



**Publication**

This document was produced in 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.



# CONTENT

04

*Location  
Overview*

05

*Supply  
Analysis*

06

*Rental  
Rates*

07

*Sales  
Prices*

08

*Rental Rates  
Analysis*

09

*Sales Prices  
Analysis*

10

*Studio Apartment  
Analysis*

11

*One Bedroom Apartment  
Analysis*

12

*Two Bedroom  
Analysis*

13

*Two Bedroom  
Analysis*

14

*Two Bedroom  
Analysis*

# DOWNTOWN LOCATION OVERVIEW

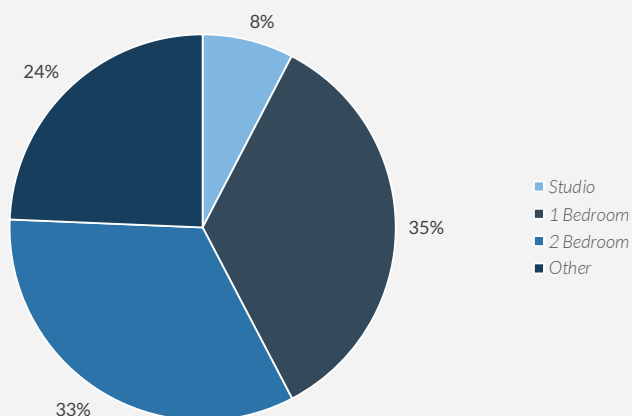
This report analyses studio, one, and two-bedroom unit typologies within the secondary residential market, through this publication we assess the performance of the sales and rental market and aim to highlight any key trends.

The Dubai Downtown rental market showed strong signs of stabilisation after almost a year of negative compression, Q4 like Q3 witnessed some of its best results within the past year. The rental market witnessed an overall compression of only 0.62 percent on Q3. Studio apartments performed the best with a gain of 3.8 percent after a year of softening. One and two bedroom units softened by 3.8 and 3.5 percent respectively.

Sales transactions in Downtown increased by 90% compared to Q3, once again providing evidence that the market is on the road to recovery. Sales prices softened across the board by an average of 2.5 percent, with studios performing the best with a 1.9 percent increase on Q3.

With more than 10,000 units in the pipeline, the supply fallacy should raise some awareness for investors. With significant construction in the area, choosing the most profitable investment proves to be challenging. We expect volatility in the area to remain high until construction begins to slow and more apartments are complete.

## Unit Distribution



< Stock delivered in Q4 2018



0  
Project



0  
Units

< Transaction History





## SUPPLY ANALYSIS

Total No. of  
Completed Buildings  
*(Apartment only)*

87

Total No. of  
Residential Units  
*(Apartment only)*

12,946

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

21

No. of Units  
Under Construction  
*(Within 5 years)*

10,274

# Rental Rates

USD / sq.ft / Year



BUILDING NAME	STUDIO		1 BEDROOM		2 BEDROOM	
	From	To	From	To	From	To
29 Burj Boulevard - 1	36	39	24	39	26	37
8 Boulevard Walk	30	35	18	28	16	23
Boulevard Central Towers - 1*			21	34	26	31
Burj Al Nujoom	30	33	20	43	16	21
Burj Views - Tower A	25	33	22	35	22	24
Claren Tower 1	38	39	24	33	20	32
Miska 3*			25	27	31	35
South Ridge Towers - 1*			25	33	22	31
South Ridge Towers - 5*			23	35	21	25
Standpoint Towers - 1	35	40	25	40	23	33
The Signature*			23	29	21	26

(\*) 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



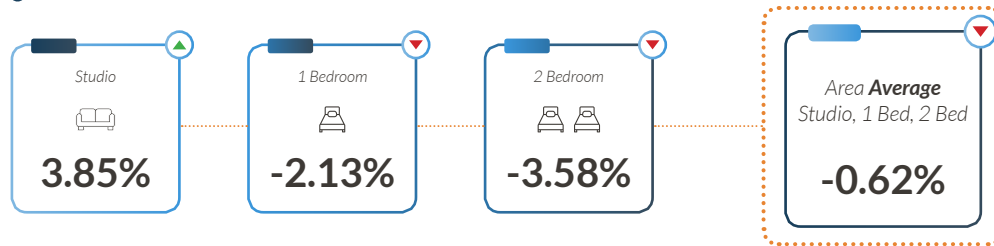
BUILDING NAME	STUDIO		1 BEDROOM		2 BEDROOM	
	From	To	From	To	From	To
29 Burj Boulevard - 1*			408	567	423	575
8 Boulevard Walk	412	496	283	351	275	466
Boulevard Central Towers - 1*			390	525	451	493
Burj Al Nujoom	363	432	288	411	274	300
Burj Views - Tower A	382	382	279	418	344	411
Claren Tower 1	509	594	393	474	352	433
Miska 3*			545	548	476	476
South Ridge Towers - 1*			308	432	366	502
South Ridge Towers - 5*			340	411	370	541
Standpoint Towers - 1*			382	559	398	616
The Signature*			276	467	521	582

(\*) 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.

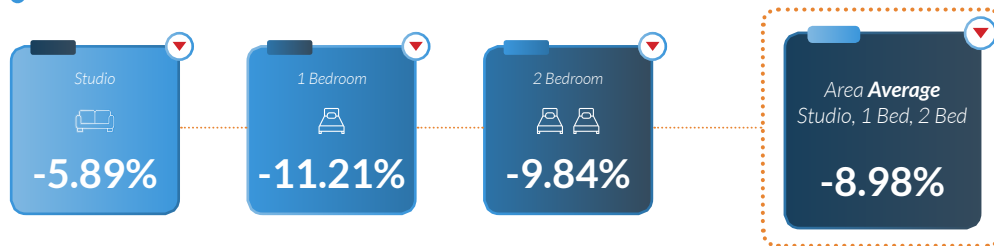
# RENTAL RATES

## Analysis

### RENTAL RATES Q4 2018 vs Q3 2018

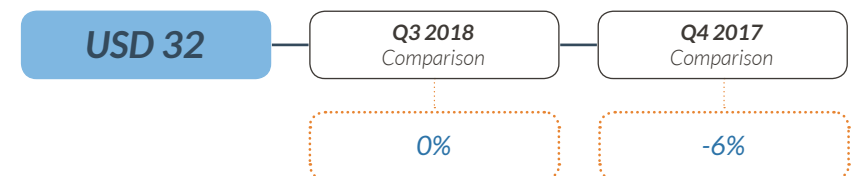


### RENTAL RATES Q4 2018 vs Q4 2017



## Q4 AVERAGE RENTAL RATE

USD sq.ft / Per Year



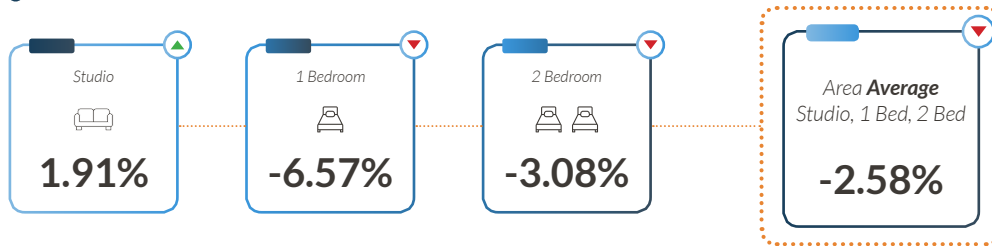
\*Source: REIDIN, Dubai Land Department



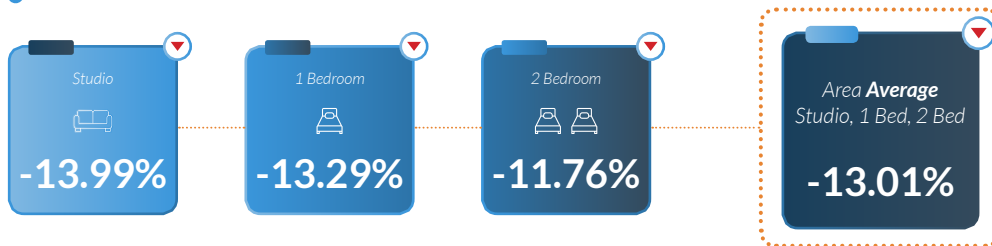
# SALES PRICES

## Analysis

### SALES PRICES Q4 2018 vs Q3 2018

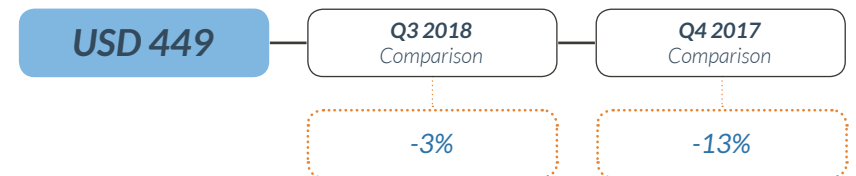


### SALES PRICES Q4 2018 vs Q4 2017



## Q4 AVERAGE SALES PRICES

USD sq.ft / Per Year



\*Source: REIDIN, Dubai Land Department



Q4 Sales Transactions Based on Ready Properties >



11

### SALES PRICES

Alternative Units USD / Sq.ft

Affordable

1210 - 2130

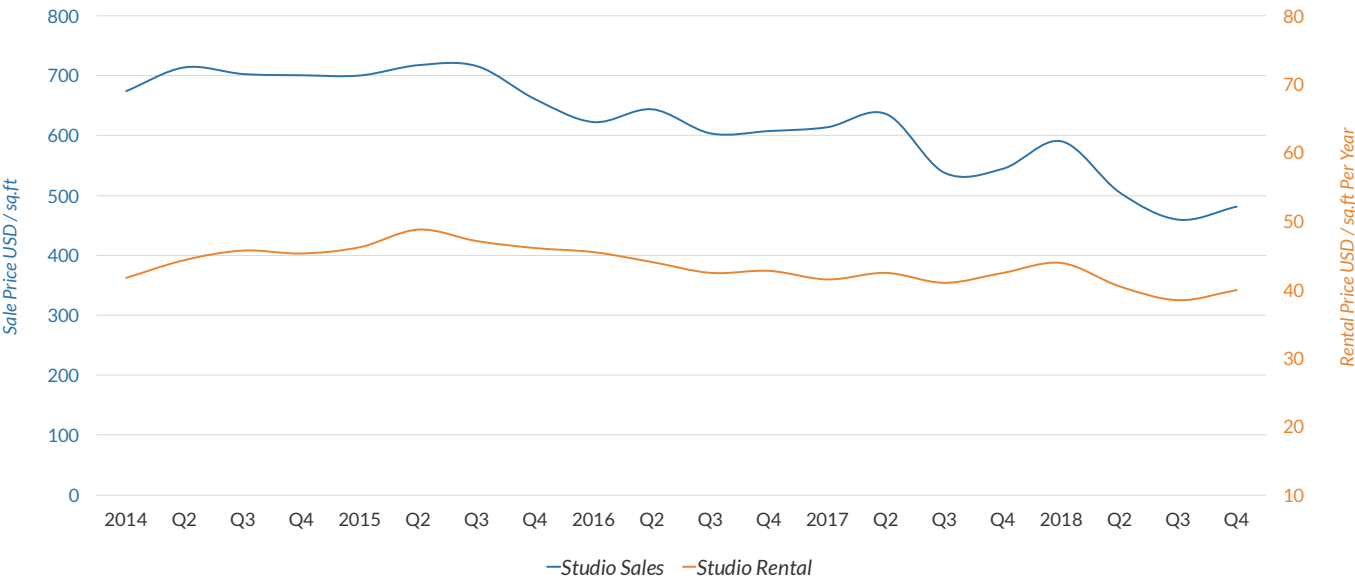
Mid to High End

2130 - 2590

High to Luxury

2590 - 4430

Sales Prices & Rental Rates >



# ONE-BEDROOM APARTMENTS

## Unit Type Analysis



Q4 Sales Transactions Based on Ready Properties >



62

### SALES PRICES

Alternative Units USD / Sq.ft

Affordable

793 - 1543

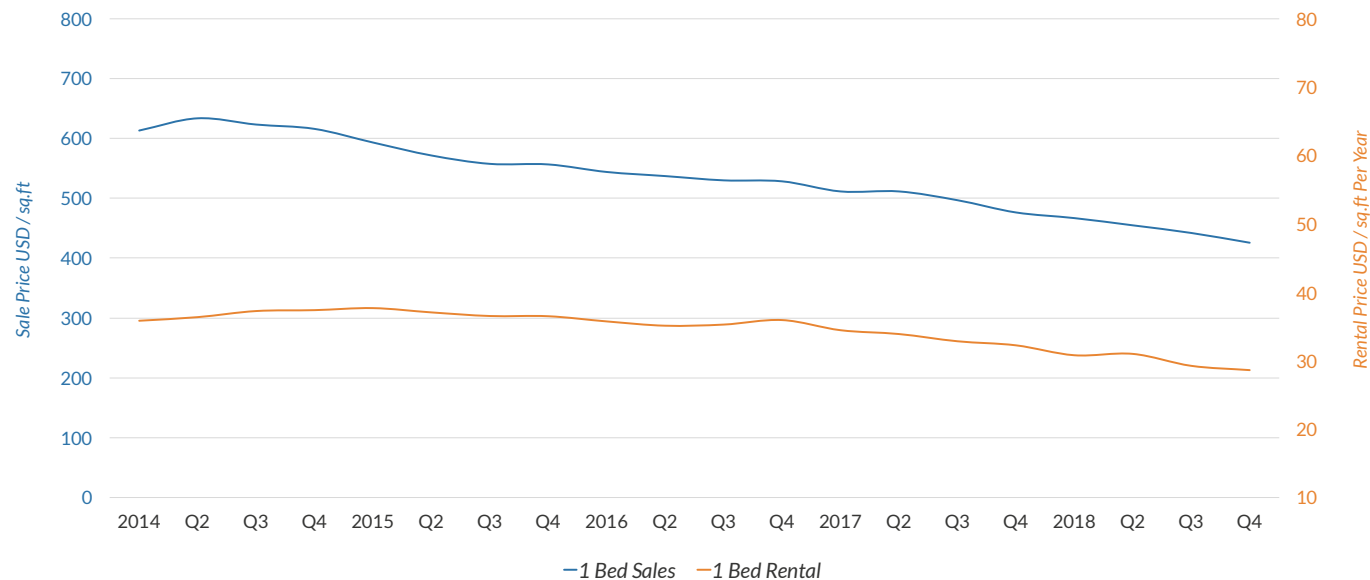
Mid to High End

1543 - 3193

High to Luxury

3193 - 5893

Sales Prices & Rental Rates >



# TWO-BEDROOM APARTMENTS

## Unit Type Analysis



Q4 Sales Transactions Based on Ready Properties >



46

### SALES PRICES

Alternative Units USD / Sq.ft

Affordable

706 - 1666

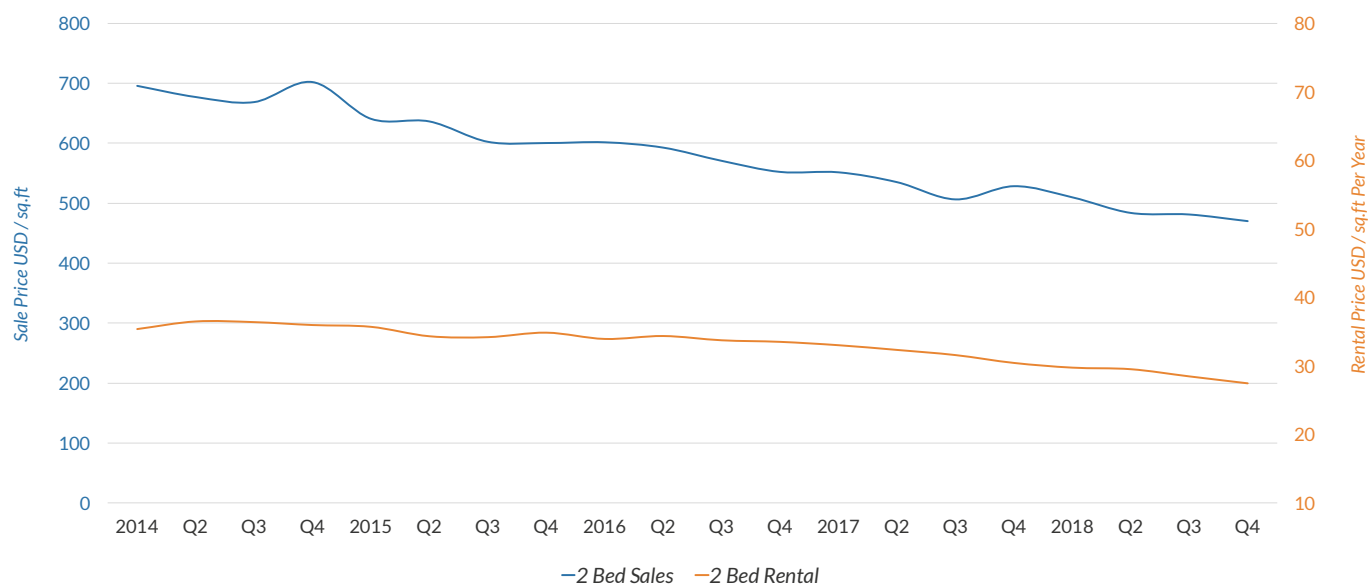
Mid to High End

1666 - 2946

High to Luxury

2946 - 5506

Sales Prices & Rental Rates >



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