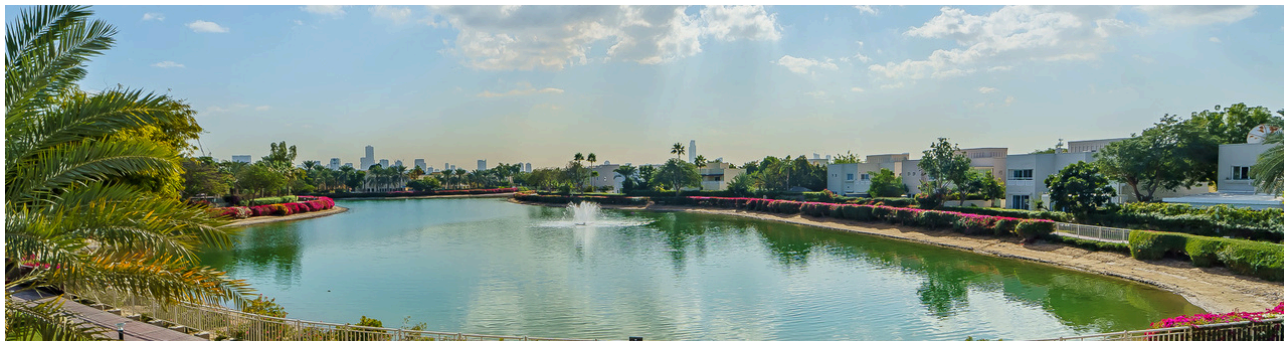




Residential market snapshot

DUBAI | JULY 2025

Residential market snapshot



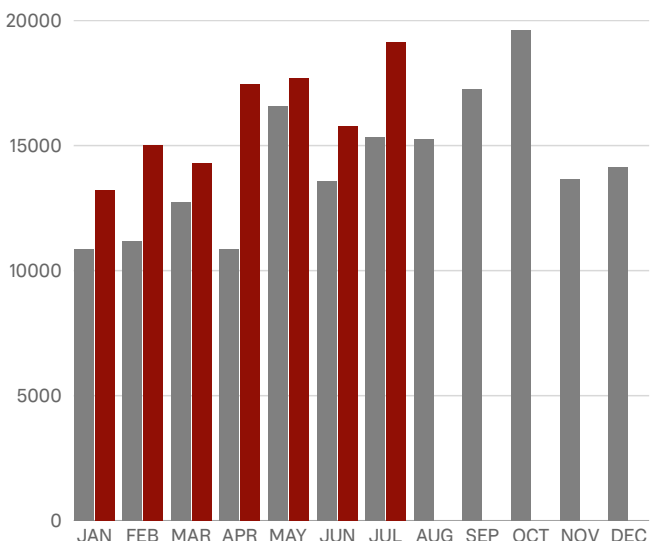
19,115	Sales transactions +24.6% YOY	52.1 Bn	Residential value sold (AED) +30.1% YOY	6.8%	Average gross rental yield -3.6% YOY
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Dubai’s residential market recorded another milestone month in July, posting the second-highest transaction volume on record. The off-plan segment remained the primary driver of growth, accounting for 65% of all transactions. Compared to July 2024, off-plan sales volumes rose by 33.9%, with the total value sold up 45.9%. While some of these deals were likely agreed in May and June, the figures underscore the strength of buyer demand heading into the summer.

The secondary market also performed strongly in July, with transaction volumes and value increasing by 10.3% and 15.9% respectively. Whilst apartment prices in some established communities show signs of stabilisation, the average apartment rental yield of 7.2% remains very competitive. In the villa segment, limited ready supply and buoyant demand continue to drive up prices, with year-on-year growth of 10–20% in many prime areas.

Although a seasonal slowdown is likely in the near term, the outlook remains highly positive. With resilient demand, robust economic fundamentals, and continued population growth, Dubai’s residential market is well-positioned for the months ahead.

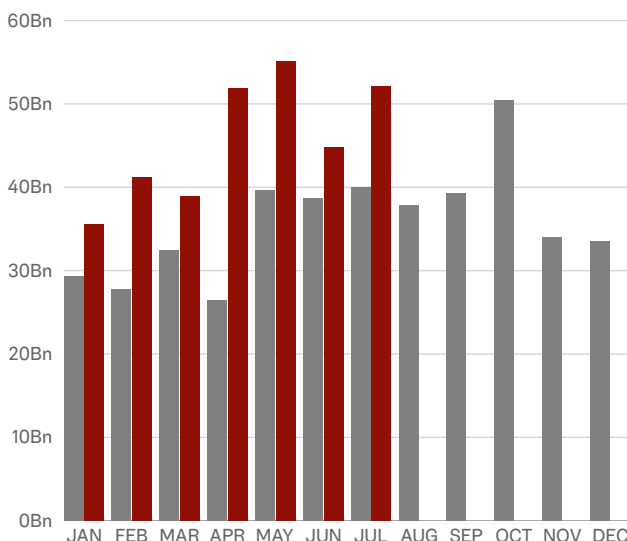
Sales transactions by month



Source: Property Monitor

◆ 2024 ◆ 2025

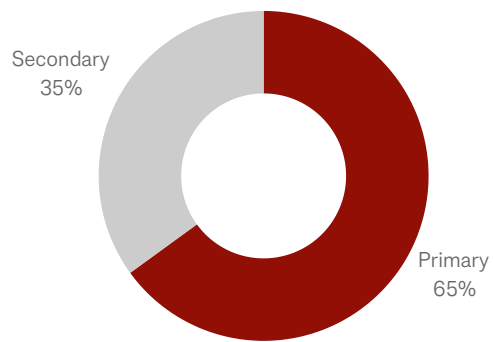
Transacted value by month (AED billion)



Source: Property Monitor

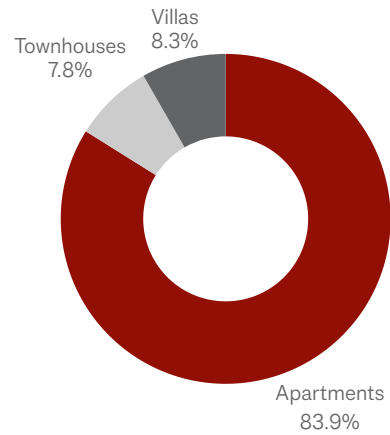
◆ 2024 ◆ 2025

Primary vs secondary sales



Source: Property Monitor

Sales by property type



Source: Property Monitor

Sales price changes in key communities

Apartments

Community	Last month	Last 12 months
Bluewaters	-0.4%	+2.3%
Business Bay	+0.9%	+3.4%
Damac Hills	+0.6%	+5.4%
Downtown Dubai	-1.2%	+6.8%
Dubai Creek Harbour	+0.5%	+2.7%
Dubai Hills Estate	+0.3%	+5.0%
Dubai Marina	+0.4%	+9.7%
JLT	+0.5%	+9.5%
JVC	-0.4%	+17.3%
JVT	+4.1%	+36.3%
Palm Jumeirah	+1.7%	+17.9%

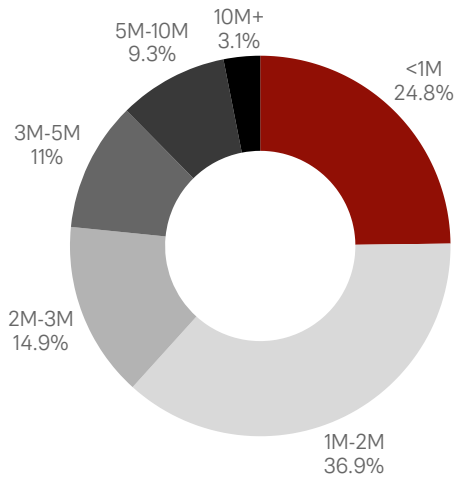
Source: Property Monitor

Villas & townhouses

Community	Last month	Last 12 months
Arabian Ranches	+1.4%	+21.7%
Damac Hills	+0.9%	+15.6%
Dubai Hills Estate	+0.8%	+24.0%
Emirates Living	+0.6%	+20.8%
Jumeirah Golf Estates	-1.0%	+22.3%
Jumeirah Park	+1.9%	+14.0%
JVT	-0.4%	+10.8%
Palm Jumeirah	-3.1%	+1.7%
The Valley	+2.6%	+14.6%
Tilal Al Ghaf	+1.1%	+22.3%
Victory Heights	+3.5%	+39.1%

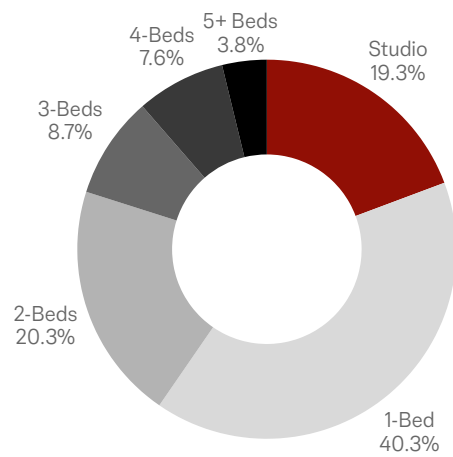
Source: Property Monitor

Sales price mix (AED)



Source: Property Monitor

Bedroom mix



Source: Property Monitor

Top communities by sales transactions

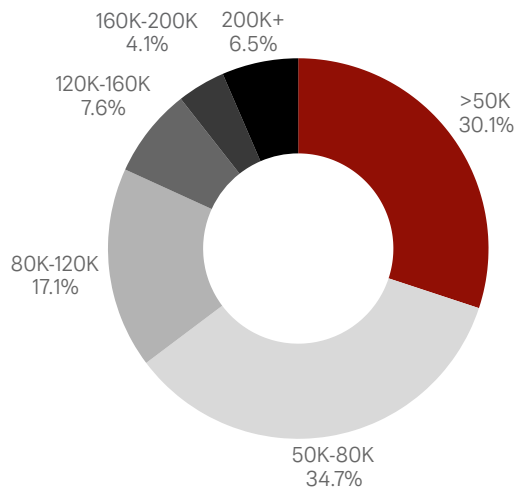
NUMBER OF UNITS SOLD + AVERAGE PRICE (/SQ.FT.)



Residential leasing

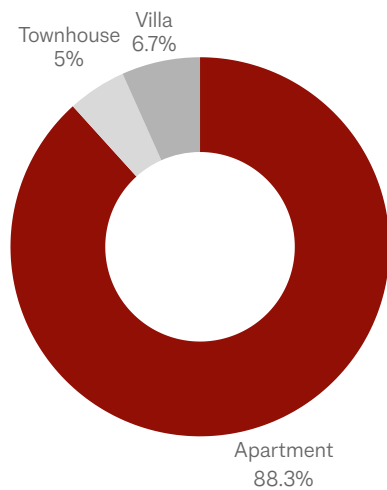


Rental price mix



Source: Property Monitor

Property type mix



Source: Property Monitor

New & renewed rental contracts

Type	New	Renewal
Apartments	13,609	20,965
Townhouses	1,009	946
Villas	1,001	1,643
Total	15,619	23,554

Source: Property Monitor

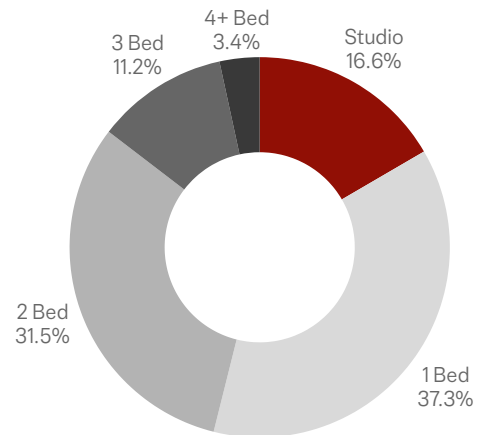


Top communities | Apartments

Community	Units Rented	Rent (AED/sqft)
JVC	1,657	91
Silicon Oasis	1,175	70
Business Bay	1,080	115
Arjan	1,005	84
Dubai Marina	938	112

Source: Property Monitor

Bedroom mix



Source: Property Monitor



Top communities | Villas & townhouses

Community	Units Rented	Rent (AED/sqft)
Damac Hills 2	373	50
Mirdif	352	46
Emirates Living	224	96
Town Square	187	67
Dubai Hills Estate	163	125

Source: Property Monitor

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 July 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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