



VALUSTRAT.COM

Abu Dhabi, UAE
Real Estate Research
Third Quarter 2025



ABU DHABI

Q3/‘25

This quarterly report contains research on Abu Dhabi's residential, office, retail, hospitality and industrial real estate markets.

FOREWORD



Haider Tuaima
Managing Director
Director & Head of Real
Estate Research

Abu Dhabi Real Estate Market Records Strongest Growth Yet

In the third quarter of 2025, Abu Dhabi's real estate market recorded its strongest performance to date. The ValuStrat Price Index (VPI) rose 4% quarterly and 10.5% annually, driven primarily by robust demand for affordable freehold apartments. This marks a sharp acceleration from 1.7% and 5.3%, respectively, during the same period last year, bringing the index to 133.4 points based on a Q1 2021 baseline of 100 points.

Villa prices posted a stronger annual increase, rising 11.6% to reach 143.2 points, while apartment values gained greater quarterly momentum, climbing 4.4% to 124.1 points.

Rental values also registered notable growth. The residential rental ValuStrat Price Index advanced 2.3% quarterly and 9.3% annually to 128.3 points. Apartment rents outpaced villas, rising 2.7% QoQ and a record 12.8% YoY, while villa rents grew at a more moderate pace of 1.9% quarterly and 5.6% annually.

New housing supply remained constrained, with only 10.3% of the projected 2025 pipeline delivered as of September. However, around 33,000 new residential units are expected to be completed over the next five years.

Abu Dhabi recorded its highest-ever volume of off-plan transactions, which accounted for 79% of total sales, up 97.5% since Q2 and 118% since Q3 last year. Meanwhile, ready property transactions grew 12.5% annually but dipped 1.7% compared to the previous quarter.

Mortgage-backed purchases represented 67% of all transactions, totalling AED 12.4 billion. In the commercial segment, office rents grew 22.7% annually and 3.6% quarterly, supported by high occupancy rates, especially in central business districts. The hospitality sector also delivered strong performance, with substantial annual increases in both occupancy and revenue, underpinned by sustained tourism demand.

REAL ESTATE PERFORMANCE

SOURCE: VALUSTRAT



VPI

Residential Capital Values

133.4

BASE: Q1 2021 = 100

↑ 4.0%
Q-o-Q

Residential Rental Values

125.6

BASE: Q1 2021 = 100

↑ 2.3%
Q-o-Q

KEY INDICATORS

SOURCE: VALUSTRAT, REIDIN, QUANTA, DCTAD



Residential

Sales Ticket Size

3.20M
AED

↑ 5.1%
Q-o-Q

Sales Volume

6,436
TRANSACTIONS

↑ 62.7%
Q-o-Q

Asking Rents

160,000
(AED / P.A)

↑ 2.3%
Q-o-Q



Office

Asking Ticket Size

2.39M
AED

↑ 4.9%
Q-o-Q

Sales Price

14,163
(AED / SQ M)

↑ 3.1%
Q-o-Q

Asking Rents

891
(AED / SQ M / P.A)

↑ 3.6%
Q-o-Q



Hotel

Occupancy

81.5%
YTD JUL 2025

↑ 2.1%
Y-o-Y

ADR

544
(AED) YTD JUL 2025

↑ 20.7%
Y-o-Y

RevPAR

443
(AED) YTD JUL 2025

↑ 23.7%
Y-o-Y

↑ INCREASE ■ NO CHANGE ↓ DECLINE

MACRO ECONOMIC SNAPSHOT

- The UAE economy is projected to grow 4.9% in 2025 and 5.3% in 2026, supported by non-oil sector growth and a recovery in hydrocarbons. Inflation is expected to remain moderate at 1.5%. According to the Central Bank of the UAE, banking, capital markets, tourism, and real estate continue to perform strongly, reflecting sustained diversification and investor confidence
- In September 2025, the US Federal Reserve announced its first rate cut of the year, setting the target range at 4.0% to 4.25%
- Abu Dhabi's Murban crude oil price stood at AED 258 (USD 70.10) per barrel as of September 2025
- Abu Dhabi's economy grew 3.8% annually in Q2 2025 to AED 306.3 billion, driven by strong gains in manufacturing, construction, finance, real estate, and ICT, with non-oil activities up 6.6% to a record AED 174.1 billion, accounting for 56.8% of total GDP
- Abu Dhabi Global Market (ADGM) recorded strong growth in H1 2025, with assets under management up 42% and new licences rising 47%, reaffirming its position as one of the region's leading financial centre. The Abu Dhabi Securities Exchange (ADX) saw trading value increase 33.5% and foreign net investment nearly double, reflecting robust investor confidence

Abu Dhabi Population

2020E

3,285,404

2021E

3,396,252

2022E

3,573,274

2023

3,847,585

2024

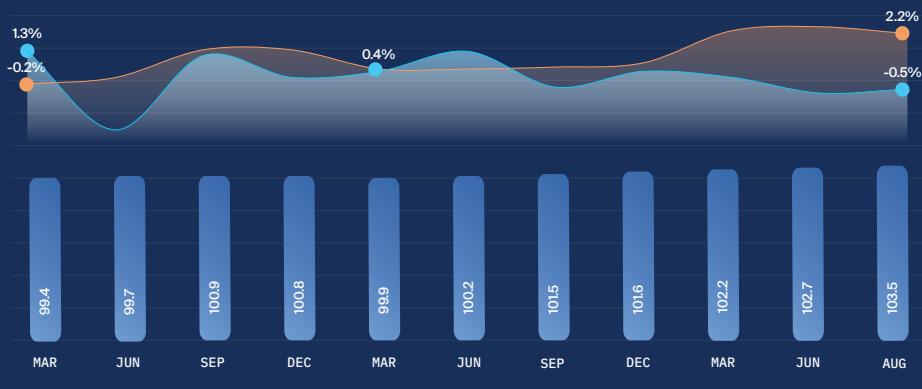
4,135,985

2025E

4,203,402

SOURCE: STATISTICS CENTRE ABU DHABI, VALUSTRAT

CONSUMER PRICE INDEX ANNUAL CHANGE



SOURCE: DUBAI STATISTICS CENTRE

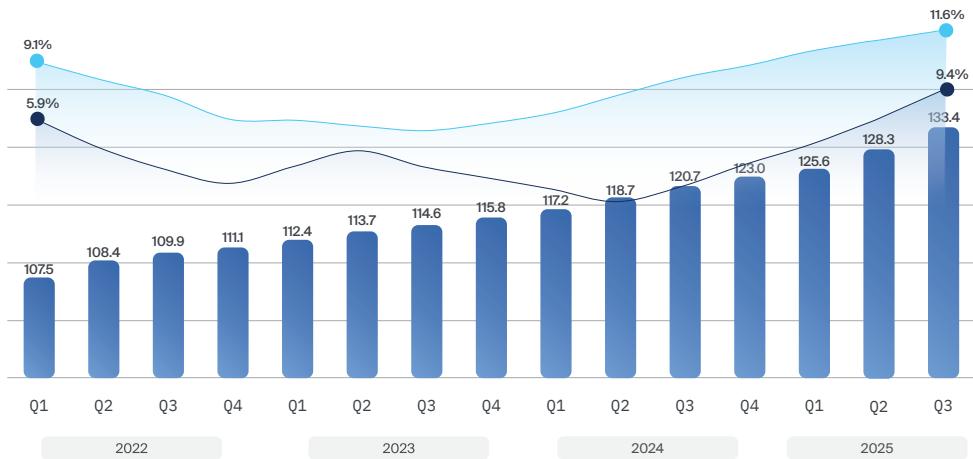
- The Abu Dhabi Consumer Price Index for August 2025 was 106 points, stable annually. Housing and Utilities up 2.2% YoY at 103.5 points, highest in two years
- The S&P Global UAE Purchasing Managers' Index (PMI) rose for a second month in September, climbing from 53.3 to 54.2. As well as signalling a solid and quicker improvement in non-oil business conditions, the PMI was at its highest mark in seven months

RESIDENTIAL CAPITAL VALUES



Annual Growth

[BASE: Q1 2021=100]



 VPI

 APARTMENTS (%)

 VILLA (%)

SOURCE: VALUSTRAT

ValuStrat Price Index

Residential Citywide

133.4

BASE: Q1 2021=100

Villa Citywide

143.2

BASE: Q1 2021=100

Apartment Citywide

124.1

BASE: Q1 2021=100

The ValuStrat Price Index (VPI), which tracks capital values in Abu Dhabi's freehold residential market, recorded its strongest growth to date, rising 4% quarterly and 10.5% annually. This marks a significant acceleration from 1.7% and 5.3%, respectively, during the same period last year, bringing the index to 133.4 points based on a Q1 2021 baseline of 100 points.

Villa prices recorded a stronger annual increase, rising 11.6% to reach 143.2 points, while apartment values showed faster quarterly momentum, climbing 4.4% to 124.1 points.

The weighted average home value in Abu Dhabi stood at AED 10,818 per sq m (AED 1,005 per sq ft), with apartments averaging AED 11,647 per sq m (AED 1,082 per sq ft) and villas at AED 8,859 per sq m (AED 823 per sq ft).

Saadiyat Island led annual villa capital gains, rising 21.2%, followed by Al Reef (8.1%) and Al Raha (7.7%). Among apartments, Al Reef posted the strongest annual growth at 13.3%, followed by Saadiyat Island (10.5%), Al Muneera Island (10.4%), and Al Bandar (9.2%).

VALUSTRAT PRICE INDEX RESIDENTIAL RENTAL VALUES



Annual Growth

[BASE: Q1 2021=100]



 VPI

 APARTMENTS (%)

 VILLA (%)

SOURCE: VALUSTRAT

Apartment Asking Rents

 **12.8%**
LAST YEAR

 **2.7%**
LAST QUARTER

Villa Asking Rents

 **5.6%**
LAST YEAR

 **1.9%**
LAST QUARTER

SOURCE: REIDIN,
VALUSTRAT

The VPI for rental values in Abu Dhabi grew by 9.3% annually and 2.3 % quarterly to reach 128.3 points, compared to a baseline of 100 points in Q1 2021.

Villas achieved 128.3 points with rents rising 5.6% annually and 1.9% quarterly, while apartments reached 123.2 points, up by a record 12.8% YoY and 2.7% QoQ. Gross yields averaged 8.1%, 8.5% for apartments and 7% for villas, with an average occupancy rate of 88.1%

RESIDENTIAL RENTS - APARTMENTS



Apartment Average Asking Rent

'000 AED per annum and

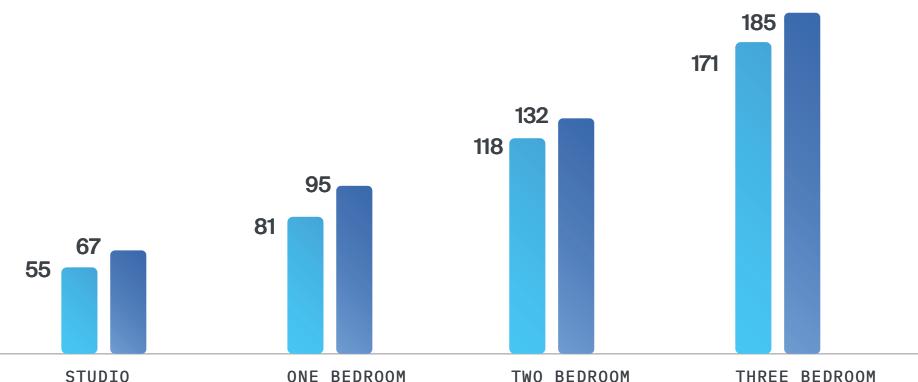
Yearly Change (%)

21.8%

17.3%

11.9%

8.2%



Q3 2024

Q3 2025

AVERAGE YEARLY CHANGE (%)

SOURCE: REIDIN,
VALUSTRAT

Apartment Asking Rents

↑ 12.8%
LAST YEAR

↑ 2.7%
LAST QUARTER

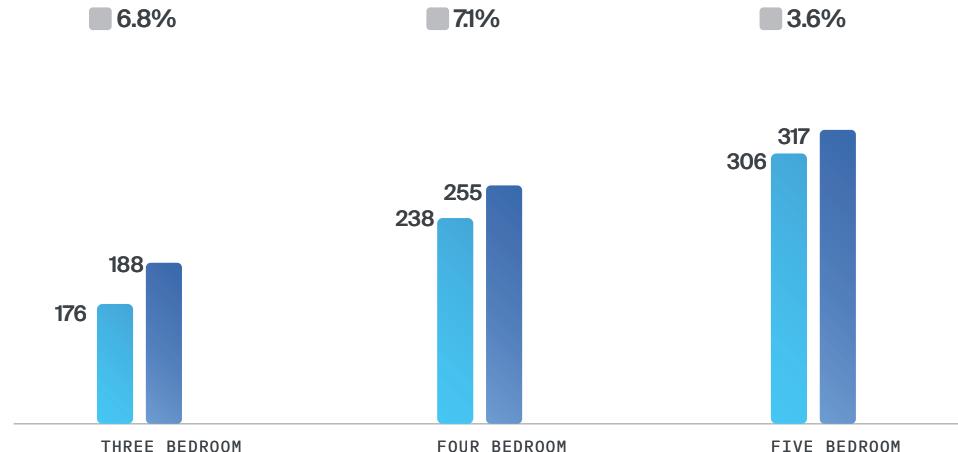
SOURCE: REIDIN,
VALUSTRAT

- Apartment asking rents in Abu Dhabi City averaged AED 120,000 per annum
- Amongst apartment locations monitored, the highest rental growth on a quarterly basis was observed in Al Reef (4.5%) and Saadiyat Island (2.8%)
- Rents in Al Muneera and Al Bandar grew 1.9% each
- Average annual apartment asking rents were as follows: studios AED 67,000, 1-bed AED 95,000, 2-beds AED 132,000 and 3-beds AED 185,000

RESIDENTIAL RENTS - VILLA



Apartment Average Asking Rent
'000 AED per annum and
Yearly Change (%)



SOURCE: REIDIN,
VALUSTRAT

Villa Asking Rents

↑ 5.6% LAST YEAR

↑ 1.9% LAST QUARTER

SOURCE: REIDIN,
VALUSTRAT

- Citywide villa asking rents averaged AED 253,000 per annum
- On a quarterly basis, villa rents grew the highest in Al Raha (3.7%) and Mohammad bin Zayed City (2.3%)
- Villa rents grew 1.5% in Al Reef and 1.3% in Saadiyat Island
- Average annual rents for 3-beds were AED 188,000, 4-beds AED 255,000 and 5-beds AED 317,000

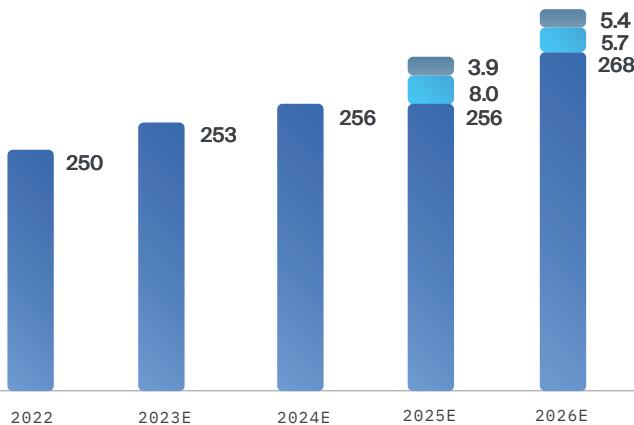
RESIDENTIAL SUPPLY



2022-2026

'000 Units

*MAY BE SUBJECT TO SIGNIFICANT DOWNWARD ADJUSTMENT



CURRENT STOCK

NEW APARTMENTS*

NEW VILLAS*

SOURCE: URBAN PLANNING COUNCIL, REIDIN, MEED PROJECTS, VALUSTRAT

- Abu Dhabi saw the completion of 178 apartments and 1,054 villas during the first three quarters of 2025, representing just 10.3% of the expected residential pipeline for 2025
- An estimated 33,000 new residential units are scheduled to be delivered by 2030
- The revised number of new build units entering the market this year stood at 11,920 homes, 67% being apartments, and 33% villas and townhouses.
- Aldar unveiled Yas Living on Yas Island, a waterfront development featuring 678 apartments across three canal-facing buildings. Designed to foster community living and sustainability, the project aims to achieve Estidama 3 Pearl certification
- Bloom Holding has launched 'Marbella', the tenth phase of Bloom Living in Zayed City, offering lakeside and park views. The development includes three- to six-bedroom homes and is slated for completion in Q4 2028
- Taraf, the real estate division of Yas Holding, has partnered with Masdar City to develop a 1.40 million sq m residential community featuring more than 1,000 villas and townhouses

RESIDENTIAL OFF-PLAN SALES TRANSACTIONS



Total Volume &
Average Price



AVERAGE PRICE (AED /SQ FT)

VOLUME

SOURCE: ADREC, VALUSTRAT

Off-plan Sales Price

SOURCE: ADREC,
VALUSTRAT

↑ 22.4% ↑ 13.2%

LAST YEAR

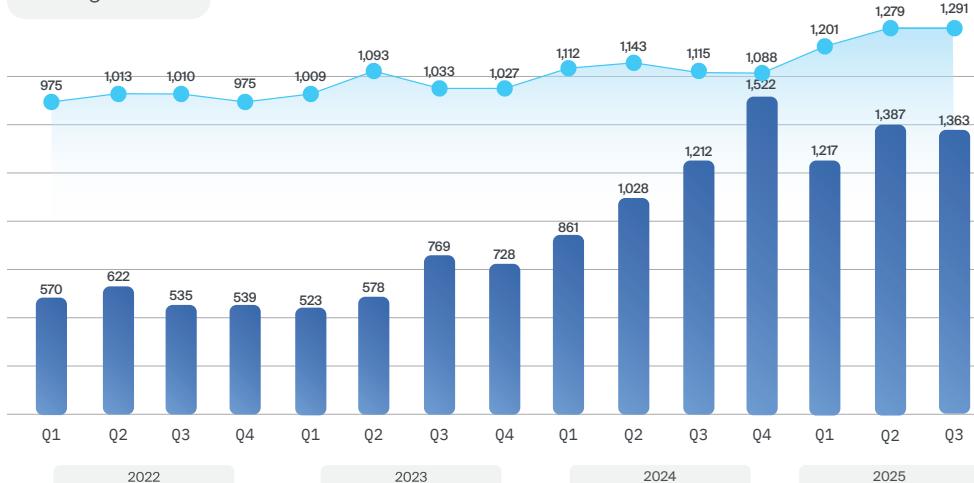
LAST QUARTER

- The average price for off-plan properties stood at AED 20,839 per sq m (AED 1,936 per sq ft), showing an increase of 13.2% quarterly and 22.4% annually
- The average ticket size of off-plan homes rose by 10.4% YoY to AED 3.4 million, driven by a continued developer focus on high-end residential offerings
- Abu Dhabi recorded its highest-ever volume of off-plan transactions, accounting for 79% of total sales and marking a growth of 97.5% QoQ and 118% YoY

RESIDENTIAL READY SALES TRANSACTIONS



Total Volume &
Average Price



AVERAGE PRICE (AED / SQ FT)

VOLUME

SOURCE: ADREC, VALUSTRAT

Ready Sales Price

↑ 15.7%
LAST YEAR

0.9%
LAST QUARTER

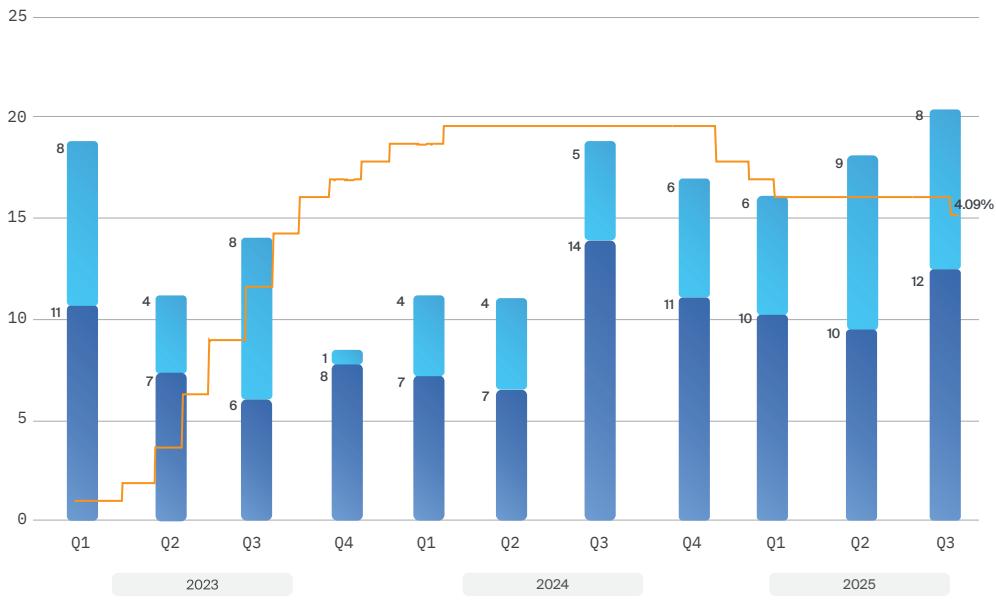
SOURCE: ADREC,
VALUSTRAT

- Transaction volumes for ready properties grew 12.5% YoY but fell 1.7% QoQ
- The average price for ready homes was AED 13,896 per sq m (AED 1,291 per sq ft), increasing 15.7% yearly and stable on a quarterly basis
- The average ticket size of ready homes reached AED 2.6 million, up 15.9% annually, and 2.4% quarterly

MORTGAGE TRANSACTIONS



Mortgage/Cash Sales vs Interest Rates*
Transaction Value (AED Bn)



MORTGAGE

CASH

FEDERAL FUNDS RATE

SOURCE: ADREC, MACTORENDS, VALUSTRAT

*ESTIMATED TO EXCLUDE OFF-PLAN TRANSACTIONS, ALL ASSET CLASSES

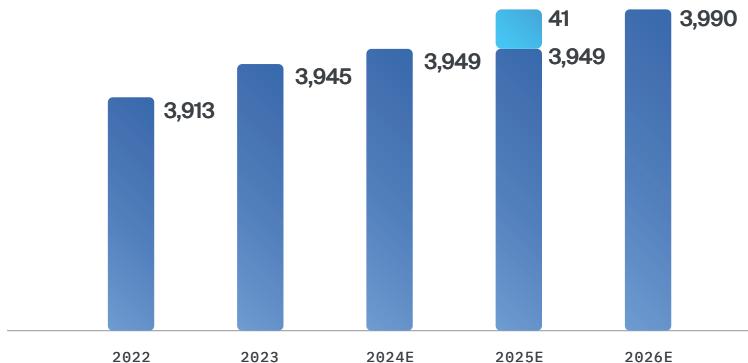
- In the third quarter of 2025, the Abu Dhabi real estate market witnessed 5,561 mortgage transactions across all asset classes compared to 2,098 cash transactions of ready properties
- The total sales value attributed to mortgage transactions stood at AED 12.4 billion, with cash transactions totalling AED 8 billion
- The US Federal Open Market Committee announced its first federal funds interest rate during the year setting the target range at 4.0% - 4.25% as of September 2025

OFFICE SUPPLY AND PERFORMANCE



('000 SQ M GLA)

2022-2026



EXISTING STOCK

EXPECTED SUPPLY

SOURCE: REDIN, MEED PROJECTS, VALUSTRAT

Office Asking Rents

SOURCE: REIDIN,
VALUSTRAT

↑ **22.7%**
LAST YEAR

↑ **3.6%**
LAST QUARTER

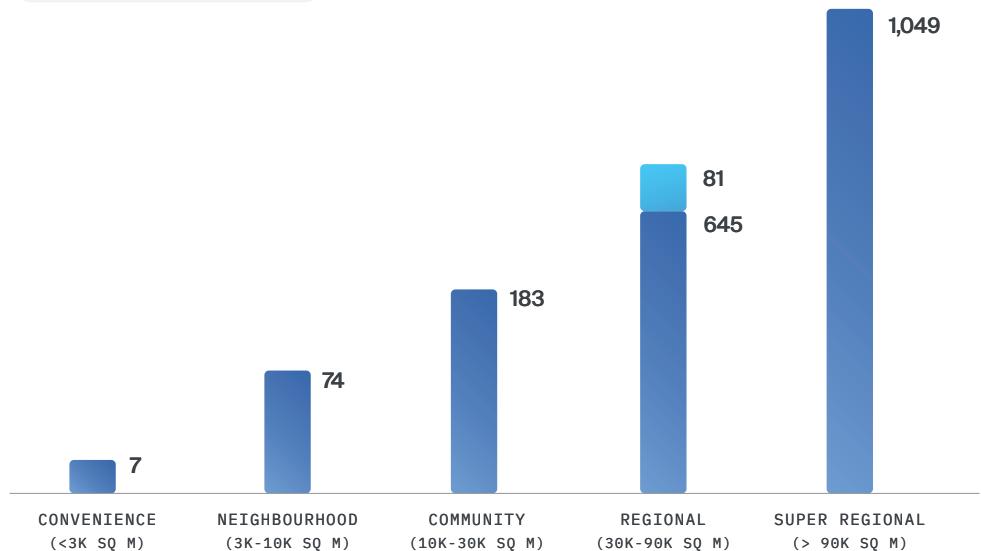
- During the third quarter, the city's estimated office stock stood at 3.9 million sq m (42 million sq ft) of Gross Leasable Area (GLA)
- Masdar City is set to add another office building in the last quarter of 2025, adding 6,000 sq m (64,584 sq ft) of built-up area (BUA) to the city's office supply
- Average asking prices for offices in Abu Dhabi grew 8.7% annually to reach AED 2.39 million
- Office asking rents in primary commercial districts within the city grew by 3.6% quarterly and 22.7% annually
- Average occupancy among buildings within the city's central business districts stood at 90.5%

RETAIL SUPPLY



Malls & Shopping Centers

('000 SQ M GLA)



RETAIL COMPLETED

RETAIL UNDER CONSTRUCTION

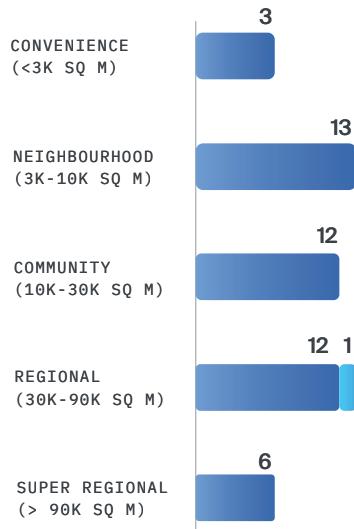
SOURCE: MEED PROJECTS, REIDIN, VALUSTRAT

- In the third quarter, shopping centre stock stood at 1.95 million sq m (20.9 million sq ft) GLA
- The most notable addition expected by the end of the year is the redevelopment and expansion of Al Jimi Mall, which will bring its total built-up area to 91,000 sq m (979,515 sq ft)
- Mira has introduced plans for a small city between Abu Dhabi and Dubai, with a shopping mall of 278,709 sq m (3 million sq ft)

RETAIL PERFORMANCE



Number of Malls & Shopping Centres



RETAIL COMPLETED

RETAIL UNDER CONSTRUCTION

SOURCE: MEED PROJECTS, REIDIN, VALUSTRAT

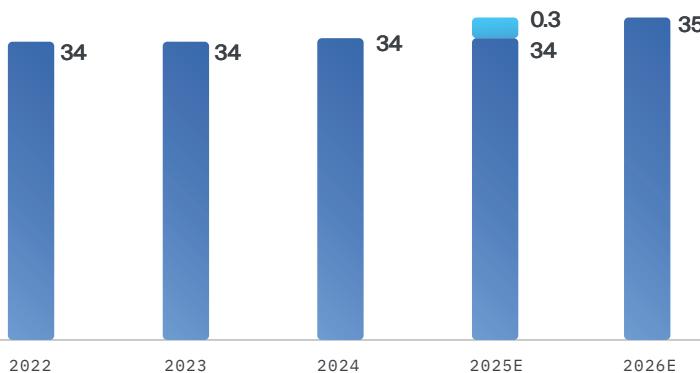
- The occupancy rate for Aldar's retail assets stood at 91% during the first half of 2025
- As of H1 2025, Aldar achieved a 12% YoY growth in revenue generated from its retail portfolio
- Yas Mall continues to excel as a premier shopping destination in Abu Dhabi, with overall occupancy reaching 98%
- The UAE e-commerce market is forecast to exceed AED 48.5 billion by 2028, with a projected penetration rate of 15.3%
- My City Centre Masdar recorded an occupancy rate of 81% during the first quarter of 2025

HOSPITALITY SUPPLY



Hotel Room Supply

2022-2026 | '000 Keys



HOTEL AND SERVICED APT ROOMS



NEW SUPPLY

SOURCE: DCTAD, MEED PROJECTS, VALUSTRAT

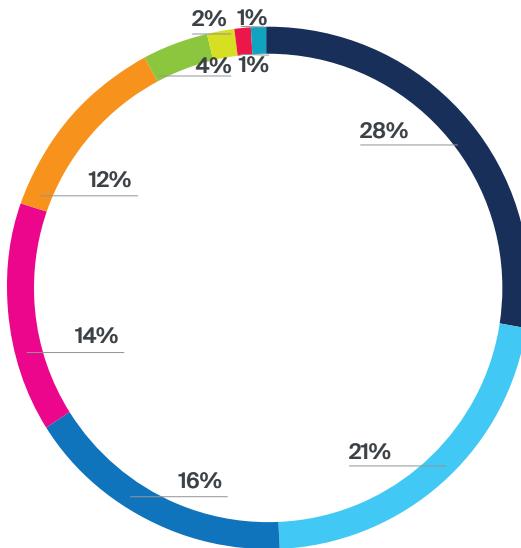
- As of July 2025, the emirate had 34,379 hotel keys, according to the Department of Culture and Tourism
- According to the Department of Culture and Tourism, total hotel supply is expected to surpass 50,000 by 2030
- The Mondrian Abu Dhabi is on track to open in late 2025 as the brand's UAE debut, featuring 221 rooms, 80 serviced apartments, six dining venues, and a notable infinity lagoon overlooking Reem and Al Maryah Islands
- Abu Dhabi's Department of Culture and Tourism (DCTAD) confirmed that the emirate expects to welcome over six million visitors in 2025, boosting the tourism sector's contribution to GDP to over AED 60 billion

HOSPITALITY PERFORMANCE



Source of Abu Dhabi Visitors by Region

JUL 2025



ASIA (EXCLUDING ARAB COUNTRIES)
EUROPE
AFRICA (EXCLUDING ARAB COUNTRIES)
OTHERS

UAE
OTHER ARAB COUNTRIES
GCC

NORTH AND SOUTH AMERICA
AUSTRALIA AND NEW ZEALAND

SOURCE: DCTAD, VALUSTRAT

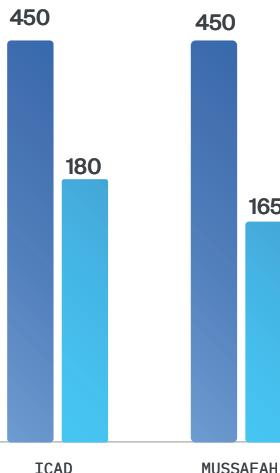
- The Department of Culture and Tourism Abu Dhabi (DCTAD) recorded an occupancy rate of 81.5% for the first seven months of 2025, up 2.1% from the same period in 2024
- The Average Room Rate (ARR) for hotels in Abu Dhabi stood at AED 544, up 20.7% annually, whilst the Revenue Per Available Room (RevPAR) was AED 443, an increase of 23.7% YoY
- Abu Dhabi hotels welcomed a total of 3 million guests during the first seven months of 2025 according to data from the Statistics Centre Abu Dhabi
- Abu Dhabi Airports welcomed 15.8 million passengers during the first half of 2025, marking a 13.1% increase annually

INDUSTRIAL INVESTMENT/SUPPLY



Industrial Prices

AED / SQ FT



PRICE HIGH PRICE LOW

SOURCE: VALUSTRAT

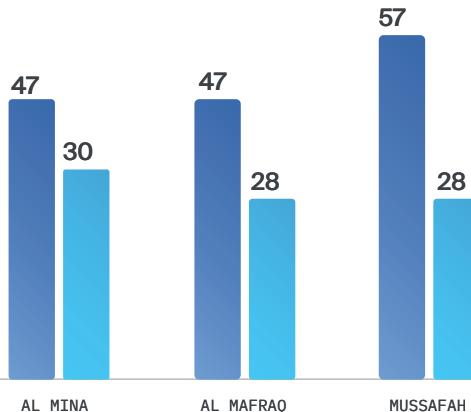
- Abu Dhabi Airports and JD.com's JINGDONG Property have formed a joint venture to develop two state-of-the-art 70,000 sq m (753,473 sq ft) warehouses in the ADAFZ Logistics Park, enhancing e-commerce and specialised cargo logistics in Abu Dhabi and the wider GCC, marking JDP's first UAE project
- Aldar acquired AED 530 million worth of high-quality warehousing and light industrial assets in Abu Dhabi's Almarkaz Industrial Park from Waha Capital, expanding its logistics portfolio across key UAE hubs and strengthening its recurring income streams
- Amazon's first fulfilment centre in the capital, located in Khalifa Economic Zones Abu Dhabi (KEZAD), has a storage capacity of up to 8 million units. While the exact floor area isn't specified, this capacity indicates a substantial facility designed to support same-day delivery across a wide range of products for customers throughout the UAE
- Abu Dhabi's ADQ completed its takeover of Dubai-based logistics firm Aramex, acquiring a 63.16% stake and integrating its 800,000 sq m (8.6 million sq ft) warehousing, GCC trucking network, and operations across 60+ countries to create a regional logistics powerhouse

INDUSTRIAL PERFORMANCE



Industrial Rental Rates

AED / SQ FT / P.A



■ RENT HIGH ■ RENT LOW

SOURCE: VALUSTRAT

- Industrial property asking prices in Abu Dhabi experienced double digit annual growth, averaging 13.7%
- In established industrial areas, warehouse prices generally ranged between AED 1,776 and AED 4,844 per sq m (AED 165 to AED 450 per sq ft), with modern cold storage facilities at the upper end and older properties at the lower end
- On an annual basis, industrial asking rental rates increased by 10.9% at the lower end and 15.5% at the higher end. Overall, rates typically range from AED 301 to AED 614 per sq m per annum (AED 28 to AED 57 per sq ft per annum), influenced by specifications, quality, age, condition, and facility size, with slightly higher rates for properties featuring cold storage

VALUSTRAT IN THE MEDIA



ValuStrat: Abu Dhabi's real estate market accelerated in second quarter

22 AUG 2025

The 'Abu Dhabi Real Estate Review for Q2' report by ValuStrat presents a detailed analysis of the emirate's real estate markets across residential, office, retail, hospitality, and industrial sectors. The report highlights that the market has seen accelerated growth in Q2, driven by strong demand, improving economic conditions, and strategic developments.

In Q2, the ValuStrat Price Index, which tracks capital values of Abu Dhabi's freehold residential market, accelerated by 2.2% vis a vis the previous quarter. The increase is primarily driven by robust performance in the freehold apartment market. Apartment prices increased by 1.7 percent quarterly, while villa prices also saw a higher increase of 2.6 percent quarter-on-quarter.



Abu Dhabi real estate: 33,000 new residential units expected as apartment prices rise 1.7 percent in Q2 2025

12 AUG 2025

The ValuStrat Abu Dhabi Real Estate Review for Q2 2025 presents a detailed analysis of the emirate's real estate markets across residential, office, retail, hospitality, and industrial sectors. The report highlights significant growth driven by strong demand, improving economic conditions, and strategic developments.



Abu Dhabi property prices rise 7.2% annually in Q1 2025 despite sales volume drop

5 AUG 2025

In the fourth quarter of 2024, Abu Dhabi's real estate market performance exhibited a primarily positive trend, a new report suggests. According to recent data from ValuStrat, the market experienced a 25.7 percent growth in residential sales throughout the fourth quarter yet recorded a yearly reduction of 23.5 percent. Off-plan transactions substantially declined by 60.8 percent to become the primary factor behind the market sales decrease according to projections. In Q4 ready properties took up 61.5 percent of the total residential property market sales. The sectors encompassing residential, office, hotel, and industrial all noted increases in rental prices, while the capital values in the residential sector continued their upward movement across most communities. The ValuStrat Price Index advanced to 123 points, with villas and apartments recording average annual capital gains of 8.9 percent and 3.5 percent, respectively.



Abu Dhabi property prices rise 7.2% annually in Q1 2025 despite sales volume drop

23 MAY 2025

Abu Dhabi's property market delivered its strongest capital gains in three years during the first quarter of 2025, even as sales volumes declined due to limited supply, according to the latest ValuStrat report.

The ValuStrat Price Index (VPI) for residential properties rose 2.1 per cent quarterly and 7.2 per cent annually to reach 125.6 points, based on a Q1 2021 baseline of 100.

Villa prices outperformed apartments, climbing 2.7 per cent quarterly and 9.7 per cent annually to 134.7 points, while apartment prices increased 1.5 per cent quarterly and 4.5 per cent annually to 116.9 points.



Premium Subscription

ValuStrat offers premium subscription reports for clients granting them access to in-depth, statistical analysis of what is happening in residential real estate; allowing for more informed decision making and forward planning. The full in-depth Abu Dhabi report includes citywide analysis of investment zones, including the ValuStrat Price Index, service charges, Price to Rent Ratios and Yields.

About VPI

The ValuStrat Price Index (VPI) regularly marks to market a sample of properties that represent more than 90% of the Abu Dhabi residential market and is built by our expert RICS Registered Valuers.

Research Methodology

Every effort has been made to ensure the accuracy of this document. New supply data covers 62 defined districts in Abu Dhabi City including non-investment zones. Only completed and under construction projects are included. The new supply data does not include announced projects and projects in design phase. The supply database does not take into account most private building projects. Sales data is sourced from actual citywide transactions. Rental data is derived from carefully chosen listings that have been properly cleansed to exclude duplicates and outliers within predetermined areas and districts for office and residential properties.

Residential
Capital Value

Quarterly

Residential
Rental Value

Quarterly

Office
Capital Value

Quarterly

Industrial Logistics
Capital Value

Quarterly

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