

Dubai Marina
Market Report
Q2 2018

Publication

This document was produced in July 2018. The data used in the tables and charts is the latest available at the time of publishing. Data sources are included for all the charts. We have detailed what we believe to be an accurate snapshot of the current market.



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DUBAI MARINA

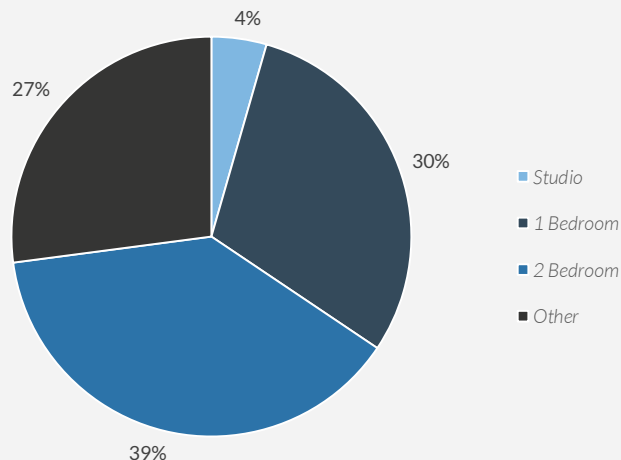
LOCATION OVERVIEW

This report analyses studio, one, and two-bedroom unit typologies within the secondary residential market, through this publication we assess the performance of the sales and rental market and aim to highlight any key trends.

With an overall rental compression, Dubai Marina remains fairly consistent comparative to Q1, with an average area softening of only 1.41 percent. Studios remained most stable with a change of only -0.09 percent. One and two-bedrooms also remained fairly constant with rates decreasing just 2 percent. Reduced rates of compression within the area compared to previous quarters further indicates market stabilisation. In comparison to the same quarter last year Dubai Marina remains one of the least volatile areas with rental rates only subsiding 6 percent.

In the sales market compression was lower than Q1, with an average softening of 2 percent overall. One-bedroom apartments again showed signs of recovery with a positive rise of 0.07 percent, keeping the momentum from a very stable Q1. Transactions were also positive, with an 8 percent increase on Q1 it shows the demand in the area remains solid.

Unit Distribution



< Stock delivered in Q2 2018

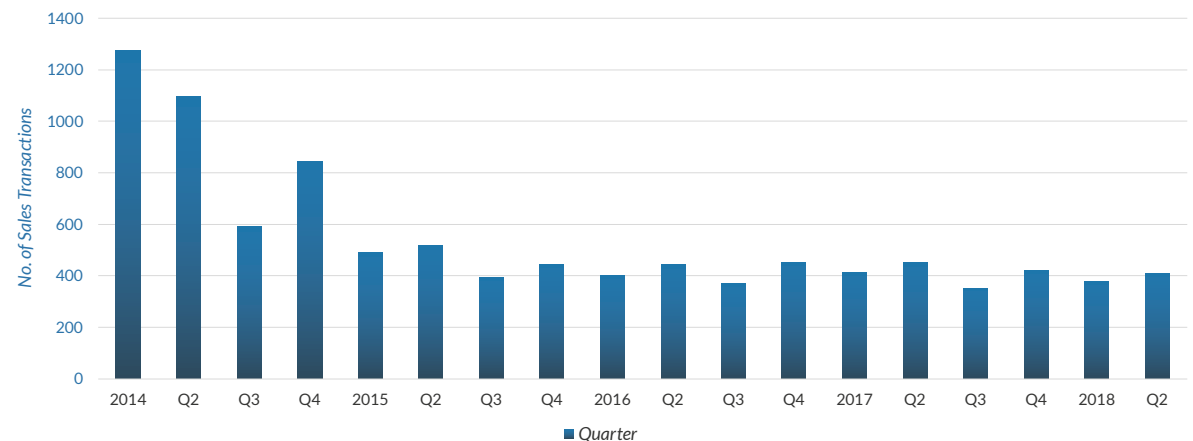


1
Project



420
Units

< History of Total Sales Transactions





SUPPLY ANALYSIS

Total No. of
Completed Buildings
(Apartment only)

158

Total No. of
Residential Units
(Apartment only)

32,369

No. of
On-going Projects
(Within 5 years)

18

No. of Units
Under Construction
(Within 5 years)

7,098

Rental Rates

USD / sq.ft / Year



BUILDING NAME	STUDIO		1 BEDROOM		2 BEDROOM	
	From	To	From	To	From	To
Al Bateen*			35	38	25	39
Bay Central	41	41	33	40	24	32
Botanica	38	44	26	40	25	30
Cayan Tower*			34	50	23	33
Elite Residence*			21	36	20	30
Mag 218*			23	30	18	22
23 Marina*					23	25
Marina Diamond	25	40	24	30	19	28
Marina Heights*			23	36	19	29
Marina Promenade	25	28	25	36	24	36
Marina Quays*			24	35	25	33
Ocean Heights*			23	33	20	32
Park Island*			32	40	29	32
Silverene	32	45	35	45	32	39
Skyview Tower	35	41	24	31	26	30
The Jewels*			28	28	21	24
Torch Tower*			21	27	17	26
Trident Grand Residence*			28	29	23	31
West Avenue	48	58	32	41	29	34

(*) Tables that contain missing data is a result of the particular tower not supporting that specific type of unit or insufficient data is available for the quarter.

Sales Prices

USD / sq.ft



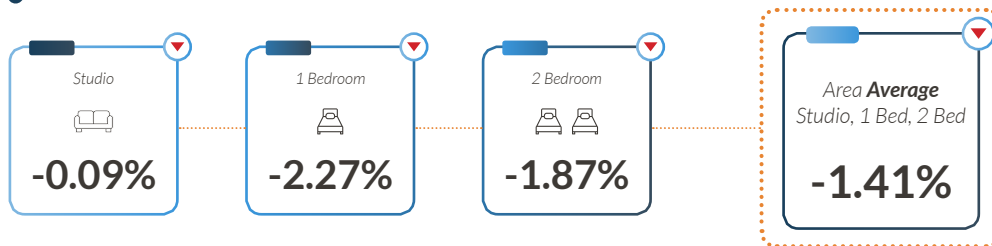
BUILDING NAME	STUDIO		1 BEDROOM		2 BEDROOM	
	From	To	From	To	From	To
Al Bateen*			618	630	430	767
Bay Central	546	621	412	590	407	513
Botanica	551	648	398	586	459	494
Cayan Tower	442	575	503	630	424	571
Elite Residence*			300	466	281	465
Mag 218*			326	399	233	370
23 Marina*					305	407
Marina Diamond	392	464	308	412	274	370
Marina Heights*			358	412	324	401
Marina Promenade*			477	486	439	513
Marina Quays*			368	504	387	537
Ocean Heights*			333	435	335	435
Park Island*			386	486	442	539
Silverene*			489	581	527	598
Skyview Tower*			382	445	309	378
The Jewels*			290	348	286	356
Torch Tower*			288	329	233	329
Trident Grand Residence*			355	418	318	507
West Avenue	543	658	435	564	398	540

(*) Tables that contain missing data is a result of the particular tower not supporting that specific type of unit or insufficient data is available for the quarter.

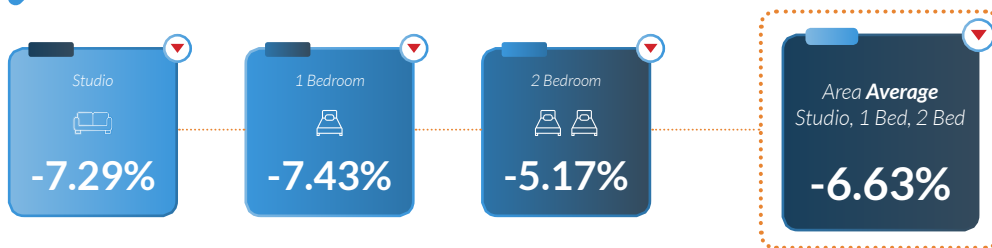
RENTAL RATES

Analysis

RENTAL RATES Q2 2018 vs Q1 2018

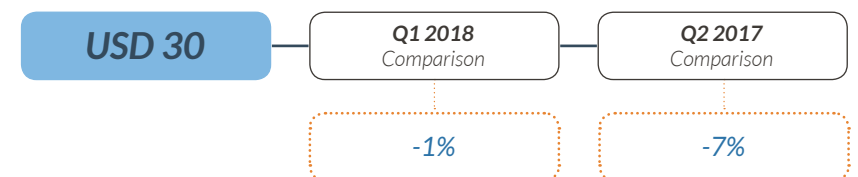


RENTAL RATES Q2 2018 vs Q2 2017



Q2 AVERAGE RENTAL RATE

USD sq.ft / Per Year

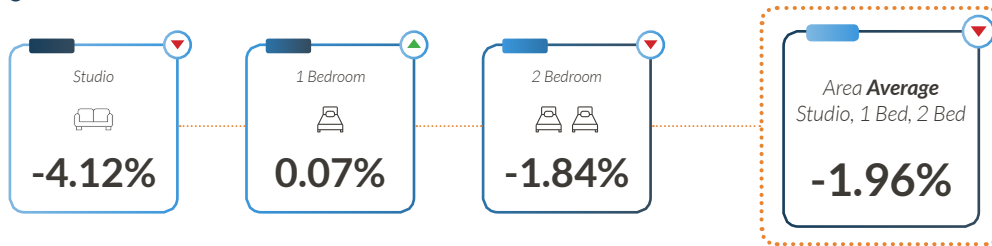


*Source: REIDIN, Dubai Land Department

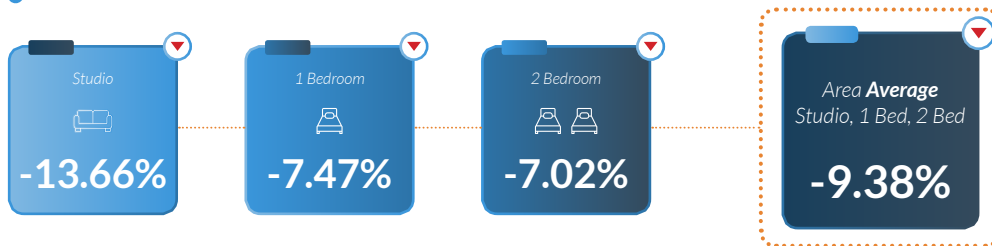
SALES PRICES

Analysis

SALES PRICES Q2 2018 vs Q1 2018

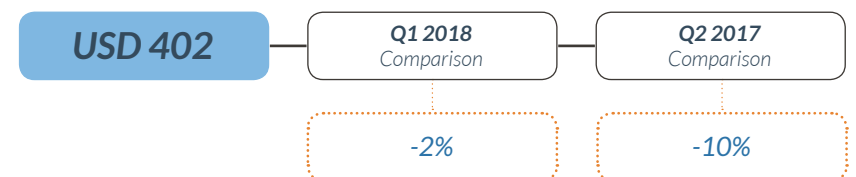


SALES PRICES Q2 2018 vs Q2 2017



Q2 AVERAGE SALES PRICES

USD sq.ft



*Source: REIDIN, Dubai Land Department



Q2 Sales Transactions Based on Ready Properties >



29

SALES PRICES
Alternative Units USD / Sq.ft

Affordable

218 - 399

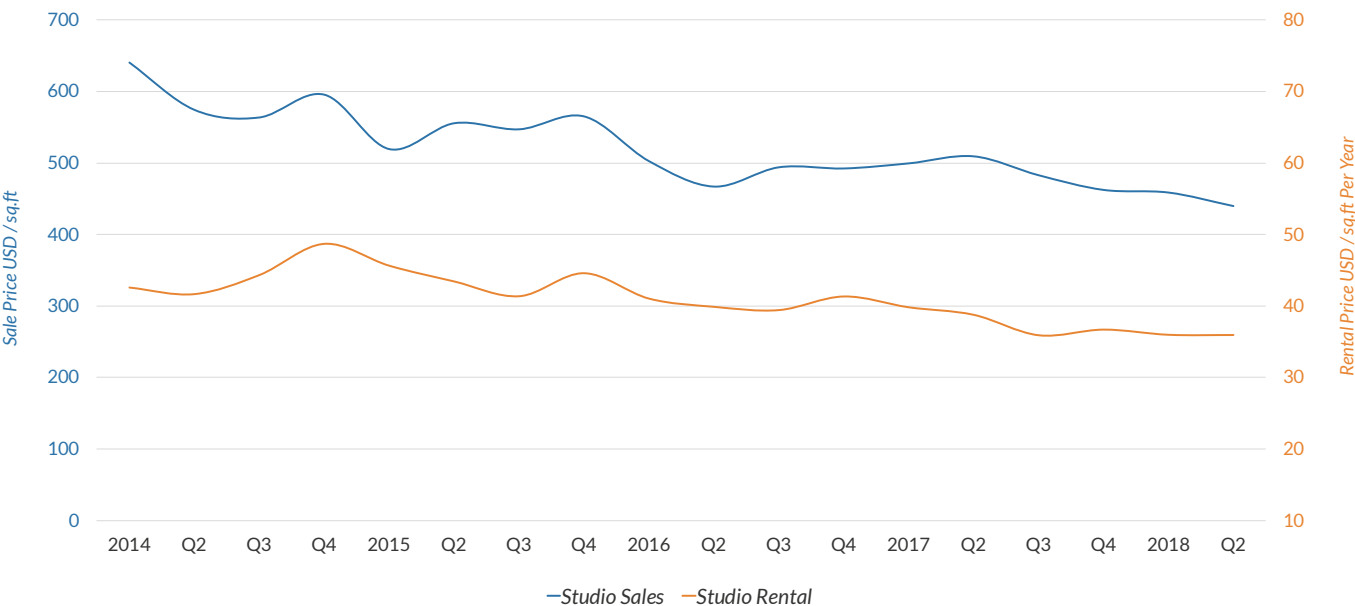
Mid to High End

399 - 489

High to Luxury

489 - 761

Sales Prices & Rental Rates >



ONE-BEDROOM APARTMENTS

Unit Type Analysis



Q2 Sales Transactions Based on Ready Properties >



176

SALES PRICES

Alternative Units USD / Sq.ft

Affordable

230 - 339

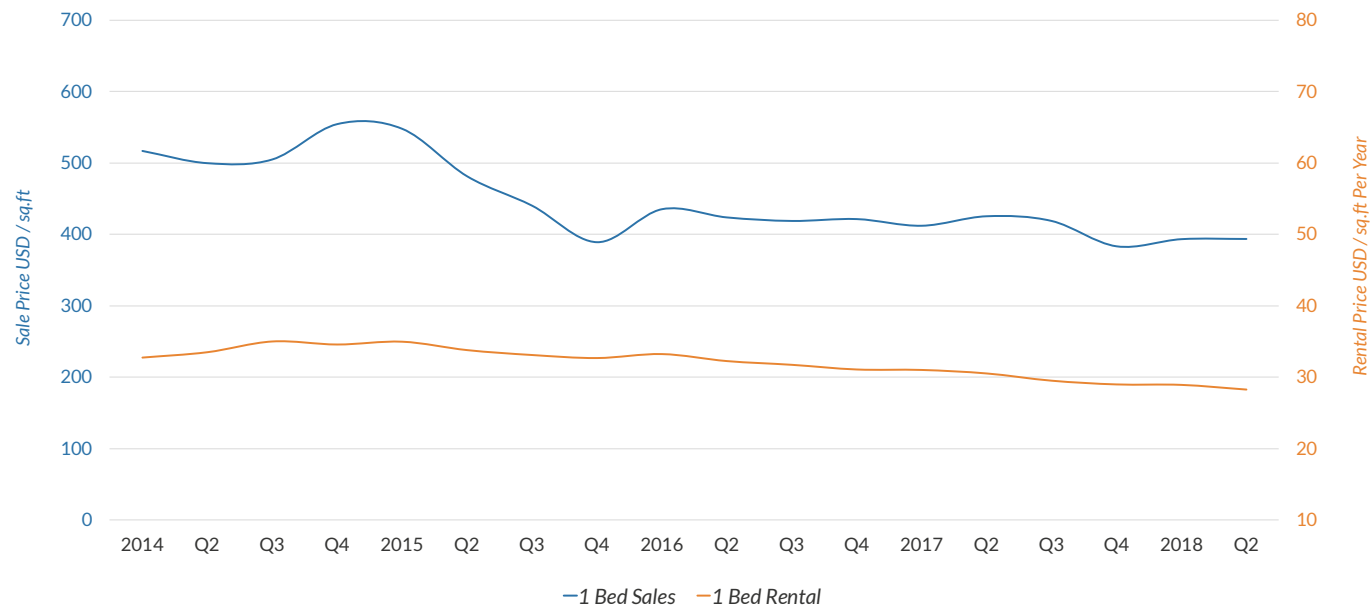
Mid to High End

339 - 394

High to Luxury

394 - 728

Sales Prices & Rental Rates >



TWO-BEDROOM APARTMENTS

Unit Type Analysis



Q2 Sales Transactions Based on Ready Properties >



153

SALES PRICES

Alternative Units USD / Sq.ft

Affordable

193 - 366

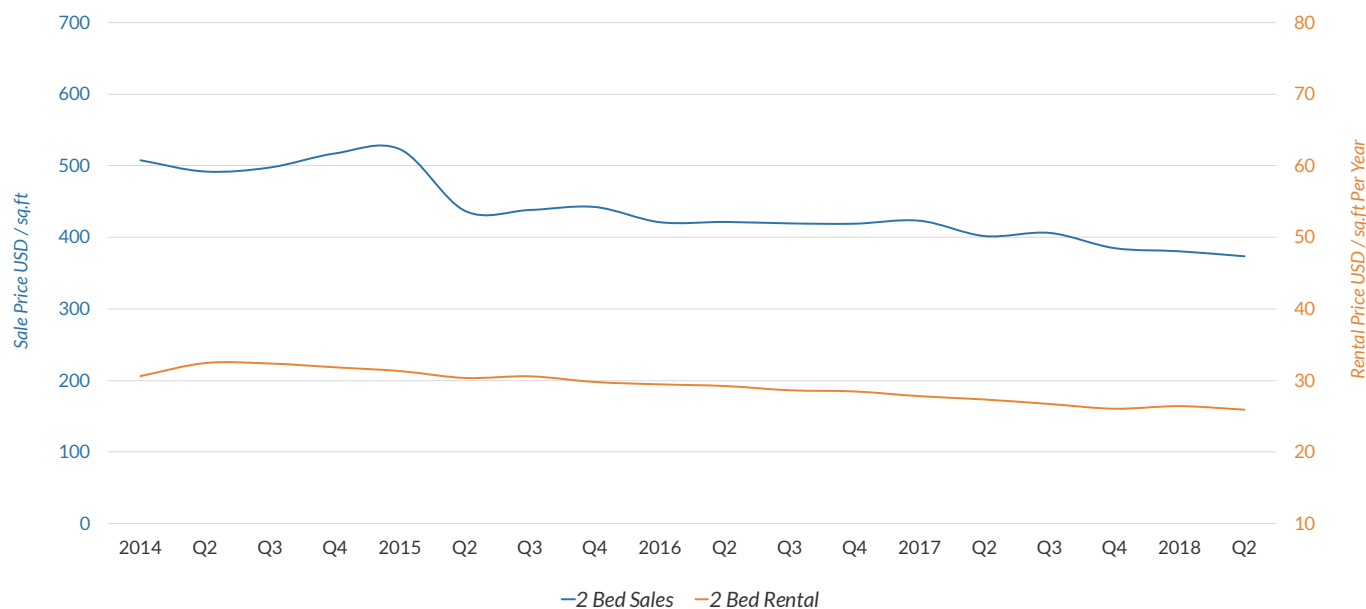
Mid to High End

366 - 470

High to Luxury

470 - 938

Sales Prices & Rental Rates >



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by producing profitable growth
and peace of mind."*

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