

**REIDIN**

Data Analytics

# DUBAI RESIDENTIAL REAL ESTATE FEBRUARY 2026 MARKET OVERVIEW



# KEY HIGHLIGHTS

## Residential Transactions and Market Activity

Dubai's residential market recorded total transactions of AED 46.3 Bn across 15,902 units, reflecting sustained market activity supported by both investor demand and end-user purchases. Apartments continue to dominate market liquidity, accounting for 82% of total transaction volume (13,073 units) and 59% of total transaction value (AED 27.2 Bn), while villas represent 18% of transactions (2,829 units) and 41% of total value, highlighting significantly higher ticket sizes within the villa segment.

## Residential Price Trends and Market Performance

Residential prices across Dubai showed steady upward momentum. Average apartment prices increased from AED 1,454/sqft in February 2024 to AED 1,878/sqft in February 2026, while villa prices rose from AED 1,743/sqft to AED 2,383/sqft over the same period.

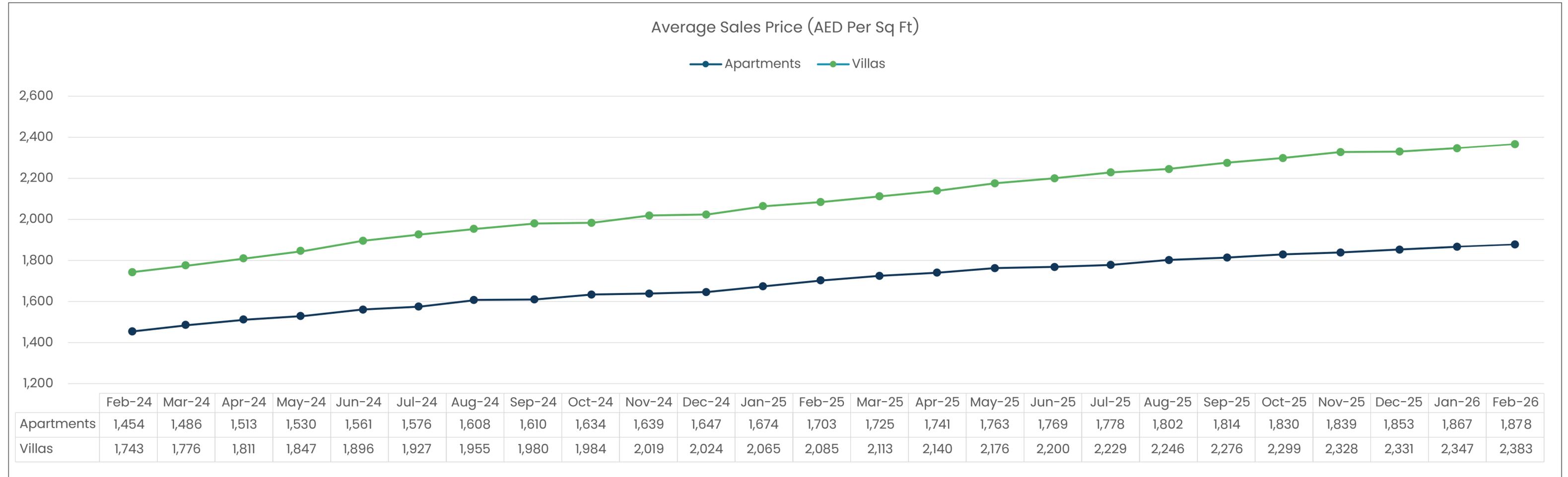
## Developer Activity

Emaar Properties PJSC recorded AED 6.50 Bn in sales value, followed by Damac Properties at AED 3.87 Bn, Meraas Development at AED 1.94 Bn, and Binghatti at AED 1.71 Bn. By transaction volume, Damac recorded 1,198 transactions, followed by Binghatti at 1,090 and Emaar at 1,034.

## Luxury Market Activity

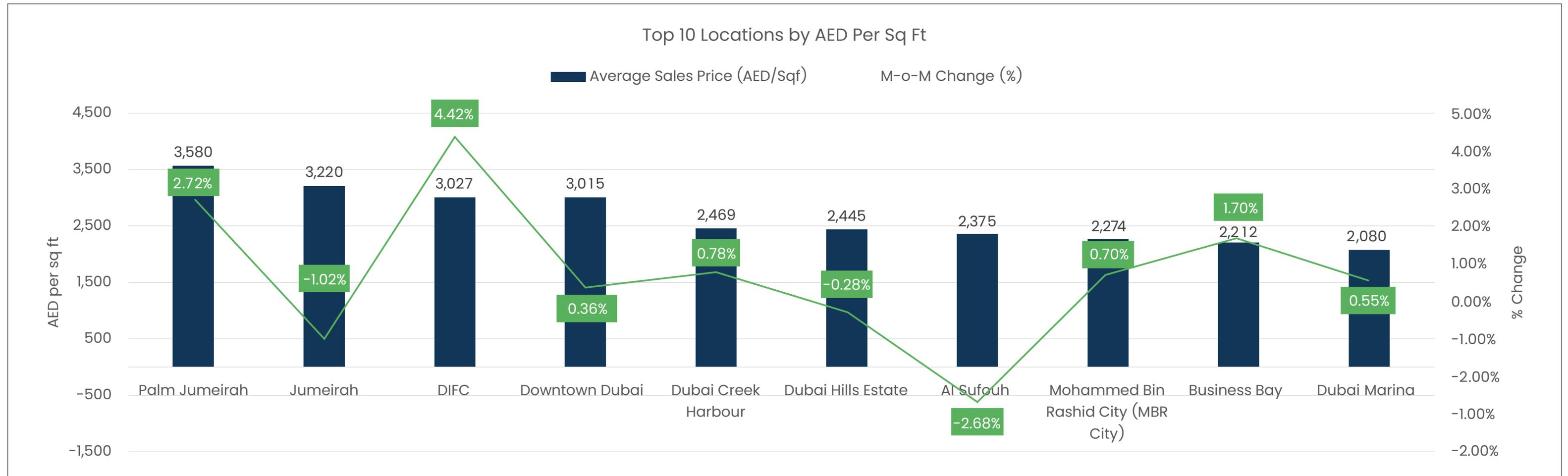
Dubai's luxury residential market recorded AED 13.1 Bn across 658 transactions above AED 10 million. Off-plan sales accounted for 74% of luxury transaction value and volume. Villas dominated high-value transactions, representing 72% of off-plan value and 73% of ready sales value. Palm Jumeirah continues to lead high-value transactions, supported by limited supply and large-scale luxury developments.

# REIDIN RESIDENTIAL CITY-WIDE SALES PRICE TREND



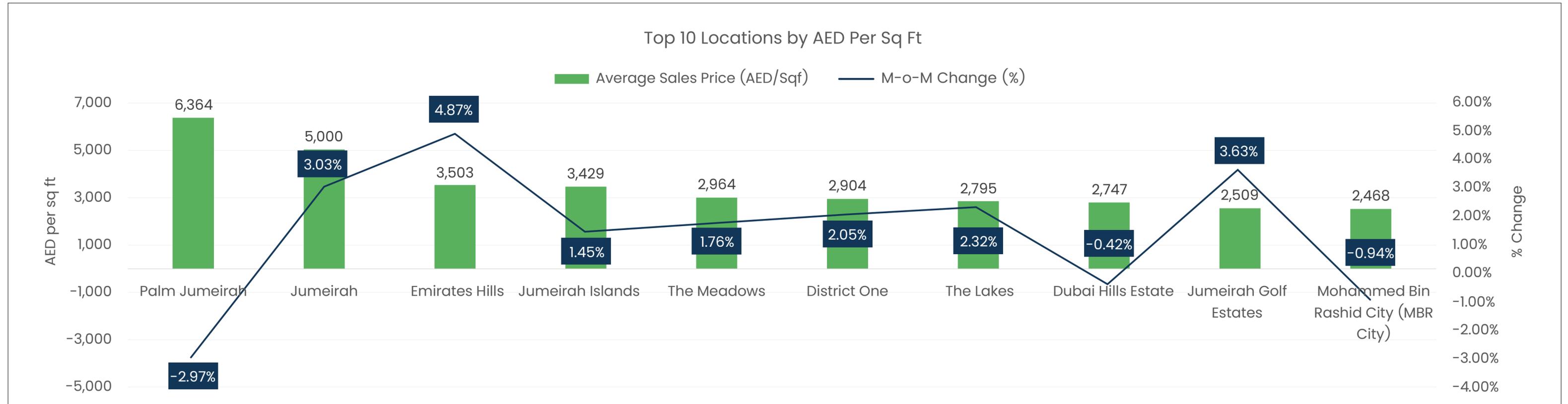
- Apartment prices increased from AED 1,454 per sq.ft in Feb 2024 to AED 1,878 per sq.ft in Feb 2026, indicating sustained upward price momentum across Dubai’s residential market.
- Villa prices increased from AED 1,743 per sq.ft in Feb 2024 to AED 2,383 per sq.ft in Feb 2026, with price growth exceeding apartments.
- The price gap between villas and apartments widened from AED 289 per sq.ft in Feb 2024 to AED 505 per sq.ft in Feb 2026, with villas maintaining a pricing premium amid limited ready supply.
- Overall, price growth remained linear across both segments, with no visible correction phases, indicating sustained absorption of supply across the cycle.

# REIDIN APARTMENTS SALES PRICE TREND



- Palm Jumeirah remains the highest-priced apartment market at approximately AED 3,580/sqft, reflecting its limited supply, waterfront positioning, and strong branded residence presence.
- Jumeirah, DIFC, and Downtown Dubai cluster within the AED 3,000–3,300 per sq.ft range, forming the core prime pricing corridor.
- Emerging waterfront and master-planned communities such as Dubai Creek Harbour and Dubai Hills Estate transact between AED 2,400–2,500 per sq.ft, below prime district pricing.
- DIFC records the highest monthly increase (+ 4.42%), while Al Sufouh declines (-2.68%), showing divergence in short-term price movements.
- Pricing remains concentrated in coastal and central districts, with higher values sustained in established prime locations.

# REIDIN VILLAS SALES PRICE TREND



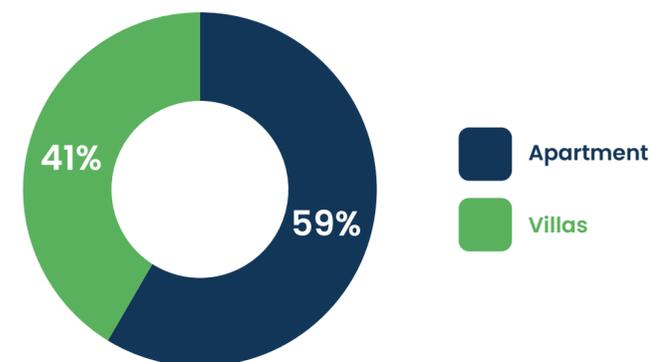
- Palm Jumeirah remains the highest-priced villa market at approximately AED 6,364/sqft, significantly outperforming other locations due to its ultra-prime waterfront positioning and limited land supply.
- Prime villa communities such as Jumeirah and Emirates Hills follow, transacting at around AED 5,000/sqft and AED 3,503/sqft respectively, supported by established luxury positioning and large plot formats.
- Established gated communities including Jumeirah Islands, The Meadows, District One, and The Lakes cluster within the AED 2,800–3,400/sqft range, reflecting stable pricing in mature villa submarkets.
- Emirates Hills recorded the strongest monthly price growth (+4.87%), while Palm Jumeirah and MBR City saw minor corrections, indicating localized price adjustments within prime segments.
- Overall, Dubai’s villa market remains concentrated in a limited number of prime low-density communities, where constrained supply and strong end-user demand continue to support premium pricing.

# TOTAL SALES TRANSACTIONS BY TYPOLOGIES & LOCATIONS

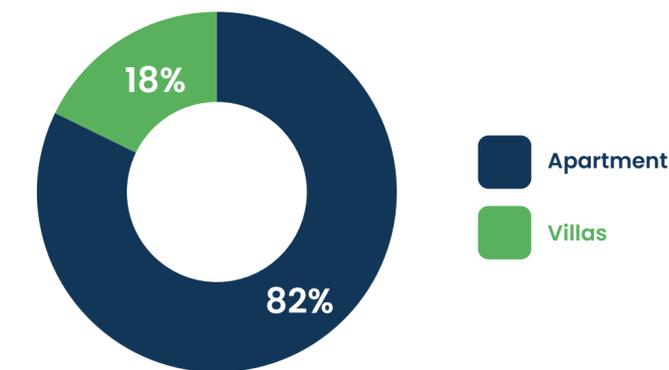
## VOLUME AND VALUE

Sales Transactions	Total Value (AED Bn)	Total Volume
Apartment Sales	27.2 Bn	13,073
Villa Sales	19.1 Bn	2,829
<b>Grand Total</b>	<b>46.3 Bn</b>	<b>15,902</b>

## TOTAL VALUE (AED Bn)



## TOTAL VOLUME



## TOP 10 LOCATIONS BY VALUE

Damac Island City	3.1 Bn
The Heights	2.4 Bn
The Oasis	2.3 Bn
Dubai Islands	2.1 Bn
Palm Jumeirah	1.9 Bn
Business Bay	1.5 Bn
Dubai Hills Estate	1.4 Bn
Jumeirah Village Circle	1.4 Bn
Dubai Creek Harbour	1.3 Bn
Al Wasl	1.2 Bn

## TOP 10 LOCATIONS BY VOLUME

Jumeirah Village Circle	1,170
Dubai Island City	912
Dubailand Residence Complex	830
Meydan City	643
Dubai Islands	620
Business Bay	579
Majan	474
Dubai Creek Harbour	425
Dubai Hills Estate	342
Dubai South Residential District	332

# PRIMARY VS SECONDARY MARKET OVERVIEW

## PRIMARY AND SECONDARY SALES SPLIT

Sales Sequence	Total Value (AED Bn)	Total Volume
Primary Sales	30.4 Bn	10,566
Secondary Sales	15.9 Bn	5,336
Grand Total	46.3 Bn	15,902

## PRIMARY SALES SPLIT BY PROPERTY TYPE

Property Type	Total Value (AED Bn)	Total Volume
Apartment Sales	18.3 Bn	8,853
Villa Sales	12.1 Bn	1,713
Grand Total	30.4Bn	10,566

## SECONDARY SALES SPLIT BY PROPERTY TYPE

Property Type	Total Value (AED Bn)	Total Volume
Apartment Sales	8.9 Bn	4,220
Villa Sales	7.0 Bn	1,116
Grand Total	15.9 Bn	5,336

# OFF-PLAN VS READY MARKET OVERVIEW

## OFF-PLAN AND READY SALES SPLIT

Transaction Type	Total Value (AED Bn)	Total Volume
Off-Plan Sales	33.4 Bn	10,974
Ready Sales	12.9 Bn	4,928
Grand Total	46.3 Bn	15,902

## OFF-PLAN SALES SPLIT BY PROPERTY TYPE

Property Type	Total Value (AED Bn)	Total Volume
Apartment Sales	19.4 Bn	8,979
Villa Sales	14.0 Bn	1,995
Grand Total	33.4 Bn	10,974

## READY SALES SPLIT BY PROPERTY TYPE

Property Type	Total Value (AED Bn)	Total Volume
Apartment Sales	7.8 Bn	4,094
Villa Sales	5.1 Bn	834
Grand Total	12.9 Bn	4,928

# OFF-PLAN MARKET ACTIVITY BY SEGMENT AND LOCATION

## TOP 5 OFF-PLAN APARTMENTS' LOCATIONS BY VALUE



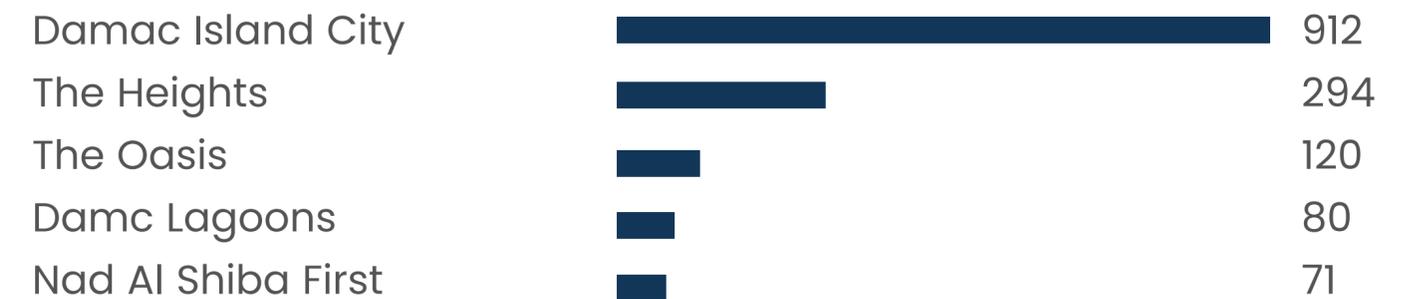
## TOP 5 OFF-PLAN VILLAS' LOCATIONS BY VALUE



## TOP 5 OFF-PLAN APARTMENTS' LOCATIONS BY VOLUME



## TOP 5 OFF-PLAN VILLAS' LOCATIONS BY VOLUME



# READY MARKET ACTIVITY BY SEGMENT AND LOCATION

## TOP 5 READY APARTMENTS' LOCATIONS BY VALUE



## TOP 5 READY VILLAS' LOCATIONS BY VALUE



## TOP 5 READY APARTMENTS' LOCATIONS BY VOLUME



## TOP 5 READY VILLAS' LOCATIONS BY VOLUME



# OVERALL TICKET SIZE SPLIT BY TYPOLOGIES

## TICKET SIZE SPLIT OF APARTMENT SALES

Sales Transactions	Total Value (AED Bn)	Total Volume
< 1 Mn	2.70 Bn	3,866
1-2 Mn	7.09 Bn	5,057
2-3 Mn	5.18 Bn	2,130
3-5 Mn	4.92 Bn	1,303
5-10 Mn	3.64 Bn	542
> 10 Mn	3.62 Bn	175

## TICKET SIZE SPLIT OF VILLA SALES

Sales Transactions	Total Value (AED Bn)	Total Volume
< 1 Mn	0.05 Bn	77
1-2 Mn	0.21 Bn	138
2-3 Mn	2.16 Bn	784
3-5 Mn	2.76 Bn	696
5-10 Mn	4.45 Bn	651
> 10 Mn	9.49 Bn	483

# LUXURY MARKET OVERVIEW

## OFF-PLAN AND READY SALES SPLIT

Transaction Type	Total Value (AED Bn)	Total Volume
Off-Plan Sales	9.7 Bn	487
Ready Sales	3.4 Bn	171
<b>Grand Total</b>	<b>13.1 Bn</b>	<b>658</b>

## OFF-PLAN SALES SPLIT BY PROPERTY TYPE

Property Type	Total Value (AED Bn)	Total Volume
Apartment Sales	2.8 Bn	127
Villa Sales	7.0 Bn	366
<b>Grand Total</b>	<b>9.7 Bn</b>	<b>487</b>

## READY SALES SPLIT BY PROPERTY TYPE

Property Type	Total Value (AED Bn)	Total Volume
Apartment Sales	0.9 Bn	54
Villa Sales	2.5 Bn	117
<b>Grand Total</b>	<b>3.4 Bn</b>	<b>171</b>

\* Luxury ≥ AED 10M

# LUXURY MARKET OVERVIEW

## TOP 5 TRANSACTIONS -- APARTMENTS

Project Name	Location	Developer	Sale Value (AED)	Average Price/ Sq ft	Transaction Type
<b>The Alba Residences 1</b>	<b>Palm Jumeirah</b>	<b>Omniyat</b>	<b>226.0 Mn</b>	<b>7,199</b>	<b>Off-Plan</b>
<b>Peninsula Dubai Residences Tower 2</b>	<b>Jumeirah Second</b>	<b>H&amp;H</b>	<b>210.0 Mn</b>	<b>9,628</b>	<b>Off-Plan</b>
<b>Fairmont Residences Solara Tower</b>	<b>Downtown Dubai</b>	<b>SOL</b>	<b>113.7 Mn</b>	<b>5,496</b>	<b>Off-Plan</b>
<b>Bella – Passo Building 2</b>	<b>Palm Jumeirah</b>	<b>Beyond</b>	<b>98.0 Mn</b>	<b>7,892</b>	<b>Off-Plan</b>
<b>Como Residences</b>	<b>Palm Jumeirah</b>	<b>Nakheel</b>	<b>63.5 Mn</b>	<b>5,485</b>	<b>Off-Plan</b>

## TOP 5 TRANSACTIONS -- VILLAS

Project Name	Location	Developer	Sale Value (AED)	Average Price/ Sq ft	Transaction Type
<b>Asora Bay Ocean Mansions</b>	<b>La Mer</b>	<b>Meraas</b>	<b>350.0 Mn</b>	<b>12,985</b>	<b>Off-Plan</b>
<b>Signature Villas Frond G (Al Shishi)</b>	<b>Palm Jumeirah</b>	<b>Nakheel</b>	<b>350.0 Mn</b>	<b>18,571</b>	<b>Ready</b>
<b>EOME</b>	<b>Palm Jumeirah</b>	<b>Blue Haven</b>	<b>115.0 Mn</b>	<b>7,389</b>	<b>Off-Plan</b>
<b>Zaya Zuha Island</b>	<b>World Islands</b>	<b>FIVE Global</b>	<b>68.6 Mn</b>	<b>3,710</b>	<b>Off-Plan</b>
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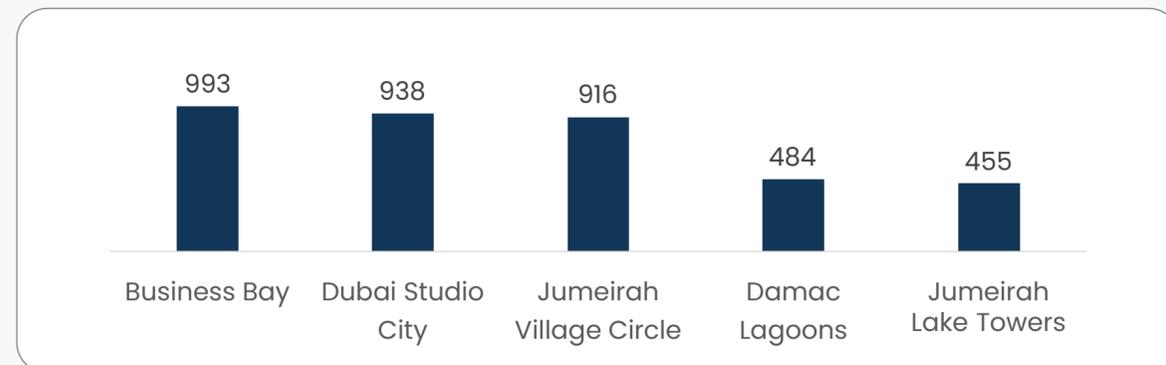
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# COMPLETED & UPCOMING SUPPLY OVERVIEW

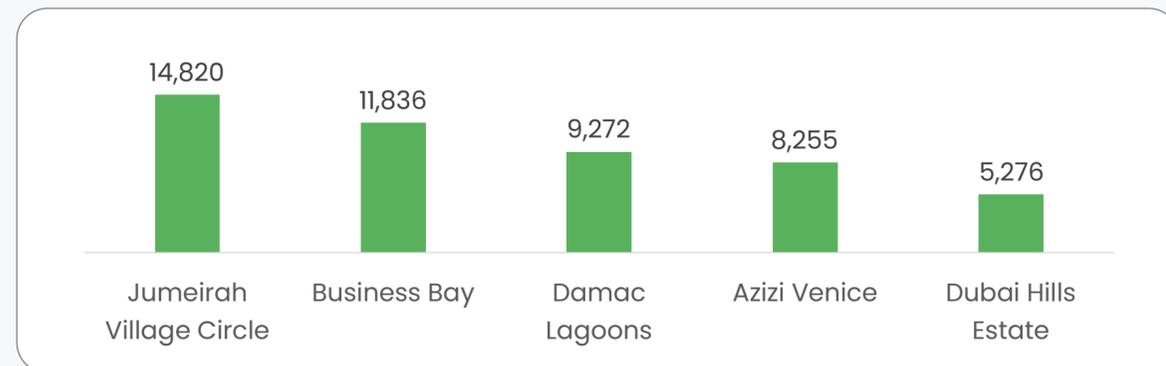
## COMPLETED & UNDER CONSTRUCTION UNITS

Status	Q1 2026	Q2 2026	Q3 2026	Q4 2026
Completed	5,805			
Under Construction		40,348	46,309	60,808

## TOP COMPLETED SUPPLY LOCATIONS IN 2026



## TOP HANDOVER LOCATIONS ANNOUNCED BY DEVELOPERS IN 2026



## COMPLETED UNITS IN 2026 BY PROPERTY TYPE

Property Type	Completed Units
Apartments	4,911
Villas	894
<b>Total</b>	<b>5,805</b>

## DEVELOPER ANNOUNCED HANDOVER UNITS IN 2026 BY PROPERTY TYPE

Property Type	Under Construction Units
Apartments	121,593
Villas	25,872
<b>Total</b>	<b>147,465</b>



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