



For SG Expats:

The Dubai Year End Report

*Wrap-up of 2025 real estate market,
focusing on locations with strong rental yields
and high ROI potential.*



Curated by:

Mallika Boobna

Singapore Country Director
at Marrfa Dubai

Table of Contents

- 01 Overview & Market Segmentation
- 02 Top 5 Performing Areas: Year-End Rental Yield Analysis
- 03 2025 Wrap-Up: Leading Off-Plan Communities
- 04 2025 Wrap-Up: Leading Off-Plan (Resale) Communities
- 05 2025 Wrap-Up: Leading Ready Communities
- 06 Year-End Snapshot: Dubai Areas with High Yielding ROI
- 07 Location Map for High-ROI Investment Hotspots in Dubai

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.



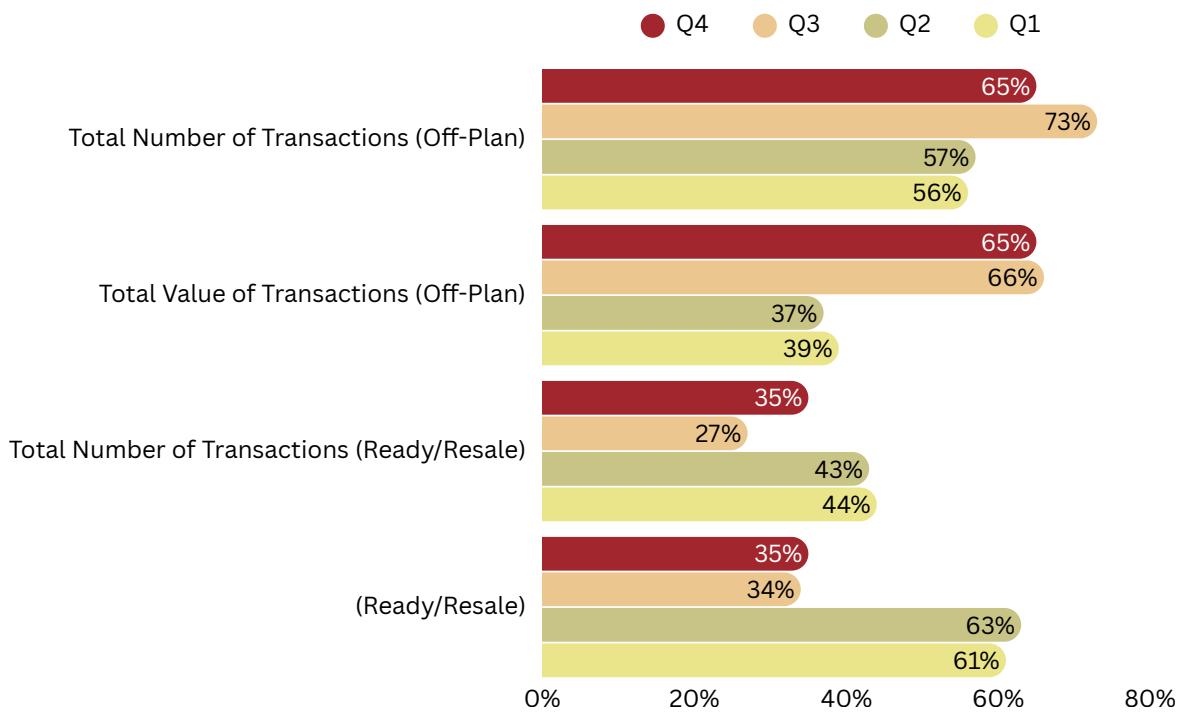
Overview

Dubai's real estate market closed Q4 2025 with its strongest quarterly performance of the year, setting a new all-time record for quarterly sales value. This capped a historic year in which both transaction volume and value reached unprecedented levels, reinforcing Dubai's position as one of the world's leading real estate investment destinations.

Here are the figures for the requested data:

- Total Number of Transactions (Q4 2025): **56,712 transactions**
- Total Value of Transactions (Q4 2025): **AED 187.47 billion**
- Total Number of Transactions (Full Year 2025): **214,912 transactions**
- Total Value of Transactions (Full Year 2025): **AED 682.49 billion**

It is important to note that according to official transaction data from the Dubai Land Department, Q3 2025 recorded the highest volume of transactions for the year, reaching a record 59,228 sales. Meanwhile, Q4 2025 achieved the highest total transaction value, amounting to AED 187.47 billion, driven by a massive surge in high-value year-end activity and record-breaking performance in December alone.



**The table above shows the breakdown of transaction volume and value by property type across all four quarters of 2025.*

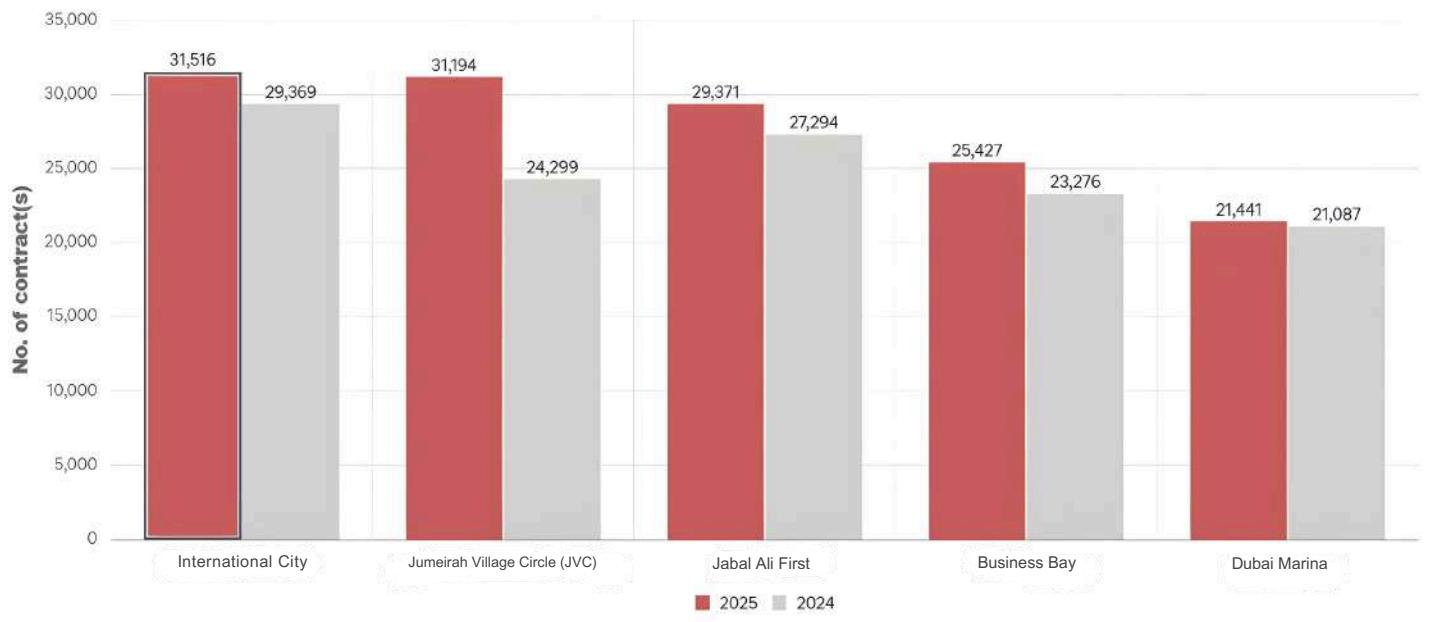
Market Segmentation

The property market in **2025** remained structurally weighted toward the **primary (off-plan)** segment, which continued to drive the majority of annual activity. The ready market maintained strong liquidity, supported by end-users and investors consolidating income-producing assets across established communities.

The dominance of the off-plan market, which represented **62.6% of total transactions** by volume in 2025, was driven by developers' competitive incentives and flexible payment plans, attracting growth-oriented investors. Conversely, the secondary (ready) market accounted for **37.4% of transactions**, appealing to end-users and investors seeking immediate rental income and tangible assets in established communities.

Period	Market Segment	Number of Transactions	Share of Transactions	Total Value (AED Billion)
Q4 2025	Primary (Off-Plan)	36,750	64.80%	AED 121.48
	Secondary (Ready)	19,962	35.20%	AED 65.99
	Total Market	56,712	100%	AED 187.47
Full Year 2025	Primary (Off-Plan)	134,623	62.60%	AED 412.38
	Secondary (Ready)	80,289	37.40%	AED 270.11
	Total Market	214,912	100%	AED 682.49

Top 5 Performing Areas: Year-End Rental Yield Analysis



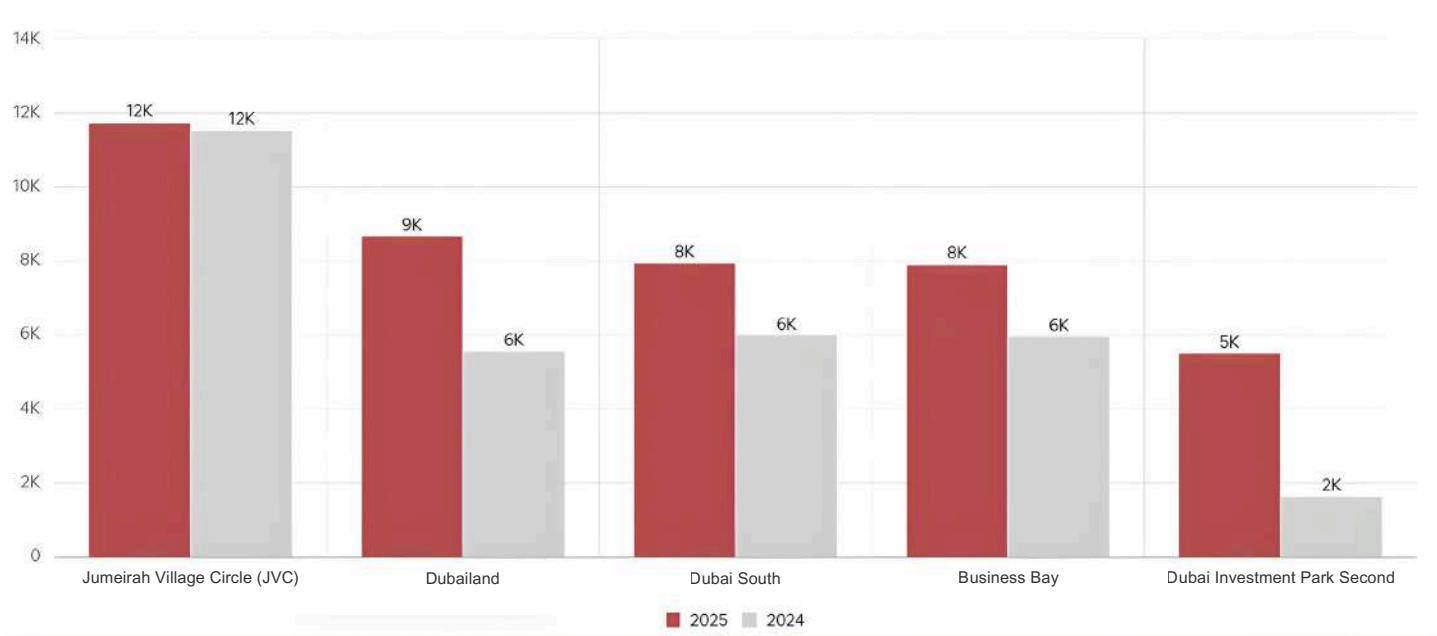
In 2025, the Dubai rental market reached a milestone with 405,000 total transactions, driven by high demand for mid-market hubs and strategic industrial zones. The year concluded with a record-breaking final quarter, establishing new benchmarks for both activity and pricing.

Q4 2025 Rental Market Highlights:

- **Highest Volume:** Q4 2025 was the year's most active period, recording over 150,000 rental contracts.
- **Highest Value:** Q4 2025 also achieved the highest total rental value of the year, reaching approximately AED 15.6 billion.
- **Rising Rents:** Average annual apartment rents hit AED 103,000 by late 2025, a 10.9% year-on-year increase.
- **Top Areas:** International City led in volume (31,516 contracts), followed by JVC, which grew to 31,194 contracts.
- **Jabal Ali First:** This industrial and logistics hub emerged as a high-yield standout (averaging 9.62%). Its high rental demand is driven by a massive blue-collar workforce and logistics professionals requiring housing near their workplace. Average annual rent comes in at approximately AED 58,000 for a 1 bed.

The shift toward industrial-adjacent communities like Jabal Ali highlights a maturing market where workforce housing provides stable, attractive returns. As we enter 2026, these strategic corridors remain central to Dubai's rental growth.

2025 Wrap-Up: Leading Off-Plan Communities



The Dubai market for off-plan projects (first sales) showed significant vitality in 2025, with several communities demonstrating strong growth in transaction volumes compared to 2024.

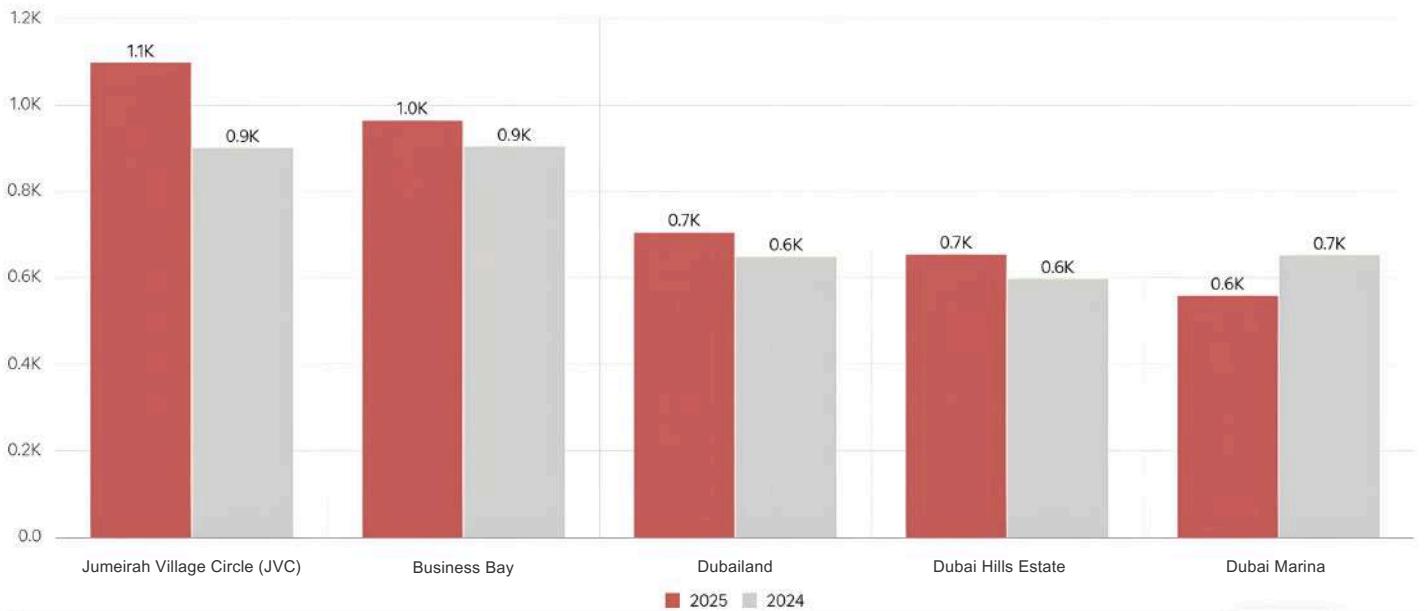
Jumeirah Village Circle (JVC) emerged as the clear leader, maintaining consistent high volume across both years with approximately 12,000 transactions in 2025. Other key areas saw notable year-over-year increases, indicating expanding interest from investors and buyers.

2025 market performance saw a strong activity, with off-plan properties accounting for a majority of all transactions.

The overall Dubai property market (combining off-plan and ready properties) closed the year strong.

- **Highest Volume of Transactions:** While Q3 2025 set a record for quarterly off-plan apartment transactions, Q4 2025 delivered the highest total sales volume across all segments on record for the year.
- **Highest Value of Off-Plan Transactions:** Based on available market reports, the value of off-plan properties sold in Q4 2025 reached approximately AED 93 billion. This segment was particularly strong in October 2025, when it comprised around 69% of all sales transactions.

2025 Wrap-Up: Leading Off-Plan (Resale) Communities

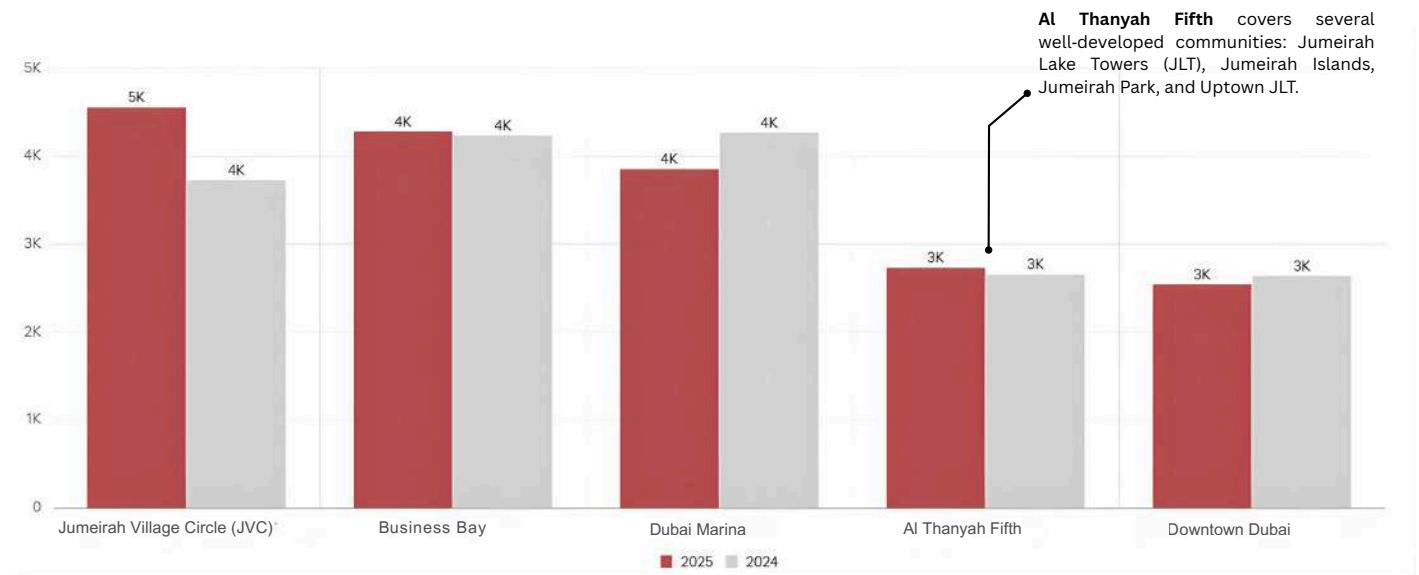


Off-plan resale comprised 62.6% of total transactions in 2025, underscoring investor appetite for new inventory and long-term plays. Q1–Q3 trends were reinforced by full-year data, with consistent leaders emerging across both volume and value.

- **Jumeirah Village Circle (JVC):** Maintained its lead in off-plan apartment transactions for the second year, with 12,285 deals in 2025. Its affordability and variety continue to attract mid-market investors and first-time buyers.
- **Business Bay:** Excelled in high-value off-plan sales, recording Dubai's highest average apartment price at AED 2.38M. Its mixed-use appeal draws luxury buyers locally and internationally.
- **Dubailand (Wadi Al Safa 5):** A resilient performer within the master-planned Dubailand, ranking top 10 in both volume and value. Strong villa and townhouse demand, especially in February, underscores its steady appeal.
- **Dubai Hills Estate:** Remains a top-tier choice for both villas and apartments, offering luxury living and strong capital appreciation potential.
- **Dubai Marina:** A coastal favorite with premium pricing and limited supply, consistently leading in sales value and apartment ownership interest.

Q3 2025 marked a record 42,000 off-plan transactions—the highest ever. Q4 followed with AED 63B in total off-plan resale value. Together, these milestones confirm 2025 as a historic year for Dubai real estate, with momentum set to carry into 2026.

2025 Wrap-Up: Leading Ready Communities



Ready project transactions remained a strong pillar of Dubai's real estate market in 2025, with stable performance across key communities. **Q2 emerged as the peak quarter, recording both the highest volume (22,975 transactions) and highest value (AED 115.5 billion), underscoring sustained demand for completed inventory.**

- **Jumeirah Village Circle (JVC):** Led the market in ready apartment transactions with 5,000 deals in 2025, up from 4,000 in 2024. Its affordability and diverse stock continue to attract mid-income buyers and investors seeking immediate occupancy.
- **Business Bay:** Maintained consistent performance with 4,000 ready transactions, reflecting its dual appeal to residential and commercial buyers. Its central location and premium positioning support steady resale activity.
- **Dubai Marina:** Matched Business Bay with 4,000 transactions, driven by coastal appeal and limited supply. Its reputation for high-end living and investor interest remains intact.
- **Al Thanyah Fifth:** Registered 3,000 transactions, a figure supported by its composition: Jumeirah Lake Towers (JLT), Jumeirah Islands, Jumeirah Parks, and Uptown JLT. This mix of apartment and villa communities offers varied options for end-users and investors alike.
- **Downtown Dubai:** Also recorded 3,000 transactions, reflecting enduring interest in its luxury high-rise inventory and proximity to key landmarks.

With strong quarterly peaks and consistent performance across diverse communities, 2025 confirmed the resilience of Dubai's ready market segment and its role in anchoring overall transaction value.

Where Investors Win: High-Return Zones

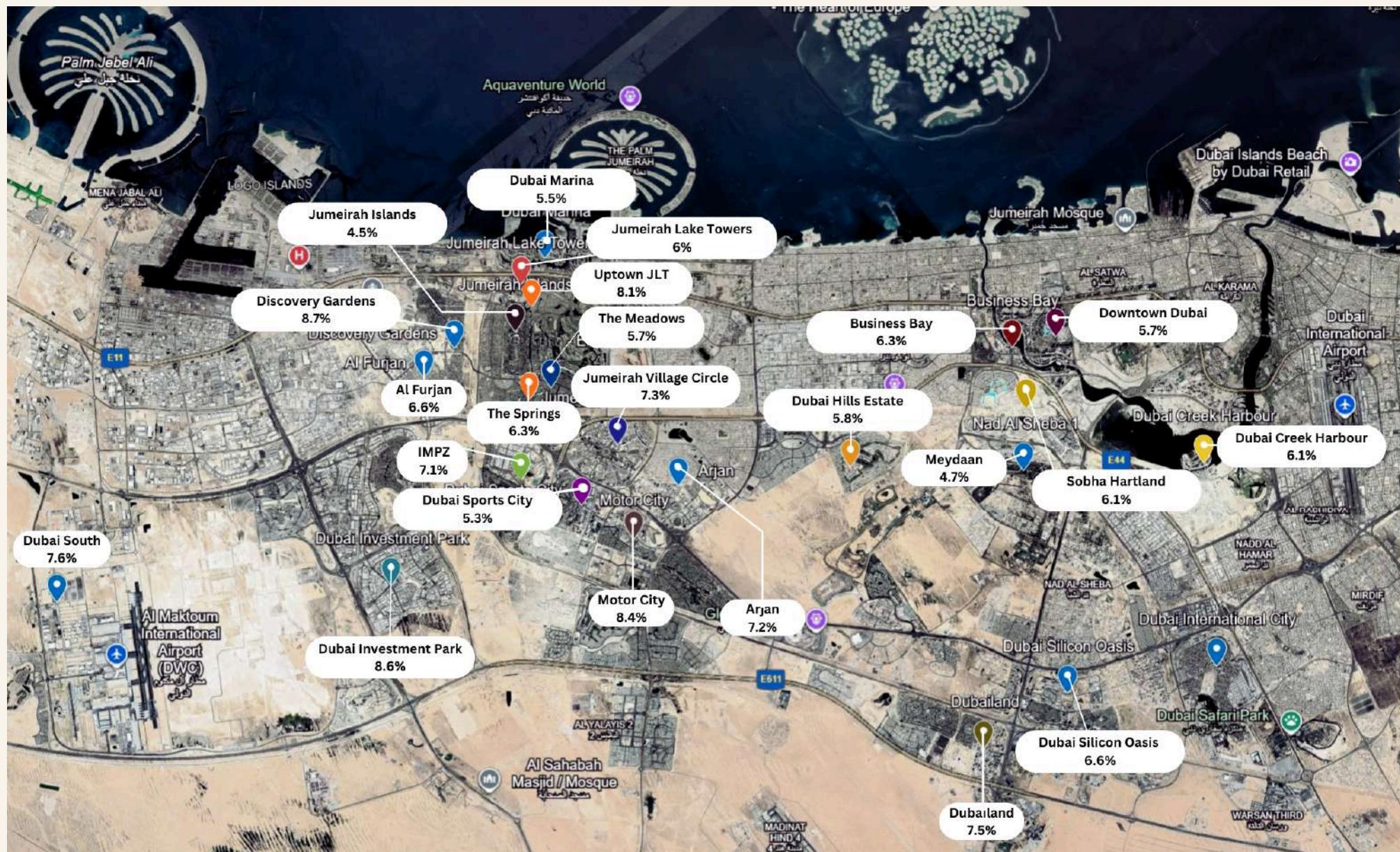
Area	Average Sale Price (AED)	Average Annual Rent (AED)	Average Sale Price (SGD)	Average Annual Rent (SGD)	ROI (%)
Discovery Gardens (C-2BR)	1,182,000	102,500	416,197	36,092	8.70%
Dubai Investment Park (C-2BR)	1,160,000	100,000	408,451	35,211	8.60%
Motor City (C-2BR)	1,403,000	118,500	494,014	41,725	8.40%
Uptown JLT (C-2BR)	3,815,000	310,000	1,343,310	109,155	8.10%
Dubai South (C-2BR)	1,116,000	85,000	392,958	29,930	7.60%
Dubailand (C-2BR)	1,000,000	75,000	352,113	26,408	7.50%
Jumeirah Village Circle (JVC) (C-2BR)	1,500,000	110,000	528,169	38,732	7.30%
Arjan (C-2BR)	1,435,000	103,000	505,282	36,268	7.20%
IMPZ (C-2BR)	1,108,000	79,000	390,141	27,817	7.10%
Dubai Silicon Oasis (C-2BR)	1,260,000	83,200	443,662	29,296	6.60%
Al Furjan (C-2BR)	1,675,000	109,800	589,789	38,662	6.60%
Business Bay (C-2BR)	2,300,000	145,000	809,859	51,056	6.30%
The Springs (L-3BR)	5,600,000	350,000	1,971,831	123,239	6.30%
Dubai Creek Harbour (C-2BR)	2,633,000	160,000	927,113	56,338	6.10%
Sobha Hartland (C-2BR)	2,395,000	145,000	843,310	51,056	6.10%
Jumeirah Lake Towers (JLT) (C-2BR)	2,480,000	150,000	873,239	52,817	6.00%
Dubai Hills Estate (C-2BR)	3,380,000	197,500	1,190,141	69,542	5.80%
Downtown Dubai (C-2BR)	3,500,000	200,000	1,232,394	70,423	5.70%
The Meadows (L-4BR)	11,000,000	625,000	3,873,239	220,070	5.70%
Dubai Marina (C-2BR)	2,525,000	140,000	889,085	49,296	5.50%
Dubai Sports City (C-2BR)	1,600,000	85,000	563,380	29,930	5.30%
Meydan (C-2BR)	2,550,000	120,000	897,887	42,254	4.70%
Jumeirah Islands (L-4BR)	6,163,000	280,000	2,170,070	98,592	4.50%

*Figures reflect actual transactions from the past 3 months.

*(C) = Condo/Apartment, (L) = Landed (villa/townhouse); 2BR/3BR/4BR indicate bedroom count.

*Data sourced from DXBInteract—reflects recent transactions and is accurate as of now, though subject to future market shifts.

Location Map for High-ROI Hotspots in Dubai



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 traveling, I specialize in helping expat 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."

- Country Director at Marrfa



What I Offer to my 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

The Nanson | 1 Nanson Road, Level 3,
Robertson Quay, Singapore

(Available by appointment)

Dubai

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

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