Quarter 3 - 2025

Abu Dhabi Market Overview

MPM CONNECTS Research with Market Intelligence

MPM Property Advantage

We manage the largest Abu Dhabi mainland property portfolio

180 **Billion AED+** Value of investments advised on

100 **Billion AED+** Value of commercial & residential valuations

200 **Billion AED+** Value of assets under management

75 **Billion AED+** Value of developments advised on

96% **Portfolio** occupancy rate across UAE

300 **Thousand+** Total lease transactions

12 **Million sqft** Total area of real estate under management

04 **Offices** across the UAE

RESIDENTIAL
Market Overview

Market Insights

> Development remains concentrated in master-planned communities, with over 1,600 units scheduled for delivery by year-end. Timely handovers will be key to easing the supply-demand gap, while delays risk deferring inventory and intensifying pressure on existing stock.

Supply

According to MPM Research, Abu Dhabi's residential real estate market reached a total stock of approximately 305,000 units by the end of Q3 2025, comprising both apartments and villas. The quarter was marked by starting the handover of Nad Al Dhabi Villas and Villas in Jubail Island, adding around 250 units to supply. Development activity remained concentrated in high-demand locations such as Fahid Island, Saadiyat Island, and Al Shamkhah, reflecting continued investor and end-user appetite for master-planned communities. Looking ahead, the market is projected to expand by more than 35,000 units by 2028, with a forecasted distribution of 67% apartments and 33% villas. In the near term, over 1,600 units are scheduled for delivery by year-end 2025, including 700 apartments and 900 villas.

Significant residential projects launched in the third quarter of 2025 include:

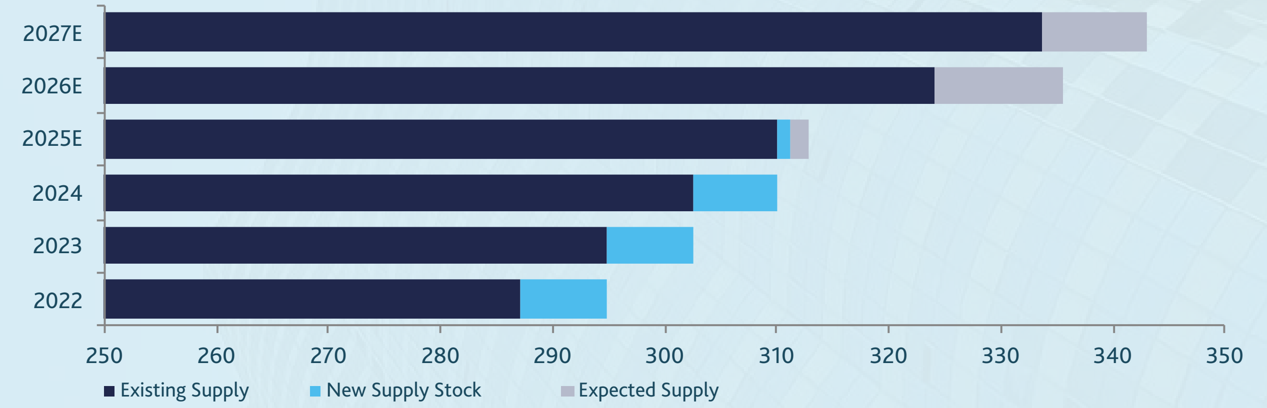
- Fahid Beach Terraces on Fahid Island – 501 units
- Yas Living on Yas Island - 678 units
- Radiant Elite Tower on Al Reem Island - 582 units
- Bab Al Qasr Canal View Residence 22 on Al Raha Beach – 242 units
- Vida Residences on Saadiyat Island - 121 units
- Bashayer Villas on Al Hudayriyat Island - 133 units
- Bloom Living (Marbella) on Zayed City – 207 units

Major handovers anticipated by the end of 2025 include Jubail Island (474 units), Louvre Residences on Saadiyat Island (416 units) and Bloom Living Villas - Tolerado in Zayed City (405 units).

It is important to note that any delays in the handover of residential units could defer the expected supply to the subsequent year. Such delays may exacerbate the supply-demand gap, placing additional pressure on the existing inventory. Conversely, timely handovers are expected to contribute significantly towards closing the supply-demand gap, thereby steering the market towards stabilization.

Abu Dhabi Residential Supply 2022 - 2027

No. of Units in '000s



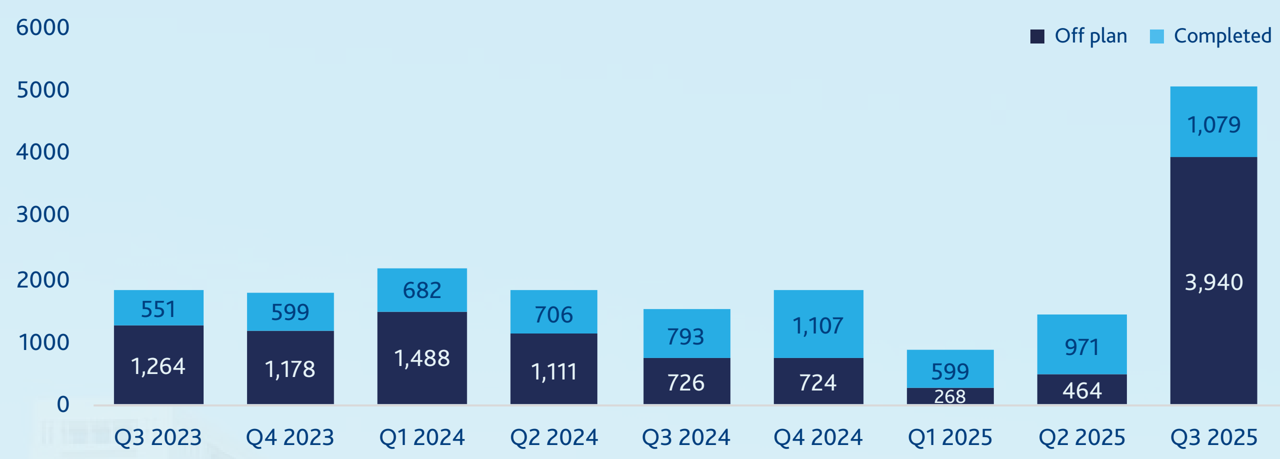
Source: MPM Research 2025

The Q3 number reflects the huge surge in the transaction numbers in Abu Dhabi, the highest quarterly residential transactions in last 2 years. According to DARI, the Real Estate Digital Ecosystem by the Department of Municipalities and Transport, residential sales transactions value reached around 20 billion AED in Q3 2025.

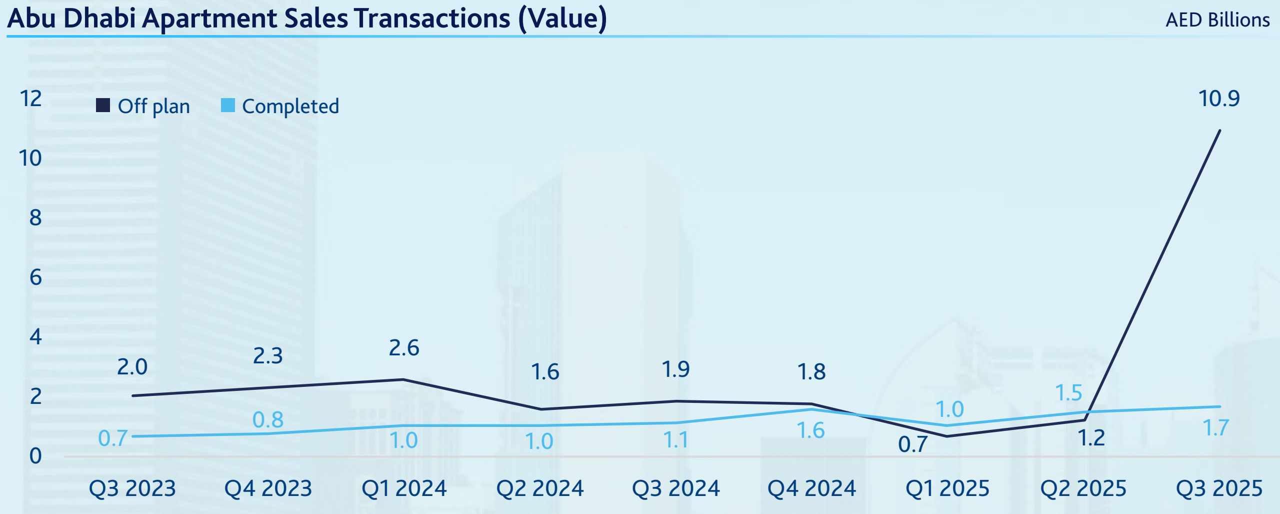
Abu Dhabi's residential market experienced a powerful surge in Q3 2025, with both apartment and villa segments posting exceptional growth in transaction volumes and values. Apartment transaction volume rose by 230% YoY and 250% QoQ, while transaction values jumped 320% YoY and 367% QoQ, driven primarily by off-plan activity, marking the highest quarterly transaction volume for apartments in the last three years. This momentum reflects strong investor confidence, attractive developer offerings, and a wave of new project launches across prime locations like Saadiyat Island and Yas Island.

As MPM Research first highlighted two years ago, Abu Dhabi's residential market has continued to outperform expectations. The powerful combination of thriving off-plan launches, and a resilient secondary market cements the capital as one of the UAE's most dynamic and competitive real estate hubs. With investor appetite at record highs and developers fast-tracking new project pipelines, Abu Dhabi is firmly positioned to sustain its growth trajectory into 2026.

Abu Dhabi Apartment Sales Transactions (Volume)



Abu Dhabi Apartment Sales Transactions (Value)



Source: MPM Research/ADREC 2025

Apartments

> Abu Dhabi's residential market soared to a two-year high in Q3 2025, with record-breaking transactions across residential sector. The quarter was defined by surging demand, robust off-plan sales, and heightened investor confidence, the emirate cemented its position as one of the region's most dynamic real estate hubs.

Performance

Apartments

18%

Y-O-Y sales growth

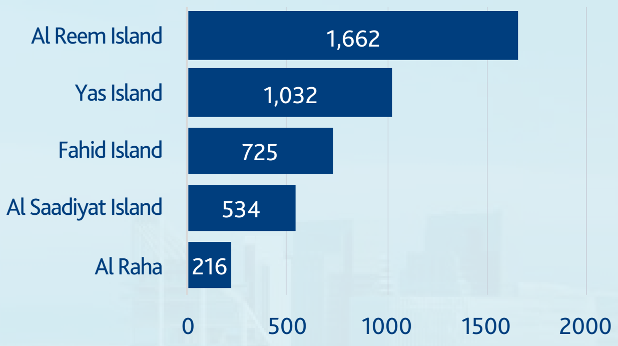
MPM's analysis shows that Abu Dhabi's residential apartment sector expanded by 18% in Q3 2025 compared to the same quarter in 2024. On a quarterly basis, sales prices advanced by 5%, extending the consistent growth trajectory observed over the past three years. Looking ahead, MPM projects this positive momentum to persist through year-end, supported by sustained demand and resilient market fundamentals.

Abu Dhabi's apartment sector has solidified its role as a key growth driver in 2025, with transaction volumes and values rising across both mid-market and luxury segments. Off-plan projects on Saadiyat Island, Yas Island, and Al Reem Island continue to attract strong demand from end-users and international investors, supported by government diversification policies, visa reforms, and infrastructure expansion. This balanced demand profile—anchored by affordability in mid-tier units and prestige in waterfront developments, has reinforced market resilience.

Looking ahead, the apartment segment is set to play a pivotal role in Abu Dhabi's non-oil economy by drawing foreign capital, sustaining construction pipelines, and stimulating related sectors such as retail and tourism. With population growth, expatriate ownership, and investor-friendly regulations driving momentum, apartments are expected to remain the most in-demand product type, underpinning the emirate's economic diversification strategy into 2026 and beyond.

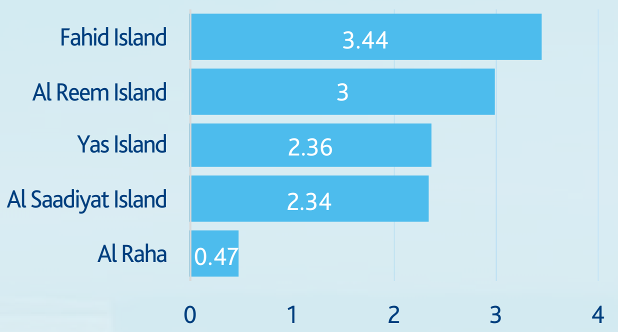
The influx of additional residential units is expected to alleviate some supply pressures, helping to balance the market and potentially moderate the rate of capital value increases. Yas Island – Waters Edge led the market with significant year-over-year growth of 31%. Al Bandar, Saadiyat Beach Residence, Shams Abu Dhabi, Al Muneera and Saadiyat-Park View demonstrated strong performance with growth rates between 19% and 27%. Conversely, Gate ARC Towers, Marina Square, City of Lights – Hydra, Sun and Sky Towers and Masdar City experienced moderate increases within a range of 5% to 13%. (Refer to graph for detailed analysis).

Top 5 - Apt. Sales Trans. (Volume)



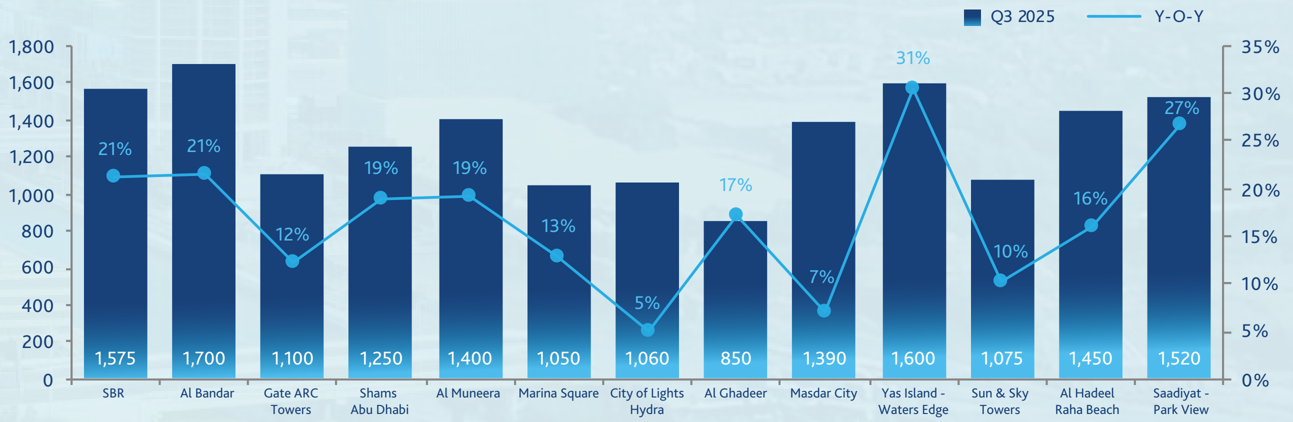
Top 5 - Apt. Sales Trans. (Value)

AED Billion



Apartment Sale Rates - Q3 2025

AED/sqft



Source: MPM Research 2025

Apartments Rental Rates

MPM Research indicates that apartment developments across Abu Dhabi experienced a quarterly rental growth of 2% in Q3 2025, with an annual growth of 11% compared to the same period last year. During this quarter, Abu Dhabi recorded a total of 54,310 rent transactions, both new and renewal, and the highest in last two years, reflecting an overall 32% increase in leasing contracts and a 41% increase in leasing value compared to the same period last year.

While leasing transactions in Abu Dhabi have surged to record levels in 2025, the percentage growth in rental rates has moderated compared to the sharp increases seen over the past two years. According to MPM Research, this deceleration is primarily linked to the steady delivery of new residential projects across key investment zones such as Yas Island, Al Raha Beach, and Al Reem Island. The influx of supply has expanded tenant choice and created a more competitive leasing environment. This has tempered landlords' ability to push rents upward at the same pace as in 2023–2024, when supply was tighter and demand was outpacing availability.

MPM Agency and Property Management's residential letting team reports that occupancy levels across most newly delivered inventory in Abu Dhabi remain above 90%, underscoring the strength of underlying demand fundamentals. The market, however, is shifting from a period of rapid rental escalation toward a phase of stability and sustainable growth.

MPM Research anticipates that while rental rates will continue to edge upward, the pace of increase will be more measured, reflecting a healthier equilibrium between expanding supply and resilient tenant demand. This trend is expected to reinforce long-term market stability and support Abu Dhabi's broader real estate outlook. Supplementary mapping highlights rental rate data across selected districts, while our overall dataset provides comprehensive coverage of the capital's residential landscape.

11 %

Y-O-Y rental growth

- Studio
- 1 Bedroom
- 2 Bedroom
- 3 Bedroom
- ▼▲ Y.o.Y % Change

AED/unit/annum

	Y.o.Y % Change	Studio	1 Bedroom	2 Bedroom	3 Bedroom
Marina Square	12 % ▲	61,000	83,000	120,000	150,000
Saadiyat Beach	10 % ▲	64,000	91,000	160,000	200,000
Shams Abu Dhabi	16 % ▲	65,000	90,000	115,000	140,000
Yas Island	5 % ▲	70,000	86,000	131,000	170,000
Al Nahyan Camp	10 % ▲	50,000	65,000	90,000	125,000
Al Reef 1	9 % ▲	47,000	63,000	78,000	93,000
Al Bateen	8 % ▲	72,000	94,000	130,000	180,000
Najmat & Tamouh	15 % ▲	51,000	73,000	106,000	135,000
Al Raha Beach	8 % ▲	70,00	95,000	130,000	165,000
Khalifa City	6 % ▲	50,000	62,000	91,500	135,000
Al Muneera	18 % ▲	-	88,000	127,000	175,000

Source: MPM Research 2025

Villas

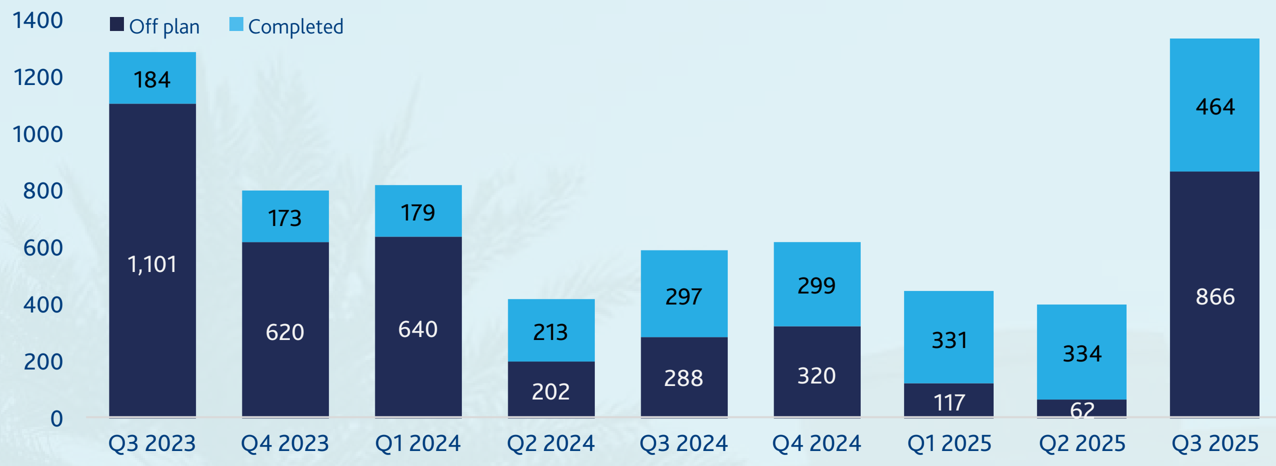
> Abu Dhabi's villa market in 2025 is experiencing a pronounced upswing, with demand for ready villas and lifestyle-oriented communities driving record sales and price growth.

According to MPM Research, villa prices in Abu Dhabi have maintained a steady upward trajectory, underpinned by constrained prime supply, sustained population growth, and an influx of high-net-worth expatriates establishing residency in the capital. This performance reflects a broader lifestyle shift, with families and investors increasingly prioritizing larger living spaces, premium amenities, and community-focused environment factors that continue to position the villa segment as a cornerstone of the emirate's residential market.

In Q3 2025, villa transactions mirrored the strength seen in the apartment sector, recording a 127% year-on-year and 236% quarter-on-quarter increase in sales volumes, while transaction values rose 136% YoY and 261% QoQ. Off-plan villa sales surged by 201% YoY and an exceptional 1,297% QoQ, marking the strongest quarter for villa activity in the past two years and underscoring the renewed appetite for lifestyle-driven communities.

Demand remains concentrated in luxury waterfront villas and family-oriented townhouses, aligning with Abu Dhabi's dual positioning as a global investment hub and lifestyle destination. With supply pipelines expanding yet demand consistently outpacing delivery, the villa market is expected to sustain upward pressure on values, reinforcing its role as a key driver of Abu Dhabi's real estate economy into 2026 and beyond.

Abu Dhabi Villa Sales Transactions (Volume)



Abu Dhabi Villa Sales Transactions (Value)

AED Billions

Source: MPM Research/ADREC 2025

Performance

Villas

16%

Y-O-Y sales growth

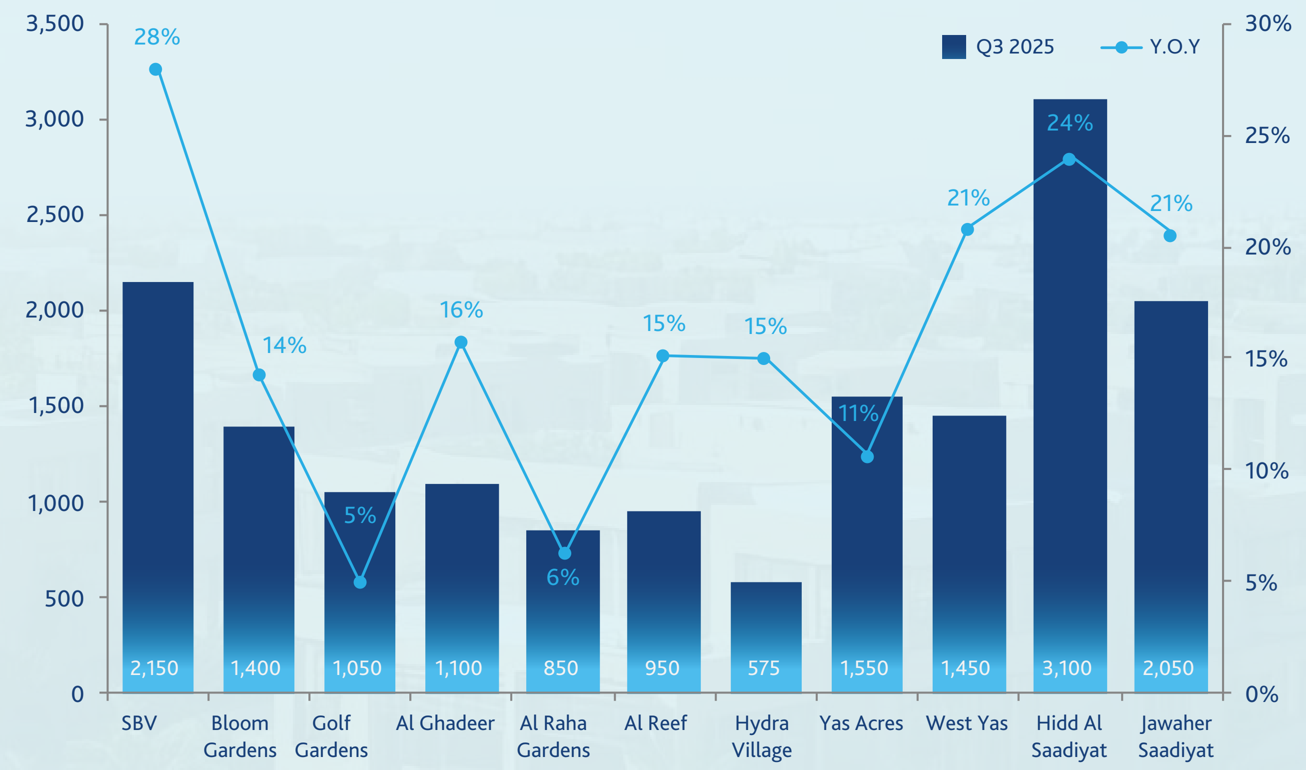
MPM Research recorded a city-wide 16% year-on-year and 4% quarter-on-quarter increase in Abu Dhabi's villa sales market during Q3 2025, closely aligning with the growth trajectory observed in the apartment sector.

Prime communities such as Saadiyat Beach Villas, Hidd Al Saadiyat, West Yas, and Jawahar Saadiyat led performance, registering annual price gains between 21% and 28%.

Meanwhile, villa sales across other established master-planned communities posted more moderate growth of 5% to 16%, underscoring the market's resilience and highlighting sustained demand across both premium and mature residential areas.

Villa Sale Rates - Q3 2025

AED/sqft



Source: MPM Research 2025

Villa
Rental Rates

The Abu Dhabi villa rental market remained resilient in Q3 2025, with premium and luxury segments continuing to outperform. According to MPM Research, average villa rents rose by 7–11% year-on-year across popular communities, while prime locations recorded stronger gains of 13–20%.

Rental activity was equally robust, with approximately 10,950 villa and townhouse transactions completed during the quarter. Renewal leases accounted for more than 58% of activity, while new leases represented 42%. Overall, leasing transaction values increased 33% year-on-year, with volumes up 53%, underscoring the depth of tenant demand.

Demand patterns highlight a dual-market dynamic. Luxury waterfront villas on Saadiyat Island and Yas Island continue to command premium rents, supported by high-net-worth expatriates and long-term residents seeking exclusivity, cultural proximity, and access to leisure amenities.

In parallel, mid-tier family villas and townhouses in communities such as Khalifa City, Al Raha Gardens, and West Yas are attracting professional families prioritizing affordability, space, and access to schools and community infrastructure.

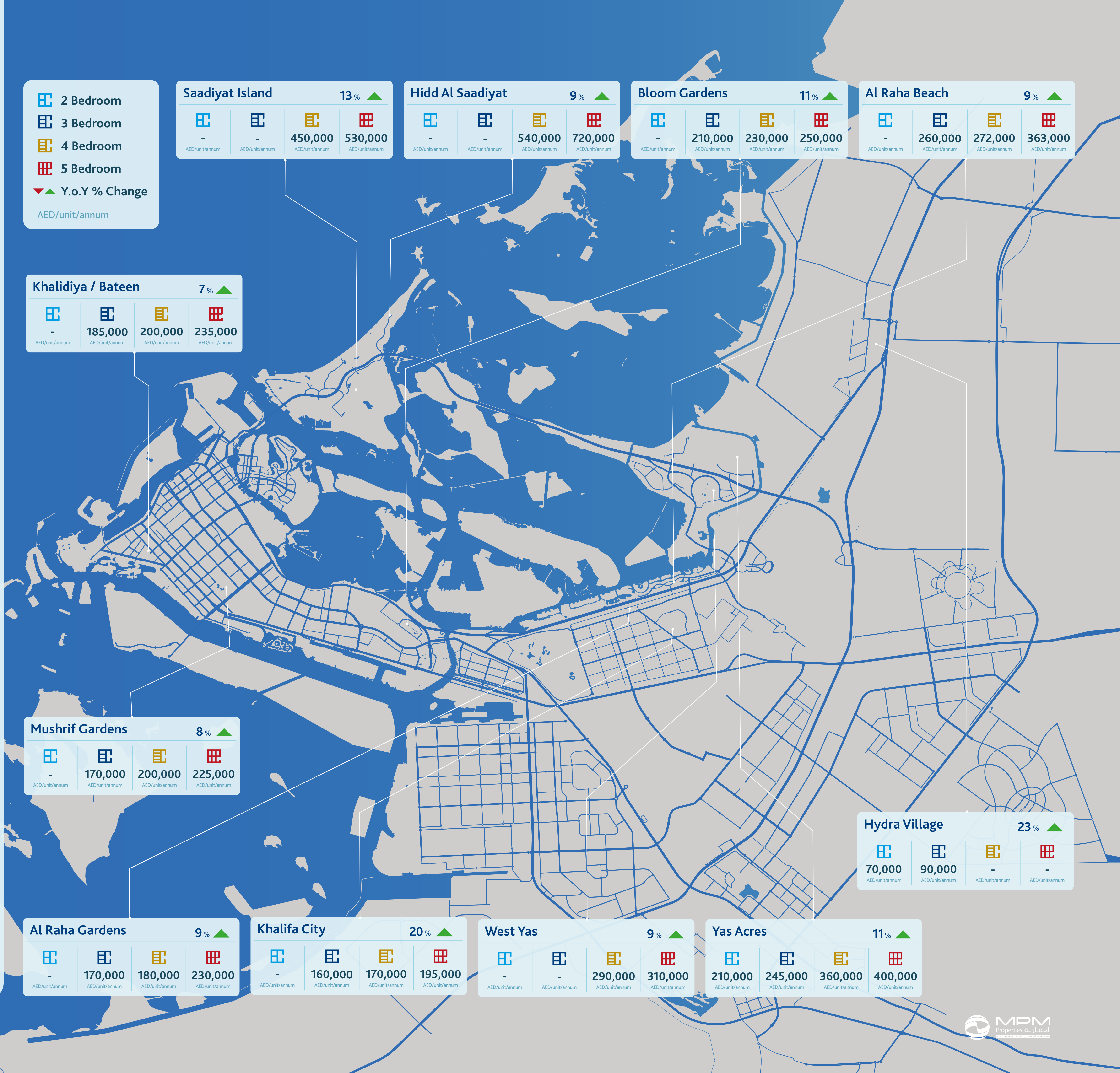
MPM's analysis indicates that tenant preferences are increasingly shaped by larger layouts, private outdoor areas, and integrated community facilities, alongside growing interest in sustainability and energy-efficient homes. With portfolio occupancy levels consistently above 90–95% and waitlists in place, the villa rental sector is positioned to sustain its momentum, reinforcing Abu Dhabi's role as a leading regional residential market.

The map reflects selected areas for villa rental rates, while our overall data covers most areas in the capital emirate, and the quarterly growth is based on overall rental rates.

12%

Y-O-Y rental growth

Source: MPM Research 2025



- 🟦 2 Bedroom
- ⬛ 3 Bedroom
- 🟨 4 Bedroom
- 🟥 5 Bedroom
- ▼▲ Y.o.Y % Change

AED/unit/annum

Saadiyat Island 13 % ▲

🟦	⬛	🟨	🟥
-	-	450,000	530,000
AED/unit/annum	AED/unit/annum	AED/unit/annum	AED/unit/annum

Hidd Al Saadiyat 9 % ▲

🟦	⬛	🟨	🟥
-	-	540,000	720,000
AED/unit/annum	AED/unit/annum	AED/unit/annum	AED/unit/annum

Bloom Gardens 11 % ▲

🟦	⬛	🟨	🟥
-	210,000	230,000	250,000
AED/unit/annum	AED/unit/annum	AED/unit/annum	AED/unit/annum

Al Raha Beach 9 % ▲

🟦	⬛	🟨	🟥
-	260,000	272,000	363,000
AED/unit/annum	AED/unit/annum	AED/unit/annum	AED/unit/annum

Khalidiya / Bateen 7 % ▲

🟦	⬛	🟨	🟥
-	185,000	200,000	235,000
AED/unit/annum	AED/unit/annum	AED/unit/annum	AED/unit/annum

Mushrif Gardens 8 % ▲

🟦	⬛	🟨	🟥
-	170,000	200,000	225,000
AED/unit/annum	AED/unit/annum	AED/unit/annum	AED/unit/annum

Hydra Village 23 % ▲

🟦	⬛	🟨	🟥
70,000	90,000	-	-
AED/unit/annum	AED/unit/annum	AED/unit/annum	AED/unit/annum

Al Raha Gardens 9 % ▲

🟦	⬛	🟨	🟥
-	170,000	180,000	230,000
AED/unit/annum	AED/unit/annum	AED/unit/annum	AED/unit/annum

Khalifa City 20 % ▲

🟦	⬛	🟨	🟥
-	160,000	170,000	195,000
AED/unit/annum	AED/unit/annum	AED/unit/annum	AED/unit/annum

West Yas 9 % ▲

🟦	⬛	🟨	🟥
-	-	290,000	310,000
AED/unit/annum	AED/unit/annum	AED/unit/annum	AED/unit/annum

Yas Acres 11 % ▲

🟦	⬛	🟨	🟥
210,000	245,000	360,000	400,000
AED/unit/annum	AED/unit/annum	AED/unit/annum	AED/unit/annum

OFFICE
Market Overview

Market Insights

> **The Abu Dhabi office market in 2025 is defined by exceptionally tight supply, escalating rental rates, and strong demand for Grade A space, with vacancy rates at historic lows.**

Supply

Abu Dhabi's office market recorded its first decline in rental transactions in Q3 2025, following a year of robust growth. As of mid-September, a total of 10,088 rental transactions were registered, representing around 20% year-on-year contraction. The combined transaction value stood at AED 0.46 billion, the lowest level in the past two years—reflecting an annual decline of more than 25%. This marks a notable shift after three consecutive years of consistent expansion in office leasing activity across both new and renewal categories.

The slowdown, however, is not demand-driven but rather a direct consequence of supply constraints. Occupancy levels across the emirate surpassed 95%, with Grade A stock effectively at full capacity. The scarcity of available space has limited new leasing opportunities, while renewal negotiations have been prolonged as tenants seek to secure favorable terms, often extending discussions by 3–5-year lease agreement.

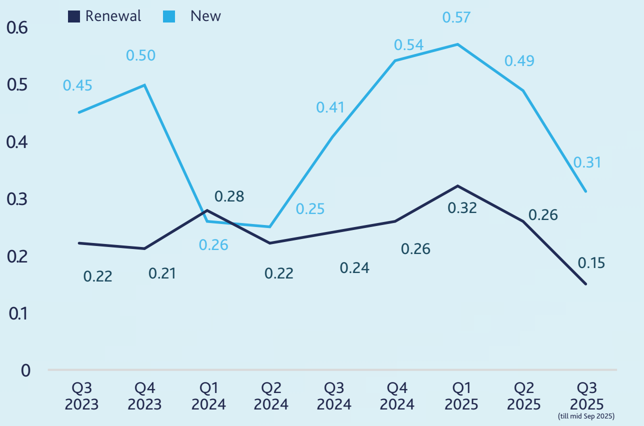
MPM Research had previously anticipated this trend, citing the emirate's extremely limited office inventory, particularly in prime Grade A assets—as a structural challenge. The current decline in transaction volumes therefore reflects a market operating at near full occupancy, where constrained supply rather than weakening demand is shaping performance. The Abu Dhabi office market is projected to remain constrained, with no meaningful relief in supply expected before 2027.

By the close of 2025, approximately 72,000 sqm of new office space is scheduled for delivery across Abu Dhabi. Key projects include Yas Place on Yas Island, Shams Business Tower (SAAS) on Reem Island, and Masdar City Square on Masdar Island, all anticipated to reach completion in the final quarter of the year. However, a significant share of this upcoming supply is expected to be pre-leased prior to handover, providing only limited relief to the prevailing shortage of prime office space.

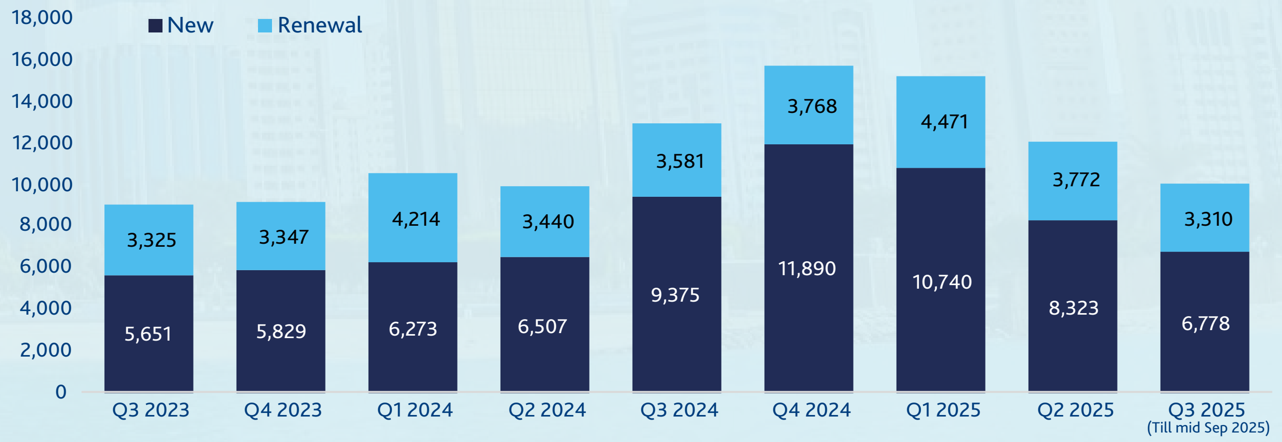
Abu Dhabi Office Supply 2020 - 2027

GLA (in 000's sq.m.)

Office Leasing Transactions in AED Billions (Value)



Abu Dhabi Office Rental Transactions (Volume)



Source: MPM Research/Quanta 2025

Performance

Offices

19%

Y-O-Y rental growth

Abu Dhabi Global Market (ADGM) strengthened its position as the MENA region's largest financial hub in H1 2025, with over 11,000 active licenses and a 42% annual rise in assets under management. This momentum, supported by transformative partnerships and cross-border deals, is directly stimulating demand for premium office space in Abu Dhabi, particularly within Al Maryah Island, where ADGM is headquartered. The centre's expansion continues to underpin the emirate's office real estate market, reinforcing sustained occupier demand for Grade A stock and positioning the sector as a critical beneficiary of Abu Dhabi's financial and economic diversification strategy.

MPM Research highlights the Abu Dhabi office market as a key driver of the capital's real estate sector, supported by the emirate's broader economic expansion. According to the Statistics Centre – Abu Dhabi (SCAD), real GDP reached AED 306.3 billion in Q2 2025, up 3.8% year-on-year, with the non-oil economy growing 6.6% to a record AED 174.1 billion. For the first time in the second quarter, non-oil activities accounted for 56.8% of total GDP, underscoring Abu Dhabi's accelerating diversification. This structural shift has reinforced demand for premium office space, positioning the sector as a critical beneficiary of the emirate's non-oil growth momentum.

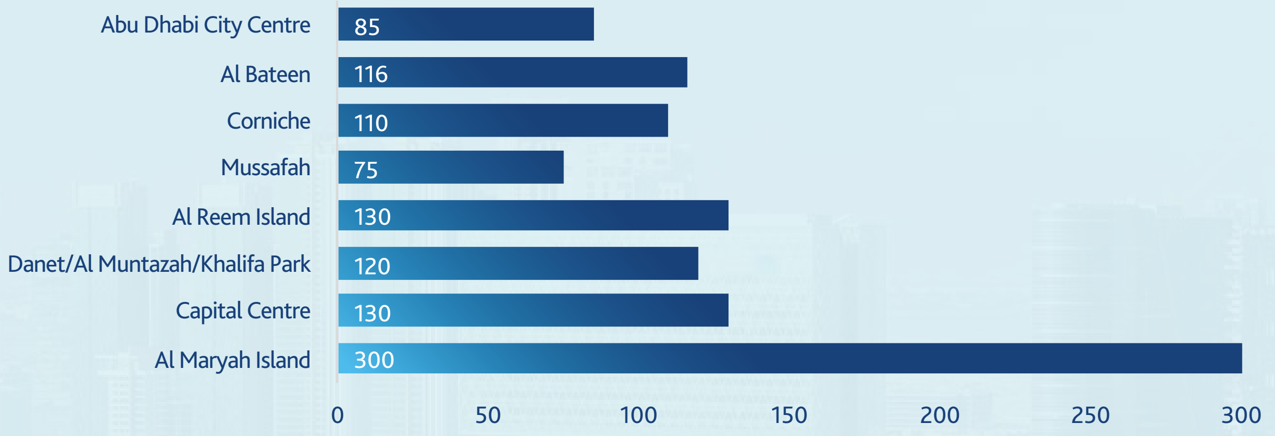
The third quarter of 2025 continued to perform strongly, with ongoing upward trends in office rental rates. MPM's research indicates a 19% year-on-year increase in Abu Dhabi's office rental market, highlighting a robust upward trajectory. Al Maryah Island continued to remain the top performer, achieving the highest rental rates in the market. Other areas selected in the chart are also experiencing positive trends, with rising rental rates and growing demand.

(Refer to both the graph for office space areas rental rates and property-level rents.)

To address the ongoing demand–supply imbalance in Abu Dhabi's office market, accelerated delivery of new premium projects will be essential, alongside the adaptive reuse and upgrading of secondary stock. Expanding flexible workspace solutions can also help bridge the gap, ensuring supply evolves in line with occupier requirements. Repositioning existing Grade B and lower-tier properties to incorporate modern specifications, sustainability features, and flexible layouts will enable landlords to capture rising demand, while supporting the emirate's long-term diversification strategy and reinforcing the resilience of its commercial real estate sector.

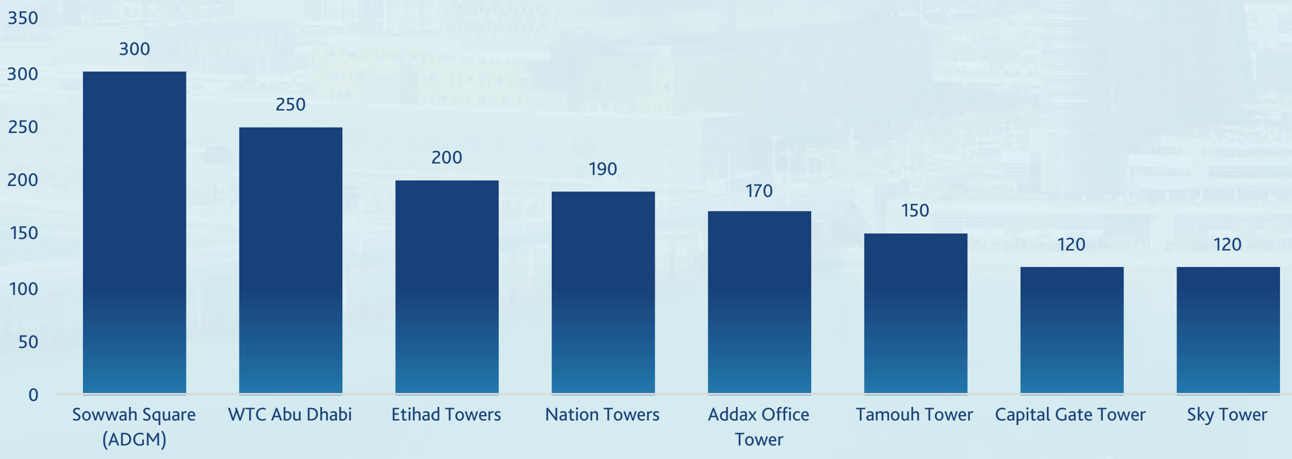
Average Annual Rents by Location (Shell & Core) - Q3 2025

AED/sqft



Average Annual Rents by Towers (Shell & Core) - Q3 2025

AED/sqft



Source: MPM Research 2025

> **Occupiers are increasingly focused on securing high-quality, sustainable, and flexible office environments, while landlords are capitalizing on limited availability through early lease renewals and upward rental adjustments. This dynamic is reinforcing a landlord-favorable market and placing continued pressure on prime office stock of Abu Dhabi.**

RETAIL
Market Overview

Market Insights

> Abu Dhabi's retail real estate market in 2025 is showing steady growth, supported by strong consumer spending, tourism recovery, and the emirate's diversification strategy. Demand is concentrated in prime malls and mixed-use destinations, while community retail and experiential formats are gaining traction.

Supply

The Abu Dhabi retail real estate sector sustained strong momentum in 2025, underpinned by limited new supply and robust demand drivers. By Q3 2025, the capital emirate's Gross Leasable Area (GLA) reached 3.26 million sqm, with minimal new mall completions reinforcing high occupancy and rental stability across prime assets.

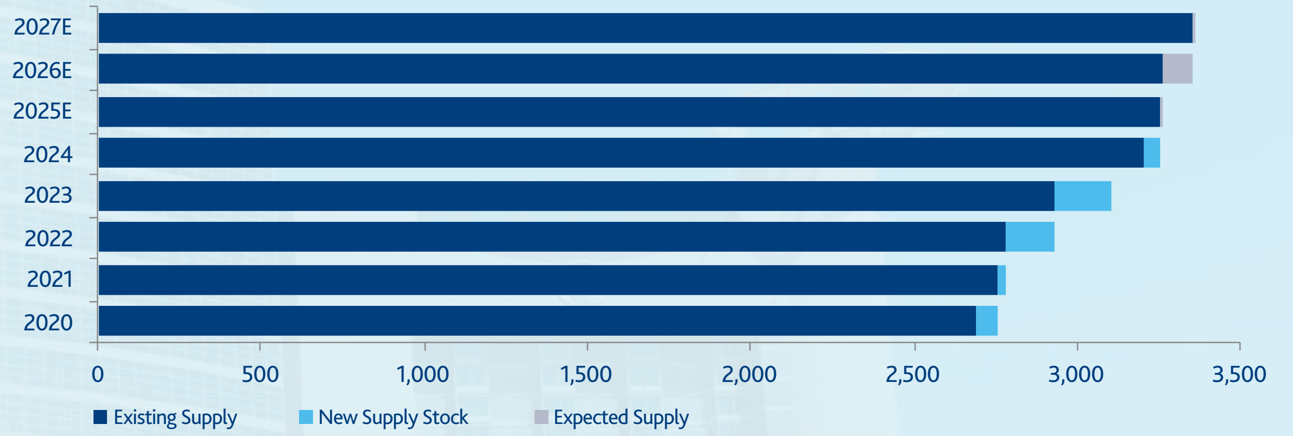
As per MPM Research, Footfall in leading destinations such as Yas Mall, Al Wahda Mall, and The Galleria Al Maryah Island remained elevated, supported by tourism inflows, office activity, and resilient luxury retail demand. Tourism-led clusters on Yas Island and Saadiyat Island outperformed, benefiting from cultural attractions and leisure-driven spending, while neighborhood strip malls and community centers in residential districts recorded optimal performance, reflecting strong demand for convenience-led retail.

Market dynamics in Q3 2025 were further shaped by a surge in residential transactions across mixed-use master-planned communities including Fahid Island, Saadiyat Island, and Al Hudayriyat Island, driving expansion of integrated community retail footprints. Upcoming supply is expected to concentrate on community-focused formats in Saadiyat Island and Al Shamkha, aligning with shifting consumer preferences toward neighborhood retail.

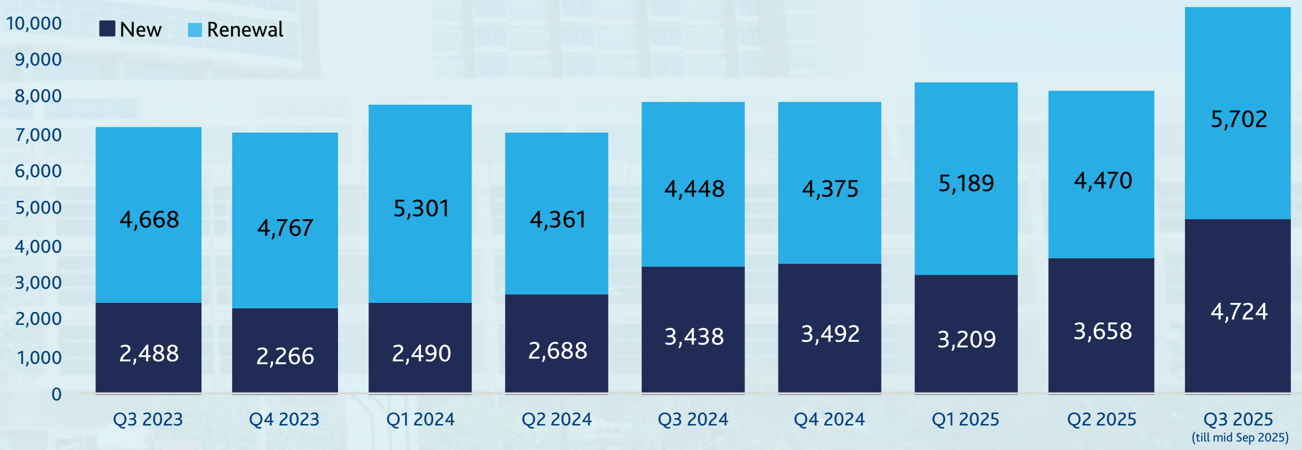
In Q3 2025, prime destinations such as The Galleria, Yas Mall, Marina Mall, Al Wahda Mall, and Dalma Mall recorded the highest value for rental leasing activity, reaffirming their dominance in Abu Dhabi's retail landscape and commanding the city's premium rents. At the same time, Madinat Zayed Shopping Centre, Bawabat Al Sharq Mall, and Mushrif Mall registered notable increases in leasing volumes, signaling shifting market dynamics. This uptick was driven by rental escalations from landlords in prime areas, which led to non-renewals and contract expirations, opening space for existing old and popular retail malls. The trend highlights growing demand for neighborhood retail, supported by their proximity to expanding residential communities, population growth, and the resulting higher footfall and quicker tenant turnover.

Abu Dhabi Retail Supply - 2020 - 2027

GLA (in 000's sq.m.)



Abu Dhabi Retail Rental Transactions (Volume)

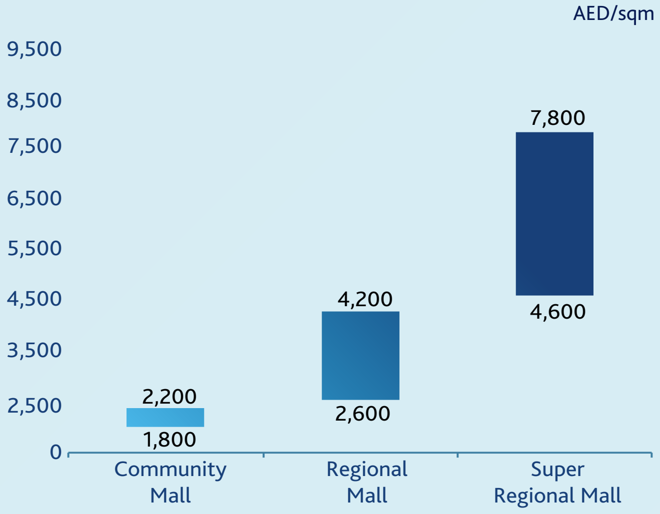


Source: MPM Research 2025

MPM research indicates the rental rates in malls across Abu Dhabi have surged by approximately 15%-18% annually. Meanwhile, ancillary retail has continued to grow steadily, with a marginal annual increase of 5%-6%.

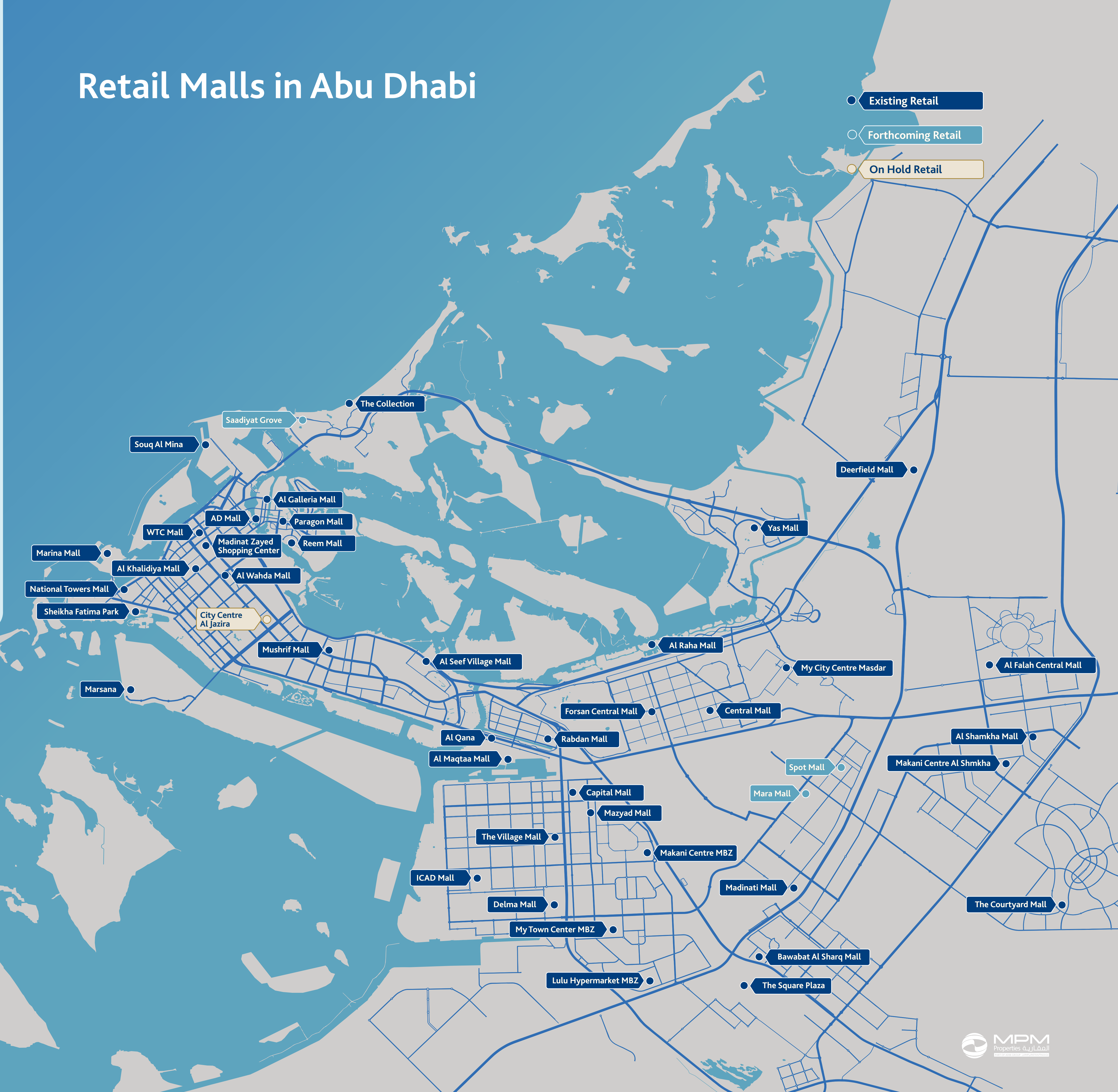
According to MPM Research, the sector is positioned for continued growth into 2026, supported by population expansion, expatriate inflows, and government-backed diversification initiatives. With constrained new supply, resilient demand fundamentals, and the integration of retail into large-scale mixed-use developments, Abu Dhabi's retail market is set to consolidate its role as a resilient and evolving hub in the region.

Average Rental Rates in the malls across Abu Dhabi



Source: MPM Research 2025

Retail Malls in Abu Dhabi



INDUSTRIAL
Market Overview

Market Insights

> “Abu Dhabi’s industrial real estate market in 2025 is experiencing strong demand, driven by logistics, e-commerce, and manufacturing growth, with warehouse rents rising over 18% year-on-year. This sector is directly supporting the emirate’s non-oil GDP expansion, reinforcing diversification and contributing significantly to overall economic performance.”

Abu Dhabi’s industrial real estate market continues to strengthen, supported by robust non-oil economic growth and rising occupier demand. According to SCAD, real GDP reached AED 306.3 billion in Q2 2025, up 3.8% year-on-year, with the non-oil sector expanding 6.6% to AED 174.1 billion and accounting for 56.8% of total GDP for the first time. Key contributors included manufacturing, construction, and real estate, all recording solid gains. This economic momentum has translated into heightened demand for logistics and industrial assets.

MPM Research reports a 18% year-on-year increase in average citywide rents during Q3 2025, with prime industrial hubs such as KEZAD recording growth of more than 25% over the same period.

Market activity has been further reinforced by strategic developments, including Amazon’s launch of its first fulfilment centre in partnership with ADIO and a leading developer’s AED 530 million acquisition of 182,500 sqm of warehousing and light industrial assets in Al Markaz Industrial Park.

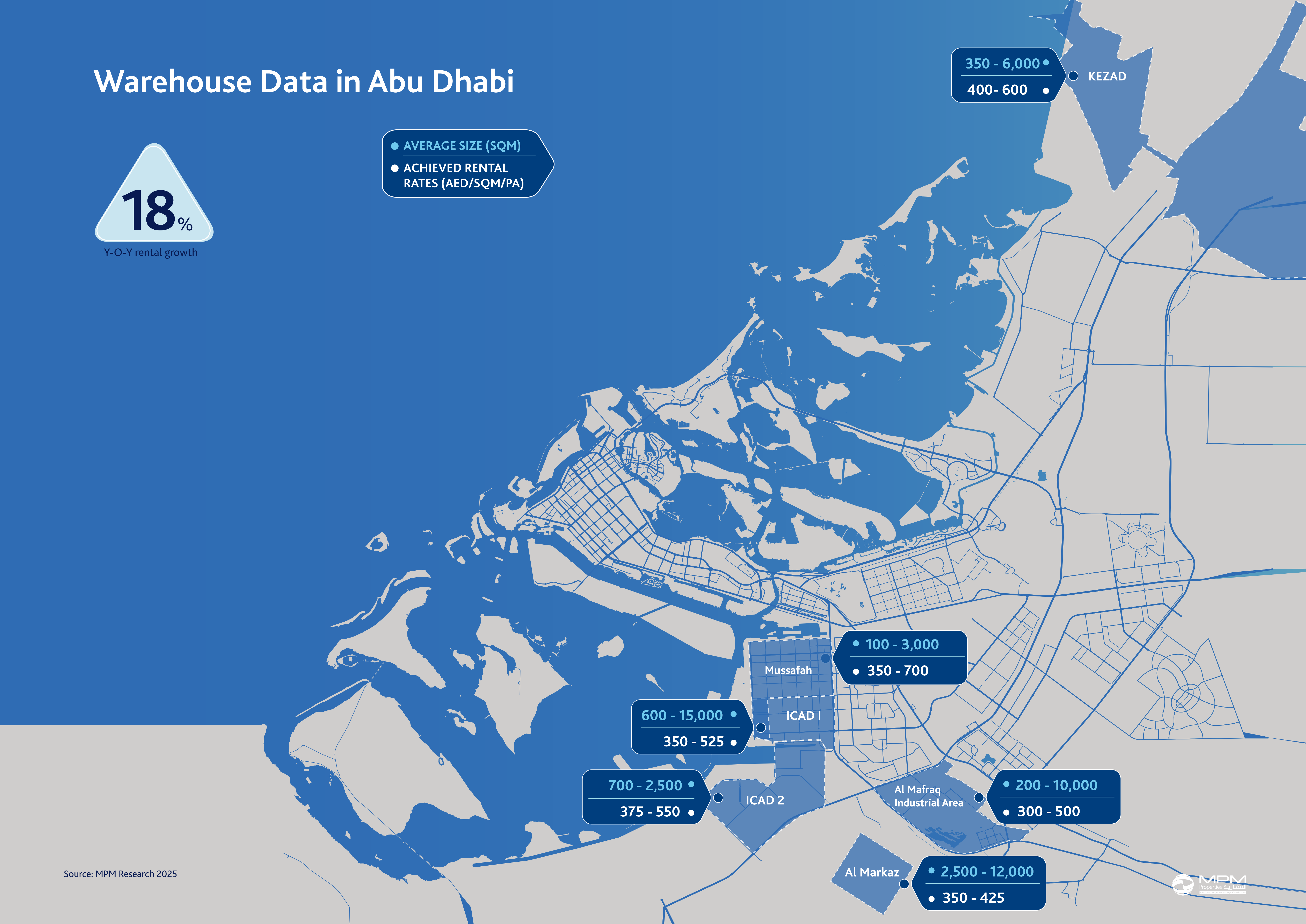
MPM Research notes that with occupancy levels nearing full capacity, flexible asset designs, and a diverse tenant base, Abu Dhabi’s industrial real estate sector continues to demonstrate resilience and growing significance. The market is in a phase of rapid expansion, directly contributing to non-oil GDP growth and reinforcing the emirate’s position as a leading logistics and industrial hub in the region.

Warehouse Data in Abu Dhabi

18%

Y-O-Y rental growth

- ● AVERAGE SIZE (SQM)
- ● ACHIEVED RENTAL RATES (AED/SQM/PA)



KEZAD
350 - 6,000 ●
400- 600 ●

Mussafah
● 100 - 3,000
● 350 - 700

ICAD I
600 - 15,000 ●
350 - 525 ●

ICAD 2
700 - 2,500 ●
375 - 550 ●

Al Mafraq Industrial Area
● 200 - 10,000
● 300 - 500

Al Markaz
● 2,500 - 12,000
● 350 - 425

Source: MPM Research 2025

Definitions & Methodology

Research Study Area

The geographic extent of the study area covers the key districts in Abu Dhabi.

Residential

New residential developments are classified as delivered and thus entered into the new supply category when they are made available for occupation. This is verified via a combination of site inspections and discussion with the developer and hence our supply numbers do take into consideration the phased release of large projects.

Rental and sales trend analysis is based on transactional data derived from the MPM Properties Agency team and data sourced from developers and owners where able.

Offices

New office developments are classified as delivered and thus entered into the new supply category when they are available for tenant fit-outs.

Given the general lack of transparency in the local market rents quoted are headline rents, thus exclude any rent free period of other financial incentives that may have been negotiated between the parties. The rents quoted are also exclusive of service charges.

Retail

New retail developments are classified as delivered and thus entered into the new supply category when the first units are open and trading.

Our classification of malls is based on our own assessment having regard to size and the catchment area which the mall typically penetrates.

Retail space classifications: (in sqm)

	Low High
Neighbourhood:	0 - 18,500
Community:	18,500 - 46,500
Sub-Regional:	46,500 - 93,000
Regional:	93,000 - 186,000
Super Regional:	186,000 & above

DISCLAIMER

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