



White & Co.

FORWARD-THINKING REAL ESTATE

2025

Annual Market Report

DUBAI REAL ESTATE

2025

Market Recap From Our CEO



Dubai's real estate market maintained strong momentum throughout 2025, with activity remaining robust across all major segments. Investor confidence was reinforced by sustained population growth, progressive visa reforms, and supportive regulatory measures. The year was marked by a surge in new project launches and a rising number of high-value transactions, underscoring the market's depth and maturity.

The residential sector delivered steady annual growth, driven largely by luxury villas and prime apartment communities. Demand continued to come from both local and international buyers prioritizing lifestyle-centric, amenity-rich neighborhoods. While premium assets performed strongly, early indications of oversupply emerged within select mid-market segments. Off-plan sales remained a dominant force in 2025, supported by competitive payment plans and ambitious master-planned developments that attracted high-net-worth and long-term investors.

Commercial real estate saw healthy leasing in Grade A and flexible offices as businesses expanded, while retail benefited from strong tourism and sustained luxury spending.

Policy updates around long-term residency and foreign ownership further strengthened sentiment, with regulators encouraging steady, sustainable growth across the sector.

Calum White

Founder & CEO

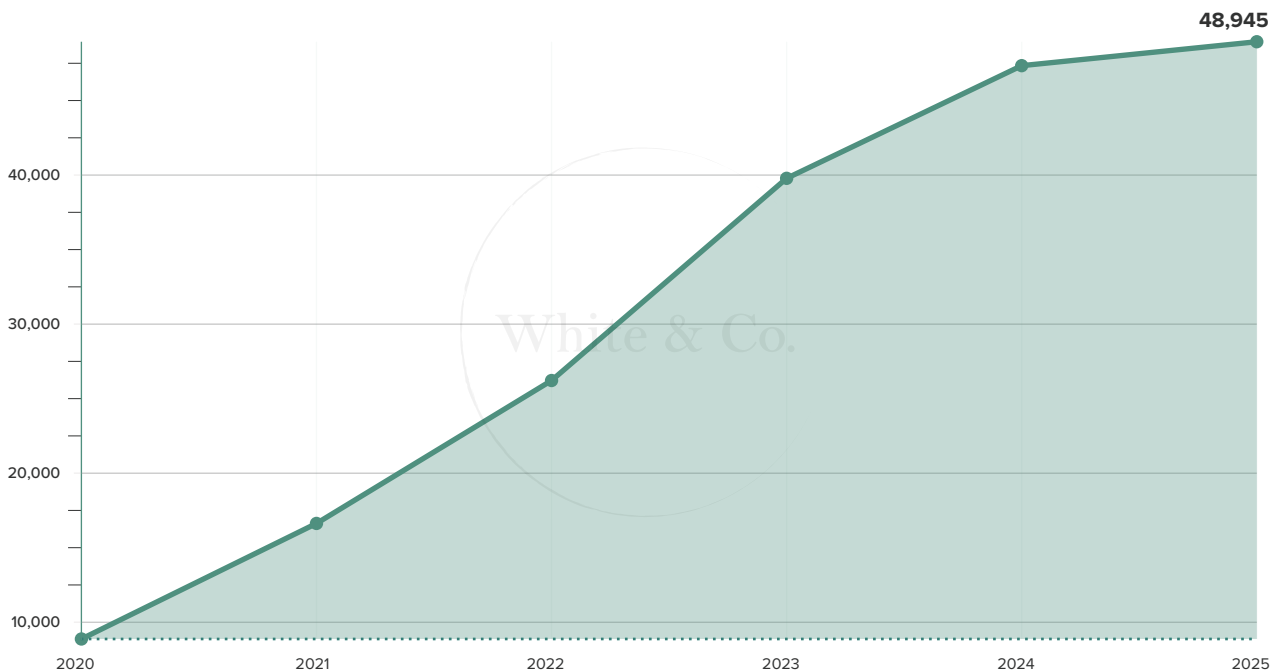
SALES

Residential

Dubai’s residential sales market remained strong in 2025, with apartments continuing to drive transaction volumes, while villas recorded solid price growth amid limited supply. Demand for premium and family-oriented homes supported higher values, reinforcing Dubai’s resilience and ongoing appeal to both local and international buyers.

Total Sale Transactions Volume

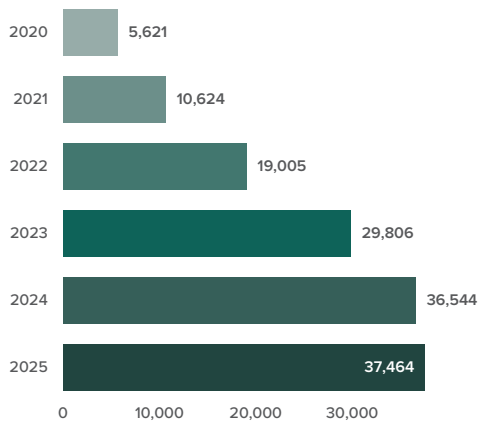
IN DUBAI, 2025 (TITLE DEED)



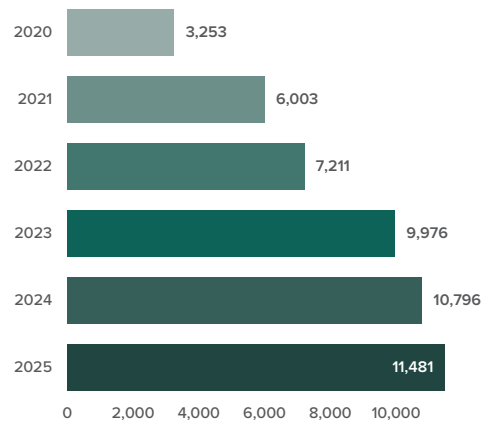
Sale Transactions Volume by Property Type

IN DUBAI, 2025 (TITLE DEED)

Apartments

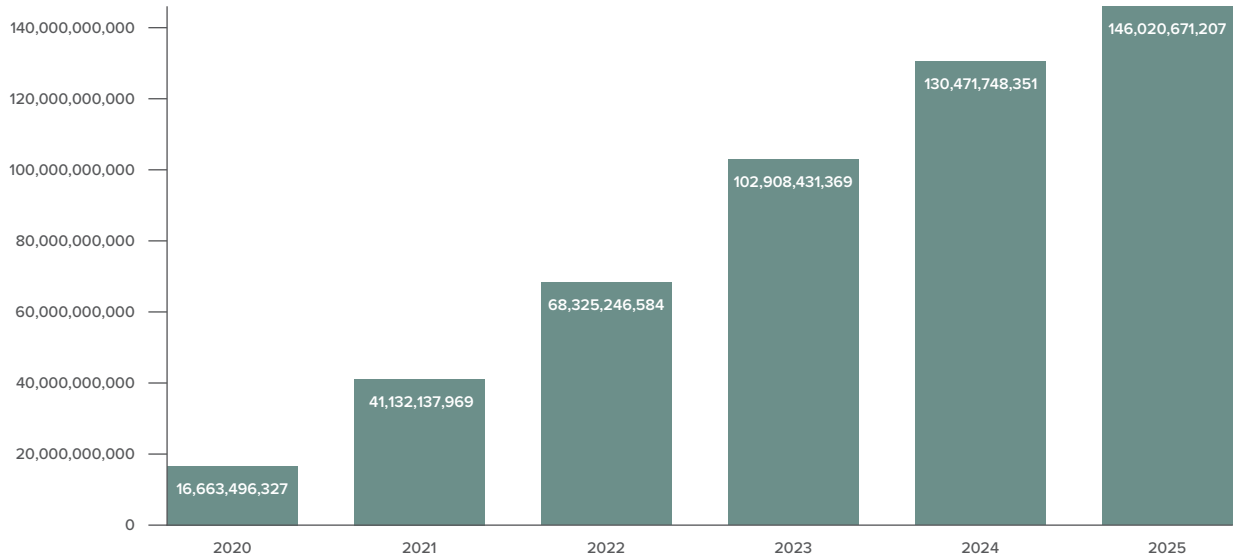


Villa | Townhouse

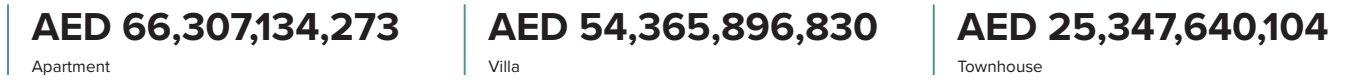


*Data Source: Property Monitor

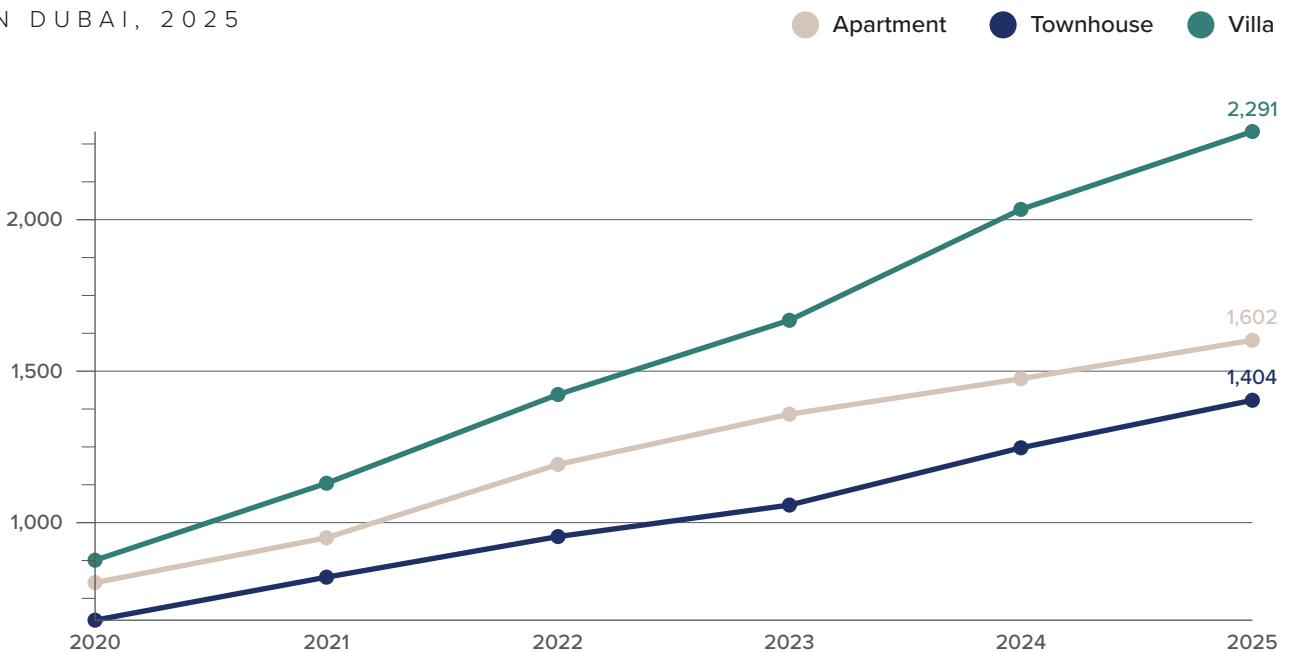
Total Sale Transaction Value (AED)
IN DUBAI, 2025 (TITLE DEED)



Sale Transactions Value by Property Type (AED)
IN DUBAI, 2025 (TITLE DEED)



Average (AED) Price/Sq.ft
IN DUBAI, 2025



*Data Source: Property Monitor

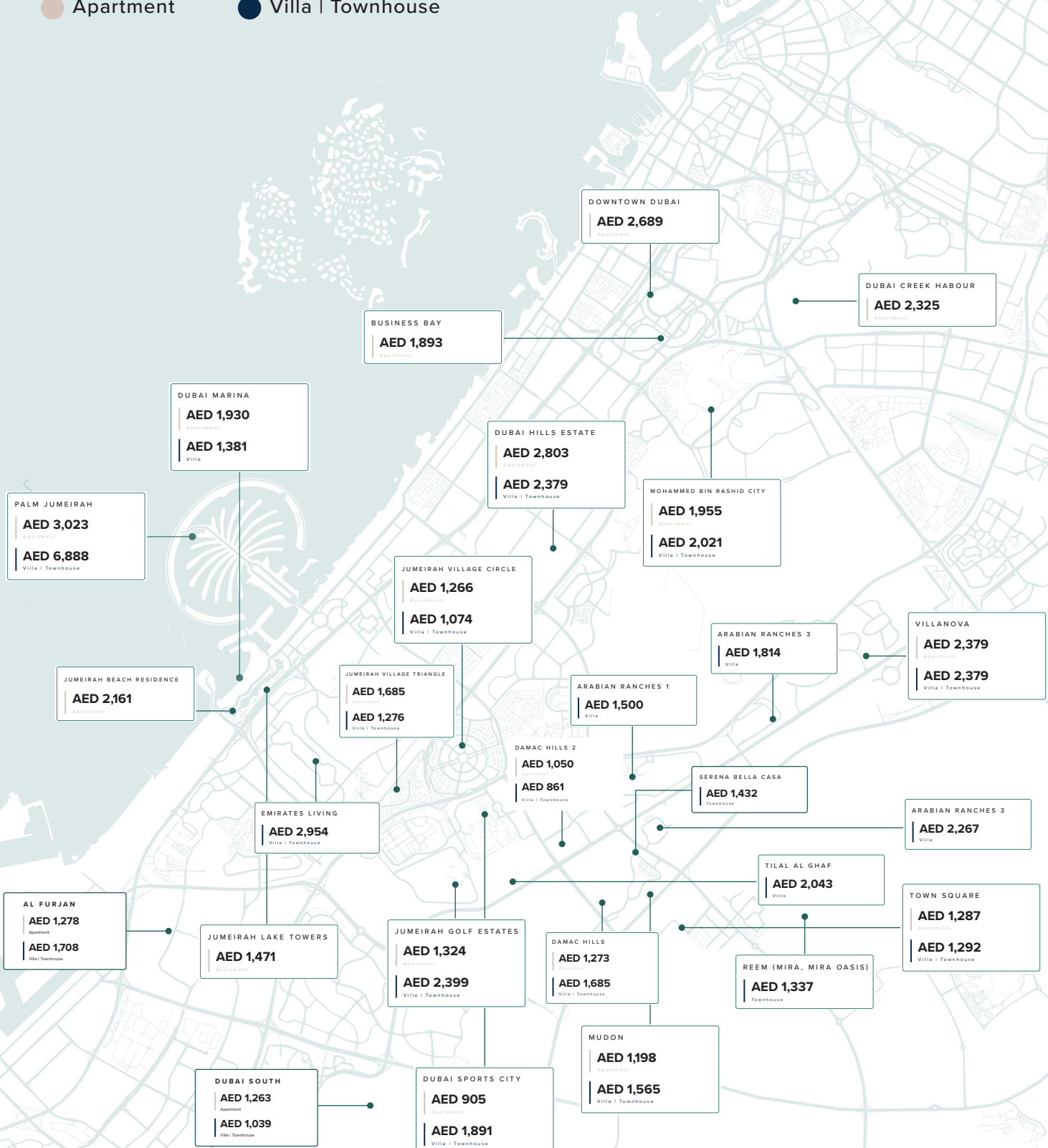
SALES

IN DUBAI, 2025 (TITLE DEED)

Average Sales Price (AED/Sq.ft)

In 2025, Dubai's residential market remained strong. Apartment prices per square foot increased steadily, reflecting consistent demand, while villas and townhouses saw the highest growth in average price per square foot amid limited supply, highlighting continued interest from high-net-worth buyers.

● Apartment ● Villa | Townhouse



*Data Source: Property Monitor

SALES

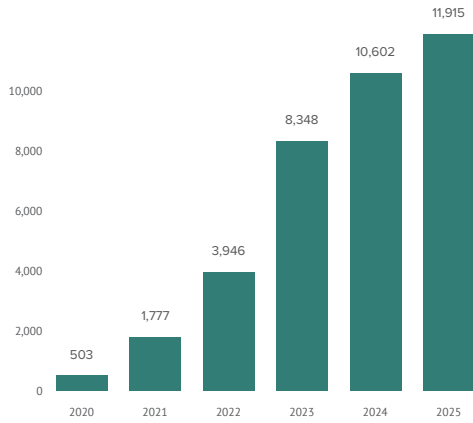
Off - Plan

Dubai’s off-plan residential market continued to drive growth in 2025, representing the majority of transactions. Apartment launches saw strong investor interest, with sales volumes rising 34% year-on-year. Prices remained stable despite higher supply, supported by attractive payment plans and developer incentives. Off-plan villas and townhouses also maintained steady demand, reflecting sustained confidence in the long-term growth of Dubai’s residential market.

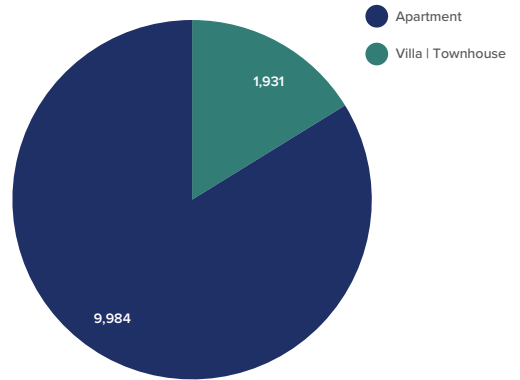
Off - Plan Transaction Volumes

IN DUBAI, 2025 (OQOOD)

Transaction Volume



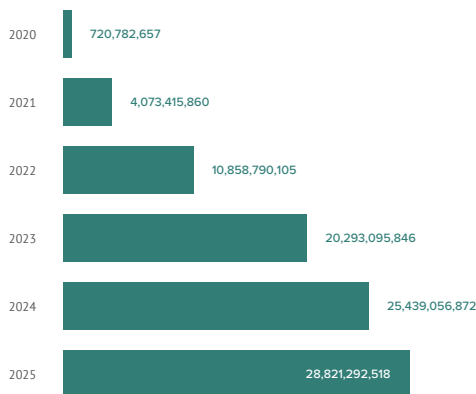
Transaction Volume By Property Type 2025



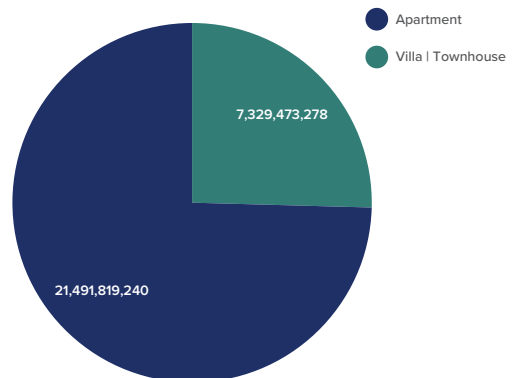
Off - Plan Transaction Value (AED)

IN DUBAI, 2025 (OQOOD)

Transaction Value (AED)



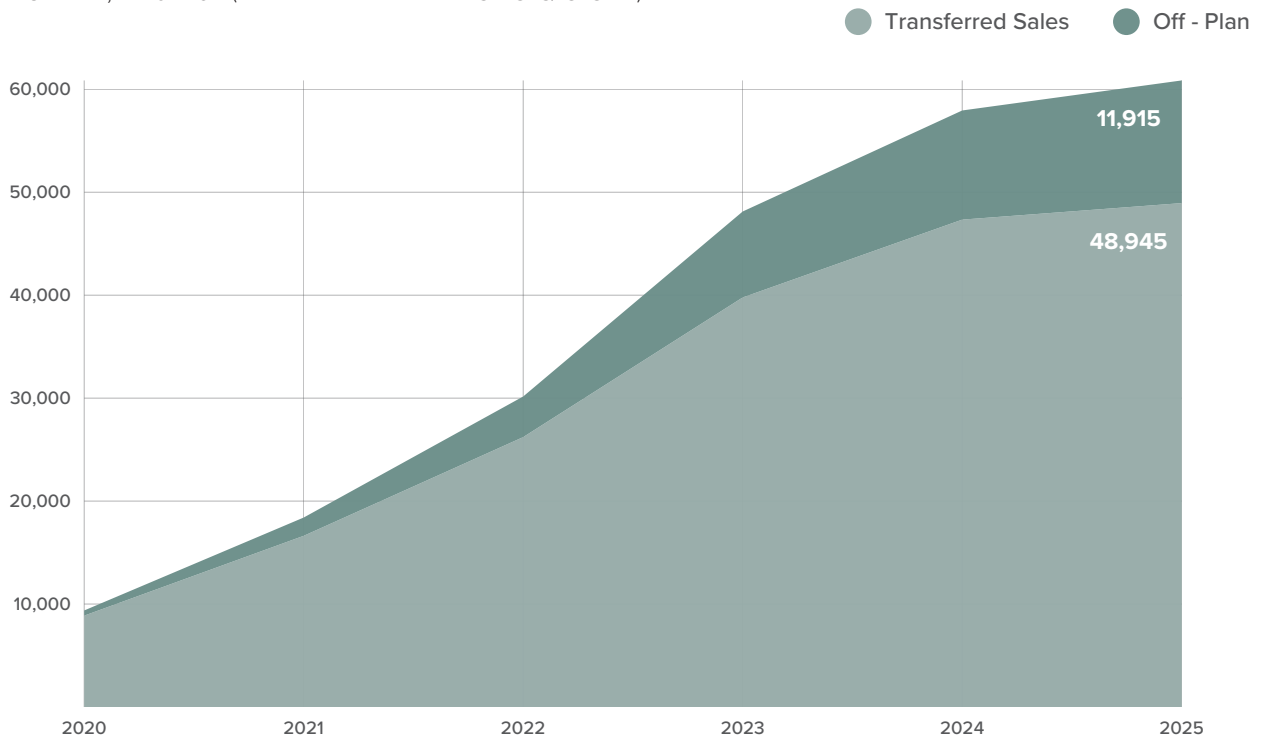
Transaction Value (AED) By Property Type



*Data Source: Property Monitor

Off - Plan Vs Transferred Sales

IN DUBAI, 2025 (TITLE DEED VS OQOOD)

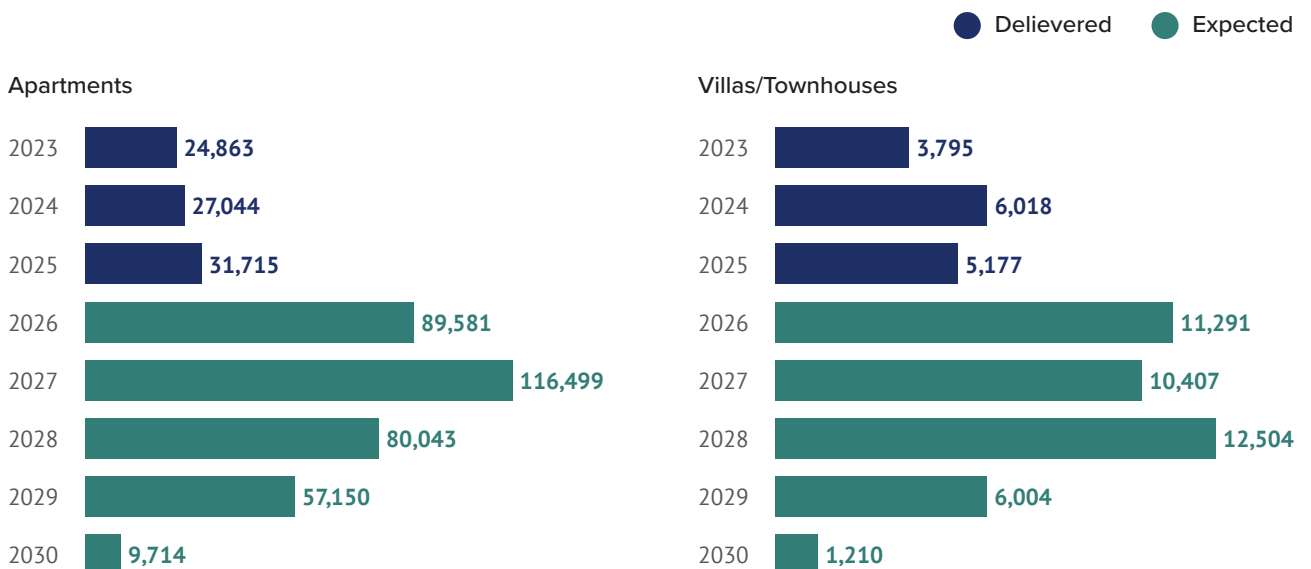


Supply

In 2025, Dubai’s residential market remained tight, though new off-plan projects are rapidly under construction and completing on schedule, helping to gradually ease supply while sustaining strong demand and prices.

Total Number of Units Delivered & Expected By Property Type

IN DUBAI, (2023-2030)



*Data Source: Property Monitor

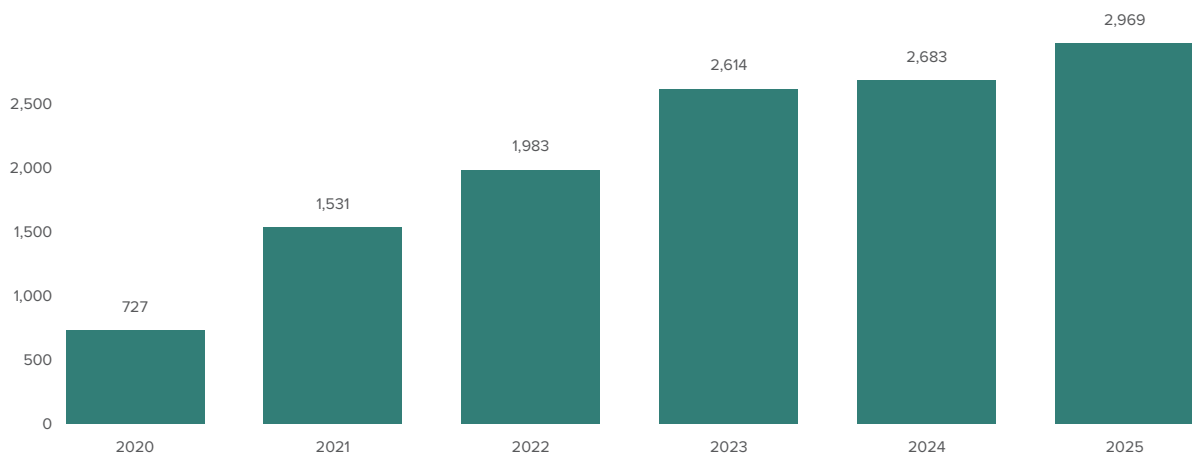
SALES

Commercial

Dubai’s commercial real estate market continued its upward trajectory in 2025, driven by strong office sales activity and sustained investor confidence. Office sales volumes rose by approximately 11% year-on-year, increasing from 2,683 transactions in 2024 to 2,969 in 2025. Demand remained concentrated in prime business districts, with limited high-quality supply supporting continued transaction growth and pricing resilience.

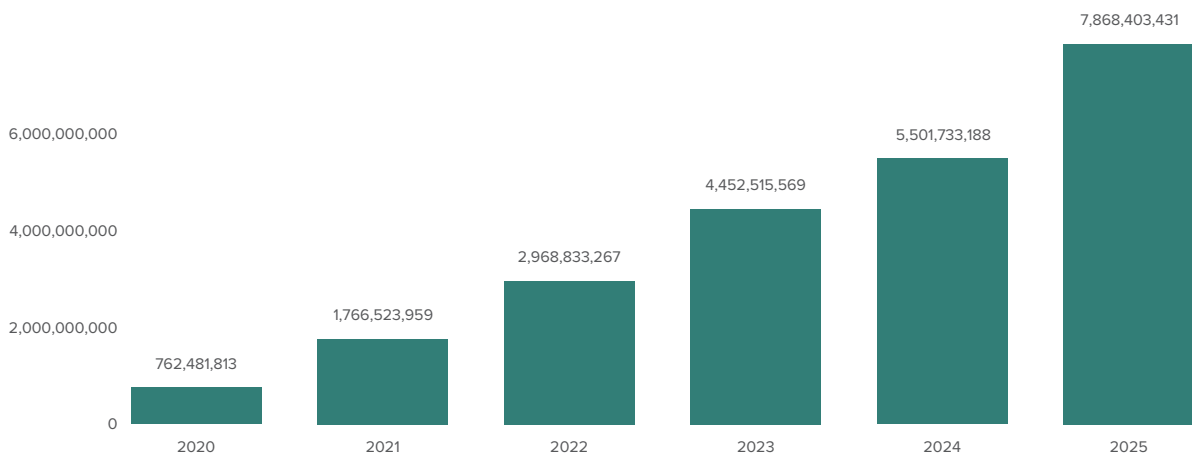
Commercial Sale Transaction Volume (Offices)

IN DUBAI, 2025 (TITLE DEED)



Commercial Sale Transaction Value (Offices)

IN DUBAI, 2025 (TITLE DEED)



*Data Source: Property Monitor

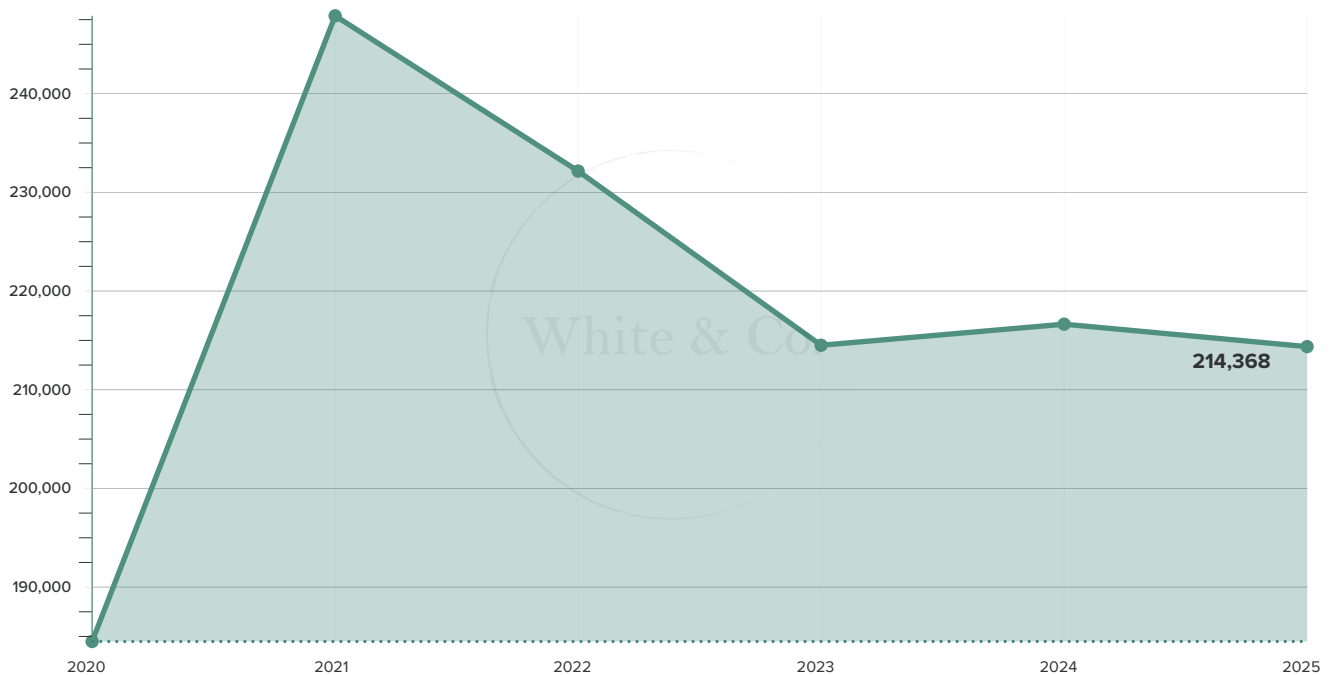
RENTALS

Residential

In 2025, Dubai’s residential rental market remained robust, with both apartment and villa rents continuing to rise. Tight supply in established and family-oriented communities, combined with strong tenant demand, supported sustained price growth. While new off-plan supply is gradually coming to the market, core areas remain competitive, reinforcing Dubai’s resilience and attractiveness in the rental sector.

Total Rental Transactions Volume

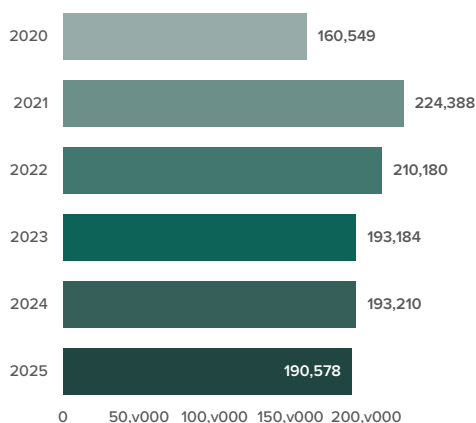
IN DUBAI, 2025 (NEW CONTRACTS)



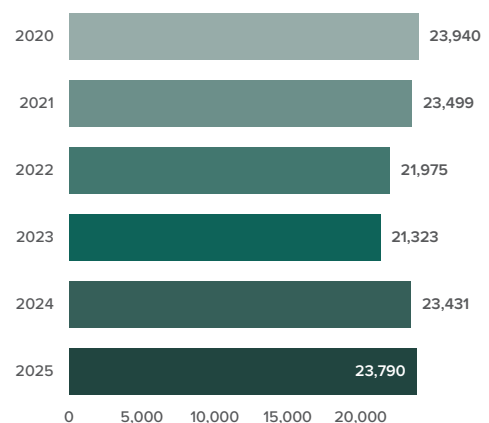
Rental Transactions Volume by Property Type

IN DUBAI, 2025 (NEW CONTRACTS)

Apartments



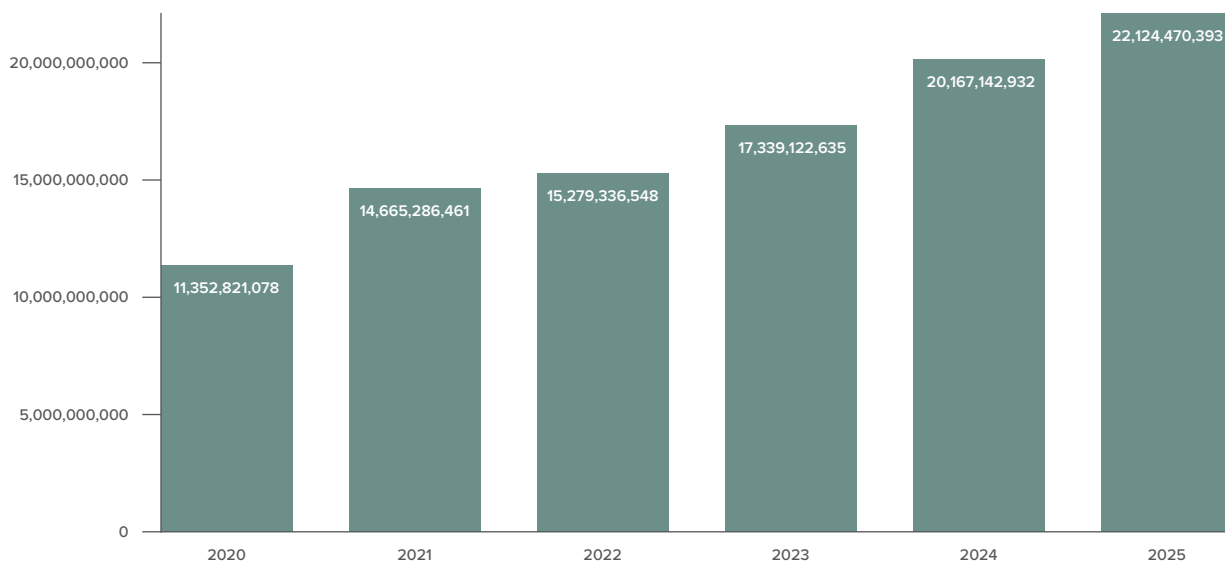
Villa | Townhouse



*Data Source: Property Monitor

Total Rental Transaction Values (AED)

IN DUBAI, 2025



New Contracts Vs Renewals

IN DUBAI, 2025

214,368

New Contracts

369,574

Renewals

Average Gross Yield by Area

IN DUBAI, 2025

Community	Community Type	Avg. Gross Yield
Al furjan	Apartment	6.97 %
Arjan	Apartment	6.48 %
Business Bay	Apartment	6.47 %
Damac Hills 1	Apartment	7.43 %
Damac Hills 2	Apartment	7.73 %
Downtown Dubai	Apartment	5.69 %
Dubai Creek Harbour	Apartment	5.75 %
Dubai Hills Estate	Apartment	6.31 %
Dubai Marina	Apartment	6.05 %
Dubai Sports City	Apartment	8.43 %
Jumeirah Golf Estate	Apartment	7.03 %
Jumeirah Lake Towers	Apartment	7.14 %
Jumeirah Village Circle	Apartment	7.28 %
MBR	Apartment	6.60 %
Palm Jumeriah	Apartment	5.02 %
Town Square	Apartment	7.06 %

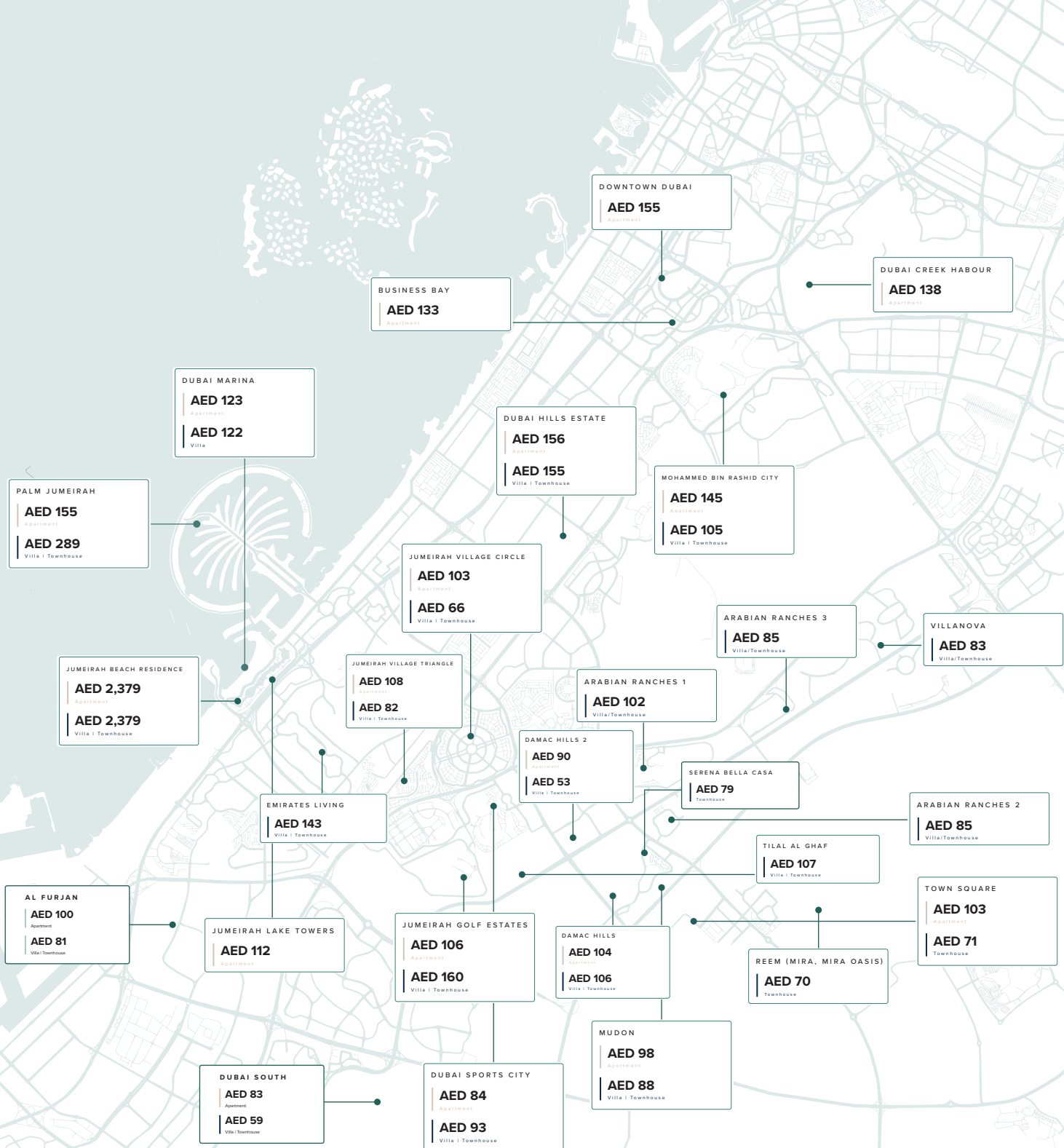
Community	Community Type	Avg. Gross Yield
Al furjan	Villa	4.85 %
Arabian Ranches 1	Villa	4.00 %
Arabian Ranches 2	Villa	4.90 %
Arabian Ranches 3	Villa	5.03 %
Damac Hills 1	Villa	5.72 %
Damac Hills 2	Villa	5.91 %
Dubai Hills Estate	Villa	4.31 %
Dubai Sports City	Villa	3.94 %
Jumeirah Golf Estate	Villa	6.06 %
Jumeirah Lake Towers	Villa	3.48 %
MBR	Townhouse	5.32 %
Mudon	Villa	5.73 %
Palm Jumeriah	Villa	3.48 %
Tilal Al Ghaf	Townhouse	5.00 %
Town Square	Townhouse	5.27 %
Villanova	Villa	5.11 %

RENTALS

Average Rent Price (AED/Sq.ft)

In 2025, Dubai's residential market remained strong. Apartment sales rose 29% year-on-year, driven primarily by off-plan transactions, while prices held steady. Villas and townhouses recorded lower sales due to limited supply, though prices remained firm, reflecting continued demand from high-net-worth buyers.

● Apartments ● Villa | Townhouse



*Data Source: Property Monitor

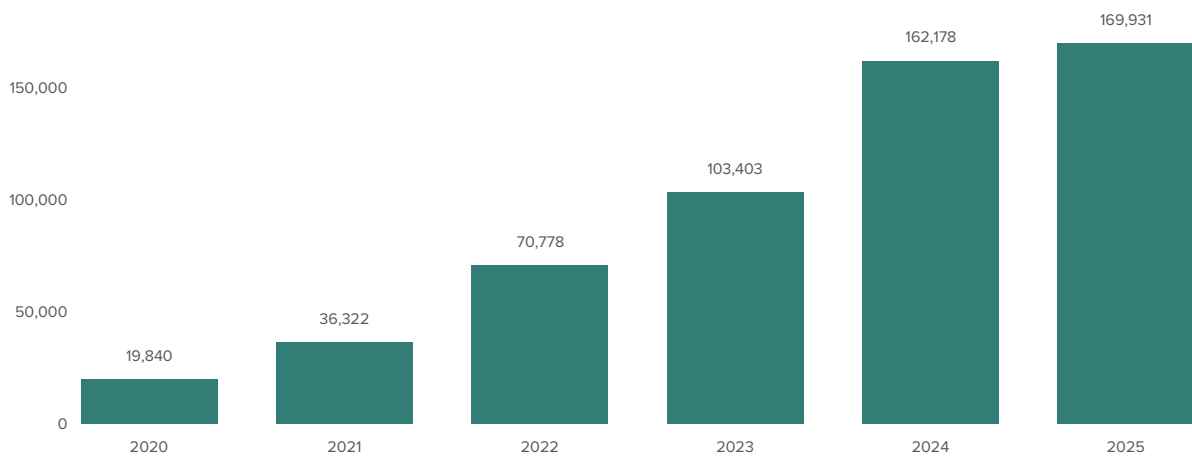
RENTALS

Commercial

In 2025, Dubai’s commercial rental market remained robust, supported by economic growth and strong investor demand. Office rents increased 7% year-on-year, driven by central business district activity, while retail spaces grew 9% amid higher footfall and consumer spending. Warehouses and logistics hubs saw the strongest rental gains, reflecting e-commerce growth and limited high-quality supply in key industrial areas.

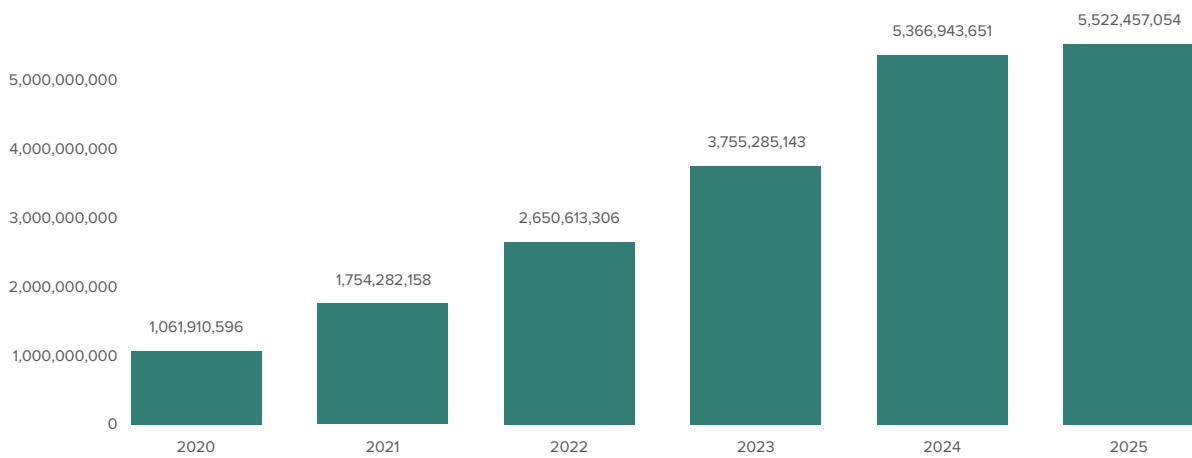
Commercial Rental Transaction Volume (Offices)

IN DUBAI, 2025 (NEW CONTRACTS)



Commercial Rental Transaction Value (Offices)

IN DUBAI, 2025 (NEW CONTRACTS)



*Data Source: Property Monitor

Retail

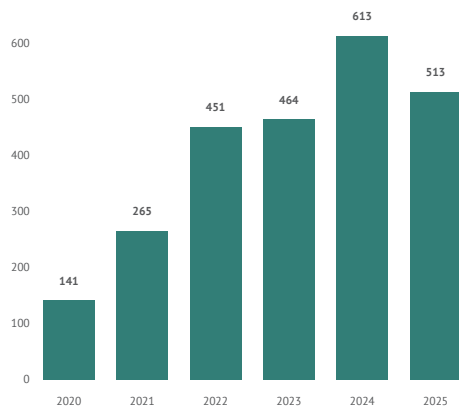
Dubai's retail real estate market remained strong in 2025, supported by robust consumer demand and rising tourism. Mall rents increased 10% year-on-year, led by prime locations, while street-level retail grew 8%. Leasing activity was driven by food & beverage outlets and lifestyle brands, with limited high-quality spaces sustaining upward pressure on rents across key retail hubs.

SALES

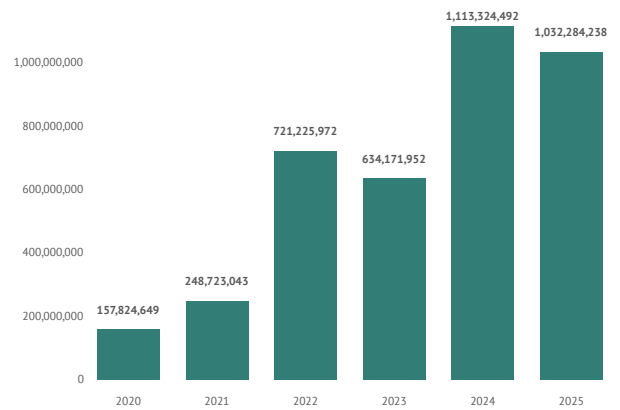
Retail Transactions

IN DUBAI, 2025 (TITLE DEED)

Transaction Volume



Transaction Value (AED)



513

Total Retail Units Sold



518,908

Total Retail Space Sold (Sqft)



AED 1,873

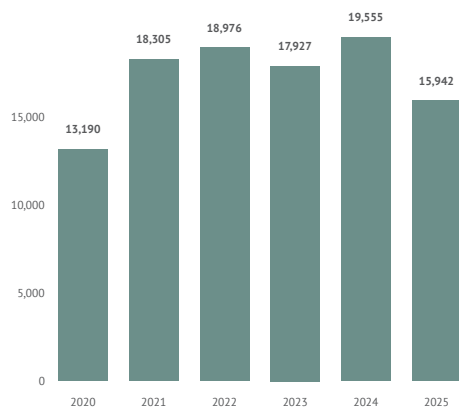
Average Retail Sale Price(Sqft)

SALES

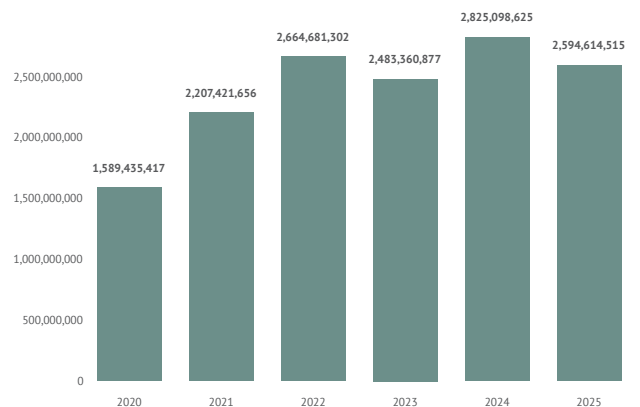
Retail Transactions

IN DUBAI, 2025 (NEW CONTRACTS)

Transaction Volume



Transaction Value (AED)



15,942

Total Retail Units Rented



21,490,566

Total Retail Space Rented (Sqft)



AED 235

Average Retail Rent Price(Sqft)

*Data Source: Property Monitor

White & Co.

What makes us different

4.7/5

Positive Ratings on google

600+

People across the group,
Each one trained, supported and
committed to doing things the right way.

500+

Homes under management,
A growing property management
division built on service excellence.

7512+

Property Transactions in 2025

AED 6.3 B+

Total Sold Value 2025,
(Secondary Sales)

AED 12.3 B+

Total Sold Value 2025,
(Sales Secondary, Sales Commercial, Sales Off Plan)

A testament to the trust clients place in us.



Methodology & Metrics

Our analysis is based on data sourced through **Property Monitor**, which draws directly from the **Dubai Land Department (DLD)**. This ensures that all sales, transfers and transactions reflected in our report are backed by official records. By leveraging this verified data, we provide accurate insights into market performance, segmented by property type, location and price.

***Data source:** Property Monitor, as of **8th January 2026**.

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