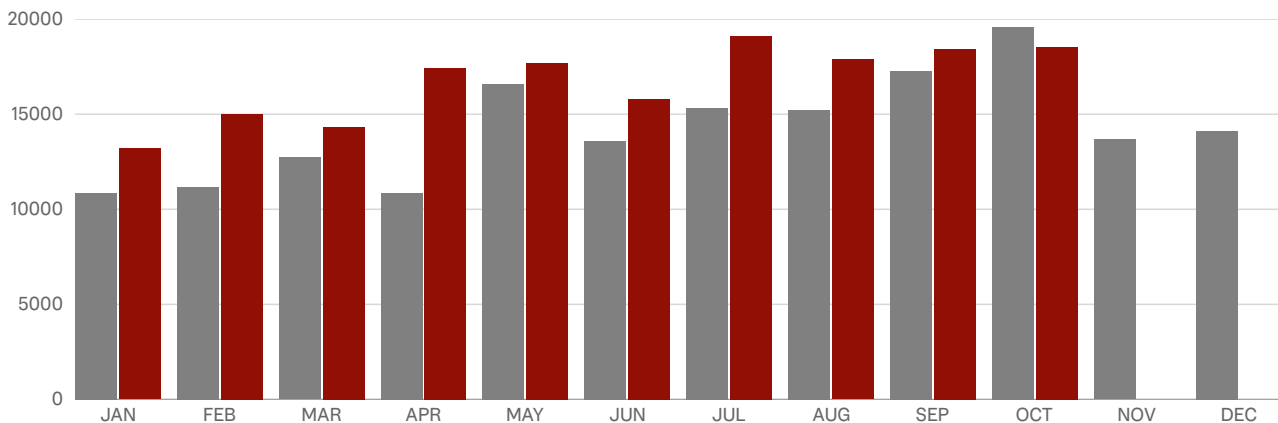
Dubai’s residential market showed early signs of entering a more sustainable phase in October, following an extended period of strong growth. Transaction volumes eased from last year’s exceptionally high levels, but steady pricing and healthy demand indicate a measured adjustment rather than a shift in sentiment.

A total of 18,530 sales transactions were recorded. Off-plan sales were 3.7% lower year-on-year, and secondary sales declined 8.9%, set against an unusually strong October 2024. Off-plan continued to lead activity at 68.3% of all sales, while secondary transactions rose 14.4% month-on-month, reflecting renewed interest in ready properties. Apartments accounted for 85.8% of sales, up from 79% last October, supported by sustained investor demand and more accessible entry points across key communities.

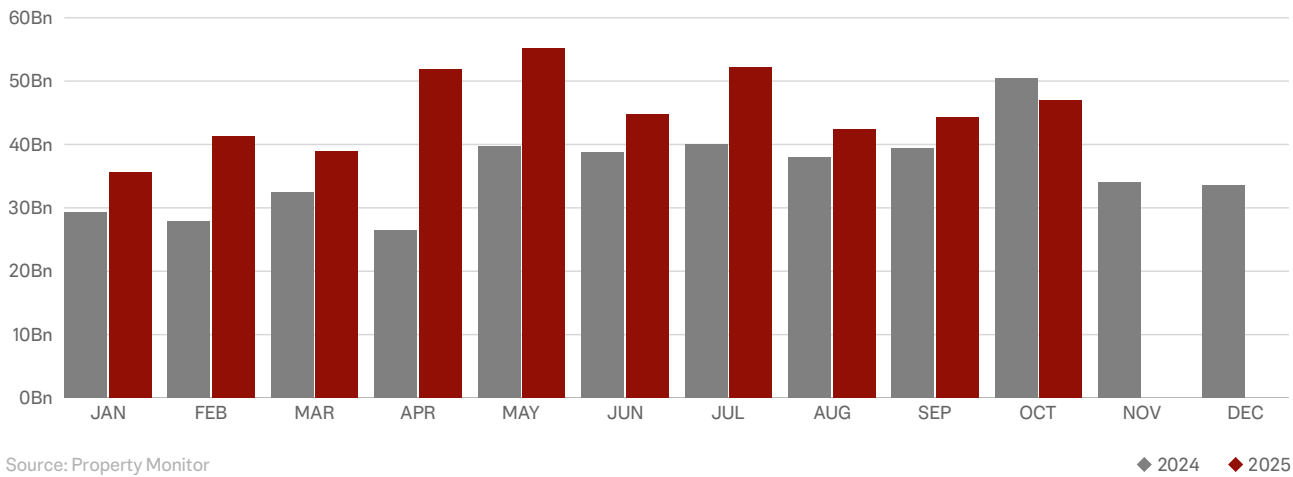
Prices remained on an upward trajectory. Many apartment communities recorded 5–10% annual growth, while villas and townhouses achieved 10–20% year-on-year. Average gross rental yields held at 6.8%, as rental growth broadly kept pace with rising sales prices.

Overall, the market continues to transition at a steady pace. Core fundamentals, including population growth, a strong economy and long-term investment confidence, remain supportive and position the market on solid footing as activity typically strengthens into year-end.

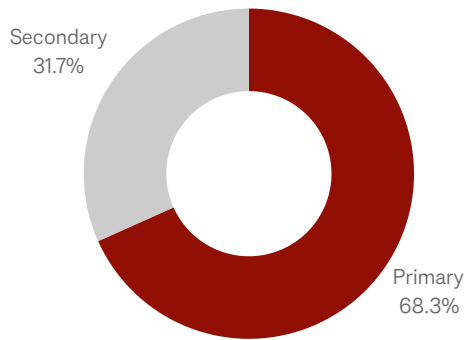
## Sales transactions by month



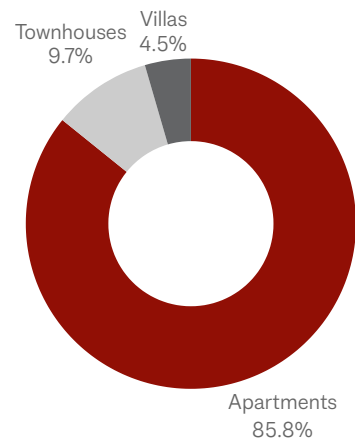
### Transacted value by month (AED billion)



### Primary vs secondary sales



### Sales by property type



### Sales price changes in key communities

#### Apartments

Community	Last month	Last 12 months
Business Bay	+3.2%	+4.7%
Downtown Dubai	+0.2%	+7.6%
Dubai Creek Harbour	+1.2%	+4.7%
Dubai Hills Estate	+1.6%	+6.8%
Dubai Marina	+1.8%	+15.5%
JLT	+1.5%	+9.2%
JVC	+1.0%	+16.1%
JVT	+0.3%	+24.3%
Palm Jumeirah	-0.6%	+15.1%

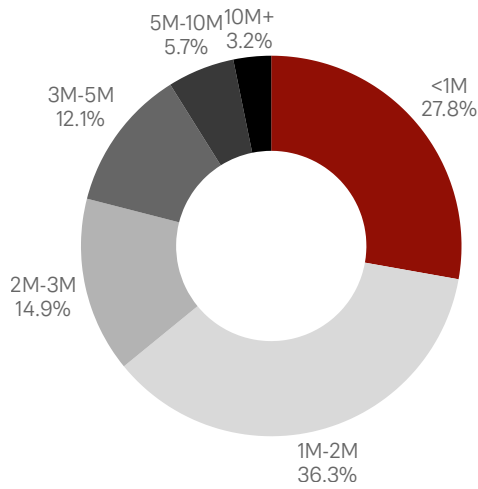
Source: Property Monitor

#### Villas & townhouses

Community	Last month	Last 12 months
Arabian Ranches 1	+0.8%	+18.0%
Dubai Hills Estate	-1.5%	+23.1%
Jumeirah Golf Estates	-1.4%	+19.0%
Jumeirah Park	+0.8%	+7.0%
JVT	+1.2%	+3.7%
Palm Jumeirah	+0.9%	+10.9%
The Springs	+0.6%	+17.5%
Tilal Al Ghaf	-0.6%	+8.1%
Victory Heights	+0.7%	+32.5%

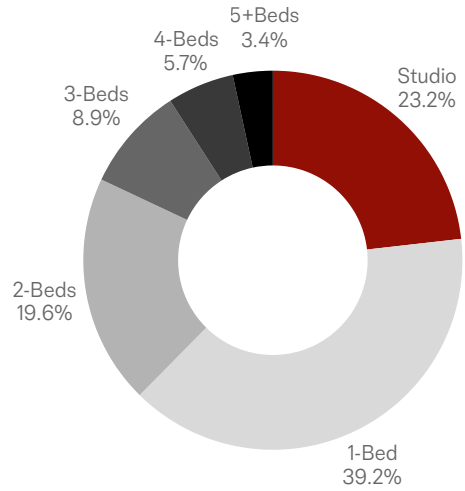
Source: Property Monitor

### Sales price mix (AED)



Source: Property Monitor

### Bedroom mix



Source: Property Monitor

## Top communities by sales transactions

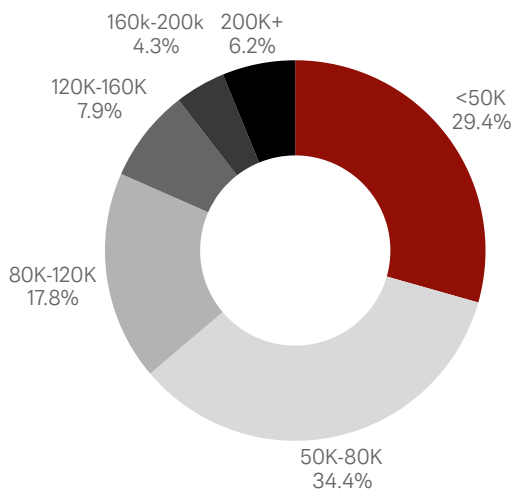
NUMBER OF UNITS SOLD + AVERAGE PRICE (/SQ.FT.)



# Residential leasing

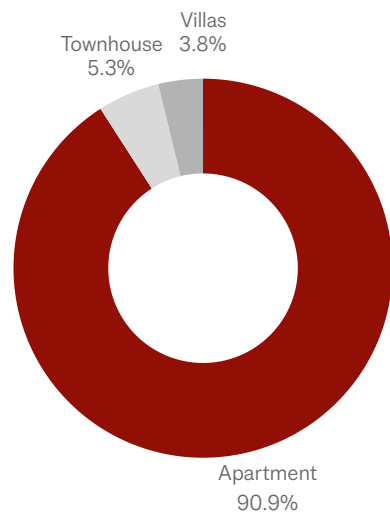


Rental price mix



Source: Property Monitor

Property type mix



Source: Property Monitor

## New & renewed rental contracts

Type	New	Renewal
Apartments	18,705	25,376
Townhouses	1,119	1,570
Villas	1,004	747
<b>Total</b>	<b>20,828</b>	<b>27,693</b>

Source: Property Monitor

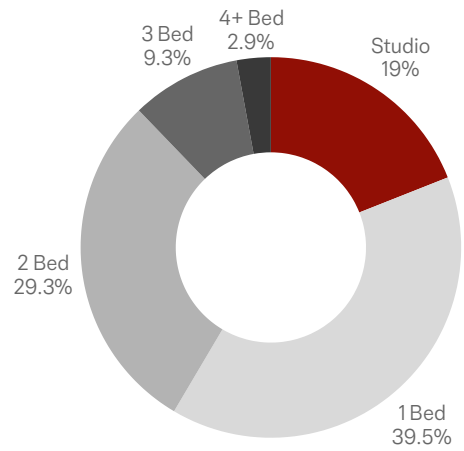


### Top communities | Apartments

Community	Units Rented	Rent (AED/sqft)
JVC	2,865	98
Business Bay	1,897	126
Dubai Marina	1,437	120
Dubai Silicon Oasis	1,278	70
Arjan	1,096	89

Source: Property Monitor

### Bedroom mix



Source: Property Monitor



### Top communities | Villas & townhouses

Community	Units Rented	Rent (AED/sqft)
Damac Hills 2	375	51
Mirdif	350	42
Town Square	184	69
The Springs	171	98
Dubai South	158	59

Source: Property Monitor

# Next steps to make smarter property decisions

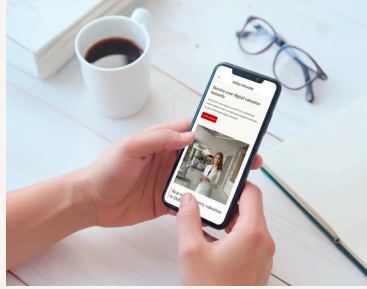
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Instant property valuation

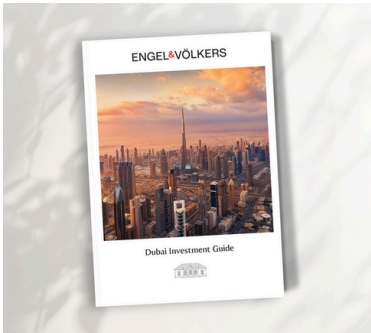
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Market Research Hub

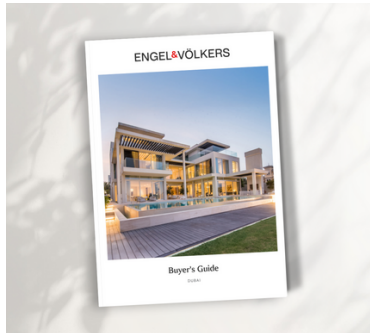
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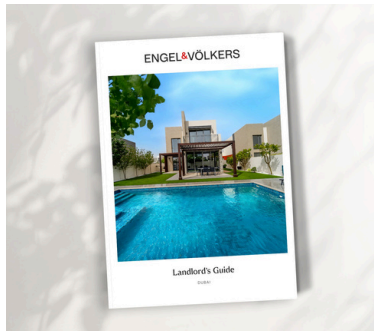
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# A global network with local market experts

For over 45 years, Engel & Völkers has specialized in the brokerage of residential and commercial property in the premium segment. As a leading real estate platform, we operate across 5 continents, providing specialized local knowledge on a global scale.

> 35

COUNTRIES

Ensure our presence across five continents

> 45

YEARS

Successful in global real estate since 1977

> 200

AGENTS

Professional real estate consultants in Dubai

> 16,500

PEOPLE

Work under the brand around the world

> €1.2 Bn

REVENUE

The total turnover (gross) in 2024

> 1,000

LOCATIONS

Provide local market expertise from experts



## Meet the team



**Daniel Hadi**  
CEO - Middle East



**Diana Dzaka**  
CMO - Middle East



**Robert Villalobos**  
Head of Secondary



**Usman Adrees**  
Head of Primary



**Jake Fletcher**  
Head of Leasing



**Joshua Hughes**  
Marketing Manager

### Methodology

Our market experts have taken a holistic approach to provide a comprehensive overview of Dubai's residential real estate market for October 2025. We have used the Property Monitor Intelligence Platform, which contains detailed DLD transaction information, alongside our internal sales and leasing data, to build a full picture of market trends and dynamics. This rigorous analysis ensures an in-depth understanding of the residential real estate market in Dubai.

## DUBAI

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