

Abu Dhabi's residential market continues to perform well in 2025, underpinned by population growth, a strong economy and strategic vision. According to data released by The Statistics Centre - Abu Dhabi (SCAD) the Emirate's total population reached over 4.1M at the end of 2024, representing a 7.5% annual

increase. Population growth has coincided with robust economic performance, with GDP reaching an all-time high of AED1.2 trillion (3.8 % annual growth). Population growth is forecast to continue to 5.4M by 2040.

Market Activity

Residential transaction volumes within Abu Dhabi Municipality reached a 12-month peak in Q3 2025, at over 6,500 transactions, up from circa 4,000 in Q2 2025 and 3,700 in Q1 2025.

Off-plan sales increased in Q3 2025 to 77% of all transactions, up from a steady 12-month average of 64%, reflecting the pent-up demand and some key launches including Fahid Island and

One Saadiyat by Aldar, Wadeem land plots by Modon and further launches within Bloom Living by Bloom Properties.

The apartment sector strengthened its dominance of market activity with a 78% share of all transactions, up from 68% for the first two quarters of the year.

Pricing

Strong demand has resulted in higher average sales rates across the Abu Dhabi market increasing 16% y-o-y from AED 14,485 per sq. m in Q3 2024 to AED 17,394 in Q3 2025.

Capital values continue to rise across all the key districts Savills track for both villas and apartments.

Supply and Demand

Supply levels reached new highs in Q3 2025, with 21 projects launched to the market totaling just over 5,700 units. This reflects 50% of the units launches YTD, taking the annual launch total to circa 11,200 units. The Abu Dhabi market is attracting international and regional developers including Sobha Realty, Mered and Mira Developments bringing varied product. Despite

this, supply remains constrained. This reflects broadening demographics engaging with the Abu Dhabi real estate market. Our agency team reported increased interest from investors across local, regional and international investor profiles as well as a strong end-user demand.



Branded Residence

Prime market product continues to be announced with Four Seasons Residences launched on Saadiyat Island, Bulgari Resort and Mansions on Masnouah Island, and Aldar Properties and Hilton announcing a partnership to develop Yas Island's first branded residences under the Waldorf Astoria Brand. This reflects the HNWI demand for premium stock within Abu Dhabi.

Aldar announced the launch day sell-out of all 133 homes at Waldorf Astoria Residences Yas, the first ever branded residential development on Yas Island generating AED 850 million in sales.

Entertainment and Education

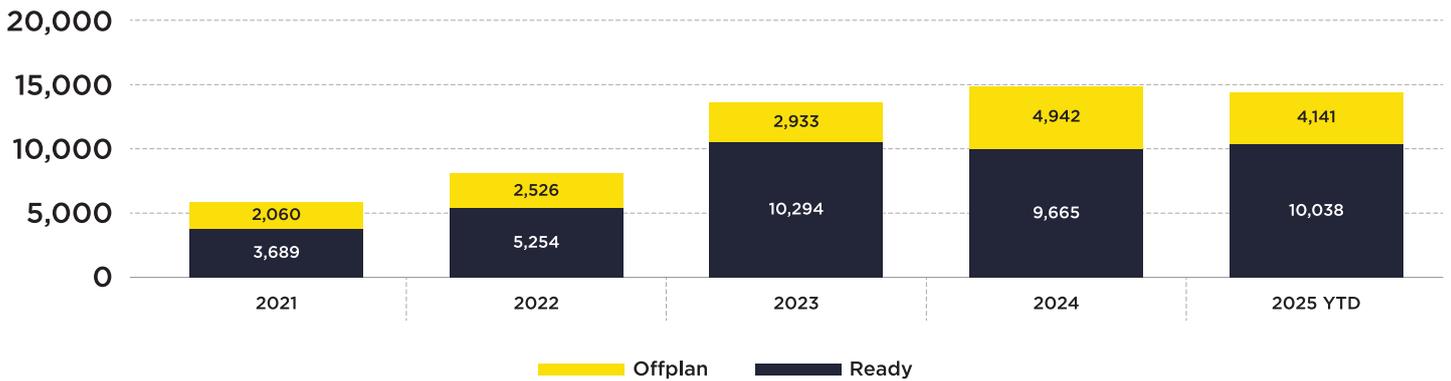
Developments in entertainment and education throughout 2025 have all heightened Abu Dhabi's visibility on the global stage and strengthened demand. The announcement of Disneyland's planned opening in 2030, adding to the leisure offerings on Yas Island and the upcoming opening of further elements of the

Cultural District on Saadiyat Island are positioning Abu Dhabi as a leisure destination. Commitments by numerous international schools including Kings College Wimbledon School, Harrow and Gordonstoun have increased Abu Dhabi's educational offering and appeal to families looking to relocate to the region.

Regulatory Reform

The introduction of the Madhmoun system by ADREC, states that a property can be marketed by a maximum of three listing brokers all of which must be verified and registered with ADREC. This adds transparency to the market and confidence in broker engagement.

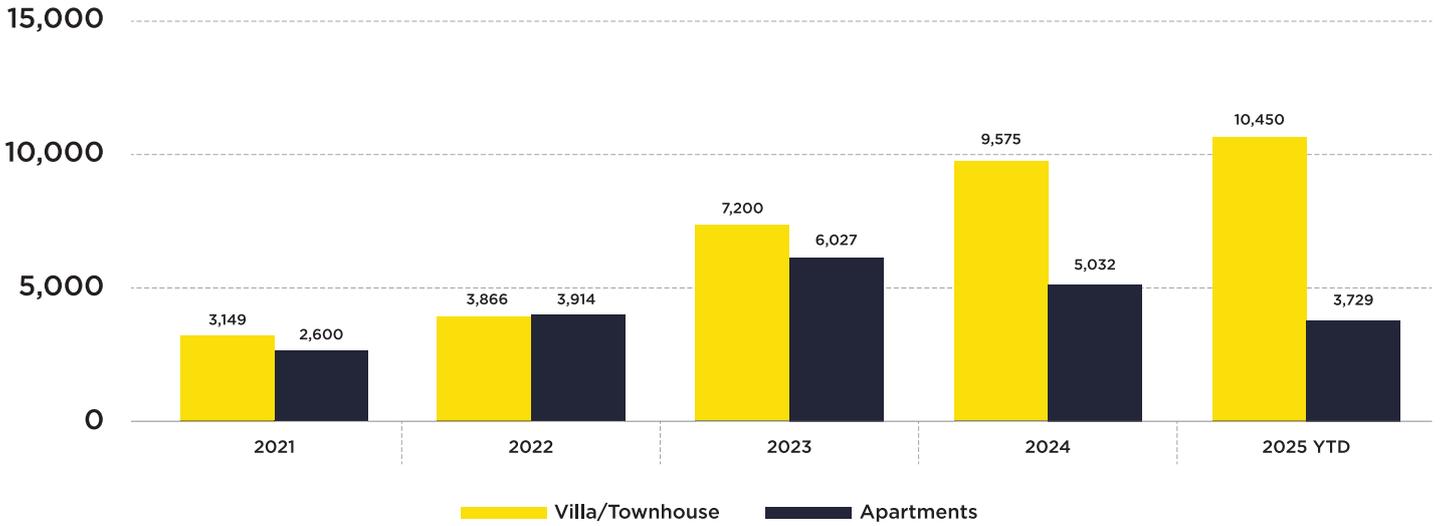
TRANSACTION SPLIT ACROSS OFF-PLAN AND READY, Q3 2025



SOURCE: ADREC, SAVILLS RESEARCH

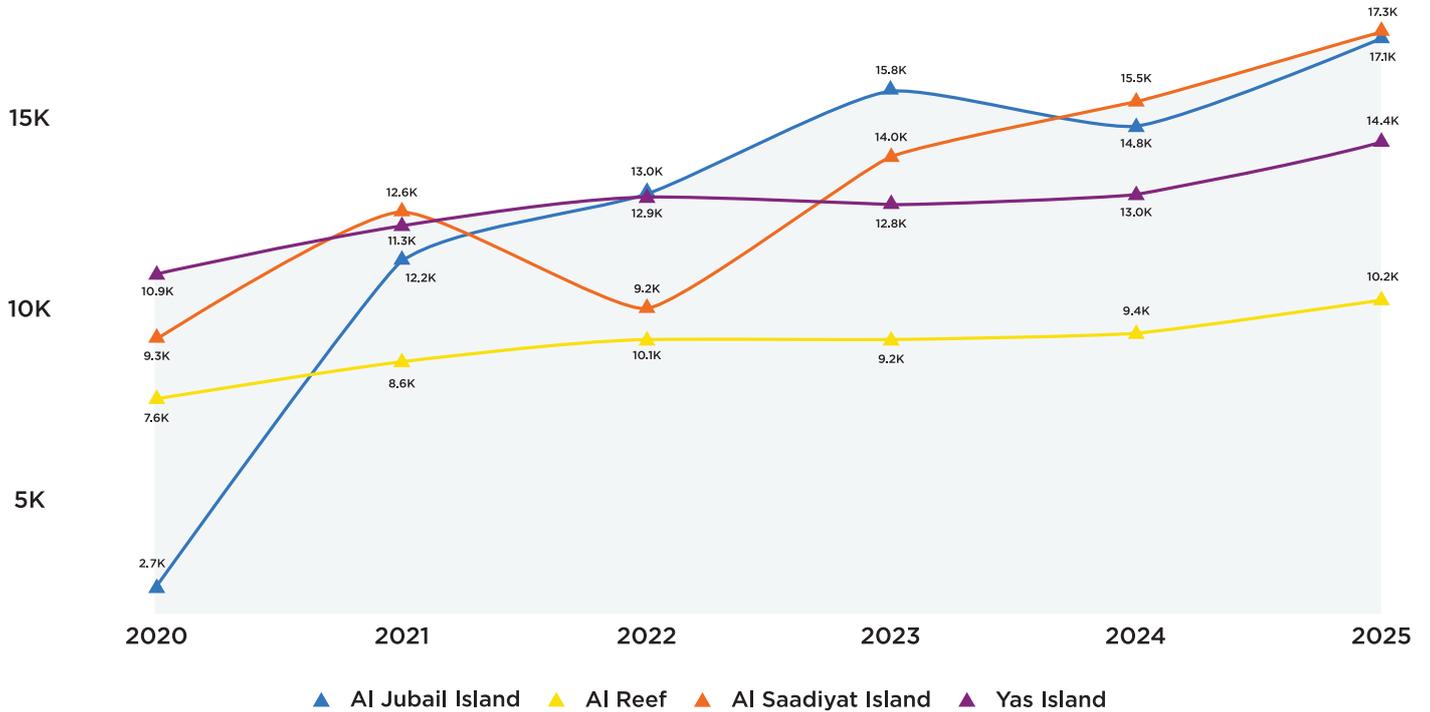


TRANSACTION SPLIT BY PROPERTY TYPE, Q3 2025



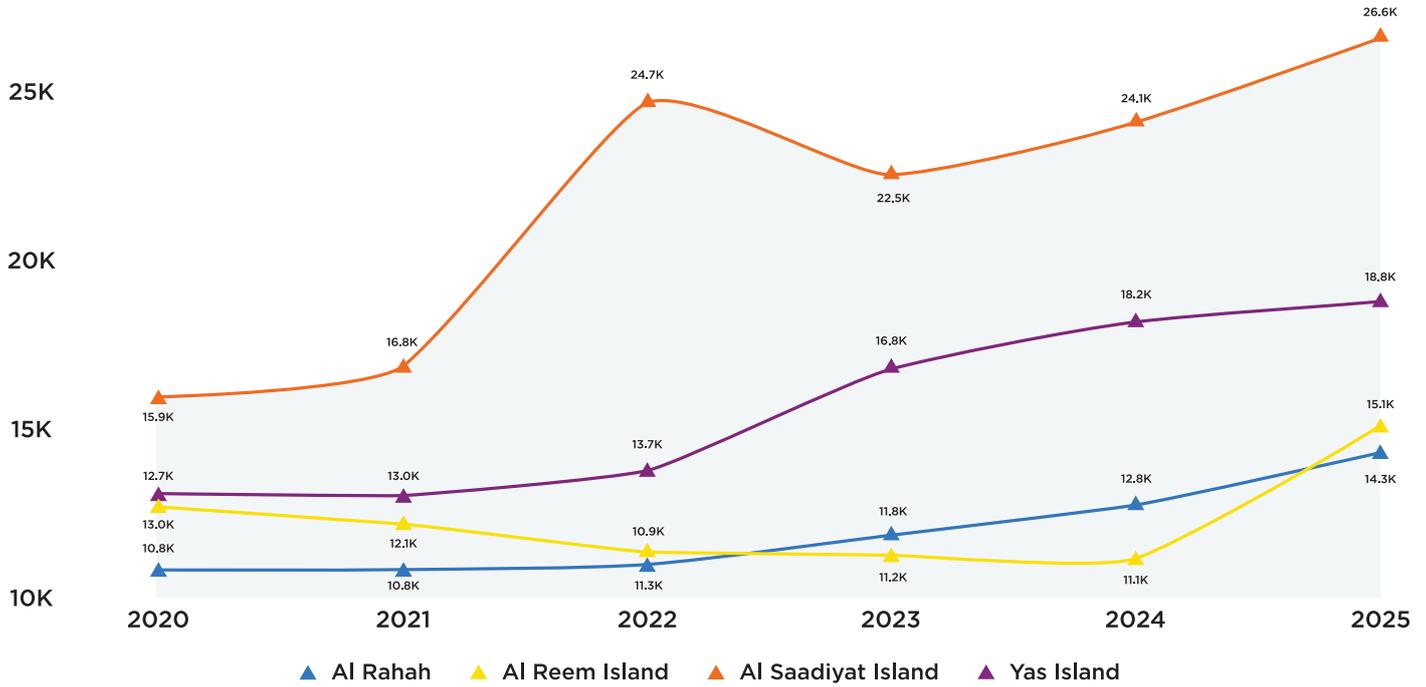
SOURCE: ADREC, SAVILLS RESEARCH

CAPITAL VALUE TREND ACROSS KEY LOCATIONS - VILLAS



SOURCE: ADREC, SAVILLS RESEARCH

CAPITAL VALUE TREND ACROSS KEY LOCATIONS - APARTMENTS



SOURCE: ADREC, SAVILLS RESEARCH

Outlook

Supply constraints, limited handovers in the next few years and economic growth will continue to sustain demand within Abu Dhabi's residential market. The on-going influx of overseas wealth is driving a need for developers to cater to a varied

demographic. Given the limited choice currently available, new handovers are likely to trigger a general migration within the residential stock to more products which align more closely with end-user needs.



Working alongside investors, developers, operators and owners, we inject market insight and provide evidence-based advice at every stage of an asset's lifecycle. We have unrivalled reach across the Middle East with extensive market experience in UAE, Bahrain, Oman, Egypt and KSA.

ALI ISHAQ

Head of Residential Agency - Abu Dhabi
ali.ishaq@savills.me

RACHAEL KENNERLEY

Director Research
rachael.kennerley@savills.me

Savills Real Estate LLC, 28th Floor, Arenco Tower, Sheikh Zayed Road, PO Box 3087, Dubai, UAE | +971 4 365 7700 | www.savills.me

Savills plc: Savills plc is a global real estate services provider listed on the London Stock Exchange. We have an international network of more than 700 offices and associates throughout the Americas, the UK, continental Europe, Asia Pacific, Africa and the Middle East, offering a broad range of specialist advisory, management and transactional services to clients all over the world. This report is for general informative purposes only. It may not be published, reproduced or quoted in part or in whole, nor may it be used as a basis for any contract, prospectus, agreement or other document without prior consent. While every effort has been made to ensure its accuracy, Savills accepts no liability whatsoever for any direct or consequential loss arising from its use. The content is strictly copyright and reproduction of the whole or part of it in any form is prohibited without written permission from Savills Research.