



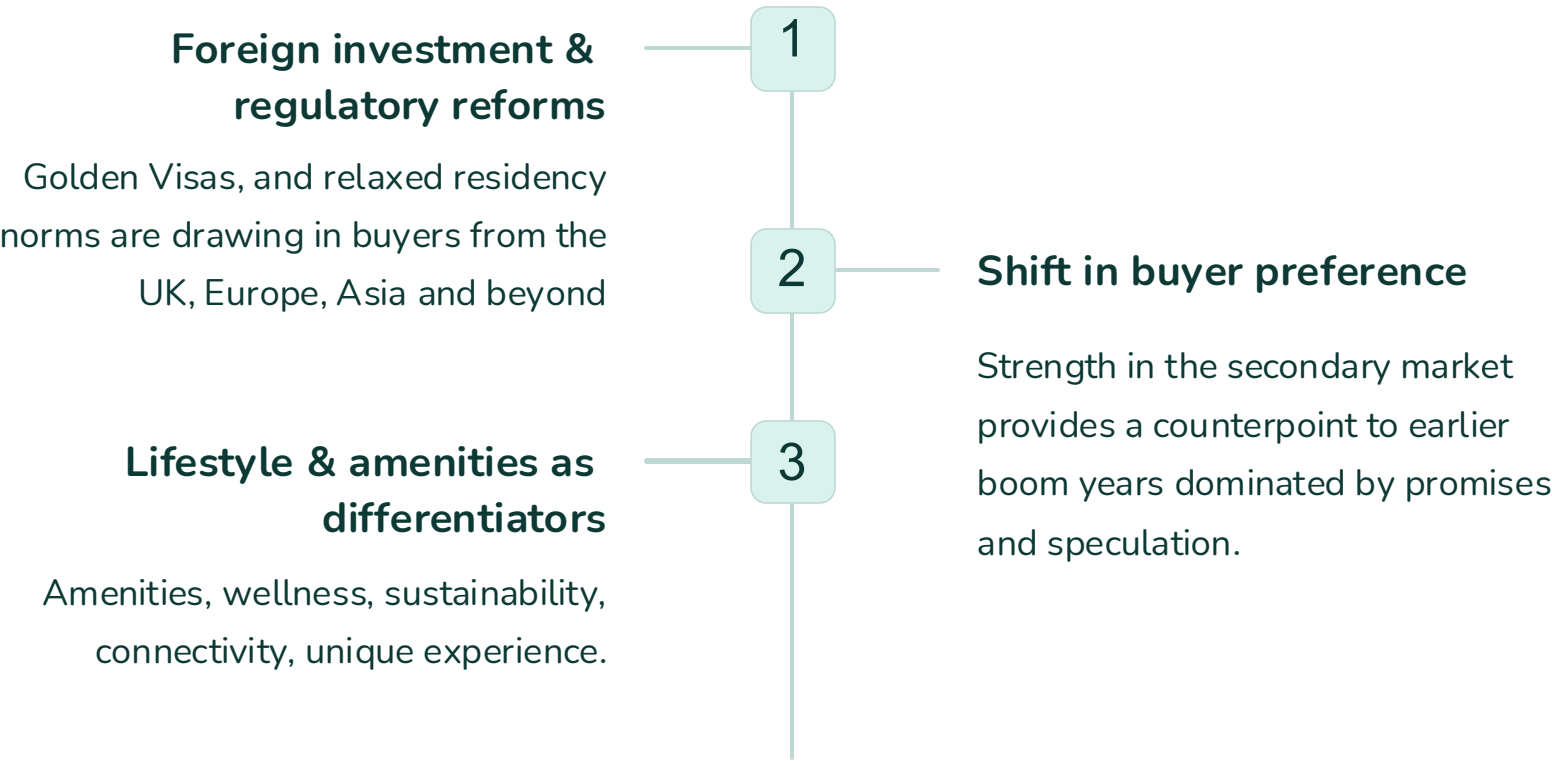
Real Estate Trends

SEPTEMBER | 2025



UAE Real Estate's Path to Global Leadership

The UAE real estate sector is entering a defining chapter. With Statista projecting the market to reach US\$759.04 billion by 2029, the stakes and opportunities are both large and urgent. Fueled by strong policy support, foreign buyer interest, changing buyer preferences, and ambitious development pipelines, the market is evolving fast—presenting both potential and risk for developers.



Why this matters?

For developers, this evolving landscape signals both opportunity and greater responsibility.

As the sector scales up, the coming years will be defined by how well developers can balance growth with sustainability, innovation with reliability, and ambition with execution discipline. The market is set to reward those who adapt quickly to change, remain close to evolving customer needs, and deliver projects that strengthen the UAE's global stature as a destination for living, working, and investing.



Key Trends shaping the Real Estate in UAE

Move-In Momentum- Secondary Homes Outpace Off-Plan



Pound Power - How a Weakened Dirham is Rewiring Dubai's Buyer Base



Dubai Islands - A Magnet for Global Waterfront Investors



Amenity Avatars -Developers Redefining Lifestyles, One Wow-Factor at a Time



Transparency- The New Currency of Global Real Estate

A modern, multi-story villa with large glass windows and balconies, illuminated from within, set against a twilight sky with palm trees in the background.

01

Move-In Momentum

Secondary Homes Outpace Off-Plan

The UAE market — especially Abu Dhabi and increasingly Dubai — is showing a clear pivot from off-plan to **ready / completed homes**. In Abu Dhabi, ready villa & townhouse sales in H1 2025 jumped **72% y-o-y**, accounting for roughly 2,300 completed-home transactions out of 3,300 total deals, while average ready-home ticket rose from **Dh2.1m → Dh2.5m**. At the same time off-plan volumes plunged (-69.9% y-o-y), reflecting tighter new-supply and buyer preference for certainty.

In Dubai, brokers and market commentators note the same behavioral shift: buyers (end-users and many international purchasers) prefer **immediacy, lifestyle-readiness and tangible ownership** — they want to move in, rent out, or validate value immediately rather than wait on off-plan delivery.

"Abu Dhabi's real estate has become one of mature resilience: ready villas and townhouses have become the market's favorites, propelled by scarcity of off-plan developments and unwavering buyer demand".



Ready Home Sales Growth

Year-on-year increase in H1 2025



Off-Plan Volume Decline

Sharp year-on-year decrease



Price Appreciation

Ready homes: Dh2.1m to Dh2.5m

"With ready homes, buyers know exactly what they're getting whether it's the layout, the view, or the surrounding community amenities... immediacy translates into security and peace of mind".

What does this mean for the developer?

01

Create a "Move-In Now" product lane

Carve out a tranche of completed units (or expedite finishing on certain buildings) and market them as Immediate-Occupancy homes with premium positioning.

02

Product re-mix

Given the demand tilt, reallocate future phases (or future releases) toward family homes and finished apartments with proven amenity sets.

03

Marketing message: certainty > promise

Shift campaign creative from "future vision" to "today's lifestyle" (virtual tours of actual units, tenant case studies, rental yield snapshots, verified handover dates).



02 Pound Power

How a Weakened Dirham is Rewiring Dubai's Buyer Base

Dubai's real estate market is strategically attracting British buyers by leveraging the weakened Emirati Dirham (AED)—now approximately 8% weaker against the British Pound since January.

This weakening has effectively made UAE property more affordable for UK investors, leading to a 62% year-on-year surge in British investment in Q2 2025, making them the top foreign buyers, overtaking Indian nationals.

This shift comes as leading developers are opening London offices (including Aldar, Damac, Binghatti, Danube, Sobha), offering flexible payment plans, and even launching UK-themed or co-branded developments—such as Damac's partnership with Chelsea FC—to strike a chord with UK buyers.



Currency Advantage

"The currency makes a big difference," observed Danube Chairman Rizwan Sajan, highlighting the appeal of the weaker dirham for UK buyers.



Developer Outreach

Major players like Binghatti and Danube have launched London sales offices. Meanwhile, Damac has rolled out Chelsea FC-branded residences to attract British interest.



Market Impact

British investments in Dubai homes jumped 62% year-on-year in Q2 2025, making UK buyers the top foreign purchasers since 2023.

What does this mean for the developer?

01

Currency advantage is a marketing edge

Launch currency-targeted campaigns—e.g., show GBP-AED savings projections and real-time rate benefits to UK prospects.

02

Lifestyle affinity sells

Co-brand developments with British cultural icons (e.g., sports clubs, heritage motifs) to emotionally connect with UK buyers.

03

Timing is critical

Fast-track pre-launch offers for GBP buyers during favorable exchange rate windows to lock-in demand.



03 Dubai Islands

A Magnet for Global Waterfront Investors

Dubai Islands (formerly Palm Deira) are rapidly emerging as a high-demand, waterfront lifestyle destination, attracting strong interest from both local and international buyers. Sales hit nearly AED 3.5 billion in May 2025, contributing to Q2's record-breaking AED 151.8 billion total sales—a 46 % year-on-year spike across over 50,000 units sold. Its appeal is anchored in smart urban planning, seamless connectivity, and alignment with Dubai's 2040 Urban Master Plan focusing on sustainability and livability.

New launches on the Islands are already showing promise. For example, Nautis Residences was launched in July 2025 with 63 limited units, featuring amenities such as an infinity pool, sundeck, gym, yoga studio, barbecue facilities, and children's play zone.

Given current pricing, Dubai Islands offers relative value versus ultra-prime waterfront alternatives. According to Primo Capital, property prices on the Islands average Dh2,200 per sq ft, with potential for upside to Dh10,000 per sq ft as the area matures.



Sales Momentum

Over 2,075 units transacted in H1 2025—up 109% versus 2024—totaling AED 5.6 billion in sales (129.6% growth). Off-plan prices rose from AED 2,236 to AED 2,385 per sq ft (+14.2%).



Comparative Context

Compared to other waterfront hotspots, Dubai Islands remain competitively priced—AED 2,385/sq ft vs. Palm Jumeirah (~AED 5,189/sq ft).

“Dubai Islands is a natural extension of Dubai’s coastal legacy—reimagined through a modern lens ... communities that combine lifestyle, sustainable value, and fast access to the rest of Dubai ... long-term value destination”- Blagoje Antic, CEO, DHG

What does this mean for the developer?

01

Global appeal, strong growth

Accelerate development of integrated, design-forward waterfront communities. Prioritize high-quality, lifestyle-oriented offerings.

02

Investor confidence in off-plan

Promote flexible payment plans, escrow safeguards, and phased handover models to attract long-term capital.

03

Sustainability & master plan alignment

Embed green technologies and sustainable design as differentiators. Align projects with the 2040 vision to enhance value and long-term attractiveness.



04

Amenity Avatars

Developers Redefining Lifestyles, One Wow-Factor at a Time

UAE developers are pushing the boundaries of amenity design. The new era isn't about standard pools or gyms anymore—it's about amenities that spark conversation, elevate lifestyle, and justify a premium. Think floating cinemas, mist-shrouded mini-forests, rooftop sky-decks, and proposal-ready decks. This hyper-amplified amenity strategy is fast becoming a core differentiator in attracting high-net-worth and experience-driven buyers.

Lifestyle Staples—Beyond the Basics

Industry insiders report that developers are increasingly embedding amenities like private cinemas, gaming zones, padel courts, rooftop BBQs, and wellness studios into all new projects—particularly in podiums, rooftops, and amenity floors.

Amenity & Wellness Fusion

Developments also span beyond spectacle—smoothly integrating spa centers, meditation gardens, saunas, indoor Zen spaces, healthy dining zones, and nutritional services, turning homes into holistic wellness hubs.



Some Notable examples

Amali Island (Dubai)-

Villas with private marinas & pontoons, teppanyaki bar, sunken seating areas, private gardens, outdoor gatherings; essentially “island living” luxuries.

MANSORY Residences, Mohammed

bin Rashid City (Dubai)- Ultra-luxury, automotive aesthetic in interiors; dedicated car elevators and showroom -style parking

Nobu Residences, Al Marjan Island

(RAK)-Beachfront calm with Spa, Beach club, pool, gardens, leisure and wellness services by Nobu; high-design interiors with seaside terraces.

What does this mean for the developer?

01

Amenity Experience as Brand

Innovate beyond the expected—add immersive, social, and emotional value (e.g., proposal decks, fog forests).

02

Wellness as Core Feature

Package amenities not just as fitness add-ons but as lifestyle essentials—like curated spa zones, Zen gardens, and healthy dining pods.

03

Scalability & Profitability

Treat WOW amenities as optional, high-margin add-ons—think tiered packages with enhanced pricing for access.

A modern, multi-story building with large glass windows and balconies, illuminated from within, set against a twilight sky with palm trees in the foreground.

05 Transparency

The New Currency of Global Real Estate

Globally — and especially in the UAE — real estate markets are being reshaped by increasing demand for transparent governance, data-driven decision making, and strategically aligned investment. Whether by investors, regulators, or end-users, there is growing insistence on clear, accessible information (regulations, sustainability metrics, performance data), mixed-use and branded developments, and alignment of projects with long-term value rather than short-term speculation. The UAE (Dubai & Abu Dhabi) ranks among the top global performers in the 2024 Global Real Estate Transparency Index (GRETl), reflecting this shift.

Dubai ranked 28th globally in JLL's Transparency Index, the only MENA city in the Transparent tier.

Both Dubai and Abu Dhabi ranked among the top five global improvers in transparency between 2022–2024.



Investment strategy is evolving too: residential, hospitality, and mixed-use are gaining favor; high-quality commercial / office space is resurging; and developers are blending uses (residential + retail + recreation) to offer flexibility.

“Promoting clear and transparent communication has become ... a necessity, promoting trust and well-informed decision-making among lenders, occupiers, and investors”

What does this mean for the developer?

01

Transparency builds trust & unlocks capital

Publish more detailed project performance data. Improve regulatory disclosures; ensure clarity in contracts.

02

Sustainability & governance are no longer add-ons

Ensure projects meet high environmental standards, with sustainable materials & energy usage; adopt recognized certifications (e.g. LEED, WELL).

03

International benchmarks

Monitor global indices (GREETI etc.) and position your portfolios to score well

4SiGHT's Tailored Solutions

Evolving Buyer Preferences & Product-Market Fit

Home Clinics: Holistic research program to improve/optimize proposed communities and fine-tuning the targeting & pricing strategies.

Market Intelligence & Positioning

Competitive Intelligence: A program that leverages our broker network to give you quick/real time updates on the latest launches in the market.

The program also helps you keep track of the latest trends in the sector



Investor Confidence & International Appeal

International Strategy: A program that helps you fine tune your strategy for international investors (HNWI). The program identifies needs from a development, communication & positioning standpoint for investors

Post-Sales Experience & Customer Retention

Voice of customer: Making use of our in-house program to track the voice of customer at every point in their buying and post-sales journey. The program tracks customer satisfaction and provides strategies to remedy negative perceptions (if any)

Compliance, Service Quality & Trust in Developers

Mystery Audit: A program that evaluates the compliance levels among operations and front-end staff to ensure that our service delivery is as intended and results in the best customer experience that can be delivered.



THANK YOU

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