



For SG Expats:

The Dubai Quarterly Report

A snapshot of Q2 2025 Dubai Real Estate market highlighting high yielding ROI locations in Dubai



Curated by:

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Let's Connect!

I'd love to learn more about your plans and how Dubai real estate can play a role in your wealth journey.



Overview

The Dubai real estate market has seen impressive growth, with a significant increase in both the total number of transactions and the total value of those transactions. In Q2 2025, the market recorded 53,252 transactions, reflecting a 22% increase in volume compared to the previous year, and reached a total value of AED 184.3 billion. This exceptional performance marks a new quarterly record and highlights Dubai's continued rise as a global real estate investment hub, driven by consistent demand across both off-plan and ready properties.

Total Number of Transactions: 53,252 (up 22% YoY)

Total Value of Transactions: AED 184.3 billion (up 49% YoY)

Market Segmentation

Dubai's real estate market can be segmented into two main categories: the primary market (off-plan properties) and the secondary market (resale/ready properties). Each segment plays a critical role in shaping the dynamics of the market, with distinct buyer profiles, investment trends, and pricing behavior. In Q2 2025, the primary market accounted for 57% of total transactions, with off-plan property transactions valued at AED 68.8 billion. Meanwhile, the secondary market represented 43% of the total transactions, contributing AED 115.5 billion in value—reflecting strong demand in both new launches and existing inventory.

Primary Market (Off-Plan)

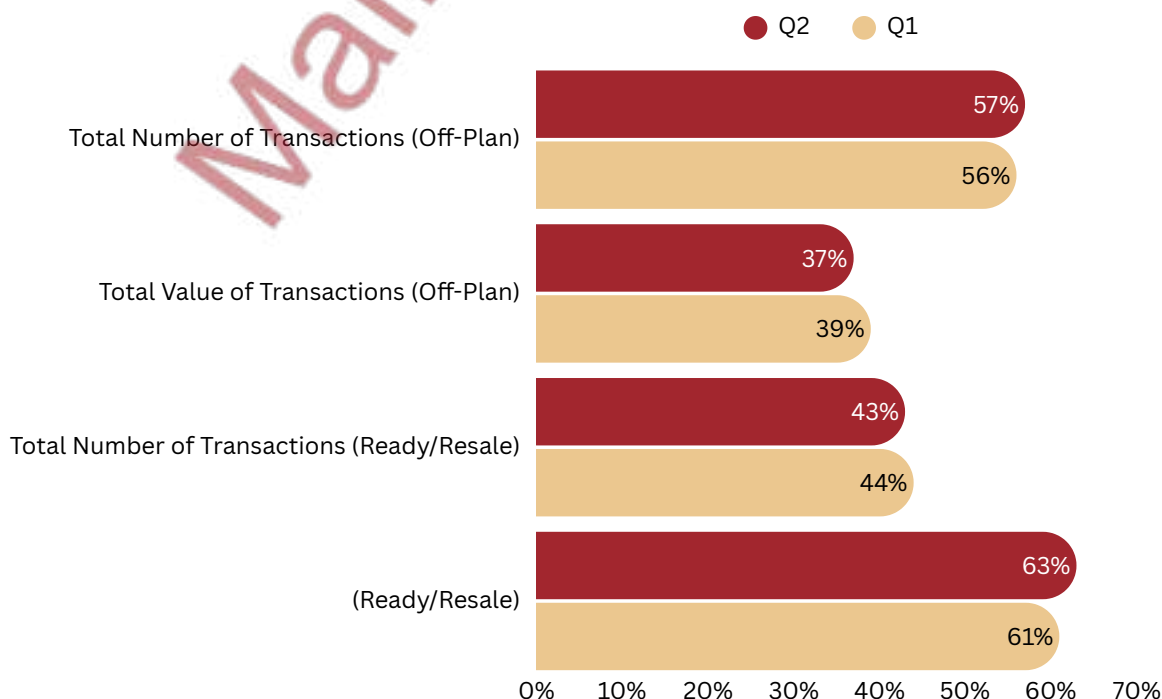
Number of Transactions: 30,277 (57% of total transactions)

Value of Transactions: AED 68.8 billion (37% of total market value)

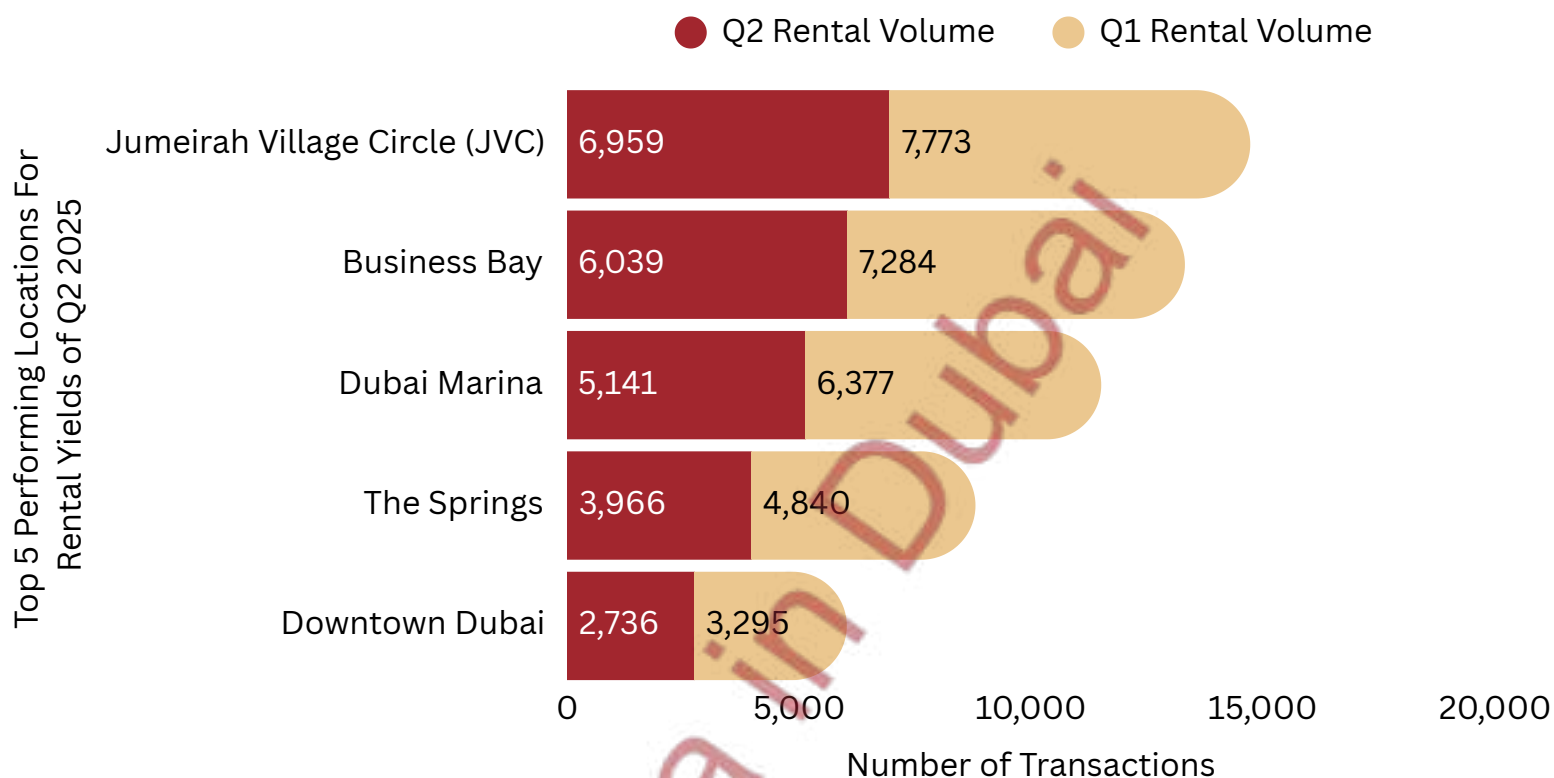
Secondary Market (Ready/Resale)

Number of Transactions: 22,975 (43% of total transactions)

Value of Transactions: AED 115.5 billion (63% of total market value)



Q1 vs Q2 Comparison between the Top 5 Locations' Rental Yields



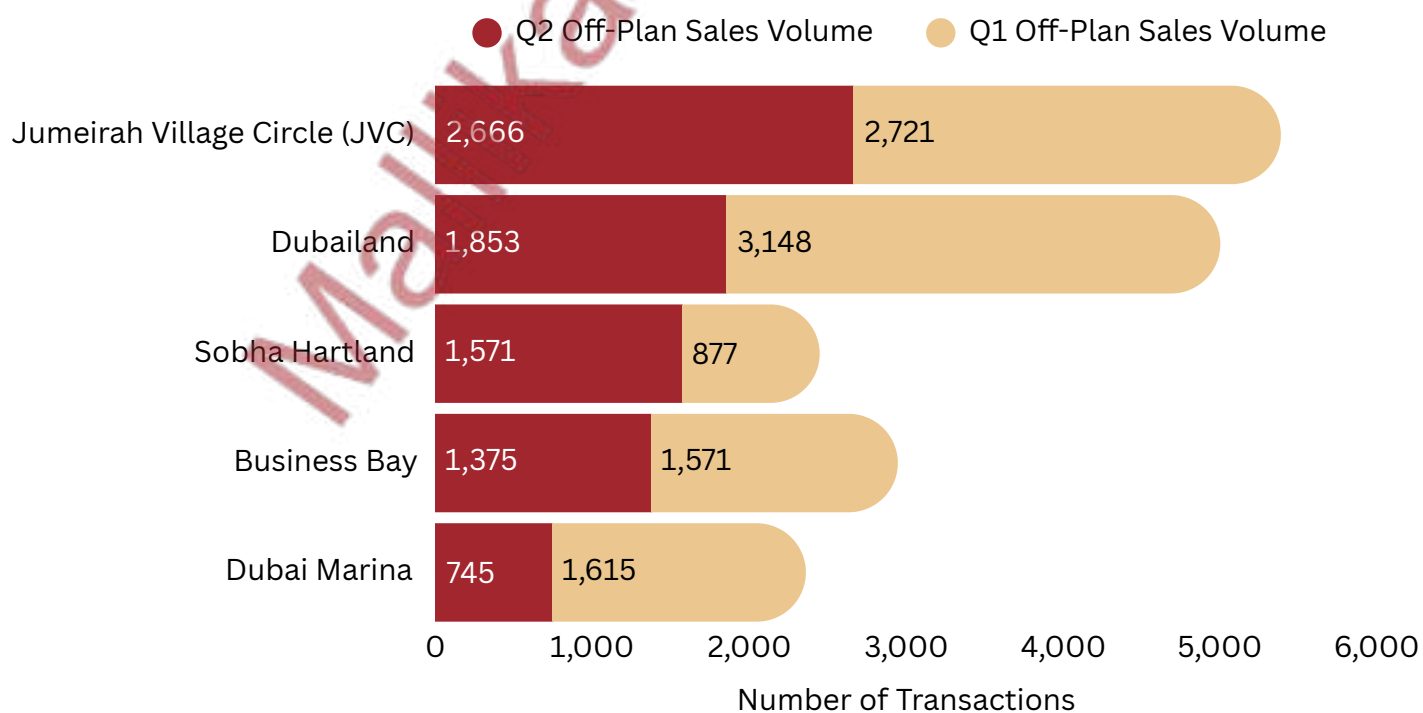
Dubai's rental market remains on a strong growth path in 2025. While Q2 showed a slight seasonal adjustment compared to Q1, overall performance continues to outpace previous years, reflecting steady demand and investor confidence.

- Q1 saw higher rental transactions driven by family relocations ahead of the school year.
- Q2 activity eased slightly, as fewer new leases are typically signed during the summer months.
- Despite the seasonal pause, **Q2 still outperformed the same period in 2024.**
- The top 5 high-yield communities remain consistent, reflecting ongoing demand.
- 2025 continues to exceed expectations, reinforcing Dubai's rental market strength.

Top 5 Areas by Sales Transactions – Primary (Off-Plan)

Area	Transactions	Value (AED)
Jumeirah Village Circle	2,076	2.9B
Dubailand	1,232	4.2B
Sobha Hartland	1,151	2.72B
Dubai Marina	745	3.6B
Business Bay	1,375	3.5B

Comparison Between the Top 5 Locations' Off-Plan Sales Transaction Volumes in Q1 and Q2



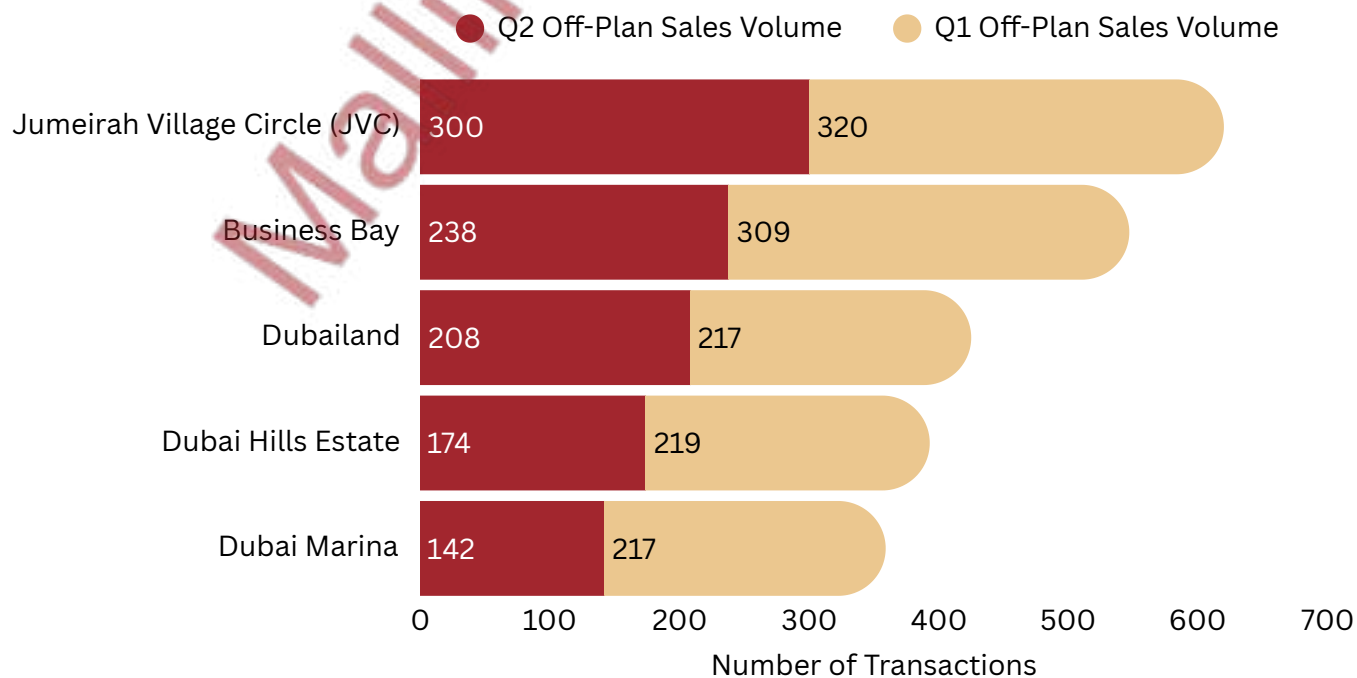
Top 5 Performing Locations Based on
Off-plan Sale Transactions Volume of
Q2 2025

Top 5 Areas by Sales Transactions – Secondary (Offplan Resale)

Area	Transactions	Value (AED)
Jumeirah Village Circle	300	460M
Business Bay	238	451.3M
Dubailand	208	412M
Dubai Hills Estate	174	564.5M
Dubai Marina	142	548.9M

Comparison Between the Top 5 Locations' Off-Plan Resale Transactions Volume in Q1 and Q2

Top 5 Performing Locations Based on
Off-Plan Resale Transactions Volume
of Q2 2025

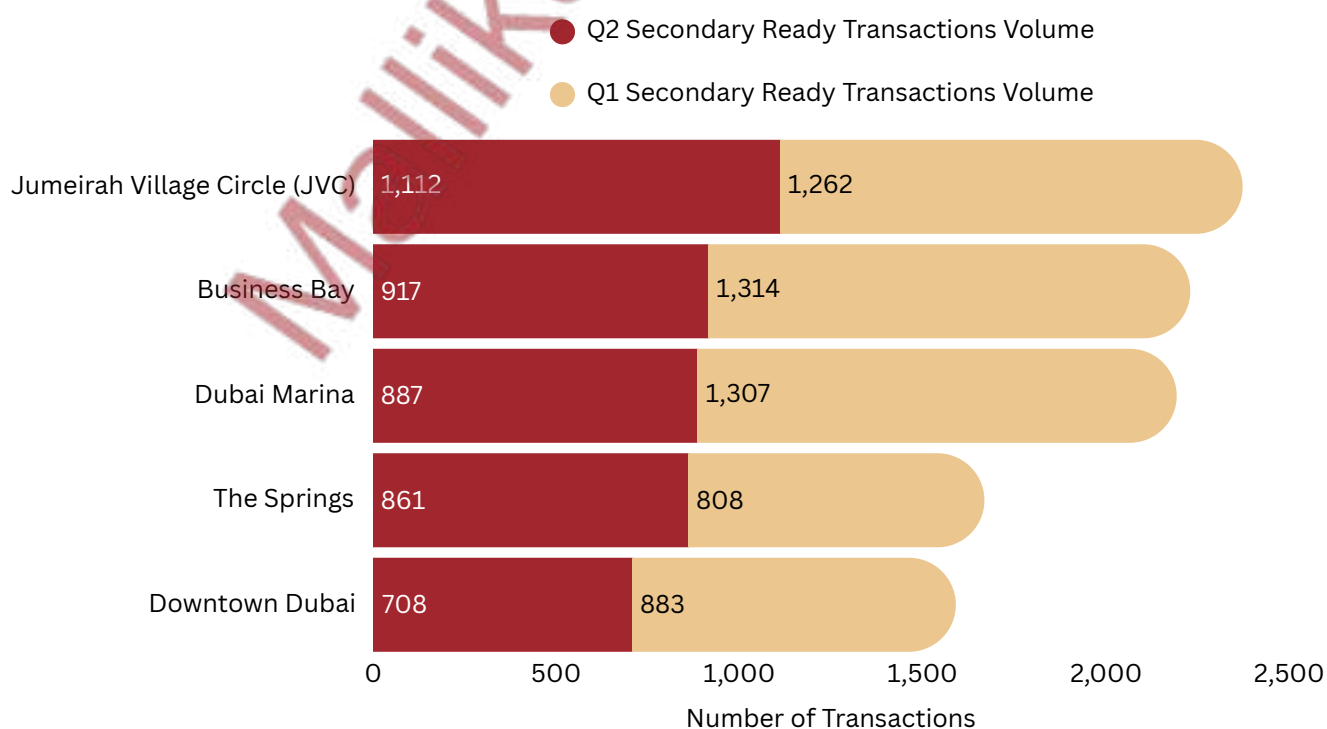


Top 5 Areas by Sales Transactions – Secondary (Ready Properties)

Area	Transactions	Value (AED)
Jumeirah Village Circle	1,112	2.2B
Busines Bay	917	2.1B
Dubai Marina	887	2.7B
The Springs	861	2B
Downtown Dubai	708	2.4B

Comparison Between the Top 5 Locations' Secondary Ready Transactions Volume in Q1 and Q2

Top 5 Performing Locations Based on
Secondary Ready Transactions Volume of
Q2 2025

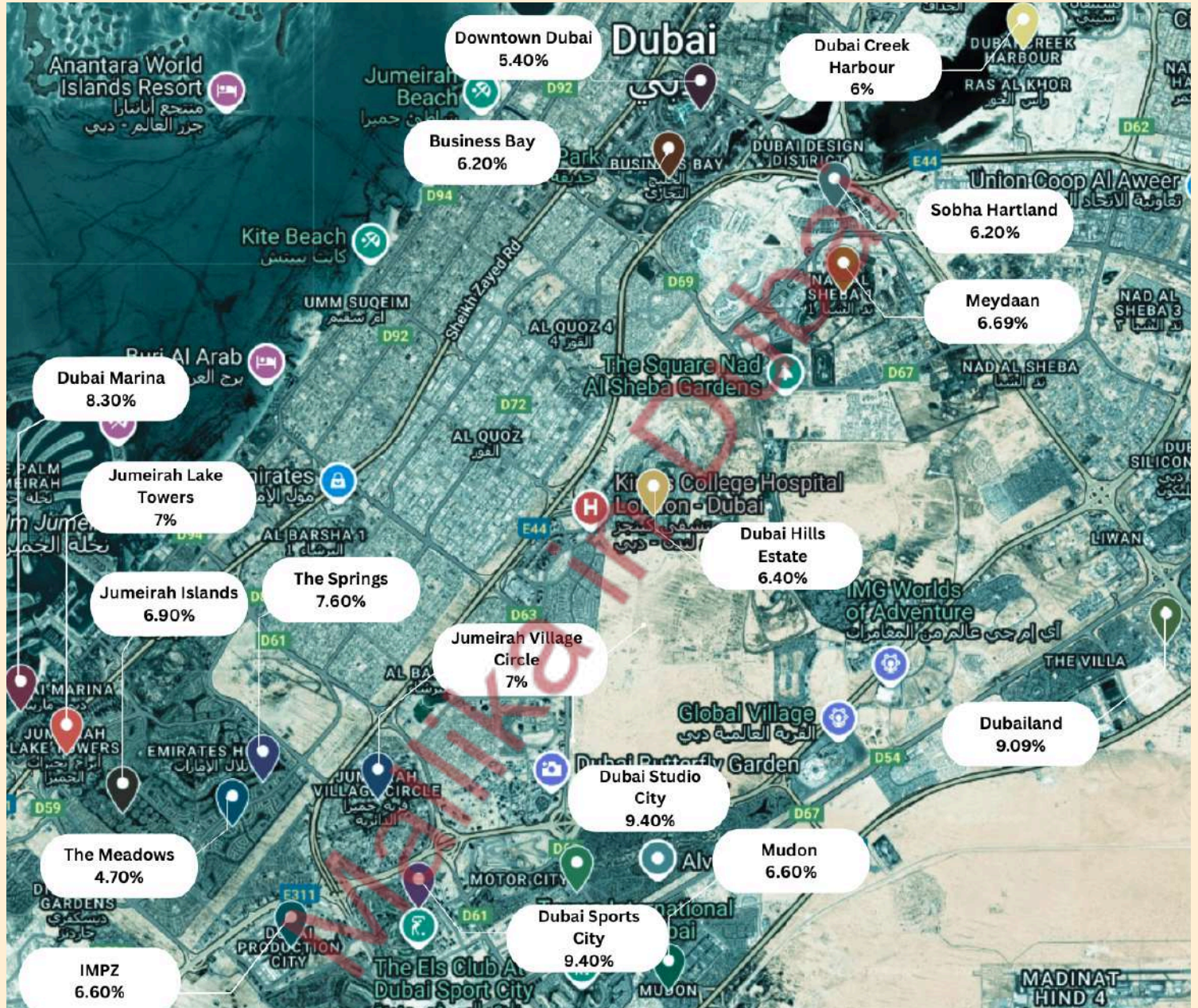


Where Investors Win: High-Return Zones

Area	Average Sale Price (AED)	Average Annual Rent (SGD)	Average Annual Rent (AED)	ROI (%)
Dubai Studio City	710,000.00	23,275.00	66,500.00	9.4
Dubai Sports City	620,000.00	20,300.00	58,000.00	9.4
Dubailand	660,000.00	21,000.00	60,000.00	9.1
Dubai Marina	1,380,000.00	40,250.00	115,000.00	8.3
The Springs	4,700,000.00	126,000.00	360,000.00	7.7
Jumeirah Village Circle	1,000,000.00	24,430.00	69,800.00	7
Jumeirah Lake Towers	1,470,000.00	35,840.00	102,400.00	7
Jumeirah Islands	1,223,000.00	29,575.00	84,500.00	6.9
IMPZ	770,000.00	17,675.00	50,500.00	6.6
Mudon	2,690,000.00	62,125.00	177,500.00	6.6
Dubai Hills Estate	2,818,000.00	63,000.00	180,000.00	6.4
Business Bay	1,480,000.00	32,200.00	92,000.00	6.2
Sobha Hartland	1,618,000.00	35,000.00	100,000.00	6.2
Dubai Creek Harbour	2,500,000.00	52,500.00	150,000.00	6
Downtown Dubai	2,800,000.00	52,500.00	150,000.00	5.4
The Meadows	9,500,000.00	155,750.00	445,000.00	4.7

Dubai's Q2 2025 real estate market showed strong rental yield performance across key communities. Top ROI areas included Dubailand (10.3%), Dubai Studio City and Sports City (9.4%), and Dubai Hills Estate (8.9%), highlighting sustained demand in affordable and family-friendly neighborhoods. Established areas like JVC, Business Bay, and JLT also maintained steady returns around 7%, reaffirming Dubai's position as a reliable high-yield market for property investors.

Location Map for High-ROI Hotspots in Dubai



2025 2nd Quarter Highlight: Sobha Realty

Following the ROI trends across Dubai's key investment zones, it's also important to spotlight not just locations—but quality developers driving real demand.

Rather than listing general area averages or entry prices by square foot, this section focuses on specific project-level opportunities from a developer that stands out in today's market for both build quality and performance: Sobha Realty.

Sobha is renowned for its fully in-house, end-to-end construction approach—offering consistent delivery standards, premium finishes, and master-planned communities with integrated greenery, retail, and lifestyle infrastructure. Their reputation for luxury detailing, timely delivery, and quality control has made their projects highly sought after by both investors and end-users.

Top Performing Sobha Projects (Q2 2025)

Based on actual transaction data:

Project	Volume (Units Sold)	Total Sales Value (AED)	Median Price (AED)
Sobha Solis	712	881.1M	1.1M
Sobha Orbis	570	710.3M	1.2M

These two projects not only rank among the top five in Dubai for Q2 in terms of sales volume, but also demonstrate strong price stability and buyer confidence. Positioned in well-connected areas with future growth potential, they offer a compelling combination of investment security and lifestyle appeal.

This shift—from looking at raw area stats to highlighting standout projects—is designed to give you clearer, actionable insight into where real demand is concentrated right now.

A bit about me . . .

Mallika Boobna | aka **Mallika in Dubai**

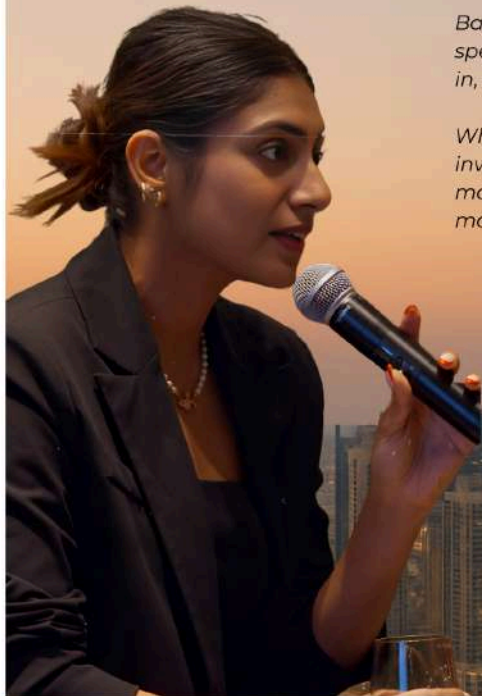
Licensed Real Estate Consultant | SuperAgent on Dubai's online property portals

"Hello! I'm Mallika — your Dubai real estate insider.

Based in Dubai, and regularly in Singapore, I specialize in helping Singapore clients explore, invest in, and relocate to Dubai.

Whether you're looking for your next property investment, a dream holiday home, or planning a move, I offer expert, end-to-end support with full market access and zero pressure."

- Singapore Country Director at Marrfa



What I Offer to Singapore-Based Investors

Investment Guidance

Understand Dubai's property market — from trending communities to ROI-rich areas.

Relocation Support

Relocating to Dubai? I help with housing, schooling, lifestyle, and everything in between.

Holiday & Secondary Homes

From sleek city apartments to beachfront escapes. I'll help you find your second home.

Full Developer Access

Registered with every major developer in Dubai - get early access to launches.

No Hidden Fees

Transparent, fair, and straightforward numbers — no surprise costs or inflated commissions.

Remote or In-Person Support

Based in Singapore? Dubai? Anywhere else? I offer both on-ground and virtual consultations.

Truly Personalised Advice

I focus on your goals and investment expectations, so you get real advice, not pressure.

One-Stop Shop

Manage everything from opening bank accounts, applying for the Golden Visa, to short-term rentals

Singapore

When in town, **find me at...**

Mandala Club | 31 Bukit Pasoh Road
1880 | InterContinental Robertson Quay
(Available by appointment)

**1:1
MEETINGS**

Dubai

I'm based at **Marrfa Real Estate**

1201B, Opus Tower, Business Bay — in the heart of the city's real estate scene.

You can click the Calendly link to book an in-person meeting with me or access the Zoom link for our virtual call.



Let's Connect!

I'd love to learn more about your plans and how Dubai real estate can play a role in your wealth journey.

