

Dubai Residential

April 2025 | **Market Review**

A MONTHLY REVIEW OF DUBAI RESIDENTIAL MARKET'S PERFORMANCE AND KEY REAL ESTATE TRENDS

Hamptons
INTERNATIONAL

Valuations & Research Department



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APR 2025

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The team of qualified valuers uses a range of comprehensive methods to provide clients with up-to-date and accurate valuations for all property types. This includes individual properties, property portfolios, and all types of asset classes.

The process is carried out by professional valuers who are members of both RICS (The Royal Institution of Chartered Surveyors) and RERA (Real Estate Regulatory Authority), ensuring both expertise and licensing compliance.

Valuation advice and reports are provided for a variety of purposes, which include the following:

- Mortgage Financing (Banks & Financial Institutions)
- Internal Purposes
- Accounting
- Mergers and Acquisitions
- Investment Due Diligence / Strategic Advice
- Government Programs (Golden Visa)

The team also provides Feasibility Studies and Development Appraisals for determining the highest and best use, which identify opportunities and assist investors and developers avoid potential pitfalls.



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Report Highlights



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Market Stability

April 2025 marked a record-breaking month for Dubai's real estate market, with 18,044 transactions totalling AED 62.8 billion. This represents a 53% increase in volume and a 92% rise in value year-on-year. Driven by strong off-plan sales, particularly in Palm Jebel Ali and The Oasis, alongside a surge in secondary market activity, this performance reflects deepening investor confidence and sustained market resilience heading into Q2.



Market Momentum Steadies

April 2025 saw activity surpass previous months and year-on-year benchmarks, reinforcing Dubai's position as a global real estate hub. Strong interest from both local and international buyers continues, supported by economic stability, long-term visa initiatives, and investor-friendly regulations.



Apartments Lead the Way

Apartments remained the top-performing segment in April 2025, with demand driven by affordability, diverse inventory, and strong interest from both end-users and investors. Popular areas such as Jumeirah Village Circle, Business Bay, and Dubai

Marina continued to lead activity due to their rental yields and lifestyle appeal.



Villa Market Increase Popularity

Villa transactions remained steady in April 2025, reflecting ongoing demand for spacious, lifestyle-oriented homes in communities like Dubai Hills Estate, Arabian Ranches, and Tilal Al Ghaf. While volumes remained below February's surge, buyer interest in premium family living continues to support this segment.



Off-Plan Sector Booming

Off-plan sales dominated the market in April 2025, accounting for 70% of total transactions, led by major launches in Palm Jebel Ali and The Oasis. This strong performance reflects investor confidence in Dubai's future growth. The secondary market also demonstrated resilience, with over 5,000 ready property deals, indicating robust end-user demand.



Rental Market Remains Active

The rental sector remained resilient in April 2025, with steady demand across apartments, villas, and commercial properties. While precise figures are pending, sustained interest in prime rental communities and key business districts

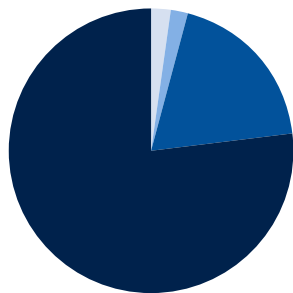
highlights the stability of Dubai's leasing market amid strong population growth and business expansion.



Commercial Real Estate Highlights Office Spaces:

Office rentals continued to dominate Dubai's commercial leasing activity in April 2025, reflecting strong corporate demand and the city's appeal as a regional business hub. Retail leases remained steady, supported by growth in F&B and hospitality. Industrial and mixed-use segments also contributed to a balanced commercial landscape aligned with Dubai's projected retail expansion through 2027.

Sales Transactions – Graph



■ Apartments	77%
■ Villas	19 %
■ Commercial	2%
■ Plots	2 %



Apartments

Apartment sales surged in April 2025, reaching 13,797 units—up from 11,660 in March—solidifying their position as Dubai’s most sought-after property type. Growth was fuelled by investor and end-user demand, driven by competitive pricing, attractive yields, and lifestyle appeal. Umeirah Village Circle led with over AED 1.7 billion in sales, followed by

Business Bay (AED 1.2 billion) and Dubai Marina (AED 1.05 billion). These prime areas continue to draw buyers thanks to central locations, strong rental returns, and developer incentives like flexible payment plans and mortgage support.



Villas

Villa sales rebounded in April 2025 to 3,462 transactions, up from 2,810 in March, signaling renewed momentum after a brief dip. Demand remains strong for spacious, lifestyle-oriented communities. Dubai Hills Estate, Arabian Ranches, and Palm Jumeirah led the market, with Dubai Hills alone generating over AED 1.1 billion in sales. Limited supply and new high-end launches are expected to maintain strong interest in the months ahead.



Commercial

Dubai’s commercial real estate sector remained stable in April 2025. Office rentals continued to lead, driven by corporate expansions and international firms establishing regional bases. DIFC, Downtown Dubai, and Business Bay were the most sought-after locations. Retail leasing remained consistent, bolstered by growth in F&B, hospitality, and

premium retail brands. Dubai’s evolving lifestyle, entertainment, and tourism infrastructure continues to fuel activity across commercial segments.



Plots (Land)

Land transactions rose to 359 in April 2025, up from 271 in March, signalling renewed interest in development opportunities. Demand remained focused on areas such as Dubai South, Meydan, and Al Furjan, where infrastructure growth and upcoming mixed-use projects are attracting developers. As Dubai expands its urban footprint, land sales are expected to play a significant role in shaping future residential and commercial supply.



Market Resilience and Outlook

Dubai’s real estate market surged in April 2025, setting new records with 18,044 transactions worth AED 62.8 billion. This represents a 53% increase in volume and a 92% rise in value compared to April 2024. Off-plan sales comprised 70% of all deals, highlighting investor confidence in future developments. Supported by government reforms, long-term visa policies, and strong economic fundamentals, the market remains on track for the projected 5 to 10% price growth in 2025.

Dubai Transactions

Month on Month | Mar 2025 - Apr 2025



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	Mar Transactions	Mar Value (AED)	Apr Transactions	Apr Value (AED)	Value Change %
Apartments	11,660	22,700,000,000	13,797	27,100,000,000	19.38%
Villas	2,810	14,900,000,000	3,462	24,900,000,000	67.11%
Commercial	409	1,200,000,000	426	1,100,000,000	-8.33%
Plots	271	8,500,000,000	359	9,700,000,000	14.12%
Total	15,150	47,300,000,00	18,044	62,800,000,00	32.77%

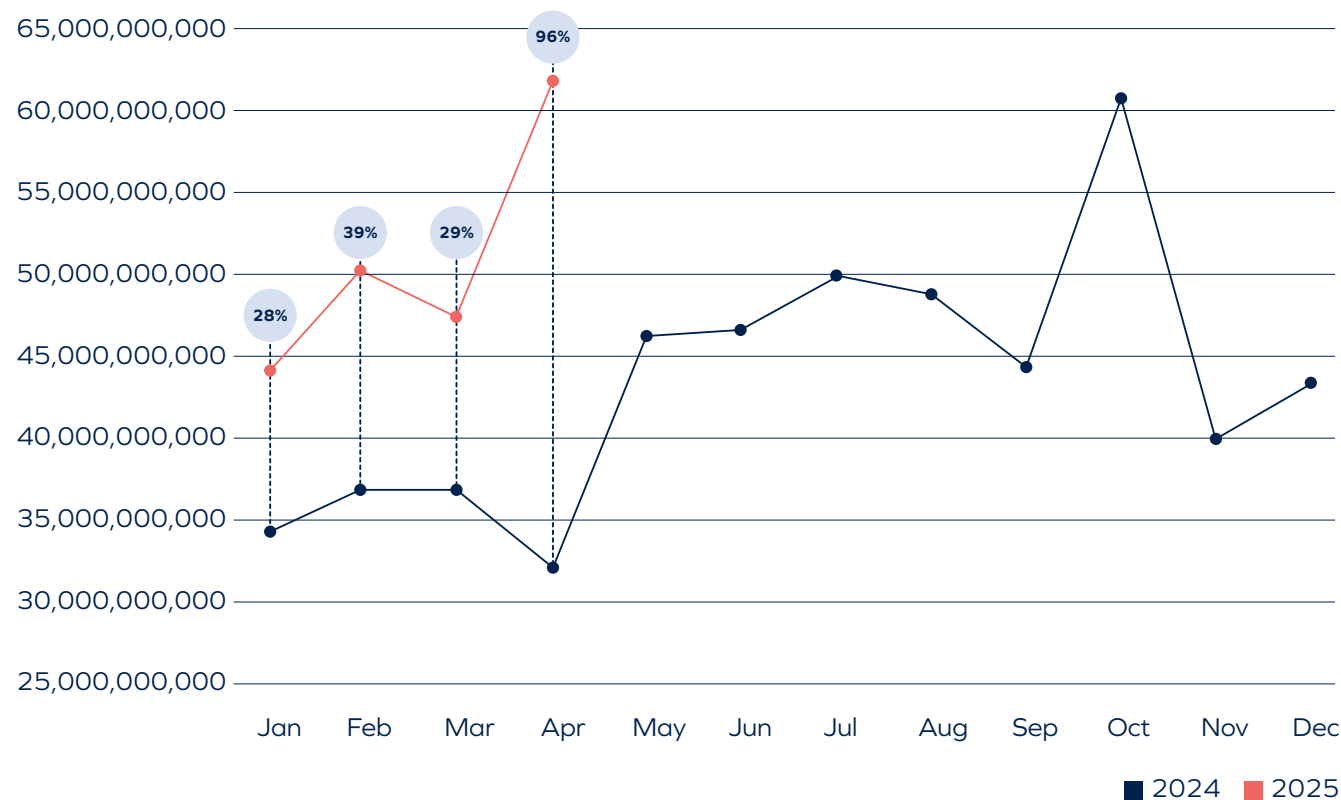


Transactions Value - Graph

2024 v/s 2025



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Dubai's property market recorded an exceptional 96% year-on-year increase in transaction values during April 2025, representing the strongest monthly performance across the 2024-2025 period and potentially indicating a significant market shift.

Transactions Value

2024 v/s 2025



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2024	Value	2025	Value
January	34,800,000,000	January	44,600,000,000
February	36,700,000,000	February	51,000,000,000
March	36,600,000,000	March	47,300,000,000
April	32,000,000,000	April	62,800,000,000
May	45,800,000,000	May	
June	46,400,000,000	June	
July	49,600,000,000	July	
August	47,300,000,000	August	
September	44,597,000,000	September	
October	60,731,000,000	October	
November	40,000,000,000	November	
December	42,600,000,000	December	

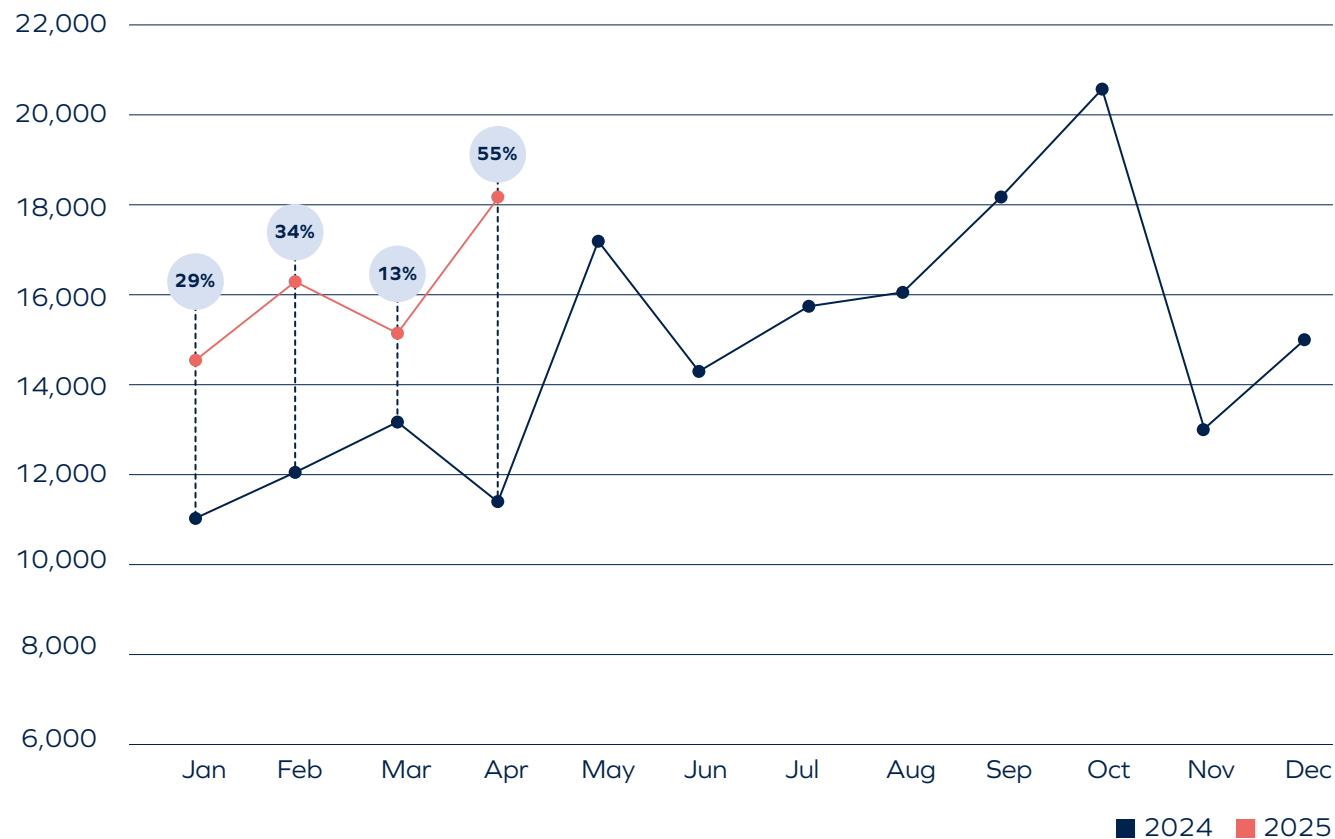


Transactions Volume - Graph

2024 v/s 2025



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By April, the 2025 figures have already overtaken those of 2024, signalling a sharp uptick in market activity. The 66% surge in transaction values year-on-year underscores a robust recovery or heightened demand, potentially driven by favourable mortgage rates, renewed investor confidence, or government stimulus measures.

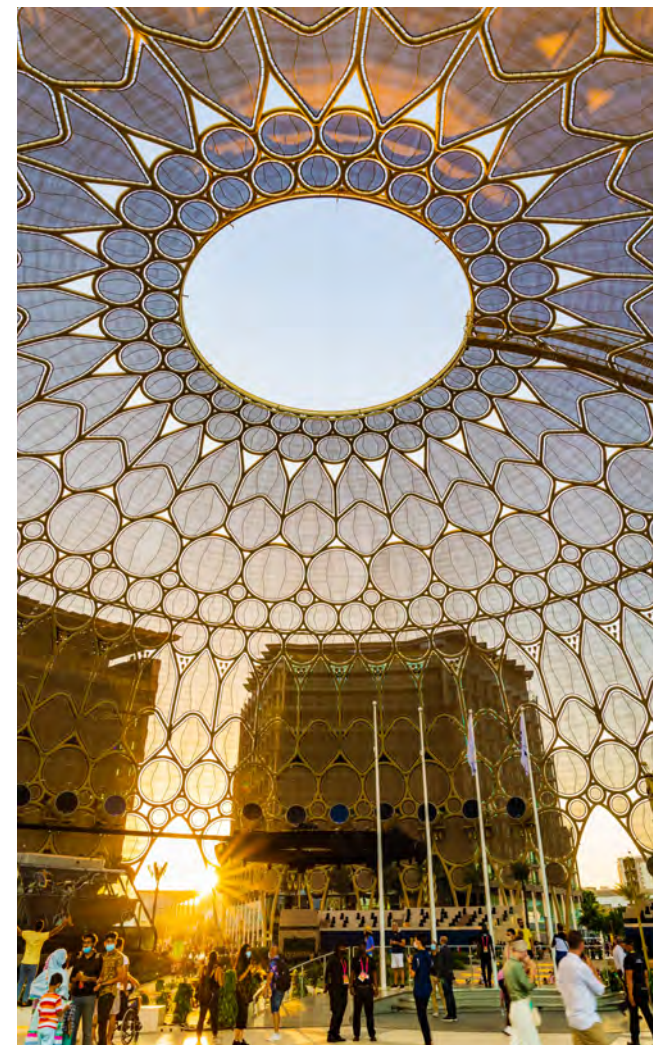
Transactions Volume

2024 v/s 2025



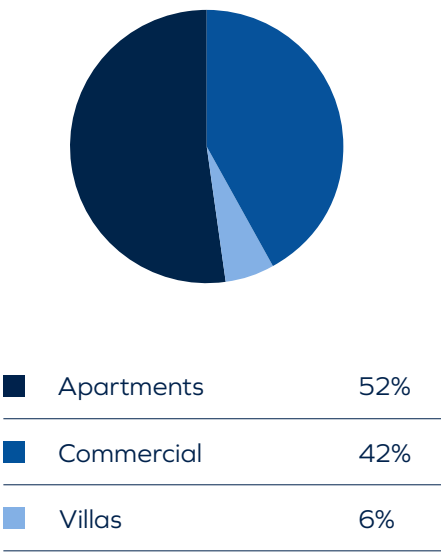
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2024	Volume	2025	Volume
January	11,029	January	14,247
February	12,025	February	16,106
March	13,394	March	15,150
April	11,608	April	18,044
May	17,539	May	
June	14,370	June	
July	15,994	July	
August	16,159	August	
September	18,045	September	
October	20,315	October	
November	13,509	November	
December	15,079	December	



New Rental Transactions

New apartment rental transactions reached 17,039 in April 2025, up slightly from 16,965 in March, reflecting stable demand for residential leases. Villa rentals also remained active, though marginally below previous highs, as tenants continued to seek spacious living in well-connected communities.

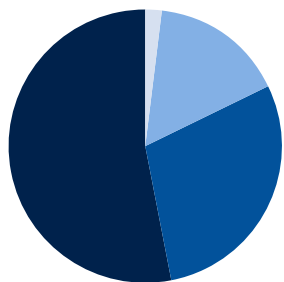


	March	April	Volume Change %
Apartments	16,965	17,039	0.44%
Villas	1,946	2,063	6.01%
Commercial	14,271	13,532	-5.18%
Total	33,182	32,634	-1.65%

New Commercial Rental Breakdown



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Office	53%
Others	29%
Shops/Showroom	16%
Industrial	2 %

	March	April	Volume Change %
Shops/Showroom	1,786	2,129	19.20%
Office	7,027	7,242	3.06%
Industrial	253	297	17.39%
Others	5,242	3,907	-25.47%
Total	14,308	13,575	-5.12%

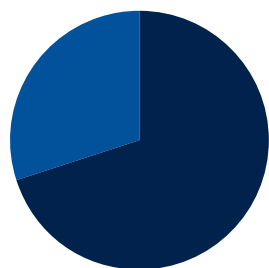
Off Plan v/s Secondary Sales Transactions



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Sales Volume	Off-Plan	12,092
	Ready	5,212

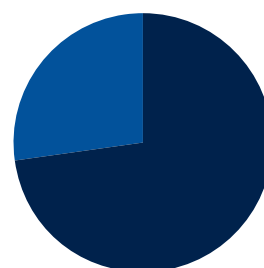
Residential Breakup	Off Plan	Ready
Apartments	9,463	4,334
Villas	2,629	878



Off-Plan	70%
Ready	30%

Sales Value (AED)	Off-Plan	38,200,000,000
	Ready	13,900,000,000

Residential Breakup	Off Plan	Ready
Apartments	19,000,000,000	8,100,000,000
Villas	19,200,000,000	5,800,000,000

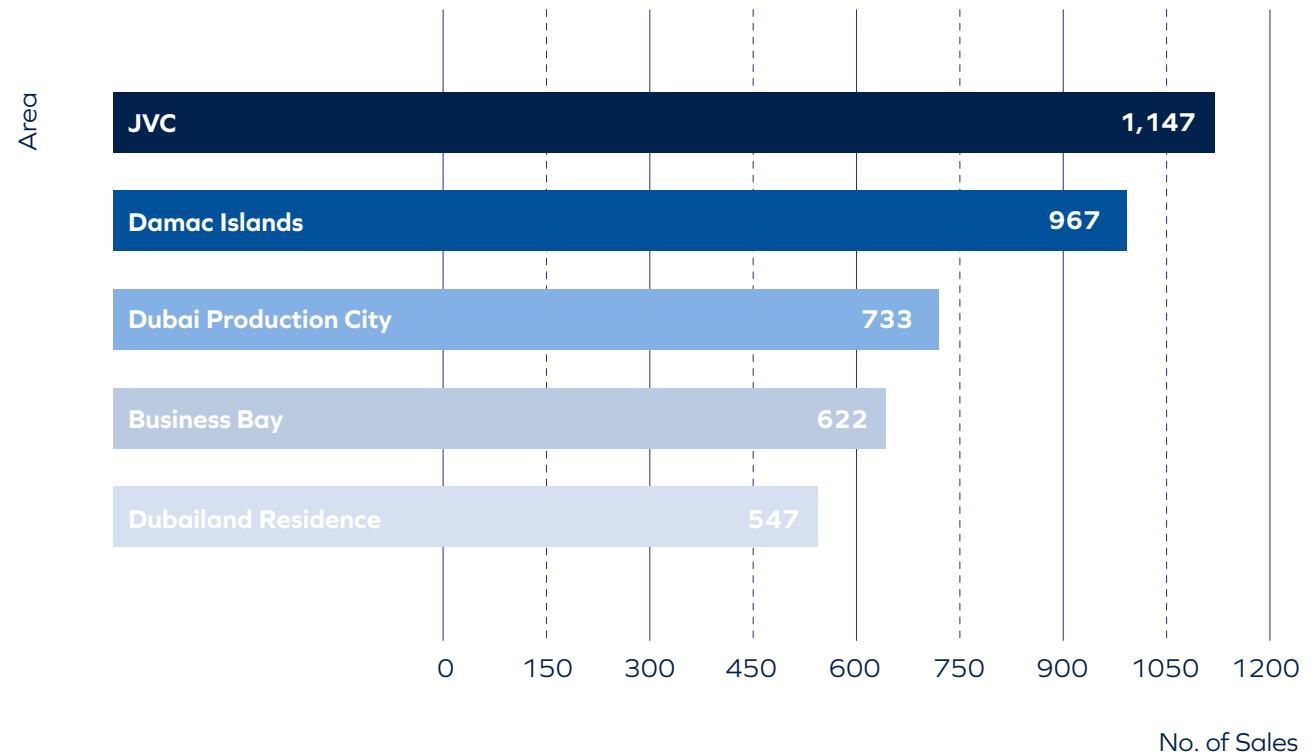


Off-Plan	73%
Ready	27%

Top 5 Performing Areas – Off Plan Sales



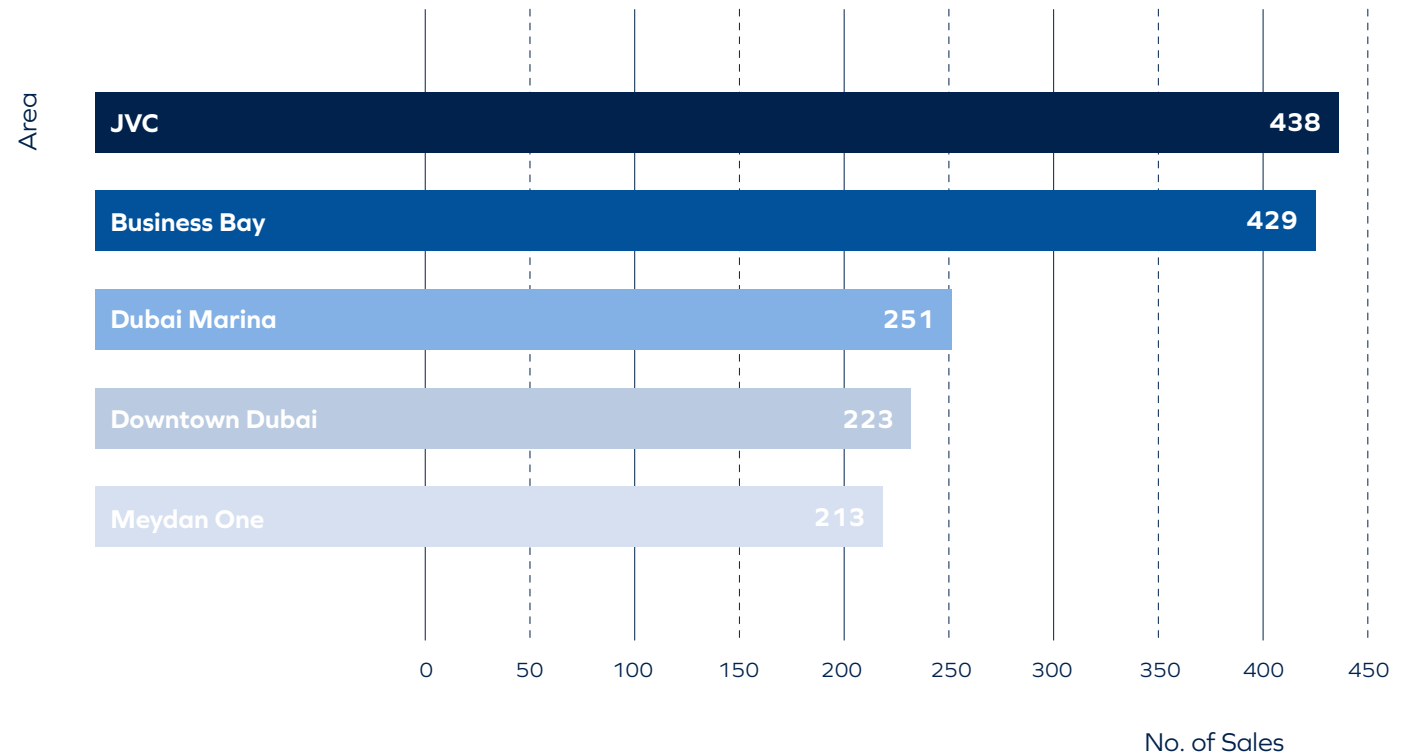
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Top 5 Performing Areas - Secondary Sales



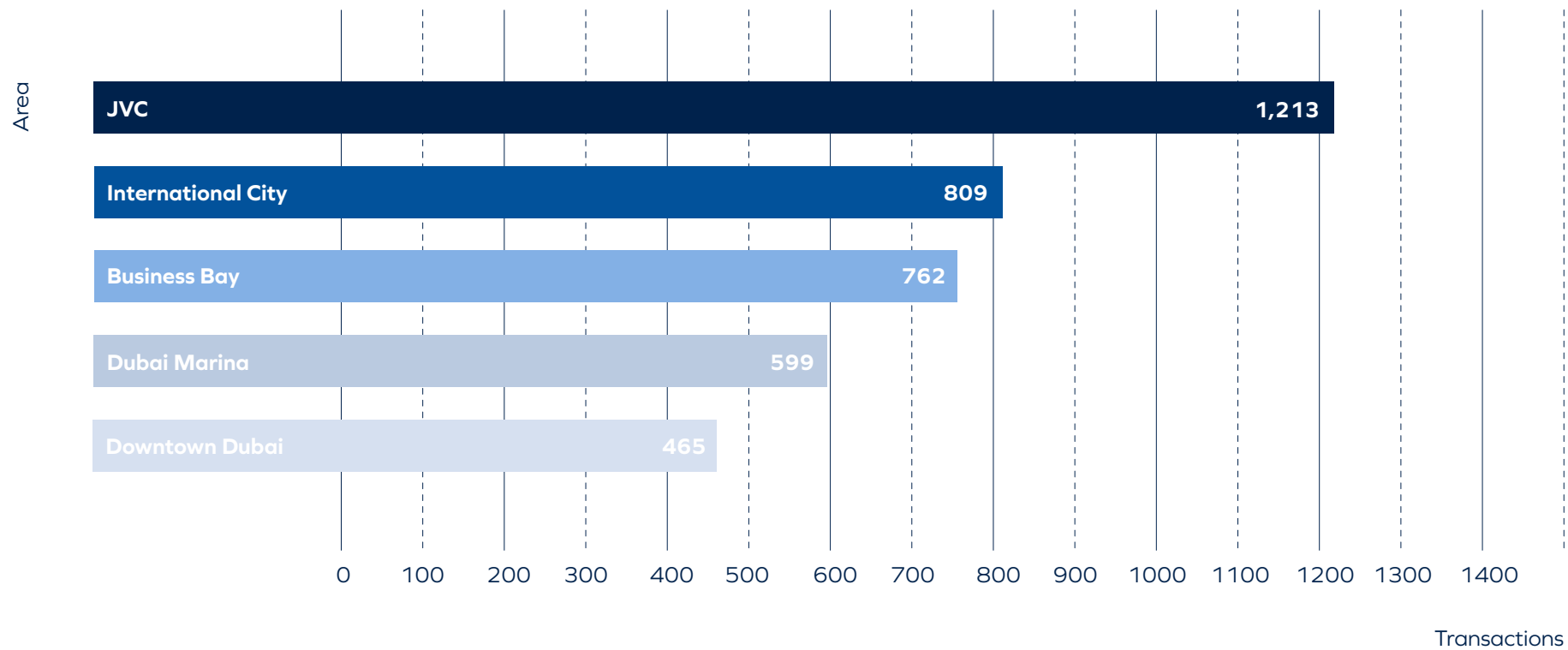
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Top 5 Performing Areas - New Apartment Rentals



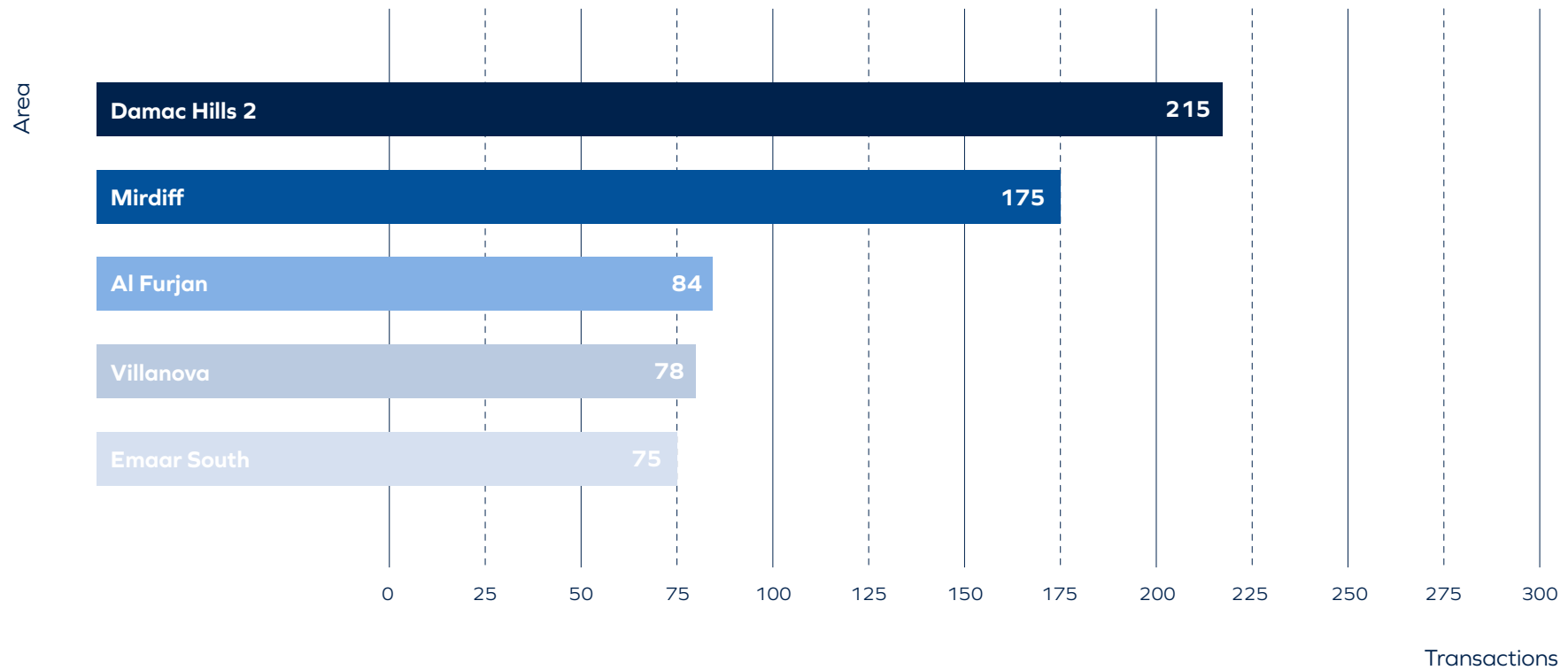
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Top 5 Performing Areas - New Villa Rentals



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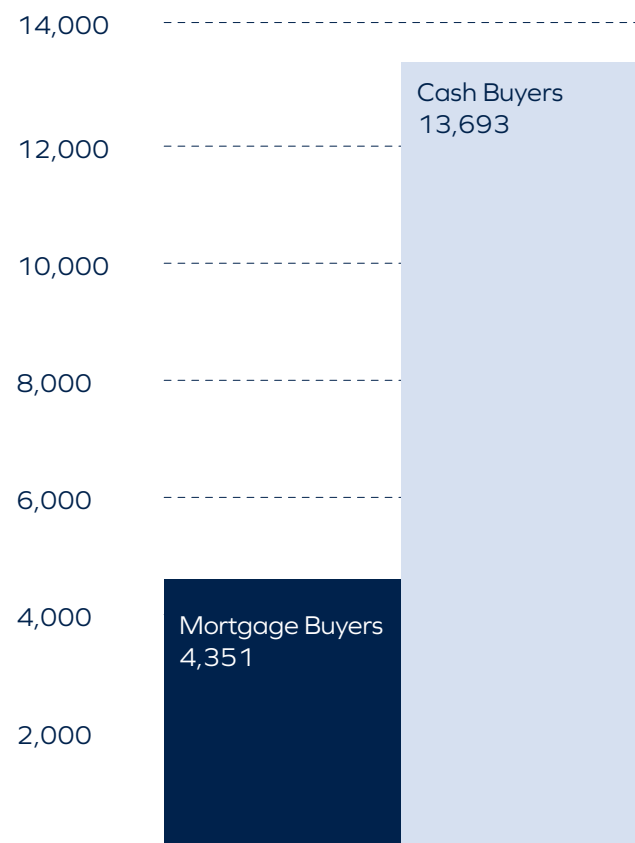


Mortgage Buyers v/s Cash Buyers

April 2025



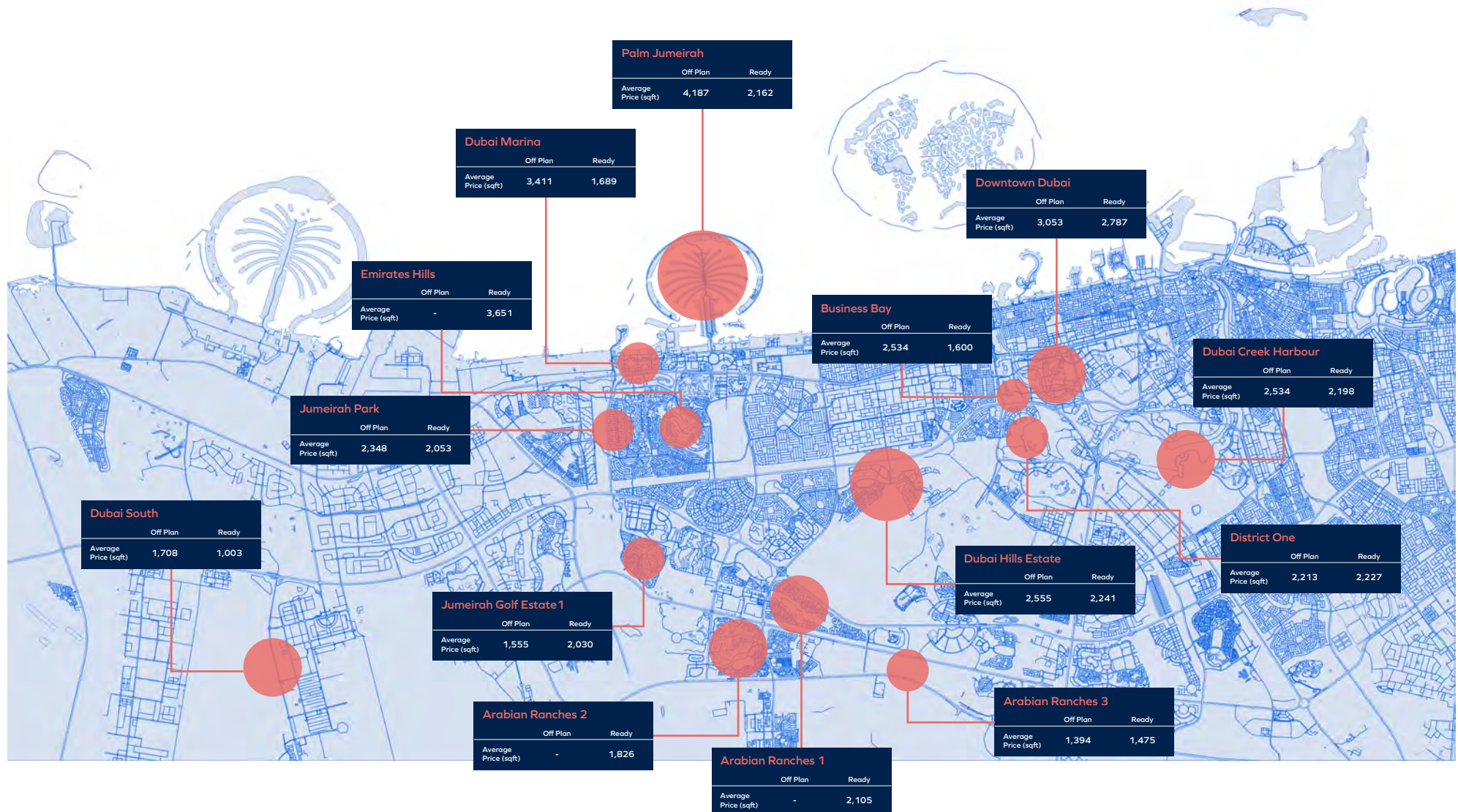
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Mortgage transactions totalled 4,351 in April 2025, indicating stable financing activity. Cash buyers continued to dominate the market, completing 13,693 transactions without financing. This reflects strong liquidity and sustained investor confidence in Dubai's property sector.



Month Rates - April



Projects Due in April 2025



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City	Community	Property	Developer	Type	Studio	1BR	2BR	3BR	4BR	5BR
Dubai	Arjan	Joya Dorado Residence	Green Yard Properties Development LLC	Apartment	253	138	13	-	-	-
Dubai	Arjan	Torino by Oro24	ORO24 Developments	Apartment	284	249	91	1	-	-
Dubai	Dubai Hills Estate	Palm Hills Villas	Emaar Properties	Villa	-	-	-	-	-	75
Dubai	Dubai Marina	LIV Marina	LIV Real Estate Development	Apartment	12	135	77	24	-	-
Dubai	Dubai Science Park (Dubiotec)	Opalz Tower 1	Danube Properties	Apartment	126	130	47	5	-	-
Dubai	Dubai Science Park (Dubiotec)	Opalz Tower 2	Danube Properties	Apartment	135	77	50	5	-	-

Dubai's property market delivered a record-breaking performance in April 2025, with 18,044 transactions totalling AED 62.8 billion—the highest monthly figure ever recorded. This equates to a 53% increase in volume and a 92% surge in value year-on-year, underscoring the strength of the city's real estate sector.

This exceptional performance was underpinned by investor confidence, robust end-user demand, and a wave of off-plan launches. The apartment segment remained the most active, with 13,797 units sold, up from 11,660 in March. Key communities such as Jumeirah Village Circle (over AED 1.7 billion in sales), Business Bay (AED 1.2 billion), and Dubai Marina (AED 1.05 billion) saw concentrated demand due to their strong yields, lifestyle amenities, and strategic locations. Flexible payment plans and favourable mortgage options further supported sales.

Villa transactions also rose to 3,462 in April, from 2,810 in March, as interest in premium, family-oriented housing remained strong. Dubai Hills Estate (over AED 1.1 billion), Arabian Ranches, and Palm Jumeirah led the way. New project launches helped fuel further demand.

Off-plan activity accounted for 70% of all sales, led by major launches including Palm Jebel Ali and The Oasis by Emaar, which together contributed over 30% of the total value. This underscores ongoing investor optimism regarding Dubai's development pipeline. Meanwhile, the secondary market remained resilient, with more than 5,200 ready property transactions—a 60% year-on-year increase.

The rental sector was stable, with 17,039 apartment leases and 2,063 villa rentals recorded in April. Commercial leases reached 13,532, with office rentals making up the majority. Demand was driven by business expansion and foreign firms establishing operations in Dubai. Retail leasing remained healthy, particularly in DIFC, Downtown Dubai, and Business Bay, supported by the F&B, hospitality, and luxury retail sectors.

The land market also showed growth, with 359 plots sold. Interest was concentrated in Dubai South, Meydan, and Al Furjan, where developers are targeting mixed-use and residential developments in line with Dubai's urban expansion.

Mortgage activity remained stable, with 4,351 transactions, while cash buyers led the market with 13,693 deals. This illustrates the market's strong liquidity base and investor confidence.

Looking ahead, the outlook remains positive. Investor-centric policies, long-term residency reforms, and significant infrastructure projects continue to support market growth. Regulatory advancements such as the Smart RERA Index are enhancing transparency, while green incentives are increasingly influencing investment strategies. With prices forecast to rise between 5 and 10% in 2025, strong rental yields, and a robust pipeline of developments, Dubai's real estate market is well-positioned as a pillar of economic expansion and long-term wealth generation.



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