MARKETBEAT
# ABU DHABI, UAE
## RESIDENTIAL Q2 2025

CUSHMAN & WAKEFIELD | CORE

### MARKET FUNDAMENTALS

| | YoY Chg | 12-Month Forecast |
|---|---|---|
| **AED 1,250** City-Wide Sales Price (AED/sqft) | ▲ | ▲ |
| **AED 85** City-Wide Average Rents (AED/sqft/year) | ▲ | ▲ |

*(Overall, All Property Classes)*

### ECONOMIC INDICATORS

| | YoY Chg | 12-Month Forecast |
|---|---|---|
| **10.67 Mn** UAE Population | ▲ | ▲ |
| **4%** UAE Real GDP Annual Growth (Q1 2025) | ▲ | ▲ |
| **8.0 Mn** UAE Employment | ▲ | ▲ |

*Source: Oxford Economics, IMF, UAE Central Bank*

### ABU DHABI'S DEVELOPMENT PIPELINE PICKS UP PACE

Q2 2025 saw more than 3,000 residential units launched in Abu Dhabi, reflecting continued confidence among developers. Major developers such as Aldar Properties and Modon led the resurgence, unveiling ambitious new communities across flagship masterplans. Among the standout launches were Aldar's Fahid Beach Residences and The Beach House on Fahid Island, alongside Modon's Muheira on Reem Island and Nawayef Village on Hudayriat - all of which reported sell-outs on launch day, reflecting deep demand for high-quality, lifestyle-driven homes.

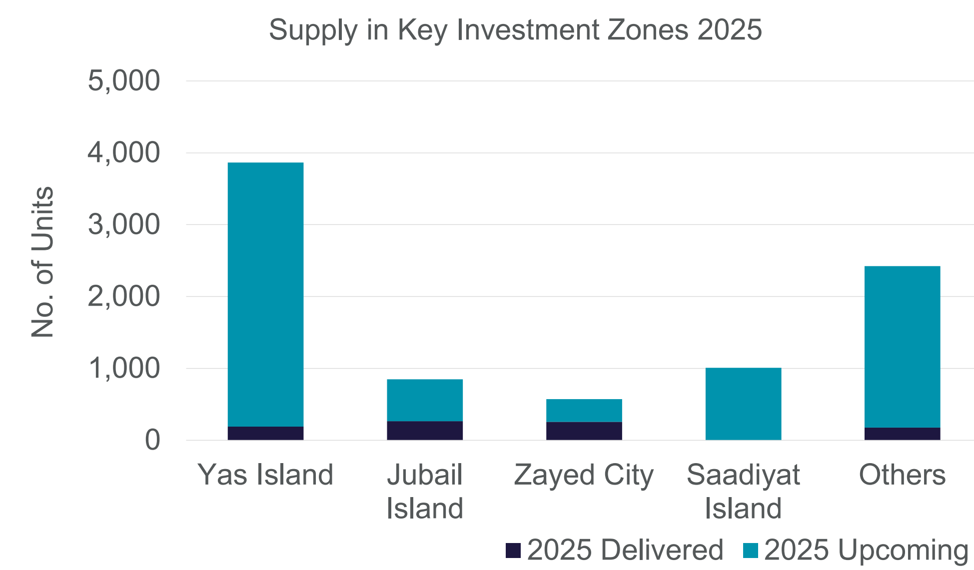
Other notable launches included Brabus by Reportage, Jacob & Co beachfront living by Ohana, and Yas Links Luxury Living, reinforcing the diversity and appeal of new offerings in the Capital. On the supply side, more than 3,600 units are expected to be handed over on Yas Island in 2025. The recent announcement of Disney World's arrival on the island has only heightened market interest. Saadiyat Island is also set to see over 1,000 units delivered this year, with both islands positioned to sustain long-term demand given their cultural, waterfront, and destination-led appeal. Additional completions are expected at Jubail Island and Al Jurf Development.

### SALES AND RENTAL MARKETS: STRONG AND SUSTAINED

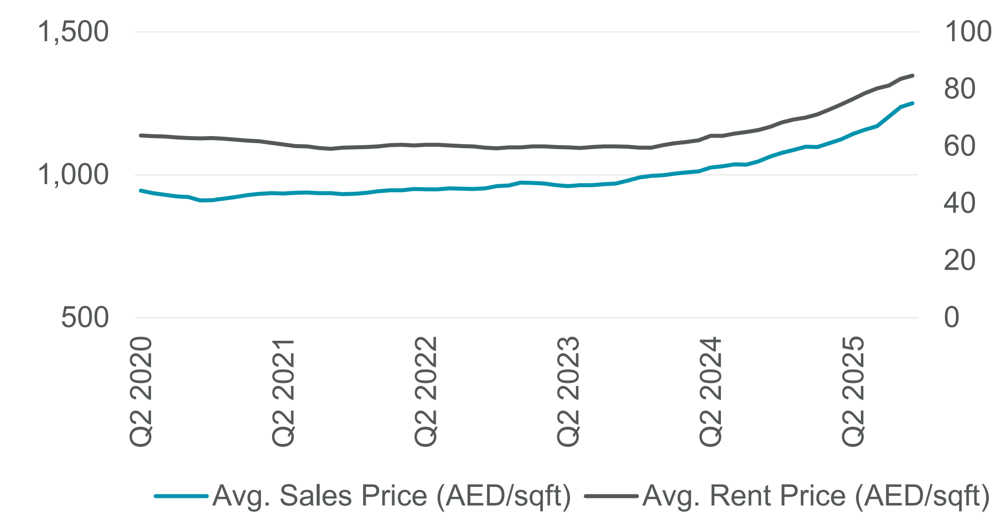
Sales prices continued to rise in Q2 2025, underpinned by solid demand, strategic project launches, and supportive macroeconomic trends. Saadiyat Island recorded the highest capital values, reaching AED 4,172 per sqft - a 30% YoY increase - driven by premium waterfront and branded residence transactions. Across the city, average sales prices rose 18% YoY.

Rental growth was equally robust, with city-wide rents increasing by 27% YoY. The apartment segment led this uptrend, supported by tight supply and strong leasing demand. Saadiyat Island and Yas Island once again outperformed, recording the highest rental uplifts. This resilience is further underpinned by Abu Dhabi's ongoing population growth, fuelled by the expansion of free zones and the steady rise of the finance, tech, and media sectors.

### RESIDENTIAL HANDOVERS




### SALES PRICES/RENTAL VALUES




*Source: REIDIN*

## CAPITAL VALUES AS OF Q2 2025

| TOP APARTMENT SUBMARKETS | AVERAGE SALE PRICE (AED/SQFT) | YoY CHANGE (%) | QoQ CHANGE (%) |
|---|---|---|---|
| Saadiyat Island | 4,171.9 | 30% | 4% |
| Yas Island | 1,912.2 | 19% | 10% |
| Reem Island | 1,350.6 | 19% | 7% |
| Al Raha Beach | 1,516.3 | 16% | 11% |
| Al Reef Downtown | 785.2 | 19% | 8% |

| TOP VILLA SUBMARKETS | AVERAGE SALE PRICE (AED/SQFT) | YoY CHANGE (%) | QoQ CHANGE (%) |
|---|---|---|---|
| Saadiyat Island | 1,635.9 | 12% | 2% |
| Yas Island | 1,547.7 | 10% | 1% |
| Khalifa City | 1,393.3 | 33% | 9% |
| Al Reef Villas | 822.4 | 16% | 4% |
| Mohamed Bin Zayed City | 1,457.3 | 16% | 2% |

*Source: REIDIN*

## RENTAL VALUES AS OF Q2 2025

| TOP APARTMENT SUBMARKETS | AVERAGE RENTS (AED/SQFT) | YoY CHANGE (%) | QoQ CHANGE (%) |
|---|---|---|---|
| Saadiyat Island | 179.3 | 32% | 5% |
| Yas Island | 128.9 | 26% | 7% |
| Reem Island | 102.3 | 36% | 7% |
| Al Raha Beach | 96.1 | 23% | 4% |
| Al Reef Downtown | 67.9 | 22% | 5% |

| TOP VILLA SUBMARKETS | AVERAGE RENTS (AED/SQFT/YEAR) | YoY CHANGE (%) | QoQ CHANGE (%) |
|---|---|---|---|
| Saadiyat Island | 93.2 | -10% | 0% |
| Yas Island | 85.5 | -6% | -4% |
| Khalifa City | 39.9 | 17% | 14% |
| Al Reef Villas | 53.7 | 18% | 1% |
| Mohamed Bin Zayed City | 101.5 | n/a | -1% |

## KEY PROJECTS LAUNCHED IN Q2 2025

| PROPERTY | LOCATION | DEVELOPER | UNITS |
|---|---|---|---|
| Nawayef Village | Hudayriyat Island | Modon | 378 |
| Muheira | Reem Island | Modon | 475 |
| Fahid Beach Residences | Fahid Island | Aldar | 490 |
| The Beach House | Fahid Island | Aldar | 11 Towers |
| Brabus by Reportage | Al Raha Beach | Reportage Properties | 354 |
| Jacob & Co Beachfront Living by Ohana | Al Jurf | Ohana Real Estate Development | 122 |
| Yas Links Luxury Living | Yas Island | Aldar Properties | 133 |

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