



For SG Expats:

The Dubai Quarterly Report

*Snapshot of Dubai's Q3 2025
real estate market, focusing on
locations with strong rental yields
and high ROI potential.*



Curated by:
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Singapore Country Director
at Marrfa Dubai

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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

Dubai's real estate market continued its upward trajectory in Q3 2025, setting a new quarterly record for transaction volume and maintaining strong value performance. The quarter registered 59,228 transactions, **marking a 17.2% increase in volume year-on-year**, and reached a total value of AED 170.7 billion, up 19.9% YoY. This sustained growth reinforces **Dubai's position as a leading global investment destination**, supported by robust demand across both off-plan and ready segments.

Total Number of Transactions: 59,228 (up 17.2% YoY)

Total Value of Transactions: AED 170.7 billion (up 19.9% YoY)

Market Segmentation

Dubai's property market remains balanced between off-plan and ready transactions, each contributing meaningfully to overall performance. In Q3 2025, the primary market accounted for 73% of total transactions, reflecting strong investor appetite for early-stage launches. The secondary market made up the remaining 27%, driven by end-user demand and handovers in established communities.

Primary Market (Off-Plan)

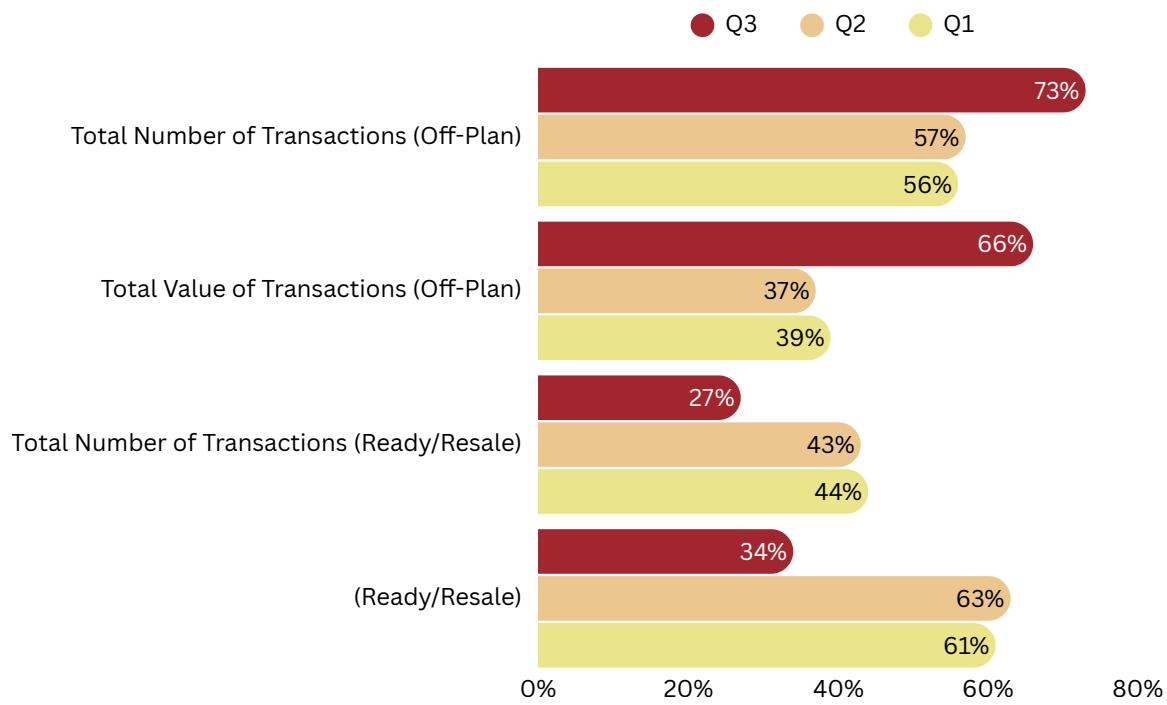
Number of Transactions: 43,239 (73% of total transactions)

Value of Transactions: AED 112.7 billion (66% of total market value)

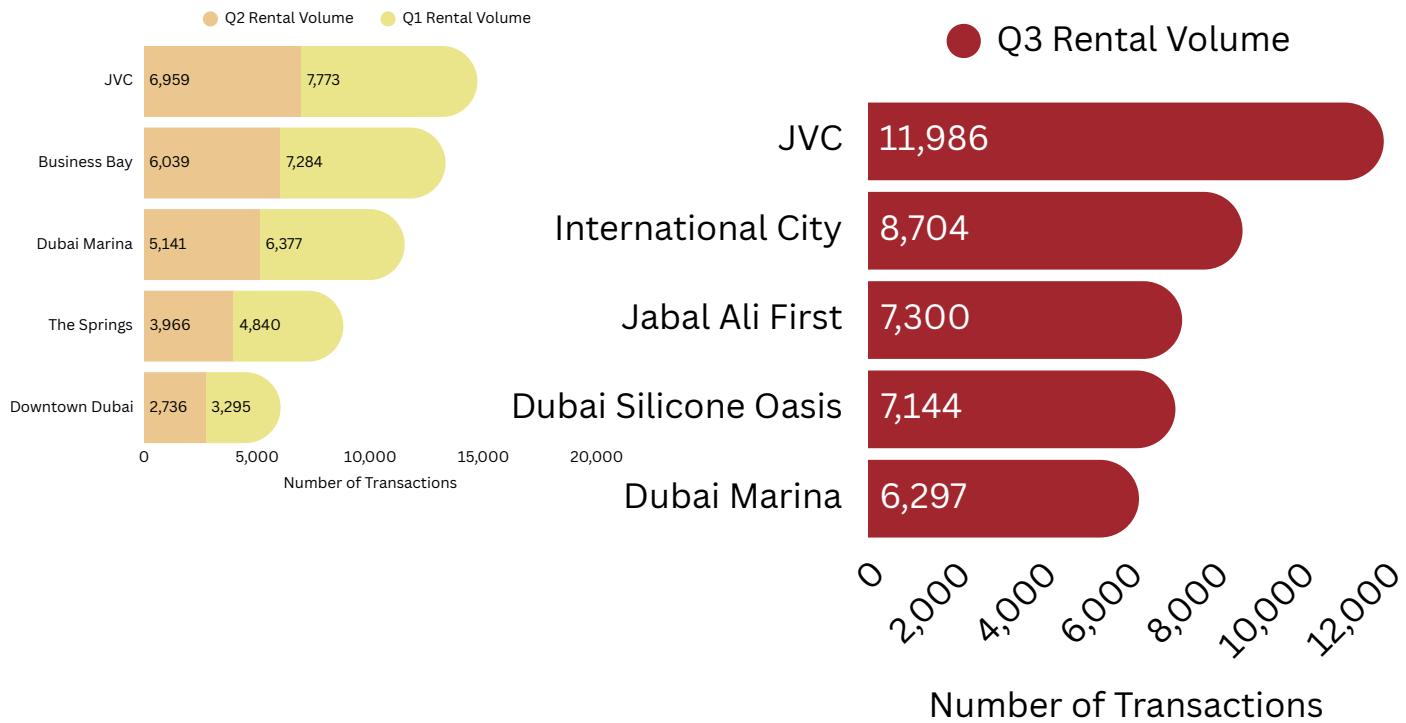
Secondary Market (Ready/Resale)

Number of Transactions: 15,989 (27% of total transactions)

Value of Transactions: AED 58.0 billion (34% of total market value)



Top 5 Locations: Rental Yield Comparison Across Q1-Q3 of 2025

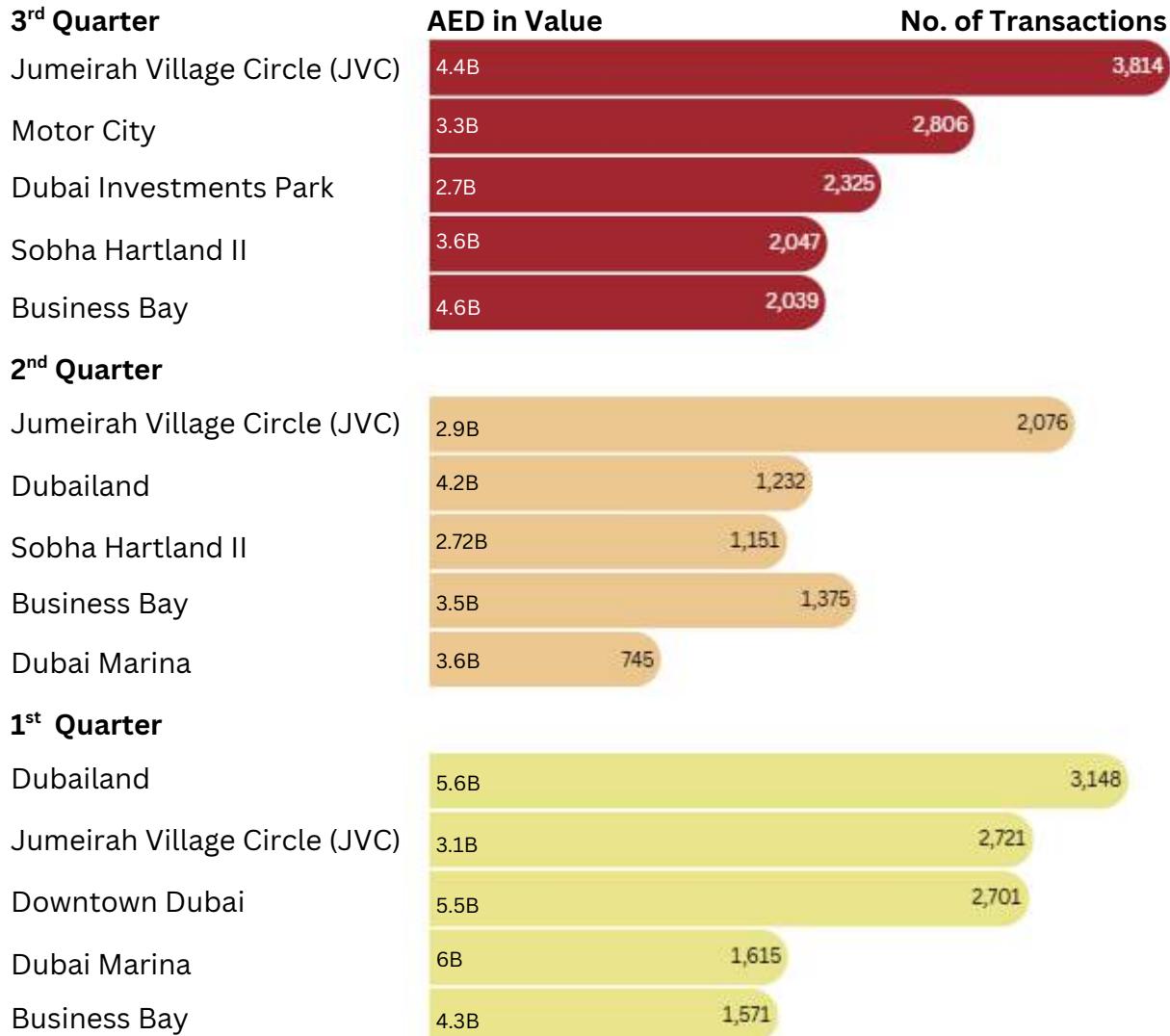


Dubai's rental market picked up speed in Q3 2025, after a steady Q2. The rise wasn't just in numbers—it showed a real shift in where people are choosing to live. More leases were signed in both well-known and growing areas, pointing to strong demand and wider interest across the city. This boost in activity shows that renters are confident and open to exploring new options.

- JVC led both quarters, nearly doubling its rental volume and confirming its position as a top-performing community. It's also because of the sheer volume of units up for grabs in the area.
- While Q2 was dominated by established areas like Business Bay and Dubai Marina, Q3 saw new contenders—International City, Jabal Ali First, and Dubai Silicone Oasis—rise quickly in tenant demand.
- This change reflects growing interest in more affordable and emerging neighbourhoods, alongside consistent demand in prime zones like Dubai Marina.
- The Q3 surge highlights both the depth and flexibility of Dubai's rental market, as tenants continue to explore a wider range of options across the city.

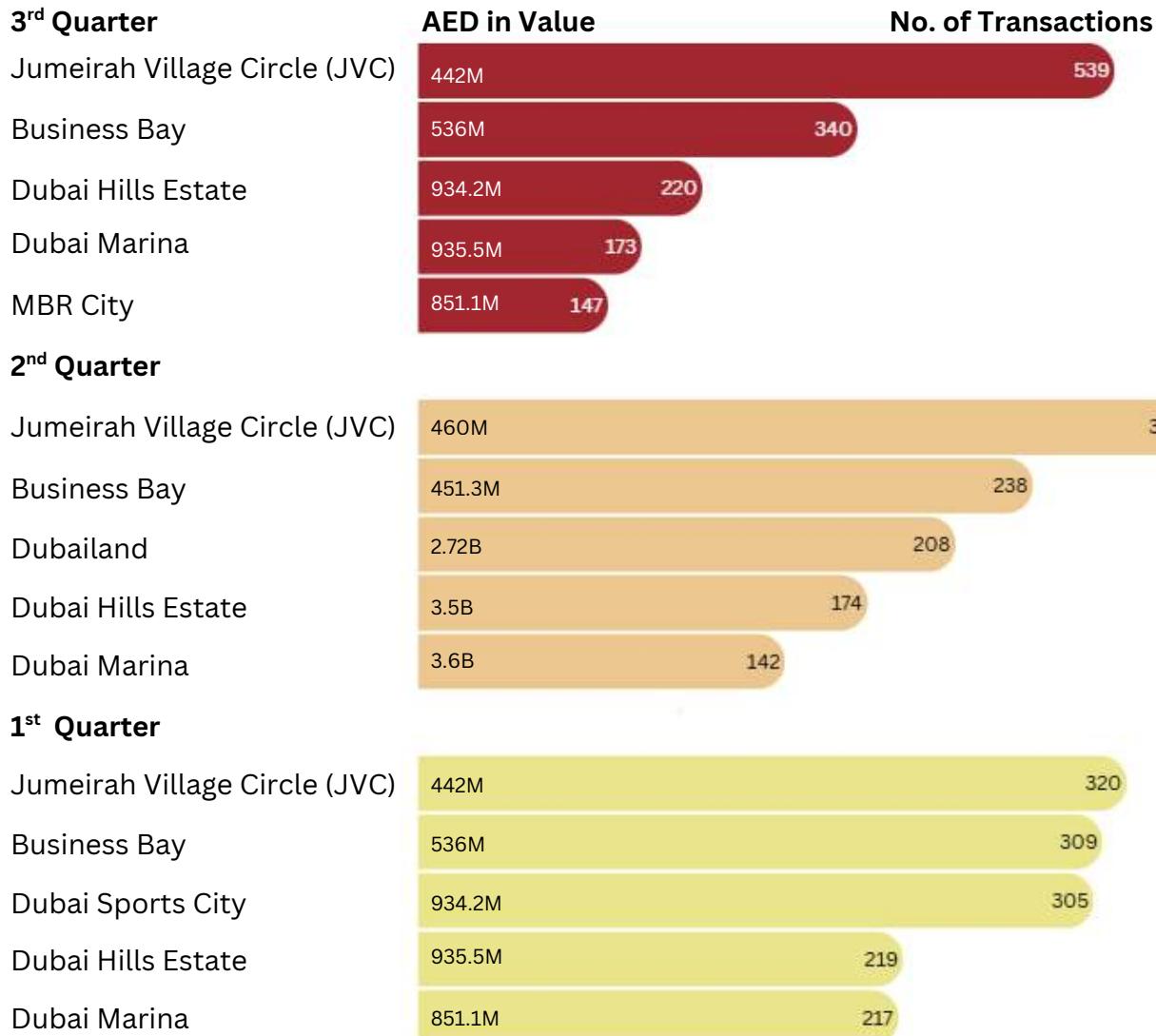
Rental activity rose steadily across all three quarters, but Q3 marked a clear breakout. JVC nearly doubled its Q1 volume, climbing from 6,939 to 11,986 leases. Dubai Marina showed consistent growth, while Business Bay peaked in Q2 before tapering slightly. Notably, Q3 introduced new high-volume zones—International City, Jabal Ali First, and Dubai Silicone Oasis—none of which featured in the top five earlier. The shift signals expanding tenant interest beyond traditional hotspots, with affordability and accessibility driving momentum in emerging districts.

Leading Off-Plan Communities Across Q1-Q3 of 2025



Dubai's off-plan market evolved noticeably across the first three quarters of 2025. In quarter 1, transaction volumes were high across legacy zones like Dubailand and Downtown Dubai, with multiple areas exceeding AED 5 billion in value. The second quarter saw a slowdown—volumes dipped, and only JVC remained above 2,000 transactions, suggesting a temporary pause in launches or buyer recalibration. By the third quarter, momentum returned sharply. JVC surged past 3,800 deals, and Motor City and Dubai Investments Park climbed into the top five. Total deal values also rebounded, with several areas crossing AED 4 billion, reflecting renewed developer confidence and strong buyer appetite for emerging communities.

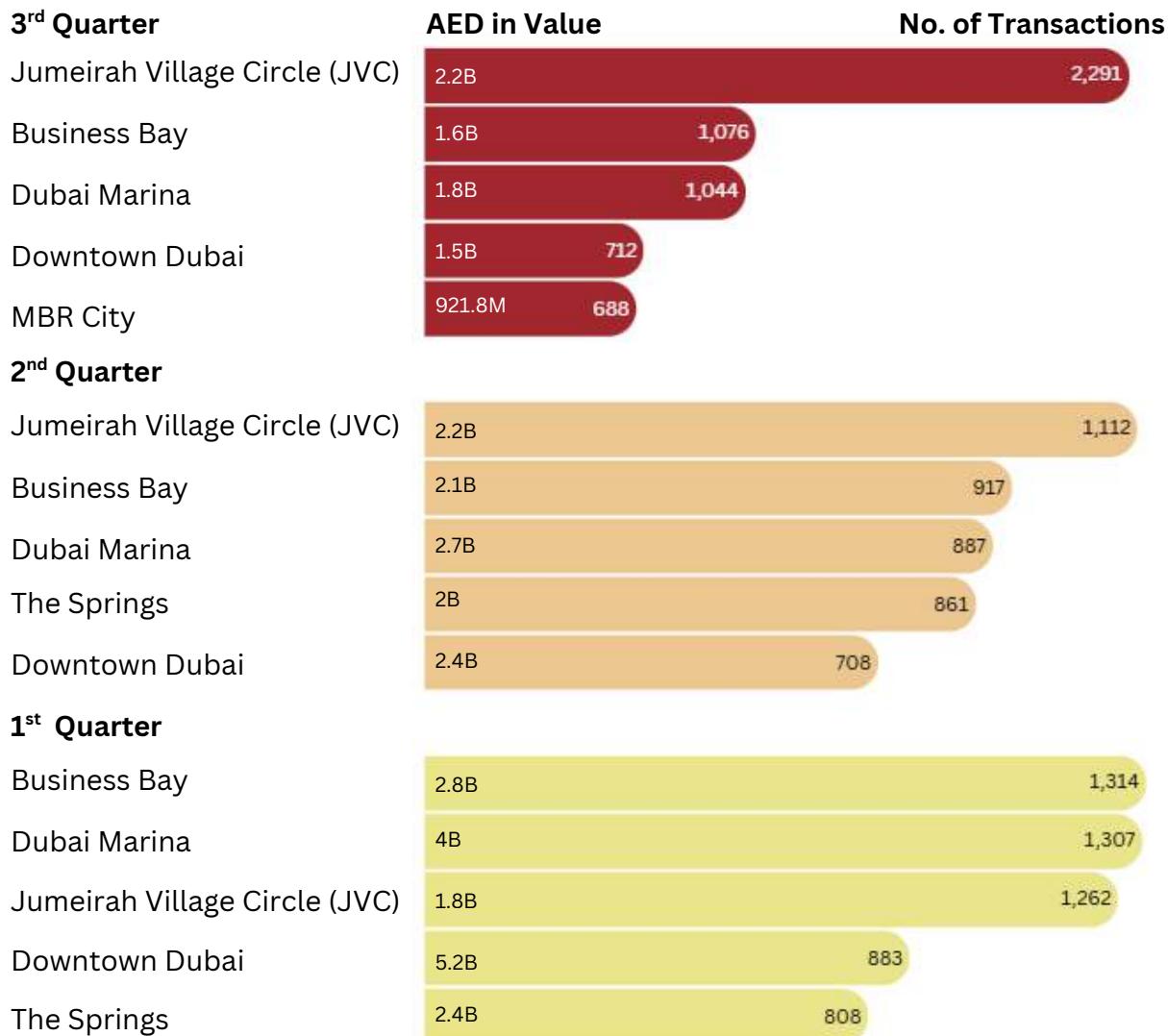
Leading Off-Plan (Resale) Communities Across Q1-Q3 of 2025



Off-plan resale activity remained steady across all three quarters, with Jumeirah Village Circle consistently leading in transaction volume. Quarter 1 saw high-value deals concentrated in Dubai Hills Estate and Dubai Sports City, both crossing AED 900M despite moderate transaction counts. The second quarter showed a slight dip in volumes, but values held firm—especially in Dubai Marina and Hills Estate, which continued to attract premium resale interest.

By the third quarter, volumes rebounded sharply. JVC surged to 539 transactions, nearly doubling its Q2 count, while Business Bay also climbed past 340 deals. Dubai Marina and Hills Estate maintained their presence, though with slightly lower values, suggesting a shift toward mid-range inventory. MBR City entered the top five in Q3, reflecting growing resale interest in newer master-planned zones. The data underscores a resilient secondary market, with consistent demand across both established and emerging communities, and a clear uptick in resale liquidity by the third quarter.

Leading Ready Communities Across Q1-Q3 of 2025



Ready property sales in Dubai remained active across all three quarters of 2025, with clear shifts in both transaction volume and geographic concentration. Quarter 1 was led by Business Bay and Dubai Marina, each crossing 1,100 transactions, while JVC and Downtown Dubai followed with steady activity. The Springs rounded out the top five, reflecting early demand in villa communities.

In Q2, JVC took the lead in both volume and value, while Business Bay and Dubai Marina maintained strong positions. The Springs and Downtown Dubai remained in the top five, though overall transaction counts dipped slightly—suggesting a brief cooling in buyer momentum.

By Q3, JVC surged dramatically to 2,291 transactions, more than doubling its Q1 volume and cementing its dominance in the ready segment. Business Bay and Dubai Marina held their ground, while Downtown Dubai remained consistent. MBR City entered the top five for the first time, signaling rising interest in newly handed-over stock within emerging master-planned zones.

Overall, the data reflects a resilient and adaptive secondary market, with buyers gravitating toward communities offering a balance of price accessibility, handover certainty, and lifestyle appeal—whether in established urban hubs or fast-growing suburban districts.

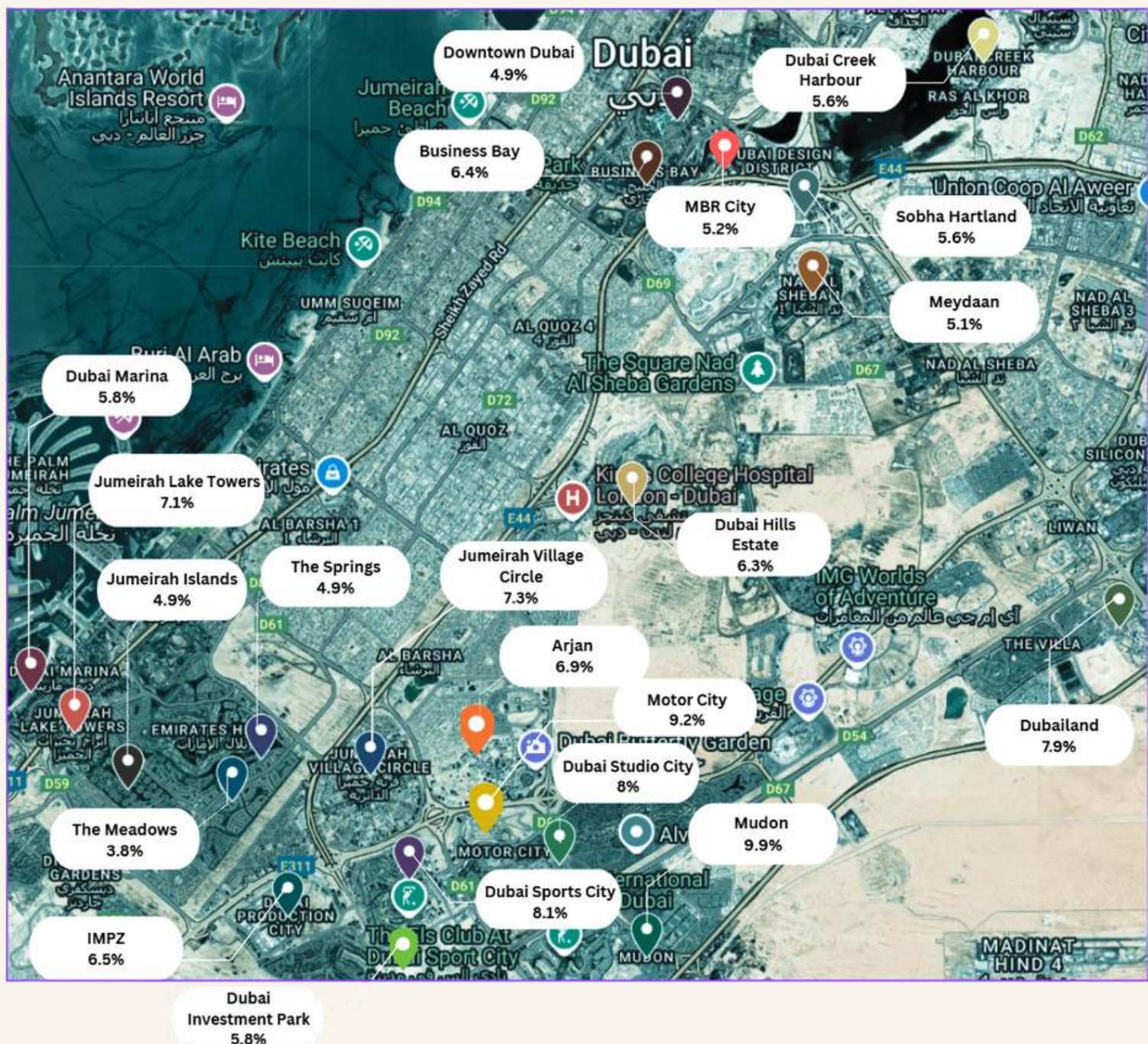
Where Investors Win: High-Return Zones

Figures are based on 2-3 bedroom units to reflect typical rental demand and ensure consistency across comparable inventory.

Area	Average Sale Price (AED)	Average Annual Rent (AED)	Average Annual Rent (SGD)	ROI (%)
Mudon	1,313,000	130,000	66,241	9.9
Motor City	1,357,000	125,000	27,372	9.2
Dubai Sports City	1,050,000	85,000	21,898	8.1
Dubai Studio City	1,130,000	90,000	25,912	8
Dubailand	1,400,000	110,000	40,146	7.9
Jumeirah Village Circle	1,500,000	110,000	26,058	7.3
Jumeirah Lake Towers	1,765,000	125,000	37,956	7.1
Arjan	1,450,000	100,000	24,818	6.9
IMPZ	1,227,000	80,000	18,869	6.5
Business Bay	2,200,000	140,000	34,234	6.4
Dubai Hills Estate	2,295,000	145,000	66,788	6.3
Dubai Marina	2,475,000	144,500	33,577	5.8
Dubai Investments Park	1,500,000	87,000	20,803	5.8
Dubai Creek Harbour	2,669,000	150,000	55,474	5.6
Sobha Hartland	2,443,000	136,500	37,044	5.6
MBR City	2,425,000	125,000	31,022	5.2
Meydaan	2,450,000	125,000	164,234	5.1
Jumeirah Islands	5,425,000	265,000	31,387	4.9
The Springs	3,380,000	165,000	133,942	4.9
Downtown Dubai	3,900,000	190,000	55,474	4.9
The Meadows	8,575,000	330,000	164,234	3.8

High-yield rental zones in Dubai this quarter were led by Jumeirah Lake Towers, Mudon, and Motor City, each delivering returns above 9%. These areas combined strong tenant demand with moderate entry prices, outperforming more expensive districts where ROI remained below 5%.

Location Map for High-ROI Hotspots in Dubai



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

**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.

