

LEWIS & DORE
REAL ESTATE

The Dubai Real Estate Market

Q3 2025



About Lewis & Dore

LEWIS & DORE
REAL ESTATE

Lewis & Dore is a real estate advisory specialising in Dubai's investment property market. As a boutique brokerage, we provide a refined and personalised approach to property management and transactions. With an unwavering commitment to precision, professionalism and bespoke solutions, we ensure that every property, from stylish studio apartments to luxurious villas, receives the exceptional attention it deserves.

CONTACT KYLE

For personalised investment advice or to explore opportunities in Dubai's real estate market, please reach out Kyle.

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Your gateway to smart investments

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Q3 2025 SALES MARKET OVERVIEW

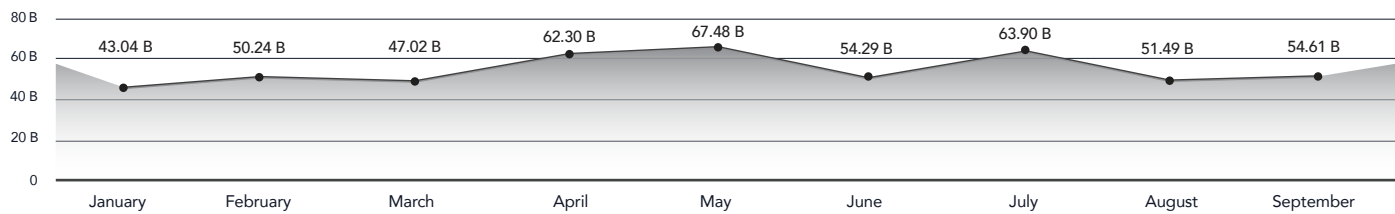
Dubai Real Estate Sales in Q3 2025: *Growth and Momentum*

Total Sales Value

Metric	Q3 2025	Q-O-Q (Q2 2025 vs Q3 2025)	Y-O-Y (Q3 2024 vs Q3 2025)
Value	AED 170B	-7.6%	+19.7%

Source: Dubai Land Department

Transaction Value Trends 2025



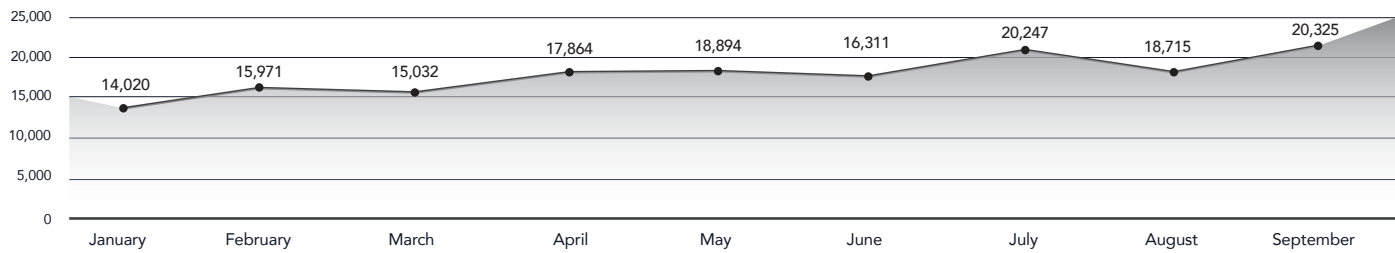
Source: Dubai Land Department

Sales Volume Performance: *Transaction Volume*

Metric	Q3 2025	Q-O-Q (Q2 2025 vs Q3 2025)	Y-O-Y (Q3 2024 vs Q3 2025)
Volume	59,287	+11.7%	+17.6%

Source: Dubai Land Department

Transaction Value Trends 2025



In Q3 2025, total sales in Dubai’s real estate market reached AED 170 billion, representing a year-on-year increase of nearly 20%. Transaction volumes also rose, up 17.6% compared with Q3 2024, indicating that higher activity accompanied the growth in sales value. Meanwhile, the average price per square foot increased by 16.4% year on year, reflecting sustained demand across both primary and resale markets and ongoing upward pressure on pricing in key communities. However, when investing, it is essential to consider your specific area and how you intend to use the property, as yields can vary significantly. Professional advice is crucial to ensure that investment decisions align with your objectives and the market’s nuances. At Lewis & Dore, we are committed to helping our clients navigate the market with confidence and make the most of every opportunity.

170 billion
TOTAL SALES IN Q3 2025 (AED)

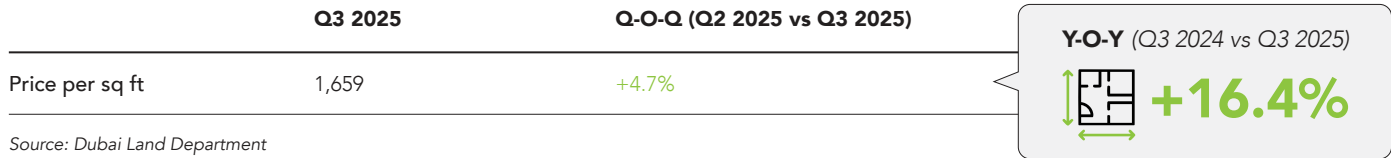
17.6%
YEAR-ON-YEAR
SALES VOLUME INCREASE

19.7%
YEAR-ON-YEAR
SALES VALUE INCREASE

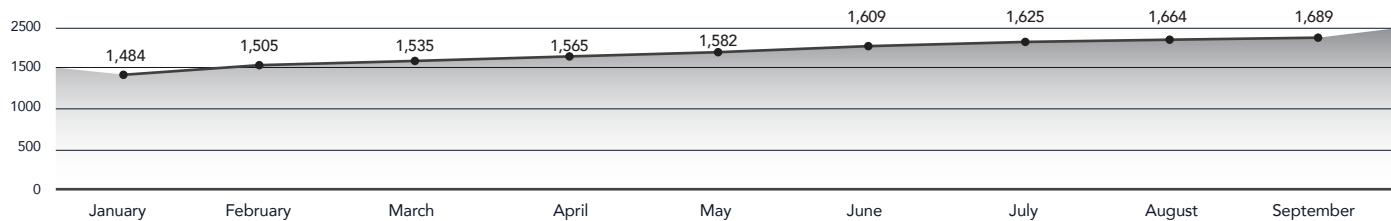
Q3 2025 SALES MARKET OVERVIEW

Pricing Insights

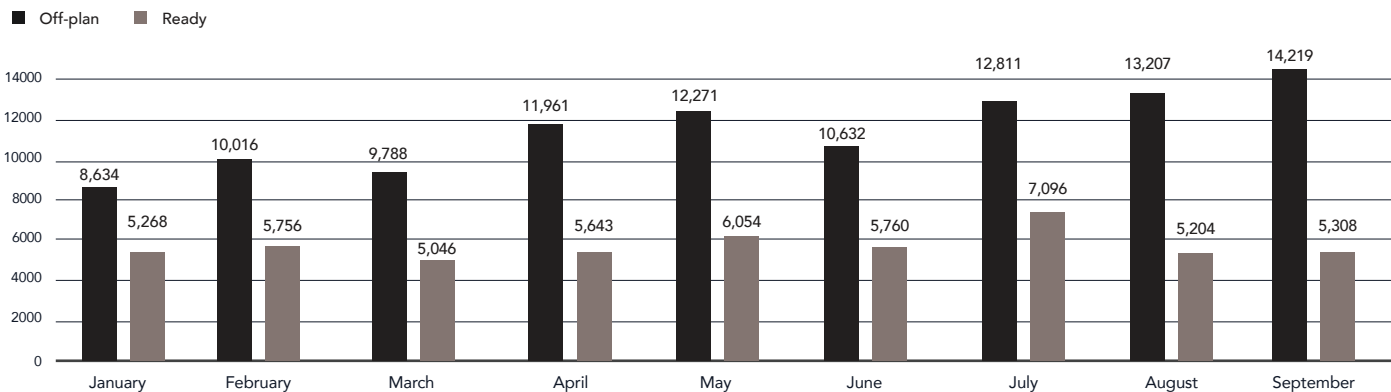
Price Per Square Foot (AED/sq ft)



Average Sales Price per Square Foot 2025



Understanding Market Trends and Investor Behaviour: Off-Plan Market Dynamics



Source: DXB Interact

Q3 2025 data indicates that off-plan properties now represent nearly 70% of all transactions, up from 64% in Q1 and 67% in Q2, highlighting the continued dominance of investor activity in the market. Many investors are attracted to off-plan opportunities with the intention of capitalising on potential appreciation or generating rental income.



Nonetheless, the current market presents challenges. Oversupply in certain areas is affecting resale profitability, while rental yields have softened in parts of the city. This underscores the importance of a considered investment strategy. Engaging a professional advisor is critical to ensure that any acquisition aligns with your specific investment objectives and maximises potential returns, whether through resale gains or long-term rental income.

NEARLY
70%
TRANSACTIONS
OFF-PLAN PROPERTIES
Q3 2025

64%
TRANSACTIONS
OFF-PLAN PROPERTIES
Q2 2025

67%
TRANSACTIONS
OFF-PLAN PROPERTIES
Q1 2025

Best-Selling Projects in Q3 2025: *Apartments*

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PRIMARY SALES

Binghatti Skyrise

BINGHATTI
SKYRISE

1,393
UNITS SOLD

2.2 billion
IN AED

1.5 million
MEDIAN PRICE (AED)



RESALES

Azizi Riviera

AZIZI
Riviera

238
UNITS SOLD

205.4 million
IN AED

696k
MEDIAN PRICE (AED)

Source: Middle East Economy

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Best-Selling Projects in Q3 2025: Villa



PRIMARY SALES

Wadi Al Safa 3

849
UNITS SOLD

5.9 billion
IN AED

6.3 million
MEDIAN PRICE (AED)



RESALES

Wadi Al Safa 5

323
UNITS SOLD

1.3 billion
IN AED

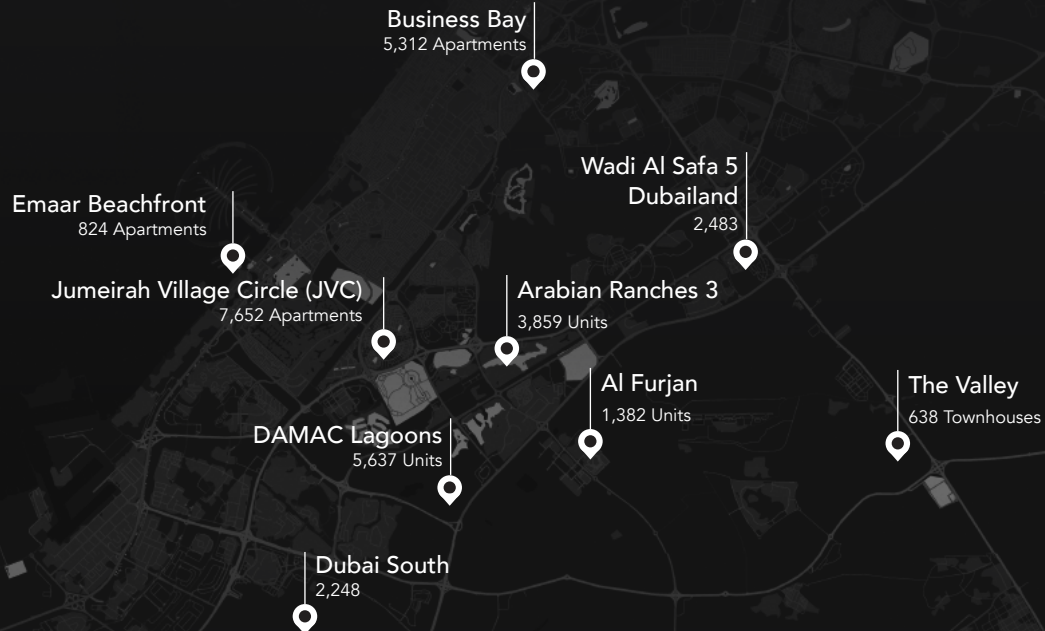
3.4 million
MEDIAN PRICE (AED)



Source: Middle East Economy

HANDOVER AND SUPPLY

Deliveries and Supply Outlook: Key Handover Locations - Q3 2025



Supply Forecast Through 2025

2025

81,084

EXPECTED HANDOVERS

JVC, Al Furjan, Arabian Ranches 3, The Valley,
Damac Lagoons, Emaar Beachfront, Business Bay

KEY AREAS/COMMUNITIES

2027

84,979

EXPECTED HANDOVERS

Damac Lagoons, Damac Hills 2,
Nad Al Sheba, The Valley

KEY AREAS/COMMUNITIES

2026

96,500

EXPECTED HANDOVERS

Arjan, Business Bay, City Walk, Dubai Creek Harbour,
Damac Lagoons, Dubai Hills, Arabian Ranches 3,
Damac Hills 2

KEY AREAS/COMMUNITIES

2028

45,480

EXPECTED HANDOVERS

Dubai Harbour, Maritime City,
Al Sufouh, Damac Lagoons,
Dubai Hills Estate

KEY AREAS/COMMUNITIES

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