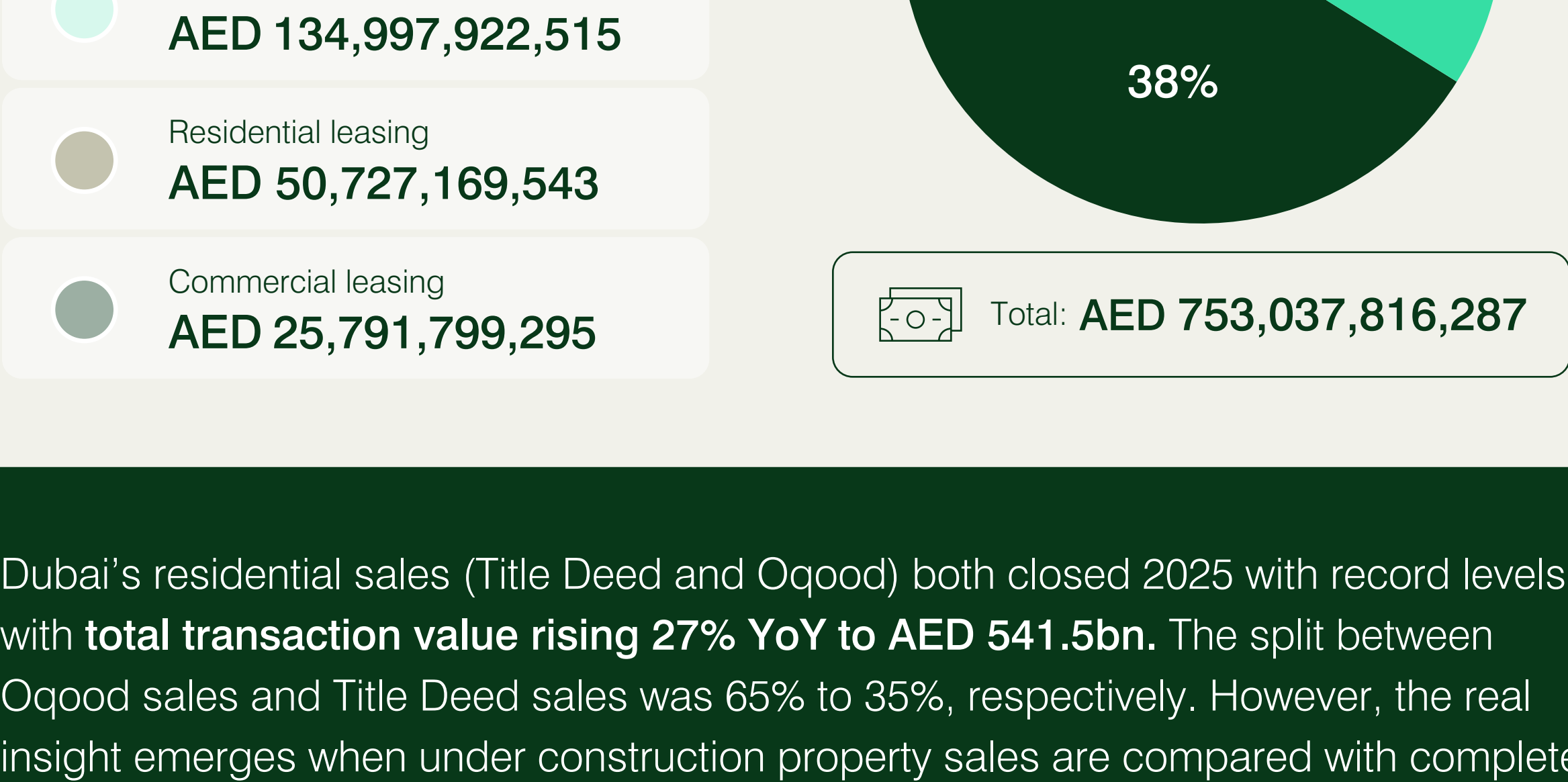




Off Plan Market Report 2025

The **Dubai 2033 Economic Agenda** set big targets for the real estate sector in October 2024 with a goal to increase total real estate transactions by 70%, for a total value of **AED 1 trillion by 2033**. With over **AED 753bn** worth of transactions in 2025 and a **27% year-on-year increase (YoY)**, Dubai is well on its way.

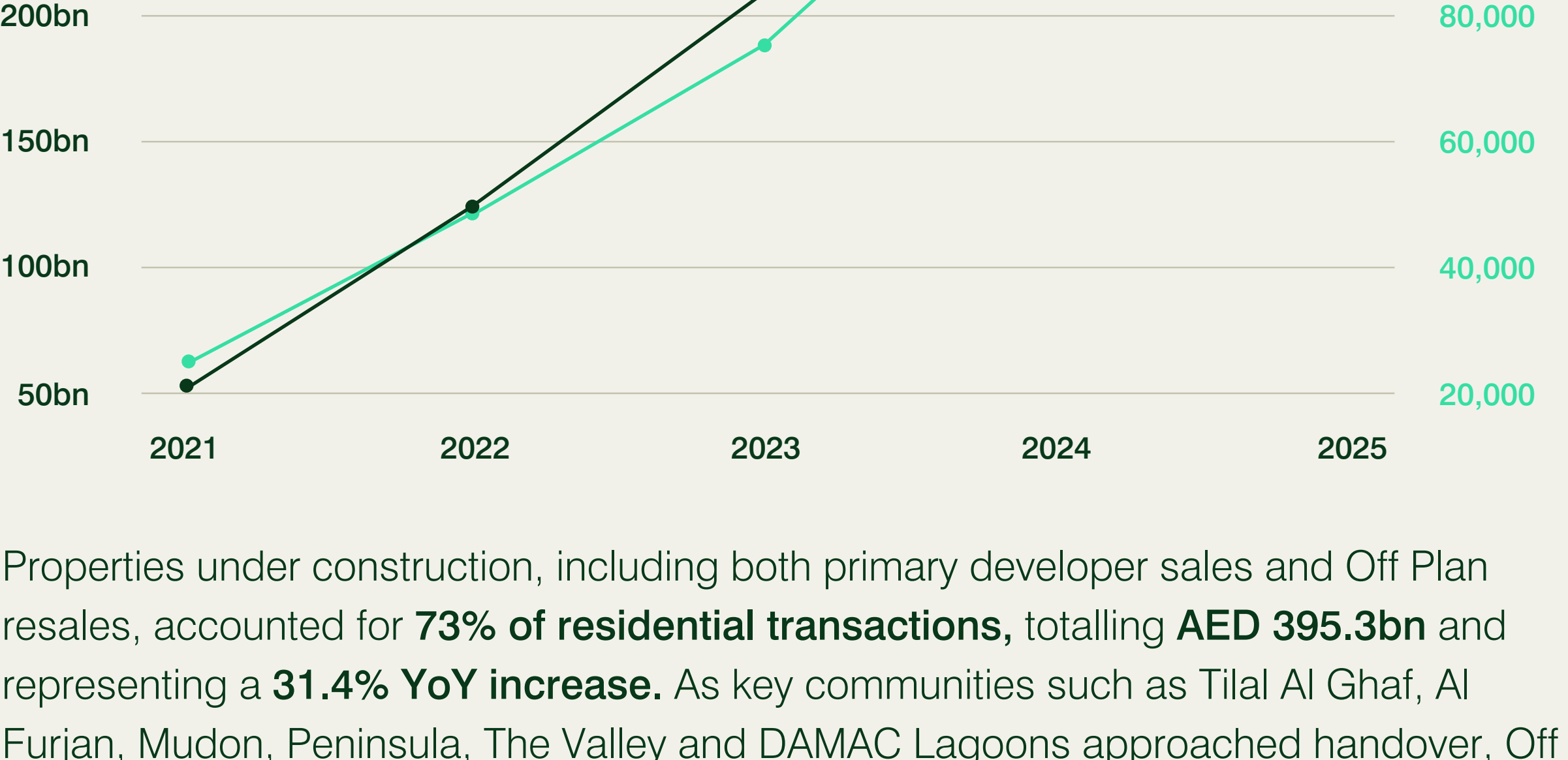
This is what the split looked like:



Dubai's residential sales (Title Deed and Oqood) both closed 2025 with record levels, with **total transaction value rising 27% YoY to AED 541.5bn**. The split between Oqood sales and Title Deed sales was 65% to 35%, respectively. However, the real insight emerges when under construction property sales are compared with completed property sales, which this report explores in detail.

Transactions & total value trend*

Under construction properties | Source: Property Monitor



Properties under construction, including both primary developer sales and Off Plan resales, accounted for **73% of residential transactions**, totalling **AED 395.3bn** and representing a **31.4% YoY increase**. As key communities such as Tilal Al Ghaf, Al Furjan, Mudon, Peninsula, The Valley and DAMAC Lagoons approached handover, Off Plan resales increased as investors capitalised on price appreciation.

Growth was not driven by pricing alone. Transaction volumes also increased materially, signalling broad based participation from **both end users and investors**. This combination of rising volumes and values underlines the depth of demand and continued market activity.

Average gross rental yields across Dubai moderated slightly to **6.76%**, compared to 6.92% in 2024. This marginal compression reflects capital value appreciation outpacing rental growth, rather than weakening leasing fundamentals. Yield levels remain attractive by global standards particularly in well located, community centric developments featuring a host of quality facilities and amenities.

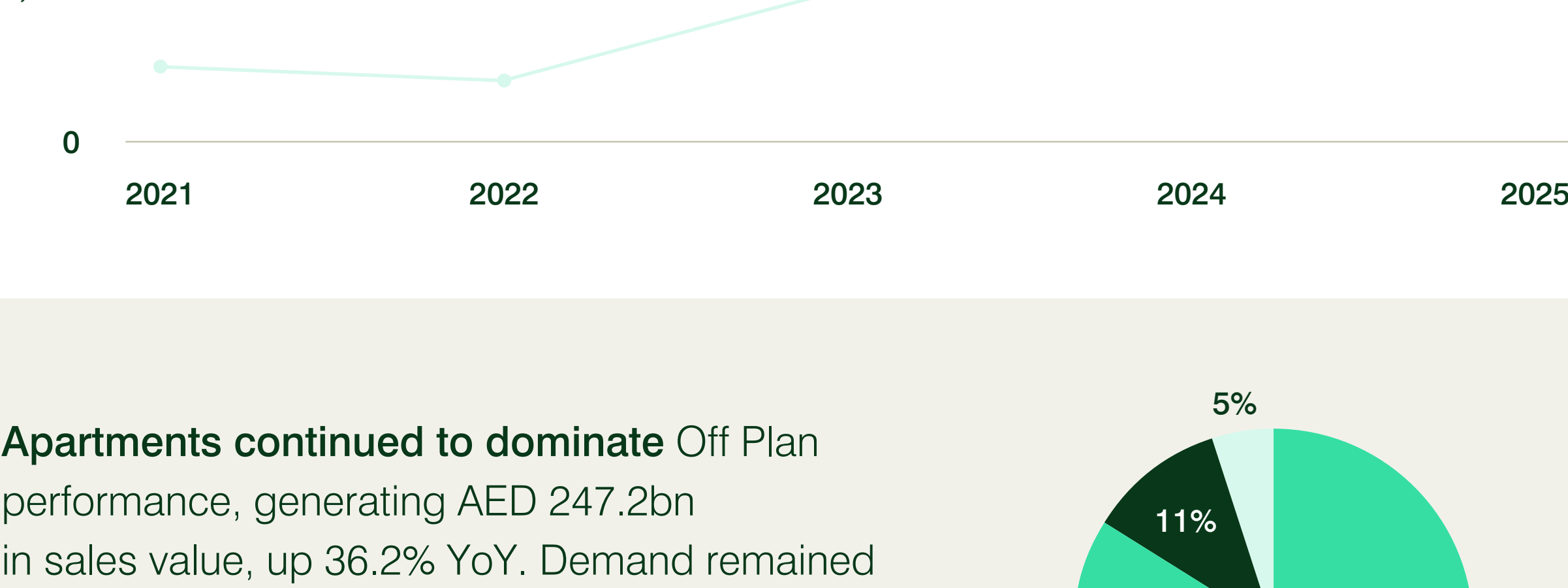
Key market indicators

Metric	2024	2025	YoY	Commentary
Transaction volume of under construction properties	AED 116,954	AED 145,754	▲ 24.6%	Broad based growth across unit types
Total sales value of under construction properties	AED 300.9bn	AED 395.3bn	▲ 31.3%	Value growth outpaced volume
Average price per sq.ft of under construction properties	AED 1,799	AED 1,936	▲ 7.6%	Pricing firmed amid strong absorption

While average pricing continued to move upward, the pace of increase remained measured, suggesting **healthy market balance**.

Average price per sq.ft*

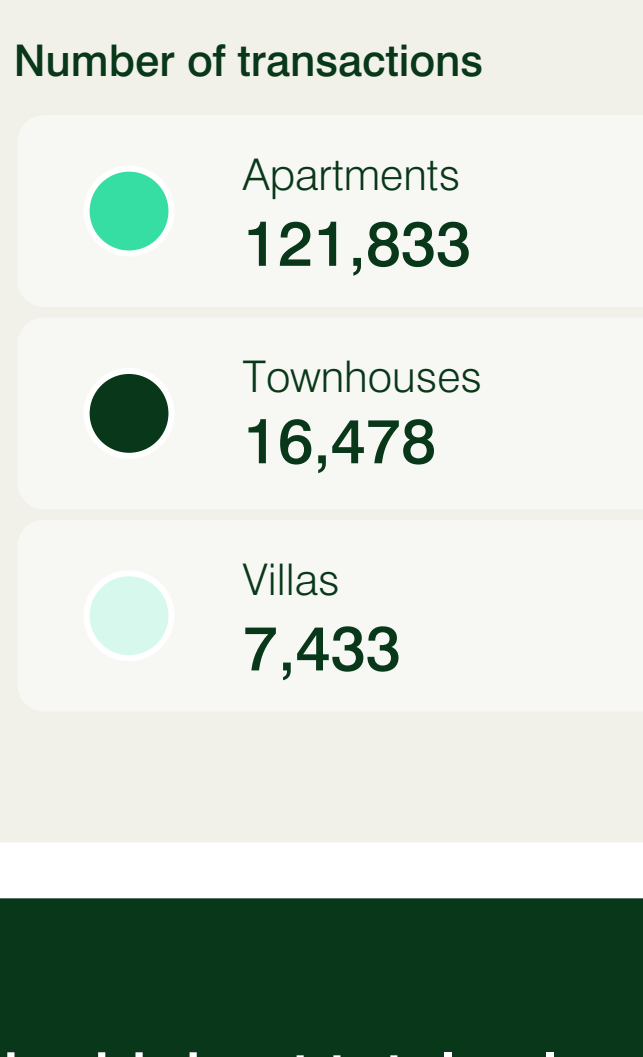
Under construction properties | Source: Property Monitor



Apartments continued to dominate Off Plan performance, generating AED 247.2bn in sales value, up 36.2% YoY. Demand remained concentrated in **low entry, investment friendly unit sizes**, particularly one and two bedroom layouts.

Villa sales value rose sharply by 35.6% to AED 95.3bn, despite more selective launch activity. This reflects **sustained demand for larger formats, land backed assets and long term wealth preservation among HNWIs**.

Townhouse performance was more measured, with sales value increasing 7.3% YoY, supported by **steady absorption**.



Number of transactions

Apartments: 121,833

Townhouses: 16,478

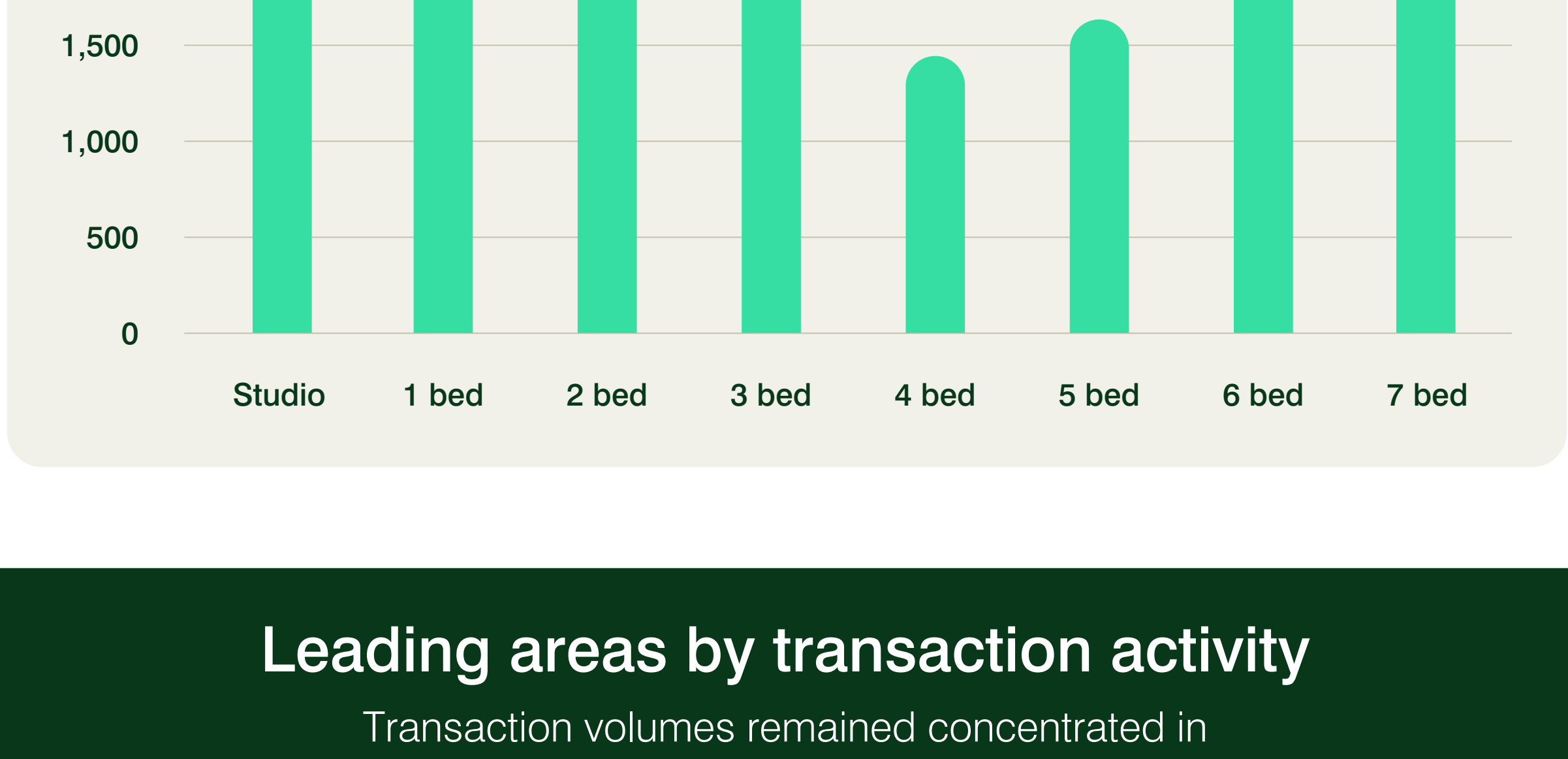
Villas: 7,433

Across 2025, **one and two bedroom homes generated the highest total sales value**, reinforcing their role as an easy and lower entry point into the Dubai Off Plan market. These unit types continue to attract both investors and end users seeking flexibility, rental demand and exit optionality.

Two bedroom units achieved the highest average price per square foot among core apartment sizes, highlighting strong demand for prime, well located mid sized homes driven by end user demand.

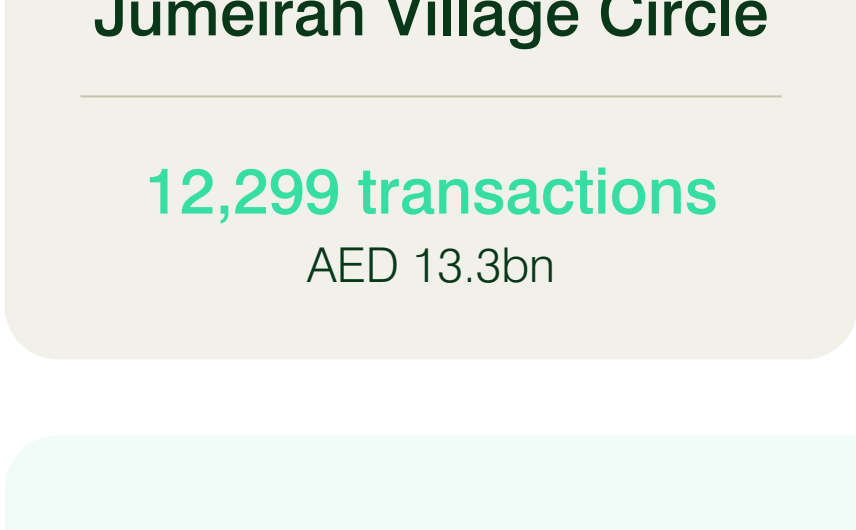
Larger formats also contributed meaningful value. **Four bedroom homes recorded a lower average price per square foot, offering relative value for buyers prioritising space and long-term occupancy**. Five plus bedroom layouts remained niche but demonstrated the market's depth at the upper end.

Price per sq.ft by number of bedrooms



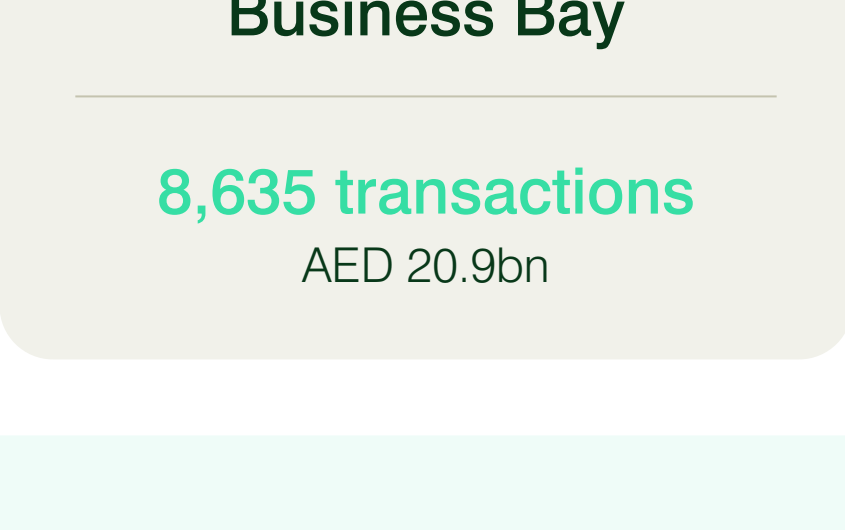
Leading areas by transaction activity

Transaction volumes remained concentrated in established and emerging locations:



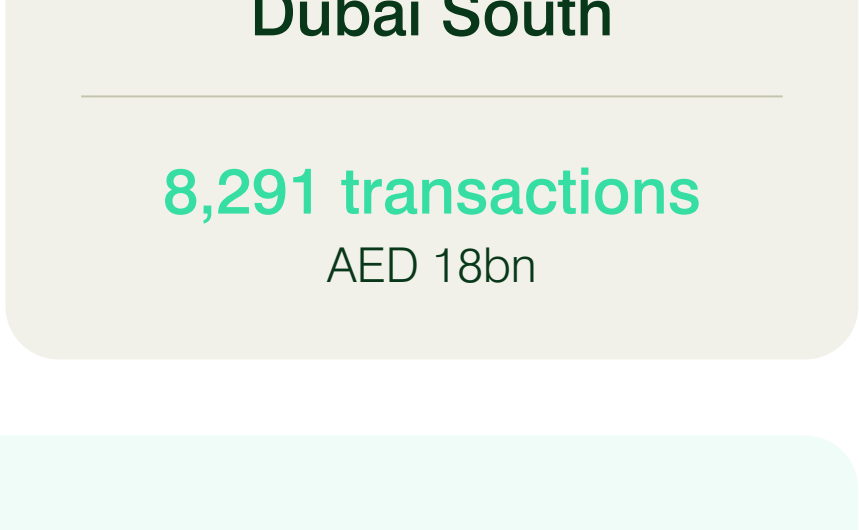
Jumeirah Village Circle

12,299 transactions
AED 13.3bn



Business Bay

8,635 transactions
AED 20.9bn

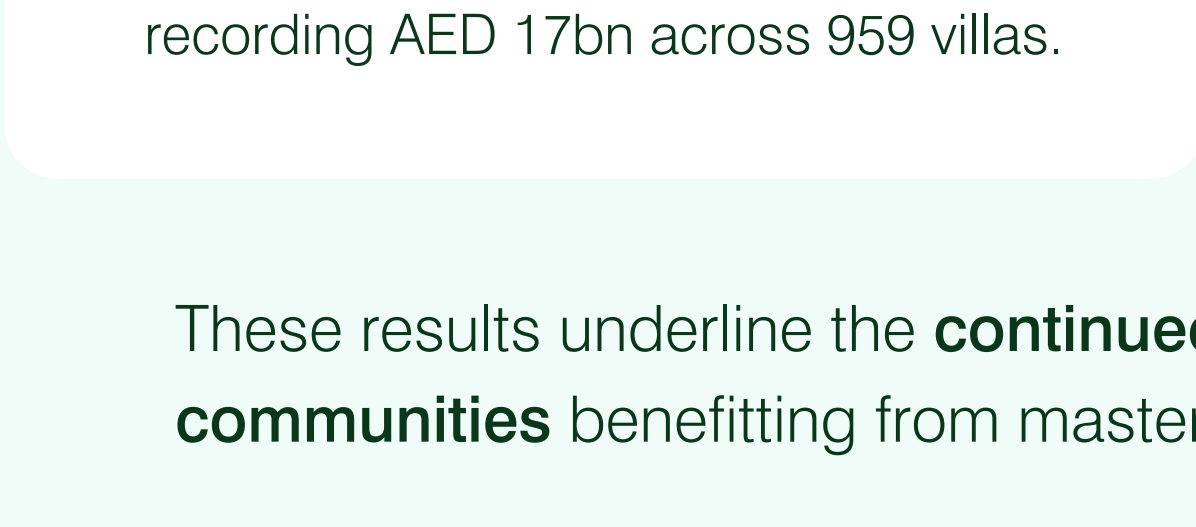


Dubai South

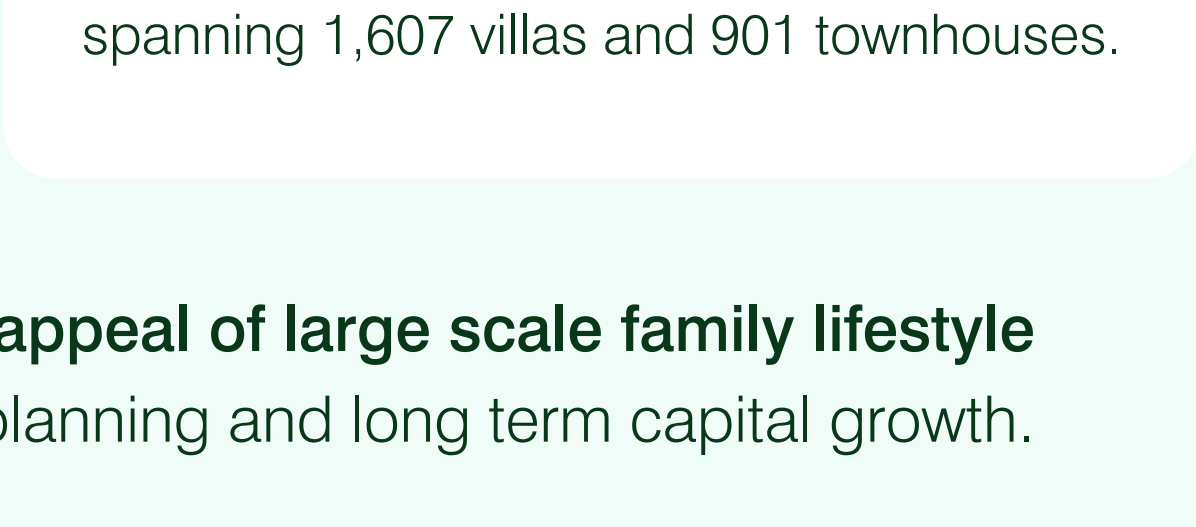
8,291 transactions
AED 18bn

EMAAR

Transaction values told a different story. **Emaar's flagship communities commanded a premium**, with masterplanned villa communities accounting for a significant share of total value.



The Oasis by Emaar ranked third by sales value, recording AED 17bn across 959 villas.



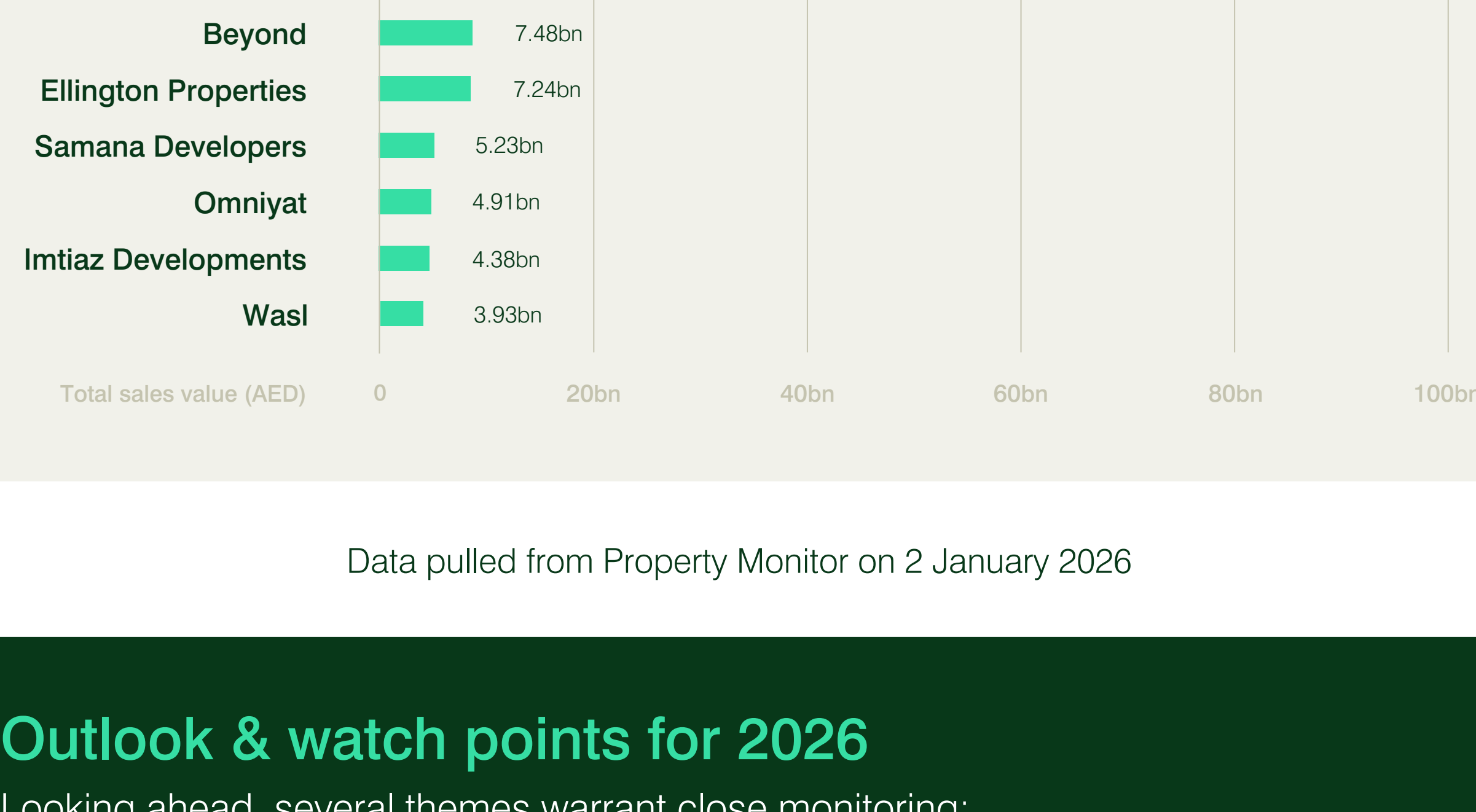
Grand Polo Club & Resort by Emaar ranked fourth, with AED 16bn in sales spanning 1,607 villas and 901 townhouses.

These results underline the **continued appeal of large scale family lifestyle communities** benefitting from master planning and long term capital growth.

Top developers by Off Plan sales value

A concentrated group of leading developers continued to account for the largest share of Off Plan sales value, supported by strong brand equity, delivery track records and depth of master planning.

Emaar led the market with AED 79.5bn in Off Plan sales, followed by Dubai Holding (Nakheel, Meraas and Dubai Properties) at AED 62.98bn. A long tail of mid-sized and boutique developers also contributed meaningful volume, particularly within design-led and niche community segments. This diversification reflects a maturing market where both scale and differentiation are rewarded.



Data pulled from Property Monitor on 2 January 2026

Outlook & watch points for 2026

Looking ahead, several themes warrant close monitoring:



Developer differentiation

Delivery history, construction progress and masterplan quality continue to be key drivers of buyer confidence and pricing resilience.



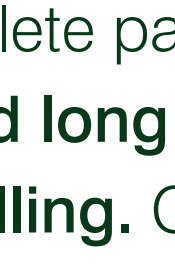
Buyer mix

The balance between end users and investors as mortgage availability and payment plan structures evolve, adding greater range of product.



Product segmentation

Larger formats remain in demand, but pricing sensitivity varies significantly by location, plot size and community maturity.



Supply discipline

The pace of new launches relative to absorption, particularly in the high volume apartment segment.

How haus & haus supports Off Plan investors

Real estate should always be bought with a mid to long term view. Buying with due care and consideration, ensuring you can complete payment in full, will ensure success long term. **haus & haus is built around long term relationships and portfolio thinking rather than transactional selling**. Our investment consultants work with clients to define clear objectives, assess risk and structure strategies aligned with both capital growth and income generation.

Our support includes:

- Deal sourcing across leading developers and emerging communities
- Comparable pricing analysis using live market evidence
- Payment plan and mortgage coordination through trusted partners
- Resale, leasing and property management support post handover

We focus on clarity, evidence and alignment, helping clients invest with confidence at every stage of the cycle.

haushaus

Unlock opportunities.