

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.

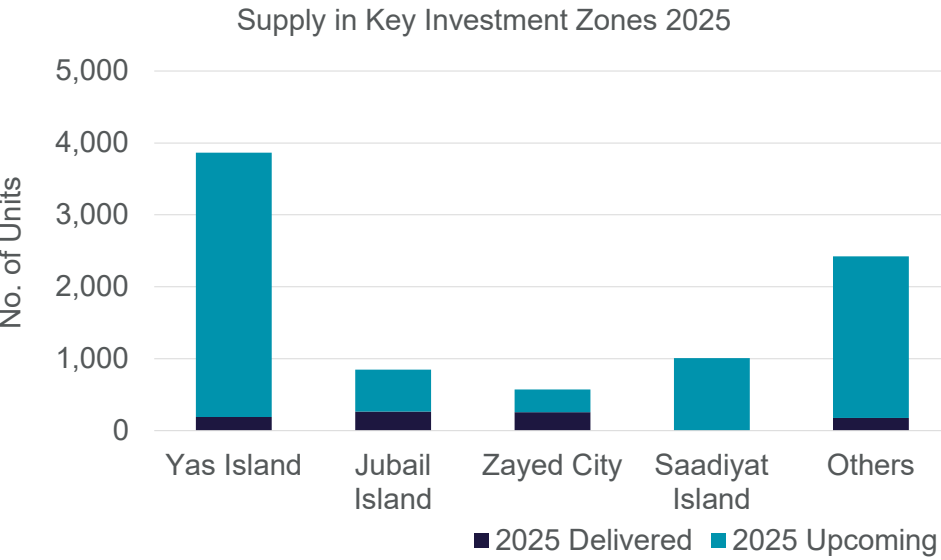
Other notable launches included Brabus by Reportage, Jacob & Co beachfront living by Ohana, and Yas Links Luxury Living, reinforcing the diversity and appeal of new offerings in the Capital. On the supply side, more than 3,600 units are expected to be handed over on Yas Island in 2025. The recent announcement 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

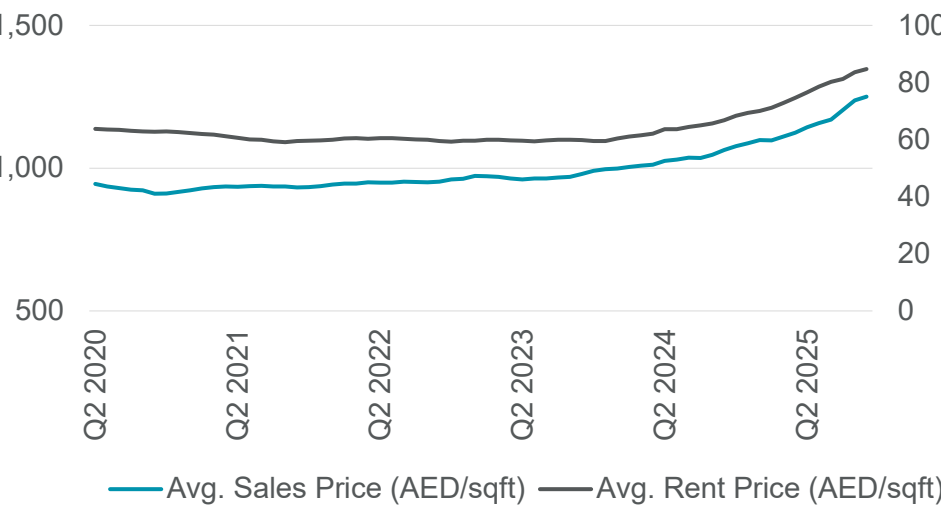
Sales prices continued to rise in Q2 2025, underpinned by solid demand, strategic project launches, and supportive macroeconomic trends. Saadiyat Island recorded the highest capital values, reaching AED 4,172 per sqft - a 30% YoY increase - driven by premium waterfront and branded residence transactions.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

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

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%

PRATHYUSHA GURRAPU
Head of Strategic Consulting
Tel: +971 52 714 7175
prathyusha.gurrapu@cushwake.ae

P.P. VARGHESE
Head of Professional Services
Tel: +971 50 913 9592
varghese.paulose@cushwake.ae

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