



VALUSTRAT.COM

Abu Dhabi, UAE

Real Estate Research  
Fourth Quarter 2025



# ABU DHABI

# Q4/'25

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

# TABLE OF CONTENTS

# 04

## Overview

Real Estate Performance and Key Indicators  
Macro-Economic Snapshot  
Abu Dhabi Consumer Price Index

---

# 07

## Residential Market

VPI - Residential Capital Values  
VPI - Residential Rental Values  
Residential Rents - Apartments  
Residential Rents - Villa  
Residential Supply  
Residential Off- Plan Sales Transactions  
Residential Ready Sales Transactions  
Mortgage Transactions

---

# 16

## Office Market

Office Supply and Performance

---

# 20

## Retail Market

Retail Supply  
Retail Performance

---

# 22

## Hospitality Market

Hospitality Supply  
Hospitality Performance

---

# 24

## Industrial Market

Industrial Investment/Supply  
Industrial Performance

---

# 26

## About Us

ValuStrat in the Media  
VPI Subscription

# FOREWORD

---



**Haider Tuaima**  
Managing Director  
Director & Head of Real  
Estate Research

## **Abu Dhabi Property Market Accelerates as Prices, Rents, and Transactions Hit New Highs Amid Tight Supply**

The ValuStrat Price Index (VPI) for Abu Dhabi's freehold residential market climbed to 139.1 points, posting strong growth of 4.3% quarterly and 13.1% annually. This marks a sharp acceleration compared with gains of 1.9% QoQ and 6.2% YoY recorded a year earlier.

Rental values also strengthened, with the residential rental VPI advancing 2% quarterly and 8.2% annually to 128.1 points. Villa rents reached 131.3 points, reflecting growth of 2.3% QoQ and 6.2% YoY, while apartment rents rose to 125.3 points, increasing by a record 10.1% annually and 1.7% over the quarter.

Supply delivery remained constrained in 2025, with 2,275 apartments and 2,071 villas completed, equivalent to just 31.2% of the expected residential pipeline for the year. Looking ahead, approximately 29,000 new homes are scheduled for delivery by 2030, with 16,362 units scheduled to enter the market in 2026. Apartments are expected to account for 64% of this supply, with villas and townhouses comprising the remaining 36%.

Off-plan market activity reached new highs, accounting for 76% of total transactions and rising 69.5% annually and 6% quarterly. The average off-plan price per square foot declined 7.5% quarterly but was 10.8% higher than the same period in 2024. Average off-plan ticket sizes also fell 13.6% YoY but increased 8.1% over the quarter to AED 3.6 million, reflecting a continued focus on higher-end developments.

In the secondary market, transaction volumes for ready homes increased by 10.3% annually and 23.2% quarterly. Average prices per square foot increased sharply by 34.1% annually and 13% quarterly. The average ticket size of ready homes climbed 24.1% annually to AED 2.58 million, although it eased marginally by 1.6% compared to the previous quarter.

Average office asking prices in Abu Dhabi increased by 4.8% quarterly and 15% annually to reach AED 2.5 million. Office asking rents in prime commercial districts rose by 5.8% quarterly and 25.5% annually, with average occupancy levels in central business districts standing at a healthy 90%.

The hospitality sector continued to perform strongly. Hotel occupancy reached 83.1% during the first eleven months of 2025, up 2.3% YoY. Average Room Rates rose 18.5% annually to AED 559, while Revenue per Available Room increased by 22.2% to AED 465. Total hotel guest numbers reached 4.9 million over the same period.

Industrial property performance remained robust, with asking prices recording double-digit annual growth of 13.7%. Asking rental rates also increased, rising between 6.6% and 13.3% year-on-year across the market.

# REAL ESTATE PERFORMANCE

SOURCE: VALUSTRAT



## VPI

Residential Capital Values

**139.1**

BASE: Q1 2021 = 100

↑ **4.3%**  
Q-o-Q

Residential Rental Values

**128.1**

BASE: Q1 2021 = 100

↑ **2.0%**  
Q-o-Q

## KEY INDICATORS

SOURCE: VALUSTRAT, REIDIN, ADREC, SCAD



## Residential

Sales Ticket Size

**3.37M**

AED

↑ **5.6%**  
Q-o-Q

Sales Volume

**7,054**

TRANSACTIONS

↑ **9.6%**  
Q-o-Q

Asking Rents

**163,000**

(AED / P. A)

↑ **2.0%**  
Q-o-Q



## Office

Asking Ticket Size

**2.51M**

AED

↑ **4.8%**  
Q-o-Q

Asking Price

**15,068**

(AED / SQ M)

↑ **6.4%**  
Q-o-Q

Asking Rents

**942**

(AED / SQ M / P. A)

↑ **5.8%**  
Q-o-Q



## Hotel

Occupancy

**83.1%**

YTD NOV 2025

↑ **2.3%**  
Y-o-Y

ADR

**559**

(AED) YTD NOV 2025

↑ **18.5%**  
Y-o-Y

RevPAR

**465**

(AED) YTD NOV 2025

↑ **22.2%**  
Y-o-Y

↑ INCREASE    ■ NO CHANGE    ↓ DECLINE

# MACRO ECONOMIC SNAPSHOT

- The UAE economy is expected to accelerate to around 5% growth in 2026, with inflation averaging 2% over the medium term, supported by strong non-oil sectors and rising oil output, as per the International Monetary Fund (IMF)
- In December 2025, the US Federal Reserve announced its third rate cut of the year, setting the target range at 3.5% to 3.75%
- Abu Dhabi's Murban crude oil price stood at AED 230 (USD 62.54) per barrel as of December 2025
- The UAE reinforced its position as a leading global investment hub, attracting more than AED 165 billion in foreign direct investment last year, an increase of nearly 50% despite an 11% global decline, accounting for over half of total Middle East inflows
- Abu Dhabi Global Market (ADGM) recorded strong growth in Q3 2025, with assets under management up 48%, 161 asset and fund managers overseeing 220 funds, and 11,920 active licences, including 2,801 issued in 2025. Operational entities rose 43% to 3,227, while the workforce reached 39,870, reflecting ongoing expansion across the centre

## Abu Dhabi Population

2020

3,285,404



2021

3,396,000



2022

3,573,000



2023

3,848,000



2024

4,136,000



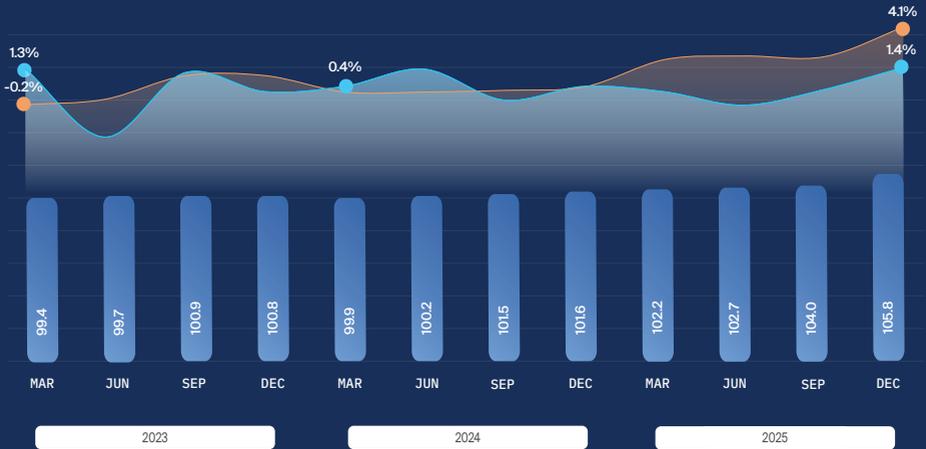
2025E

4,311,000



SOURCE: STATISTICS CENTRE ABU DHABI, VALUSTRAT

# CONSUMER PRICE INDEX ANNUAL CHANGE



HOUSING INDEX

GENREAL %

HOUSING %

SOURCE: DUBAI STATISTICS CENTRE

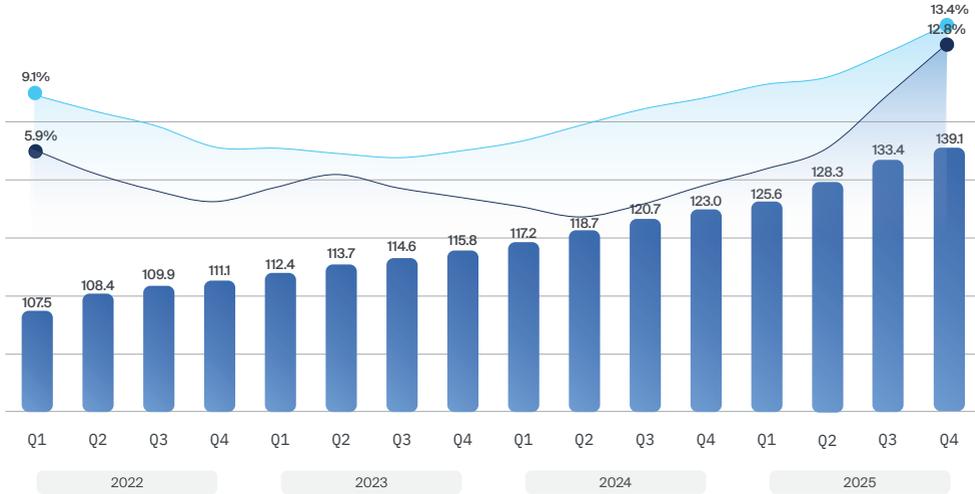
- The Abu Dhabi Consumer Price Index for December 2025 was 107.5 points, up 1.4% annually. Housing and Utilities up 4.1% YoY at 105.8 points, highest in two years.
- The S&P Global UAE Purchasing Managers' Index (PMI) eased slightly in December to 54.2 from 54.8 in November, remaining close to its long-term average and signalling a robust expansion in non-oil business conditions, supported by strong demand and one of the fastest output growth rates recorded in 2025, despite rising input cost pressures

# RESIDENTIAL CAPITAL VALUES



## Annual Growth

[BASE: Q1 2021=100]



VPI

APARTMENTS (%)

VILLA (%)

SOURCE: VALUSTRAT

ValuStrat Price Index

Residential Citywide

**139.1**

BASE: Q1 2021=100

Villa Citywide

**148.8**

BASE: Q1 2021=100

Apartment Citywide

**129.9**

BASE: Q1 2021=100

The ValuStrat Price Index (VPI) for Abu Dhabi's freehold residential market rose to 139.1 points, recording a 4.3% quarterly and 13.1% annual increase, a marked acceleration from 1.9% and 6.2% respectively a year earlier, against a baseline of 100 set in Q1 2021.

Villa prices saw a sharper increase, rising by 3.9% QoQ and 13.4% YoY to 148.8 points. In comparison, apartment prices grew by 4.7% QoQ and 12.8% YoY to 129.9 points, representing Abu Dhabi's highest apartment annual growth rate in ten years. In the fourth quarter of 2025, the weighted average home value in Abu Dhabi stood at AED 11,313 per sq m (AED 1,051 per sq ft), with apartments averaging AED 12,185 per sq m (AED 1,132 per sq ft) and villas at AED 9,235 per sq m (AED 858 per sq ft).

Saadiyat Island recorded the strongest annual villa capital growth at 20.9%, followed by Al Reef (14.2%) and Al Raha (7.7%), while Mohammed Bin Zayed City and Hydra Village posted more moderate gains of 6.3% and 4.4%, respectively. In the apartment segment, Al Reef led with an 18.3% annual increase, followed by Al Muneera Island at 13.7%, with Saadiyat Island and Al Bandar both registering gains of 13.1%.

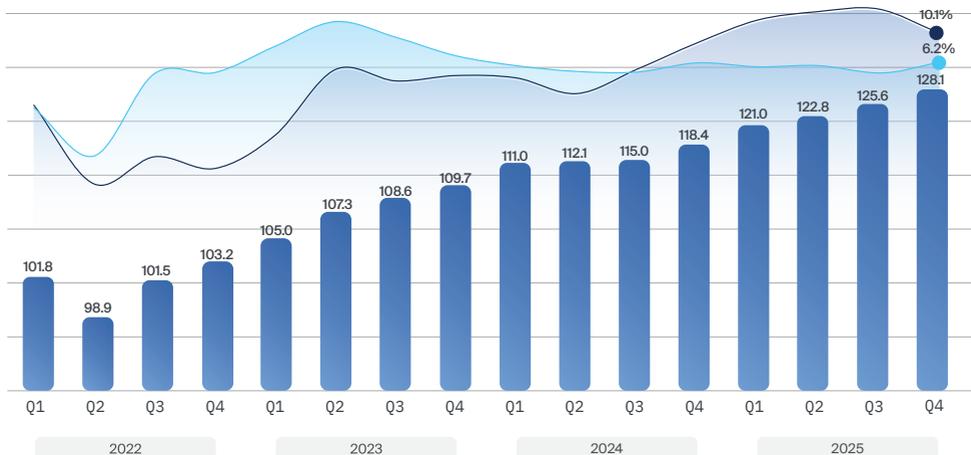
# VALUSTRAT PRICE INDEX

## RESIDENTIAL RENTAL VALUES



### Annual Growth

[BASE: Q1 2021=100]



VPI

APARTMENTS (%)

VILLA (%)

SOURCE: VALUSTRAT

### Apartment Asking Rents

↑ **10.1%**  
LAST YEAR

↑ **1.7%**  
LAST QUARTER

### Villa Asking Rents

↑ **6.2%**  
LAST YEAR

↑ **2.3%**  
LAST QUARTER

SOURCE: REIDIN, VALUSTRAT

The VPI for rental values in Abu Dhabi grew by 8.2% annually and 2% quarterly to reach 128.1 points, compared to a baseline of 100 points in Q1 2021.

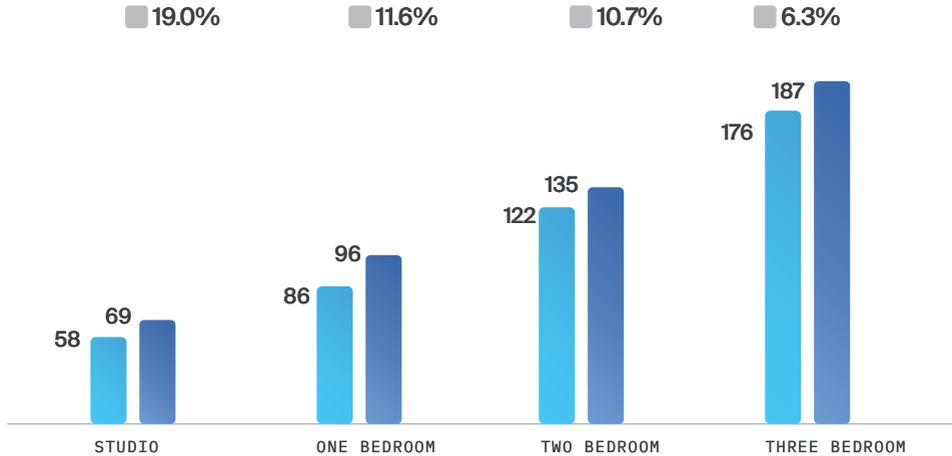
Villas achieved 131.3 points with rents rising 6.2% annually and 2.3% quarterly, while apartments reached 125.3 points, up by a record 10.1% YoY and 1.7% QoQ. Gross yields averaged 8.1%, 8.5% for apartments and 7.3% for villas, with an average occupancy rate of 87.7%

# RESIDENTIAL RENTS - APARTMENTS



## Apartment Average Asking Rent

'000 AED per annum and  
Yearly Change (%)



■ Q4 2024 ■ Q4 2025 ■ AVERAGE YEARLY CHANGE (%)

SOURCE: REIDIN,  
VALUSTRAT

## Apartment Asking Rents

↑ 10.1%  
LAST YEAR

↑ 1.7%  
LAST QUARTER

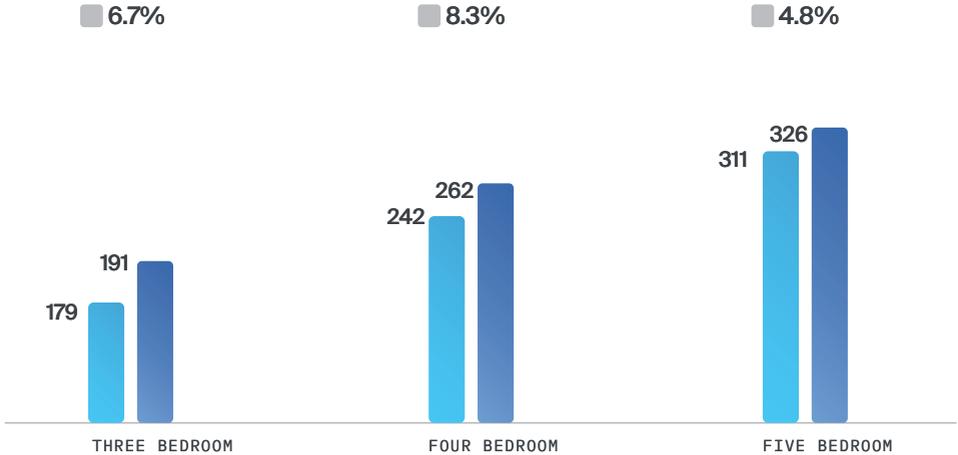
SOURCE: REIDIN,  
VALUSTRAT

- Apartment asking rents in Abu Dhabi City averaged AED 122,000 per annum
- Amongst apartment locations monitored, the highest rental growth on a quarterly basis was observed in Al Reef (4.3%) and Saadiyat Island (2.9%)
- Rents in Al Muneera and Al Reem grew 1.7% and 1.2% respectively
- Average annual apartment asking rents were as follows: studios AED 69,000, 1-bed AED 96,000, 2-beds AED 135,000 and 3-beds AED 187,000

# RESIDENTIAL RENTS - VILLA



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



■ Q4 2024 ■ Q4 2025 ■ AVERAGE YEARLY CHANGE (%)

SOURCE: REIDIN, VALUSTRAT

Villa Asking Rents

↑ 6.2% LAST YEAR    ↑ 2.3% LAST QUARTER

SOURCE: REIDIN, VALUSTRAT

- Citywide villa asking rents averaged AED 259,000 per annum
- On a quarterly basis, villa rents grew the highest in Mohammad bin Zayed City (4.4%) and Al Reef (3.5%)
- Villa rents grew 3% in Al Raha and 1.1% in Saadiyat Island
- Average annual rents for 3-beds were AED 191,000, 4-beds AED 262,000 and 5-beds AED 326,000

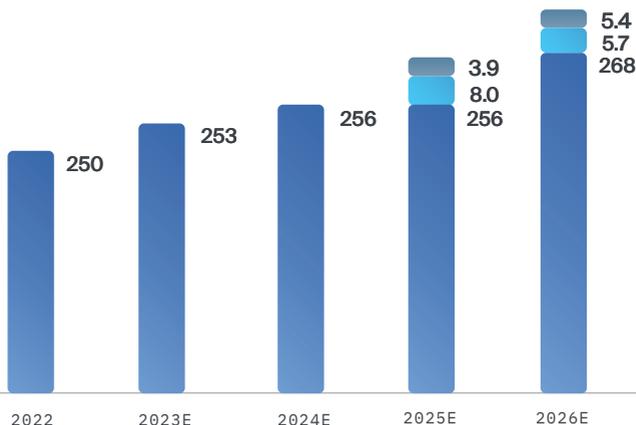
# RESIDENTIAL SUPPLY



2022-2026

'000 Units

\*MAY BE SUBJECT TO SIGNIFICANT DOWNWARD ADJUSTMENT



■ CURRENT STOCK

■ NEW APARTMENTS\*

■ NEW VILLAS\*

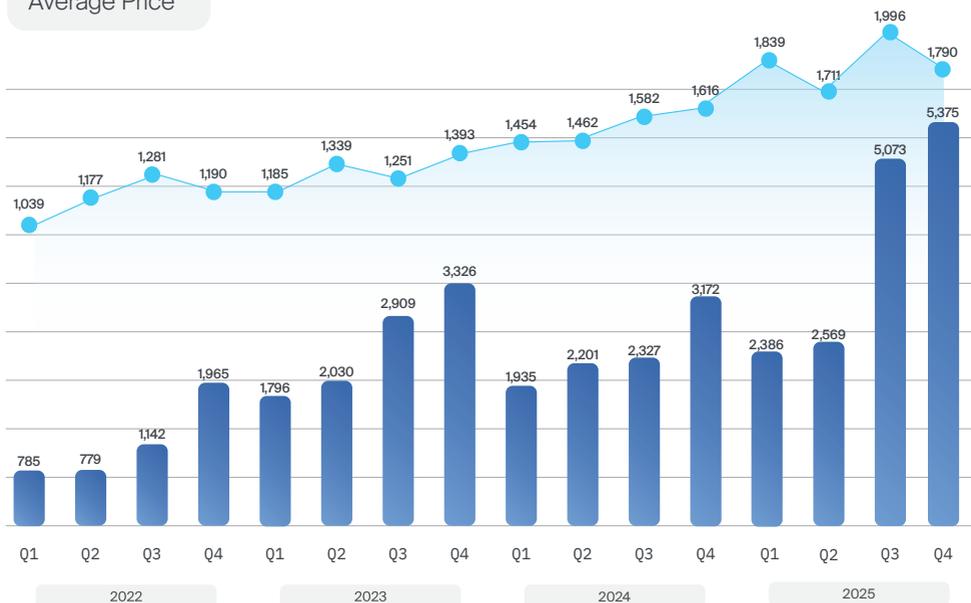
SOURCE: URBAN PLANNING COUNCIL, REIDIN, MEED PROJECTS, VALUSTRAT

- Abu Dhabi saw the completion of 2,275 apartments and 2,071 villas during 2025, representing just 31.2% of the expected residential pipeline for 2025
- An estimated 29,000 new residential units are scheduled to be delivered by 2030
- 16,362 new homes are projected to enter the capital's housing supply in 2026, with apartments accounting for 64% of additions and villas and townhouses making up the remaining 36%
- Aldar launched Yas Riva Residences on Yas Island's northern canal, comprising 950 apartments from studios to three-bedrooms. The waterfront development is organised with amenities for active living, family recreation, and leisure across four pavilion based precincts
- Aldar launched Yas Living on Yas Island, a waterfront community with 678 apartments across three canal-facing buildings, designed for community living and targeting Estidama 3 Pearl certification
- Bloom Holding has launched 'Malaga' the eleventh phase of Bloom Living in Zayed City, offering lakeside views. The development includes three- to six-bedroom homes and is slated for completion in Q4 2028
- Aldar launched The Row Saadiyat, a luxury residential development offering 315 apartments across seven mid-rise buildings in Saadiyat Cultural District

# 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

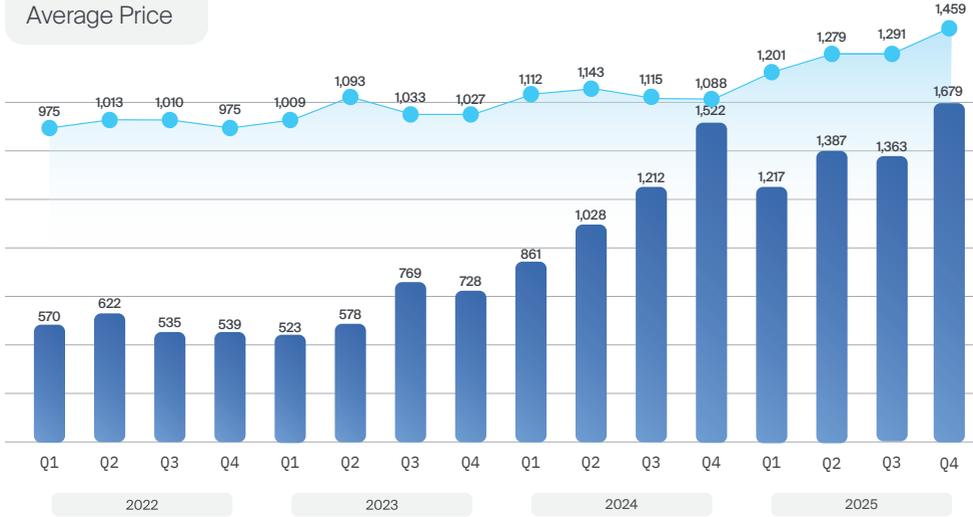


- The average price for off-plan properties stood at AED 19,267 per sq m (AED 1,790 per sq ft), down 7.5% quarterly but grew 10.8% annually
- The average ticket size of off plan homes fell 13.6% YoY but rose 8.1% quarterly to AED 3.6 million, reflecting a continued developer focus on high-end residential offerings
- Abu Dhabi recorded its highest-ever volume of off-plan transactions, accounting for 76% of total sales and marking a growth of 69.5% YoY and 6% QoQ

# RESIDENTIAL READY SALES TRANSACTIONS



Total Volume & Average Price



■ AVERAGE PRICE (AED / SQ FT) ■ VOLUME

SOURCE: ADREC, VALUSTRAT

## Ready Sales Price

↑ **34.1%** LAST YEAR  
↑ **13.0%** LAST QUARTER

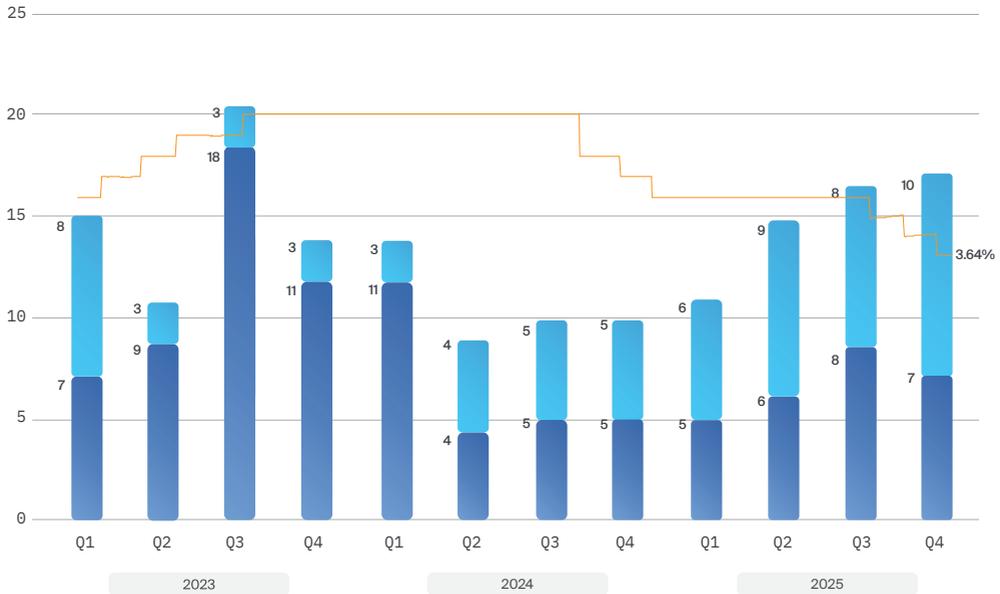
SOURCE: ADREC, VALUSTRAT

- Transaction volumes for ready properties grew 10.3% YoY and 23.2% QoQ
- The average prices for ready homes was AED 15,705 per sq m (AED 1,459 per sq ft), increasing 34.1% yearly and 13% quarterly
- The average ticket size of ready homes reached AED 2.58 million, up 24.1% annually but fell 1.6% on a quarterly basis

# MORTGAGE TRANSACTIONS



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



MORTGAGE

CASH

FEDERAL FUNDS RATE

SOURCE: ADREC,  
MACTRENDS, VALUSTRAT

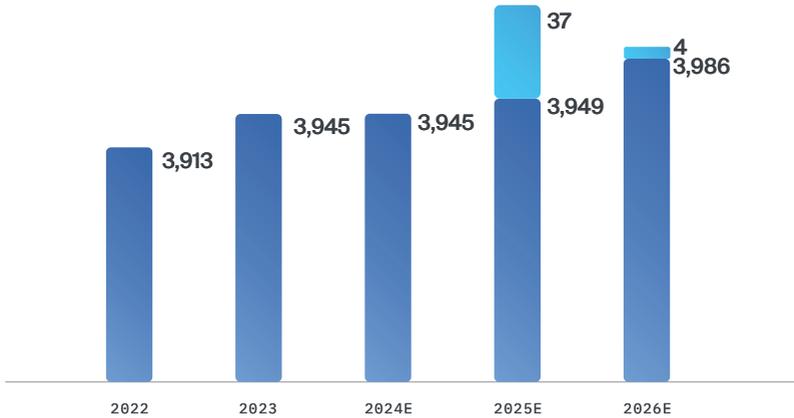
\*ESTIMATED TO EXCLUDE OFF-PLAN  
TRANSACTIONS, ALL ASSET CLASSES

- In the fourth quarter of 2025, the Abu Dhabi real estate market witnessed 4,164 mortgage transactions across all asset classes compared to 2,205 cash transactions of ready properties
- The total sales value attributed to mortgage transactions stood at AED 7 billion, with cash transactions totalling AED 10 billion
- The US Federal Open Market Committee announced its third federal funds interest rate cut during the year, setting the target range at 3.5% - 3.75% as of December 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

↑ 25.5% LAST YEAR

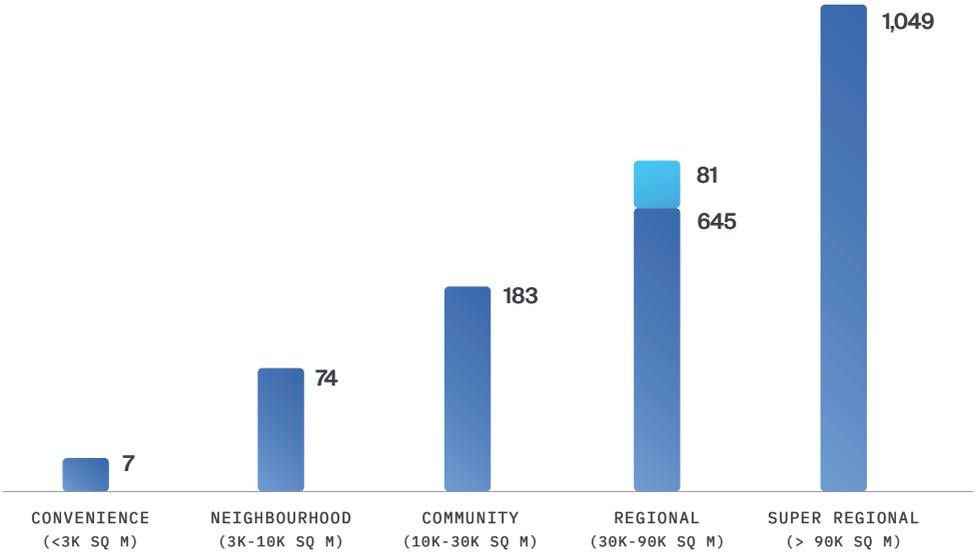
↑ 5.8% LAST QUARTER

- During the fourth quarter, the city's estimated office stock stood at 3.9 million sq m (42 million sq ft) of Gross Leasable Area (GLA)
- Mubadala Investment Company and Aldar Properties announced a AED 60 billion expansion of Al Maryah Island, expected to add over 1.5 million sq m (16 million sq ft) of mixed-use gross floor area, including new office space that will expand ADGM's overall commercial capacity
- Average asking prices for offices in Abu Dhabi grew 4.8% quarterly and 15% annually to reach AED 2.5 million
- Office asking rents in primary commercial districts within the city grew by 5.8% quarterly and 25.5% annually
- Average occupancy among buildings within the city's central business districts stood at 90%

# RETAIL SUPPLY



Malls & Shopping Centers  
( '000 SQ M GLA)



■ RETAIL COMPLETED

■ RETAIL UNDER CONSTRUCTION

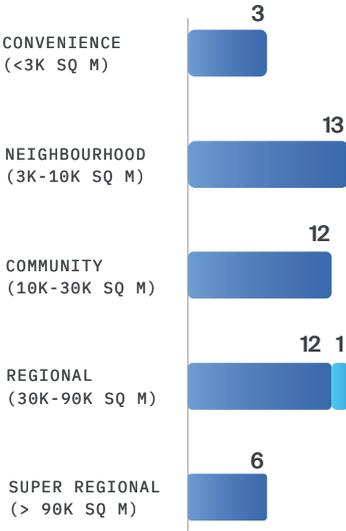
SOURCE: MEED PROJECTS, REIDIN, VALUSTRAT

- In the fourth quarter, shopping centre stock stood at 1.95 million sq m (20.9 million sq ft) GLA
- Aldar and Mubadala launched a AED 10 billion joint venture luxury retail platform combining Yas Mall and The Galleria Luxury Collection. Managed by Aldar, the platform consolidates two of Abu Dhabi's major high-end shopping destinations and supports the emirate's premium retail growth alongside the Al Maryah Island expansion
- Straylight Yas is undergoing a major refurbishment by Aldar and IHG, adding a dedicated retail and dining strip as part of a wider redevelopment of the Yas Plaza resort area

# RETAIL PERFORMANCE



## Number of Malls & Shopping Centres



■ RETAIL COMPLETED
 ■ RETAIL UNDER CONSTRUCTION

SOURCE: MEED PROJECTS, REIDIN, VALUSTRAT

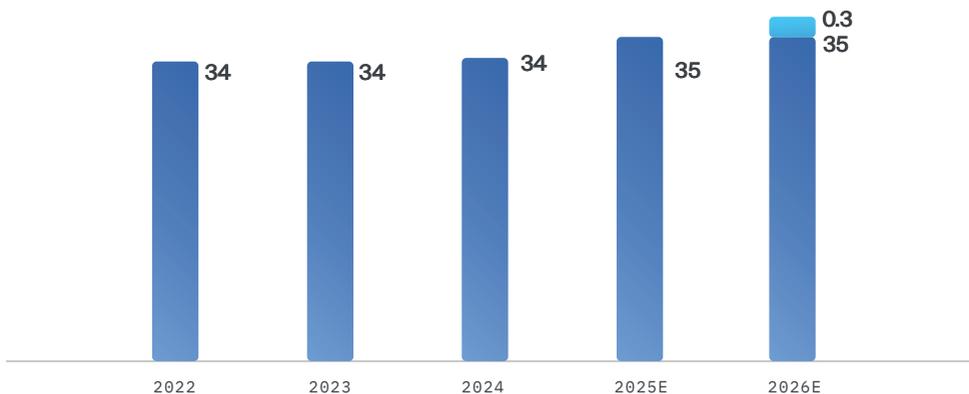
- The occupancy rate for Aldar's retail assets stood at 90% during the first nine months of 2025
- Revenue generated from Aldar's retail assets grew by 12% YoY to AED 642 million during the first three quarters of 2025
- Yas Mall continues to excel as a premier shopping destination in Abu Dhabi, with overall occupancy reaching 97%
- 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 half of 2025

# HOSPITALITY SUPPLY



## Hotel Room Supply

2022-2026 | '000 Keys



■ HOTEL AND SERVICED APT ROOMS

■ NEW SUPPLY

SOURCE: DCTAD, MEED PROJECTS, VALUSTRAT

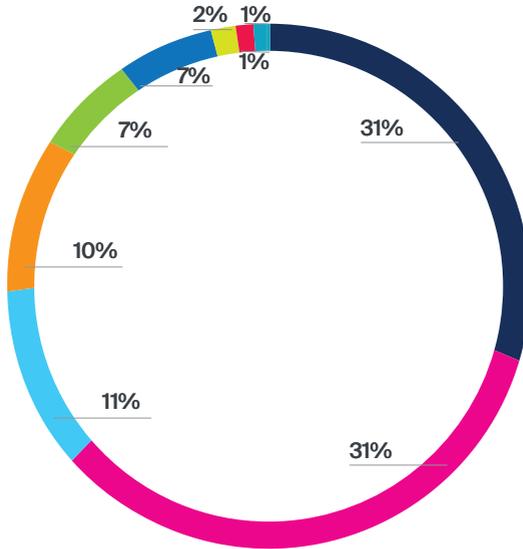
- As of November 2025, the emirate had a total of 28,574 hotel rooms and 5,977 hotel apartments according to the Department of Culture and Tourism
- Tourism volumes in Abu Dhabi continue to rise steadily, aligned with the Tourism Strategy 2030, which targets 39.3 million annual visitors (overnight and same-day), an expansion of hotel capacity to 50,000 rooms, and an increase in the sector's GDP contribution to AED 90 billion by 2030
- Upcoming hotels include Mondrian Abu Dhabi, Olympia Resort and The Mangroves Abu Dhabi, LXR Hotels & Resorts
- 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

NOV 2025



ASIA (EXCLUDING ARAB COUNTRIES)

OTHER ARAB COUNTRIES

AFRICA (EXCLUDING ARAB COUNTRIES)

EUROPE

NORTH AND SOUTH AMERICA

OTHERS & NOT MENTIONED

UAE

GCC

AUSTRALIA AND NEW ZEALAND

SOURCE: DCTAD, VALUSTRAT

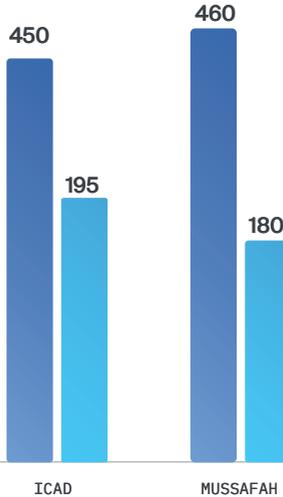
- The Department of Culture and Tourism Abu Dhabi (DCTAD) recorded an occupancy rate of 83.1% for the first eleven months of 2025, up 2.3% from the same period in 2024
- The Average Room Rate (ARR) for hotels in Abu Dhabi stood at AED 559, up 18.5% annually, whilst the Revenue Per Available Room (RevPAR) was AED 465, an increase of 22.2% YoY
- Abu Dhabi hotels welcomed a total of 4.9 million guests during the eleven months of 2025 according to data from the Statistics Centre Abu Dhabi
- Abu Dhabi Airports handled over 33 million passengers in 2025, a record for the emirate, with Zayed International Airport carrying 8.59 million in Q4, up 13.8% YoY, supporting tourism and hospitality demand amid network expansion and rising traffic at Al Bateen and Al Ain airports too

# INDUSTRIAL INVESTMENT/SUPPLY



## Industrial Prices

AED / SQ FT



■ PRICE HIGH ■ PRICE LOW

SOURCE: VALUSTRAT

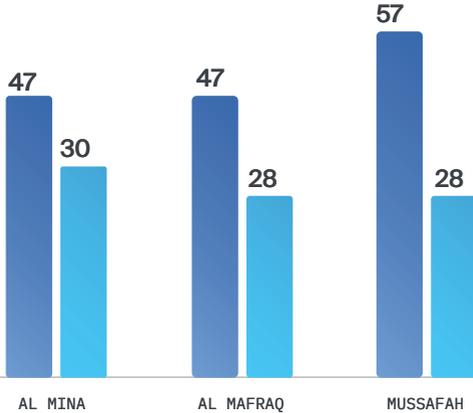
- Aldar acquired two Grade A industrial and logistical assets in KEZAD from AD Ports Group for AED 570 million, covering over 136,000 sq m (1.46 million sq ft) and fully leased to Noon and Emtelle, expanding its logistics portfolio. The facilities have direct access to Khalifa Port, Etihad Rail and major highways, supporting efficient regional distribution
- Blackstone and Abu Dhabi-based Lunate partnered to establish Gulf Logistics Infrastructure Development Enterprise (Glide), a regional platform targeting up to USD 5 billion in Grade A logistics assets across the GCC, focused on the development, acquisition and management of high-quality warehousing and logistics infrastructure to capitalise on rising trade flows and supply chain demand
- Orbitworks opened a 4,645 sq m (49,998 sq ft) satellite manufacturing facility in KEZAD, capable of producing 50 satellites per year. The facility creates skilled jobs and will produce the Altair constellation, supporting near real-time Earth observation and positioning Abu Dhabi as a regional space hub
- Jotun signed a 50-year lease with KEZAD to establish a new paint and coatings facility in Musaffah, Abu Dhabi, investing AED 490 million in an 83,177 sq m (895,309 sq ft) site to replace its existing smaller facility. The expansion will boost regional production and distribution, create around 200 jobs, and support Abu Dhabi's industrial and construction sectors

# 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 1,938 and AED 4,951 per sq m (AED 180 to AED 460 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 6.6% at the lower end and 13.3% at the higher end. Overall, rates typically range from AED 301 to AED 646 per sq m per annum (AED 28 to AED 60 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

AGBI

## State of the market: Property in Abu Dhabi and RAK

23 DEC 2025

The property markets of Abu Dhabi and Ras Al Khaimah enter 2026 with strong foundations, but are being driven by structurally different forces.

Both recorded growth in capital values, rental performance and transactions in 2025, yet the latest data shows the UAE capital shifting toward a more supply-led and affordability-aware cycle.

Abu Dhabi's residential market posted its strongest capital growth on record in the third quarter. The ValuStrat Price Index for the city rose 10.5 percent year on year and 4 percent quarter on quarter.

**Economy**  
Middle East

## Abu Dhabi real estate market records strongest growth yet in Q3 with over 33,000 new residential units projected by 2030

12 NOV 2025

Abu Dhabi's real estate market recorded its strongest growth to date in Q3 2025, marked by a sharp acceleration in residential capital values and rental prices, robust demand, and notable activity in off-plan transactions, according to ValuStrat's latest quarterly review. Haider Tuaima, managing director and head of Real Estate Research at ValuStrat, highlighted several key findings that underscore the sector's vibrancy across residential, commercial, hospitality, and industrial segments.

The ValuStrat Price Index (VPI), the benchmark tracking capital values in Abu Dhabi's freehold residential market, surged 4 percent quarterly and 10.5 percent annually, reaching 133.4 points based on a Q1 2021 baseline of 100 points. Villa prices led gains with a 11.6 percent annual rise to 143.2 points, while apartment values grew 4.4 percent quarter-on-quarter to 124.1 points.

**AlEtihad**  
السوق

## Rising demand for freehold properties in Abu Dhabi drives surge in prices and rents: ValuStrat

5 AUG 2025

Abu Dhabi's real estate market recorded its strongest growth on record in the third quarter of 2025, as demand for affordable freehold apartments and high-quality villas fuelled a broad-based rally across both sales and rental segments, according to ValuStrat, a noted real estate consultancy.

Average residential prices rose 4% quarter on quarter and 10.5% year on year, reflecting a sharp acceleration from 1.7% and 5.3%, respectively, during the same period last year, ValuStrat data showed. Villa prices jumped 11.6% annually, with Saadiyat Island leading gains at 21.2%, followed by Al Reef (8.1%) and Al Raha (7.7%). Apartment values increased 4.4% over the quarter, with the strongest annual rises seen in Al Reef (13.3%) and Saadiyat Island (10.5%).

**ConsultancyME**

## 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.



---

## 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**

**Subscribe for regular market intelligence.**

**Please email us at:**  
[business.enquiries@valustrat.com](mailto:business.enquiries@valustrat.com)

---

SINCE 1977

# Strategy determines outcome. No matter what industry you're in, we're here to help you win.

---



**Declan King, MRICS**  
Senior Partner & Group Head of  
Real Estate  
[declan.king@valustrat.com](mailto:declan.king@valustrat.com)



**Haider Tuaima**  
Managing Director & Head of Real  
Estate Research  
[haider.tuaima@valustrat.com](mailto:haider.tuaima@valustrat.com)



**Vismer Mulenga, MRICS**  
Director, Commercial Valuation  
[vismer.mulenga@valustrat.com](mailto:vismer.mulenga@valustrat.com)



**Darshan Shah, MRICS**  
Partner & Group Head, Industrial  
Consulting  
[darshan.shah@valustrat.com](mailto:darshan.shah@valustrat.com)



**Adrian Briones, MRICS**  
Associate Director & Head of  
Residential Valuation  
[adrian.briones@valustrat.com](mailto:adrian.briones@valustrat.com)



**Anchal Rajpal**  
Senior Research Analyst  
[anchal.rajpal@valustrat.com](mailto:anchal.rajpal@valustrat.com)

---

## Dubai, AE

702 Palace Towers  
Dubai Silicon Oasis  
+971 4 326 2233

## Abu Dhabi, AE

Office C102G, Al Bateen,  
Tower C6 Bainunah,  
ADIB Building  
+971 2 207 6664

## London, UK

189 Brompton Road,  
Knightsbridge, London  
SW3 1NE, UK

## Riyadh, SA

6th Floor, South Tower  
King Faisal Foundation Building  
Al Faisaliah Complex  
+966 11 293 5127

## Jeddah, SA

111 Jameel Square,  
Tahlia Road  
+966 12 283 1455

## Doha, QA

Office 704,  
Palm Towers B West Bay  
+974 4 039 9001

## Karachi, PK

8th Floor, Elegant Tower,  
Block 5, Clifton  
+92 213 517 4201

**For business enquiries, please email us at:**  
[business.enquiries@valustrat.com](mailto:business.enquiries@valustrat.com)

---

THIS DOCUMENT IS THE PROPERTY OF VALUSTRAT CONSULTING FZCO AND MUST NOT BE REPRODUCED OR TRANSMITTED IN ANY FORM OR BY ANY MEANS, WITHOUT THE PRIOR WRITTEN CONSENT OF VALUSTRAT CONSULTING FZCO. WE WELCOME YOUR CONSTRUCTIVE FEEDBACK AND ANY CORRECTIONS THAT MAY NEED TO BE MADE TO THIS DOCUMENT. VALUSTRAT CONSULTING FZCO DOES NOT ACCEPT ANY LIABILITY IN NEGLIGENCE OR OTHERWISE FOR ANY DAMAGE SUFFERED BY ANY PARTY RESULTING FROM RELIANCE ON THIS DOCUMENT.