

MARKET FUNDAMENTALS

YoY Chg 12-Month Forecast

AED 1,374 ▲ ▲
City-Wide Sales Price (AED/sqft)

AED 88 ▲ ▲
City-Wide Average Rents (AED/sqm/year)
(Overall, All Property Classes)

ECONOMIC INDICATORS

YoY Chg 12-Month Forecast

2.82 Mn ▲ ▲
Abu Dhabi City Population

4.8% ▲ ▲
UAE Real GDP Annual Growth (Q3 2025)

2.1% ▼ ▼
UAE Unemployment

Source: IMF, World Bank, Statistics Centre of Abu Dhabi

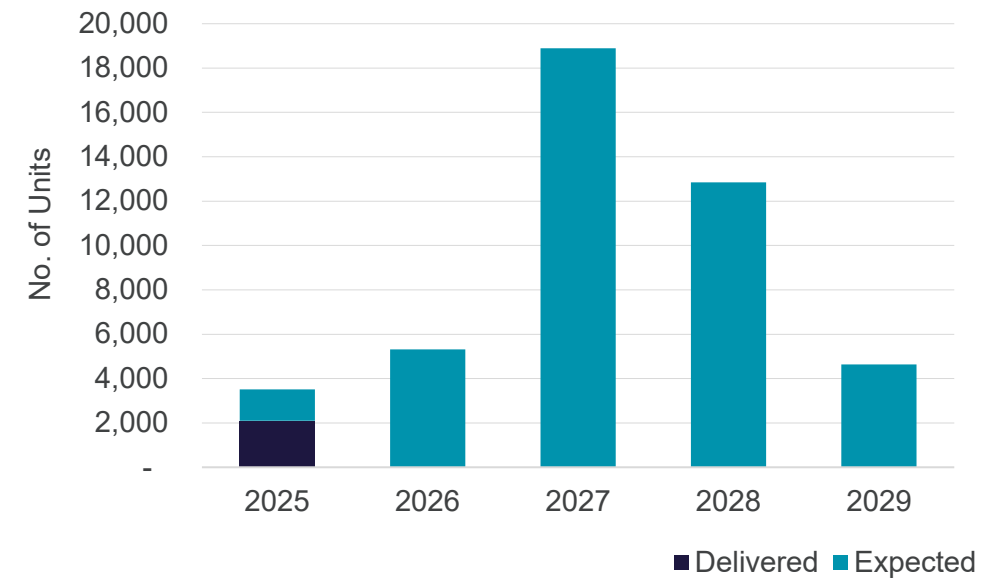
ABU DHABI'S DEVELOPMENT PIPELINE PICKS UP PACE

Abu Dhabi's residential supply pipeline remains moderate, with limited completions in Q3 2025. Around 1,423 units are expected in Q4 2025, though some spillover into early 2026 is likely. Key upcoming projects include subsequent phases of Al Jurf Gardens, Jubail Island, and Al Reeman. 2026 is projected to see approximately 5,000 new units, before a major supply surge in 2027 and 2028, when 18,900 and 12,900 units respectively are anticipated. This two-year delivery wave will mark the peak of the current development cycle, before tapering in 2029. Much of the future pipeline is concentrated across key prime islands, with Yas Island, Reem Island, Hudayriat Island Fahid Island, and Masdar City, together making up over 50% of upcoming completions over the next 4 years. This concentration reinforces the emirate's strategic shift toward high-quality waterfront and mixed-use developments, reflecting both sustained end-user and investor interest and the government's long-term urban growth vision.

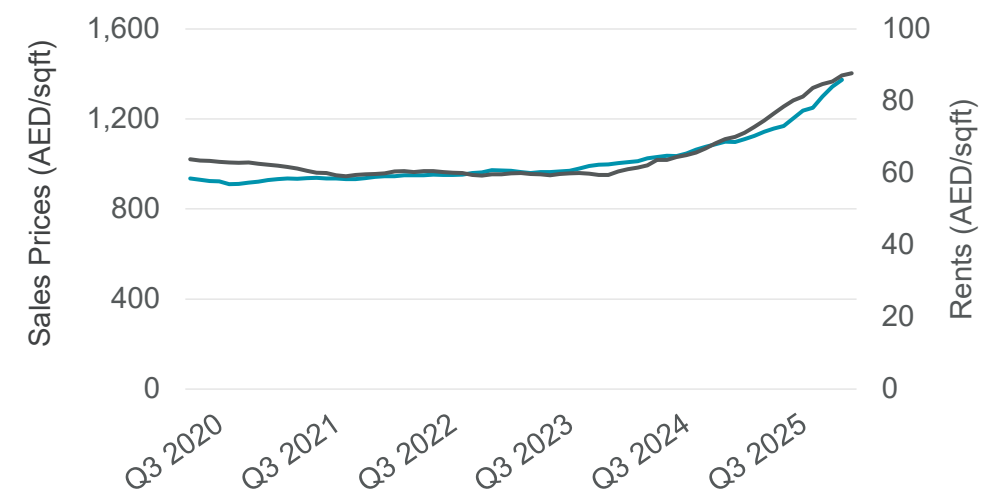
SALES AND RENTAL MARKETS: MAINTAIN STRONG MOMENTUM

Sales prices continued to rise in Q3 2025, recording a sharp 25% YoY increase supported by strong end-user demand, strategic project launches, and favourable macroeconomic conditions. Apartments on Saadiyat Island achieved the highest capital values at AED 4,255 per sqft, up 14% YoY, driven by premium waterfront and branded residence developments. Yas Island recorded the sharpest price increase at 30%, followed by Al Raha Beach and Reem Island at 27%, reflecting sustained appetite for prime waterfront living and new launches at higher price points. Rental growth remained equally strong, with city-wide rents up 25% YoY. Apartments led this trend, supported by tight supply and high absorption levels. Reem Island (34%) and Yas Island (29%) recorded the highest rental uplifts, while villa rents grew at a more moderate pace. This continued expansion in the rental market is underpinned by Abu Dhabi's sustained population growth, expanding free zones, and rising demand from finance, technology, and media occupiers, which continue to drive both leasing and ownership activity.

RESIDENTIAL HANDOVERS



SALES PRICES/RENTAL VALUES



Source: REIDIN

CAPITAL VALUES AS OF Q3 2025

TOP APARTMENT SUBMARKETS	AVERAGE SALE PRICE (AED/SQFT)	YoY CHANGE (%)	QoQ CHANGE (%)
Saadiyat Island	4,255	14%	2%
Yas Island	2,122	30%	11%
Reem Island	1,478	27%	9%
Al Raha Beach	1,696	28%	12%
Al Reef Downtown	864	26%	10%

TOP VILLA SUBMARKETS	AVERAGE SALE PRICE (AED/SQFT)	YoY CHANGE (%)	QoQ CHANGE (%)
Saadiyat Island	1,648	10%	1%
Hudayriyat Island	1,666	20%	14%
Yas Island	1,648	13%	6%
Khalifa City	1,361	13%	-2%
Al Reef Villas	919	24%	12%
Al Raha Gardens	898	2%	3%

Source: REIDIN, ADREC

KEY PROJECTS LAUNCHED IN Q3 2025

PROPERTY	LOCATION	DEVELOPER	UNITS
Wadeem by Modon	Hudayriyat Island	Modon	1,794
Yas Living	Yas Island	Aldar	678
Fahid Terraces	Fahid Island	Aldar	501
Bloom Living Granda 2	Zayed City	Bloom District Properties	449
Al Deem Townhomes	Al Bahyah	Aldar	424
Al Deem Townhomes	Yas Island	Aldar	424
Bloom Living Carmona	Zayed City	Bloom District Properties	354
Brabus	Brabus Island	Reportage	352
Bayn Lagoon	Ghantoot	ORA Q Development	323
Bab Al Qasr Resort Residence	Masdar City	Burtville	483

RENTAL VALUES AS OF Q3 2025

TOP APARTMENT SUBMARKETS	AVERAGE RENTS (AED/SQFT)	YoY CHANGE (%)	QoQ CHANGE (%)
Saadiyat Island	164	4%	-2%
Yas Island	135	29%	5%
Reem Island	105	34%	3%
Al Raha Beach	102	19%	6%
Al Reef Downtown	75	30%	11%

TOP VILLA SUBMARKETS	AVERAGE RENTS (AED/SQFT/YEAR)	YoY CHANGE (%)	QoQ CHANGE (%)
Saadiyat Island	119	28%	3%
Yas Island	82	-12%	-5%
Al Reef Villas	60	29%	11%
Al Raha Garden	55	-6%	-5%
Khalifa City	39	14%	-4%

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