



## Dubai Residential Supply & Delivery Outlook (2025–2027)





## Overview

This study provides a comprehensive breakdown of Dubai's residential pipeline for the years 2025 through 2027, comparing anticipated unit handovers with realistic delivery expectations based on construction progress as of mid-2025. The data has been sourced from development records, construction progress reports, and internal forecasting models.

## The Completion Threshold Framework

- **2025 Realistic Deliveries:** Units with construction progress  $\geq 80\%$ .
- **2026 Realistic Deliveries:** Units with  $\geq 50\%$  construction progress and delayed units from 2025.
- **2027 Realistic Deliveries:** Units with  $\geq 30\%$  construction progress and delayed units from 2025 & 2026.



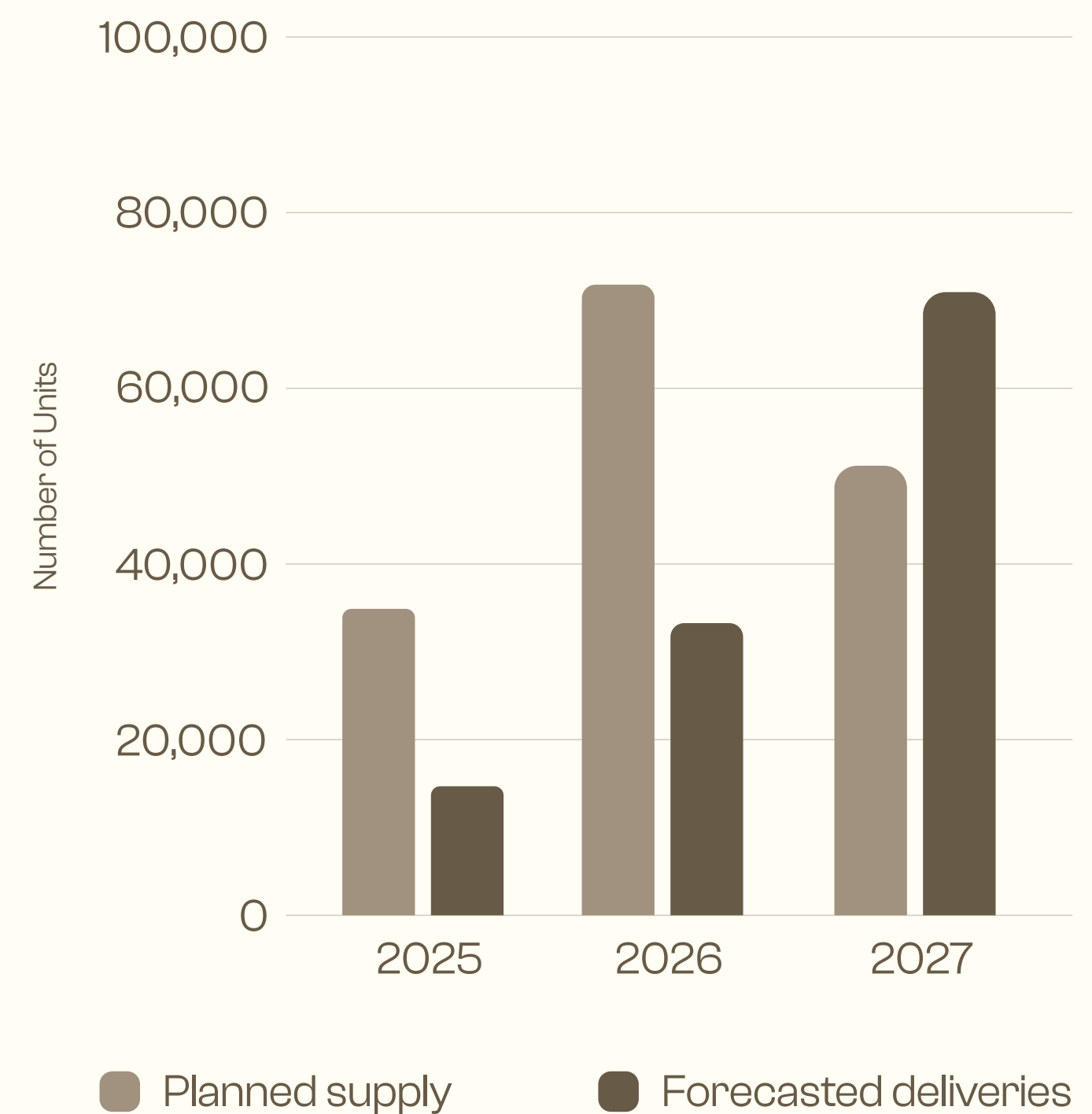
## Verified Construction Based Supply Outlook

Based on an internal audit of over 1,000 under-construction residential projects:

Year	Anticipated Supply	Already Delivered	Expected Additional Deliveries	Realistic Total Deliveries
2025	37,171 units	16,631 units	~6,265 units	<b>~22,896 units</b>
2026	71,613 units	—	—	<b>34,740 units</b>
2027	55,238 units	—	—	<b>70,537 units</b>

Source: Public forecasts vs. Morgan's International Realty internal construction audit (June 2025)

Verified Residential Supply Deliveries  
(Dubai, 2025-2027)







## Location Matters

As construction intensifies in high-growth areas like JVC and Business Bay, the resulting supply surge could place downward pressure on prices. Meanwhile, mature districts such as Palm Jumeirah, Downtown, and Dubai Marina—with limited upcoming stock and enduring buyer demand—are likely to remain resilient.

## Areas with Highest Residential Deliveries

2025		2026		2027	
Master Development	Units	Master Development	Units	Master Development	Units
Dubai Studio City	1,082	Jumeirah Village Circle	6,898	Jumeirah Village Circle	9,181
Sobha Hartland	965	Azizi Venice	4,502	Business Bay	7,794
Jumeirah Village Circle	773	DAMAC Lagoons	3,087	Azizi Venice	3,358
Jumeirah Lakes Towers	396	Business Bay	2,333	Dubai Hills Estate	3,148
Al Furjan	371	Arjan	1,581	Dubai Creek Harbour	3,078



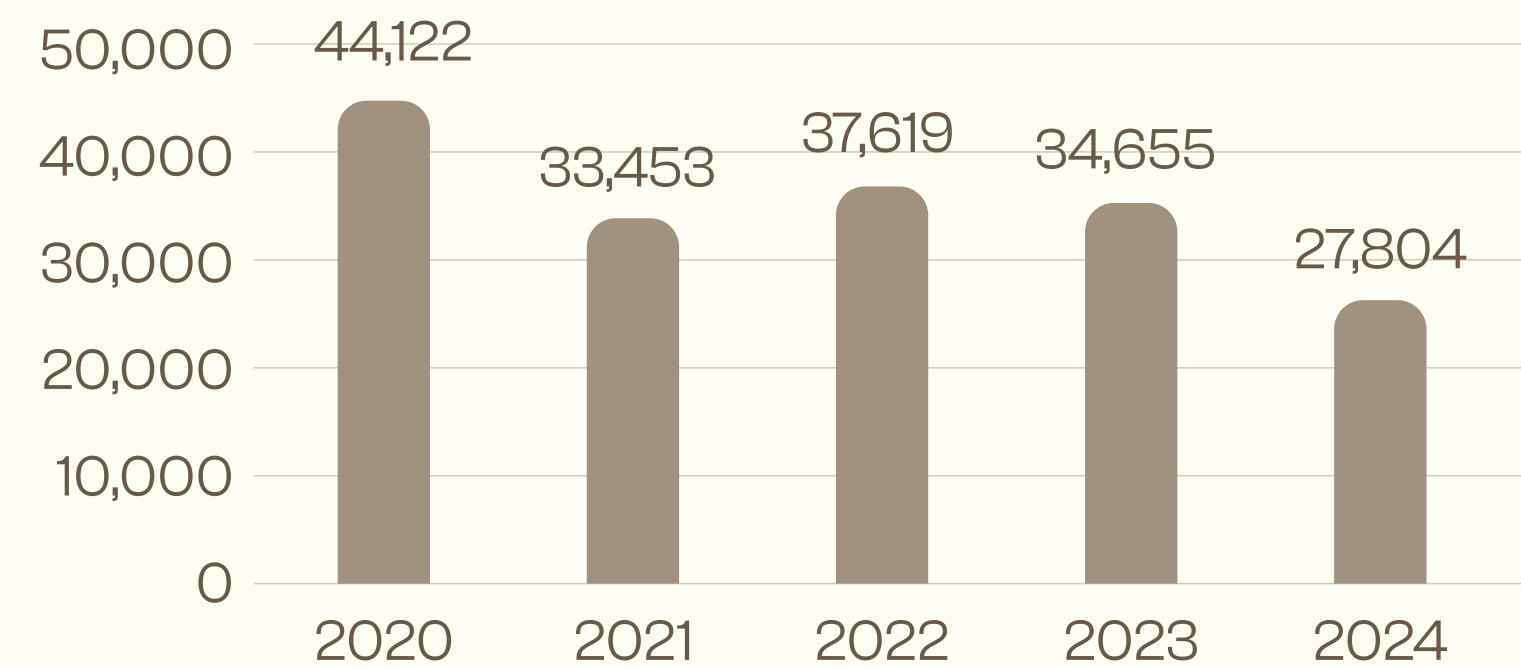
## Key Insights

Only around 62% of Dubai's anticipated residential supply for 2025 is expected to be delivered, 16,631 units were already completed. In 2026, delivery rates are projected to drop further, with just 48% of the 71,613 anticipated units likely to reach completion.

2027 Supply Surge Set to Test Market Absorption With 70,537 units forecasted for delivery, Dubai is on track to introduce over 98% more inventory than its average annual supply of 35,531 units over the past five years.

Jumeirah Village Circle remains the most consistently active development zone across all three years, with a total of 16,852 residential units expected to be completed between 2025 and 2027 — a volume that may exert downward pressure on prices due to potential oversupply. It is followed by Business Bay with 10,127 units and Azizi Venice with 7,860 units over the same period, both of which also face elevated delivery volumes that could influence market dynamics.

Historical Residential Completions







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## Contact

+971 4 2418886  
+971 58 557 1887  
info@morgansrealty.com  
www.morgansrealty.com

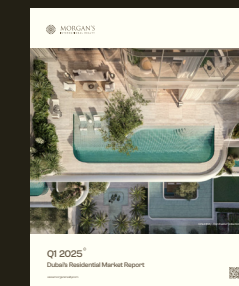
## Address

Morgan's International Realty  
Office 2407/2408/2409, Concord Tower,  
Dubai Media City,  
P.O. Box 450642, Dubai, UAE.

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