

REIDIN

Data Analytics

DUBAI RESIDENTIAL REAL ESTATE JANUARY 2026 MARKET OVERVIEW

KEY HIGHLIGHTS

Strong Start to 2026 with AED 53.6 Billion in Residential Transactions

Dubai's residential market recorded AED 53.6 billion in transactions across 16,306 units in January 2026, reflecting a strong start to the year. Apartments accounted for 79% of total transactions (12,810 units), while villas represented 21% (3,496 units) but generated a slightly higher share of value at AED 27.3 billion (51%), highlighting larger transaction sizes within the villa segment. Market activity was primarily driven by off-plan sales, which accounted for AED 40.5 billion across 11,666 transactions, significantly exceeding the ready segment at AED 13.1 billion across 4,640 transactions, highlighting strong demand for newly launched residential projects.

Residential Prices Continue to Rise with Villas Outpacing Apartments

Dubai's residential prices continued to trend upward between Jan-25 and Jan-26, with apartments increasing from AED 1,674 psf to AED 1,867 psf, while villa prices rose more strongly from AED 2,065 psf to AED 2,347 psf, widening the price differential between the two segments despite signs of price moderation across parts of the market. Prime locations continue to command the highest values, led by Palm Jumeirah (AED 3,485 psf for apartments and AED 6,559 psf for villas), followed by Jumeirah and Downtown Dubai, while recent monthly movements indicate selective price adjustments across several communities, including DIFC, Dubai Marina, Jumeirah Beach Residence, Dubai Hills Estate, and MBR City.

Record Luxury Deals Mark Strong Start to 2026

Dubai's luxury residential market opened 2026 with several landmark transactions across key locations, led by a AED 340 million beachfront villa sale on Jumeirah Bay Island, achieving AED 36,980 per sq ft. An AED 80 million transaction was recorded at Bulgari Lighthouse, while additional activity across Palm Jumeirah and Emirates Hills further highlights the continued concentration of luxury residential activity in Dubai's most prestigious communities.

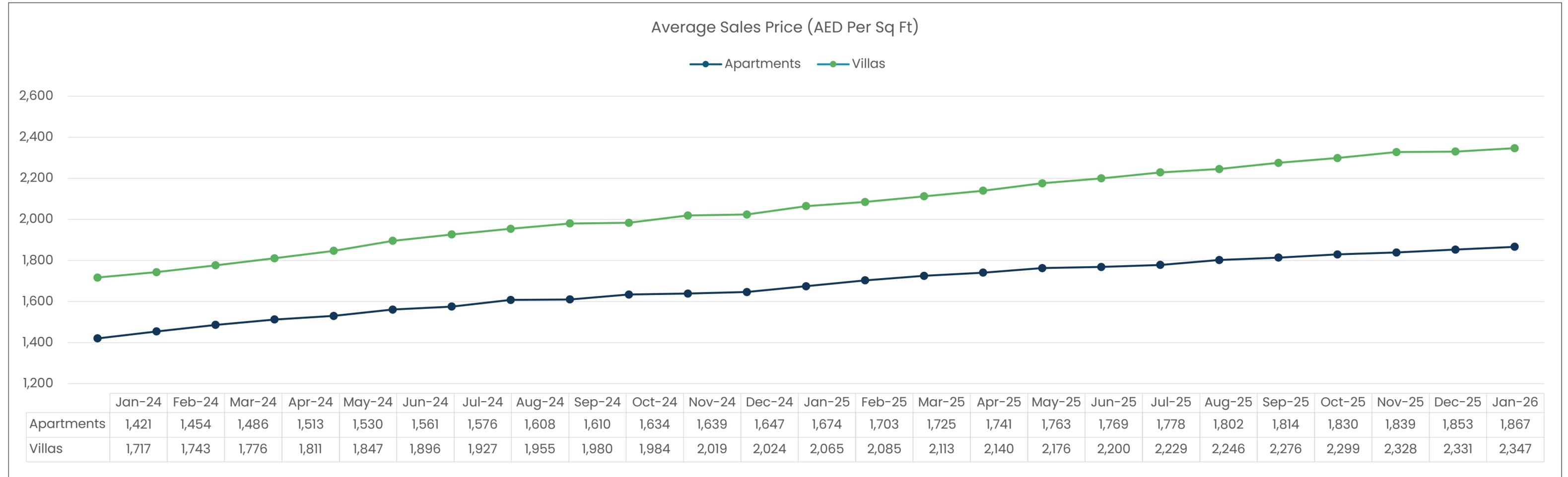
Large Development Pipeline Signals Significant Future Supply

Residential deliveries in 2026 currently stand at 5,225 units, comprising 4,331 apartments and 894 villas. At the same time, Dubai's development pipeline remains substantial, with 147,775 units under construction, predominantly within the apartment segment. Jumeirah Village Circle, Business Bay, and Damac Lagoons are expected to account for around 24% of upcoming residential handovers, highlighting the concentration of future supply across these key development corridors.

PropTech Connect 2026 Highlights Dubai's Push toward a Digitally Integrated Real Estate Market

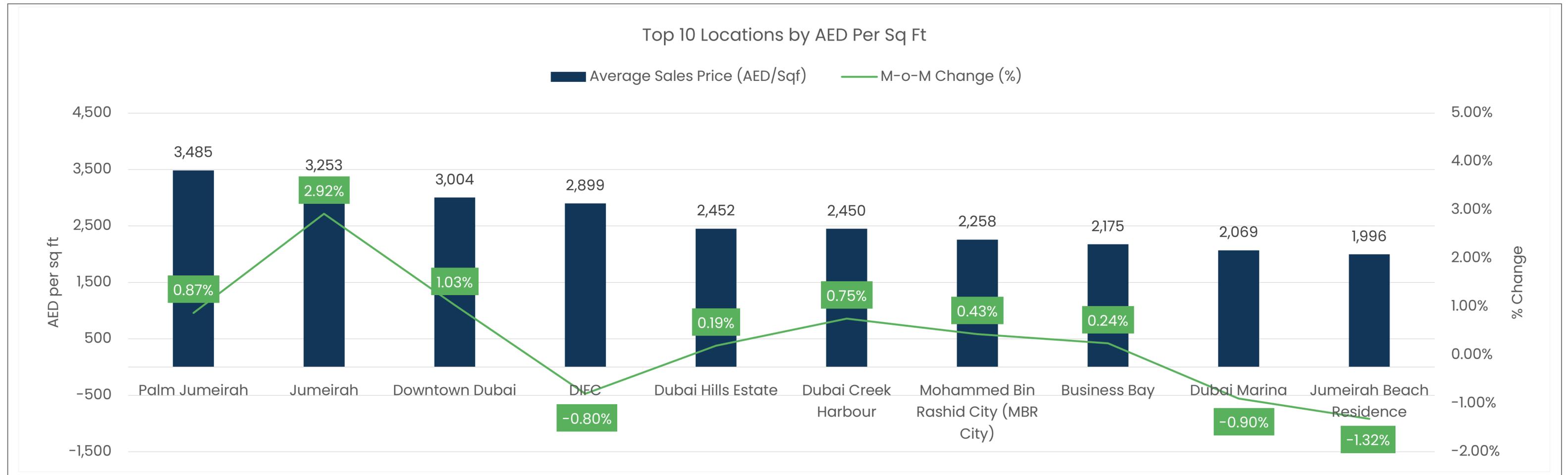
Dubai hosted PropTech Connect 2026 for the first time in the Middle East under the supervision of the Dubai Land Department, bringing together 4,000+ industry participants, 1,500 companies, and 300 speakers. The event showcased key digital platforms including Dubai REST, the AI-powered Smart Rental Index, and the Live Real Estate Transactions Screen, reinforcing Dubai's focus on technology-driven market transparency and regulatory innovation.

REIDIN RESIDENTIAL CITY-WIDE SALES PRICE TREND



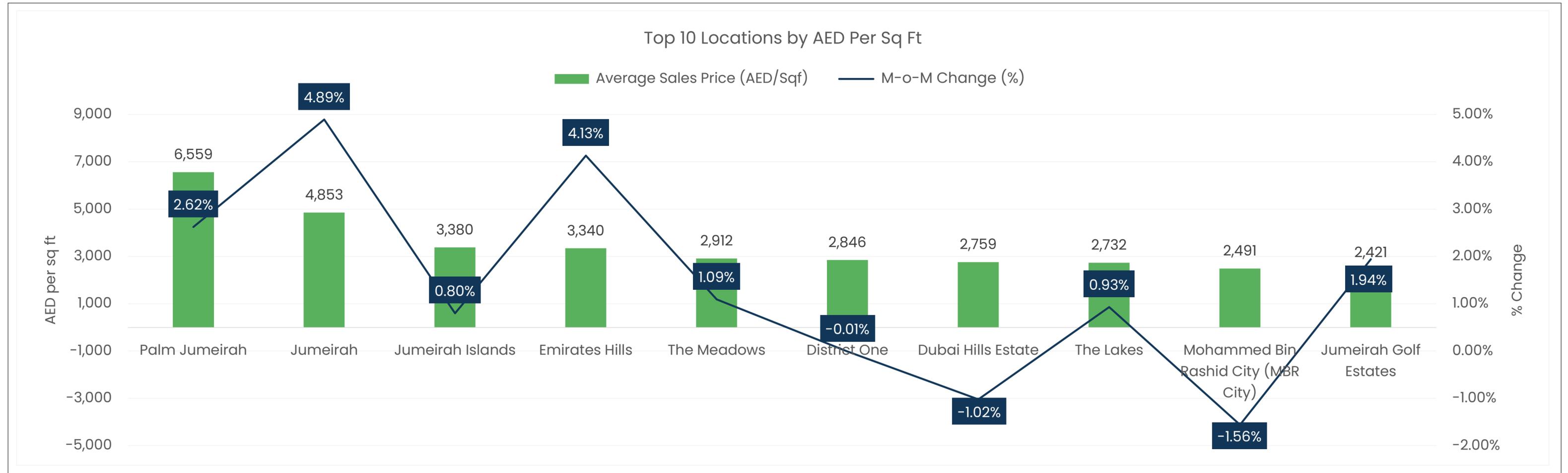
- Residential prices have continued to demonstrate steady, uninterrupted growth across both apartments and villas from Jan-24 to Jan-26, reinforcing sustained market confidence.
- Between Jan-25 and Jan-26, apartment prices increased from AED 1,674 psf to AED 1,867 psf (11%–12% YoY), while villa prices rose from AED 2,065 psf to AED 2,347 psf (13%–14% YoY), highlighting stronger price growth in the villa segment.
- The price premium of villas over apartments has widened materially, expanding from roughly AED 296 psf in Jan-24 to approximately AED 480 psf by Jan-26, reflecting sustained preference for low-density homes and greater pricing power in that segment.

REIDIN APARTMENTS SALES PRICE TREND



- Apartment prices across Dubai’s prime sub-markets remain strong, with Palm Jumeirah leading at approximately AED 3,485 psf, followed by Jumeirah (AED 3,253 psf) and Downtown Dubai (AED 3,004 psf), reinforcing the pricing premium commanded by established prime locations.
- Monthly performance reflects divergent momentum across locations. Jumeirah recorded the strongest monthly growth (+2.92%), while Palm Jumeirah (+0.87%) and Downtown Dubai (+1.03%) posted moderate gains. In contrast, DIFC (-0.80%), Dubai Marina (-0.90%), and Jumeirah Beach Residence (-1.32%) recorded minor corrections, suggesting localized price adjustments following earlier appreciation.
- Mid-tier prime communities such as Dubai Hills Estate (+0.19%), Dubai Creek Harbour (+0.75%), and MBR City (+0.43%) recorded incremental growth, indicating continued buyer interest without signs of overheating.

REIDIN VILLAS SALES PRICE TREND



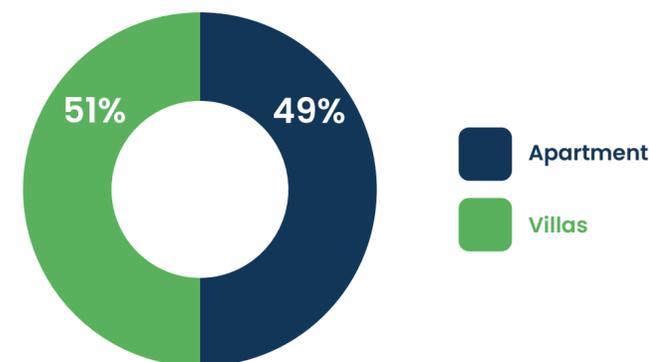
- Villa prices remain firmly concentrated in prime, low-density communities, with Palm Jumeirah leading at AED 6,559 psf, followed by Jumeirah (AED 4,853 psf) and Jumeirah Islands (AED 3,380 psf), underscoring the sustained premium commanded by waterfront and established luxury enclaves.
- Monthly price momentum reflects selective strength across key sub-markets. Jumeirah recorded the strongest month-on-month growth at +4.89%, followed by Emirates Hills at +4.13%, indicating renewed demand in ultra-prime villa locations. Palm Jumeirah also posted steady gains of +2.62%, reinforcing continued appetite for branded and waterfront assets.
- In contrast, mild corrections were observed in select communities such as Dubai Hills Estate (-1.02%) and MBR City (-1.56%), suggesting localized normalization rather than broad-based weakness.

TOTAL SALES TRANSACTIONS BY TYPOLOGIES & LOCATIONS

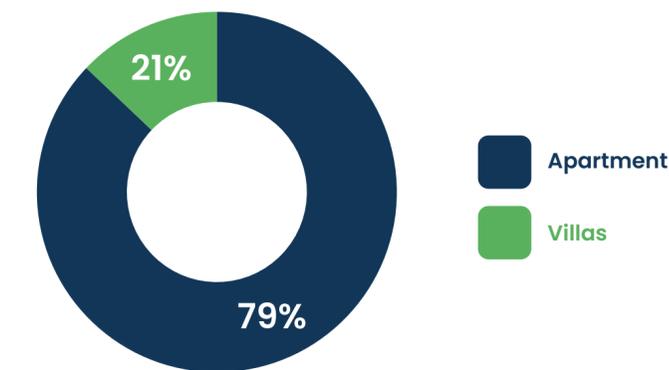
VOLUME AND VALUE

Sales Transactions	Total Value (AED Bn)	Total Volume
Apartment Sales	26.4 Bn	12,810
Villa Sales	27.3 Bn	3,496
Grand Total	53.6 Bn	16,306

TOTAL VALUE (AED BN)



TOTAL VOLUME



TOP 10 LOCATIONS BY VALUE

The Oasis	6.1 Bn
Dubai Hills Estate	3.9 Bn
Damac Island City	3.7 Bn
Business Bay	2.5 Bn
Dubai Islands	2.1 Bn
Dubai Investment Park Second	1.8 Bn
Dubai Creek Harbour	1.8 Bn
Palm Jumeirah	1.8 Bn
Palm Jebel Ali	1.7 Bn
Nad Al Shiba First	1.4 Bn

TOP 10 LOCATIONS BY VOLUME

Damac Islands 1 & 2	1,099
Jumeirah Village Circle	1,080
Business Bay	834
Dubailand Residence Complex	707
Dubai Islands	654
Dubai Creek Harbour	609
Majan	585
Dubai Investment Park Second	504
Jumeirah Village Triangle	458
Dubai Hills Estate	448

SALES SEQUENCE: PRIMARY VS SECONDARY MARKET OVERVIEW

PRIMARY AND SECONDARY SALES SPLIT

Sales Sequence	Total Value (AED Bn)	Total Volume
Primary Sales	37.5 Bn	11,234
Secondary Sales	16.1 Bn	5,072
Grand Total	53.6 Bn	16,306

PRIMARY SALES SPLIT BY PROPERTY TYPE

Property Type	Total Value (AED Bn)	Total Volume
Apartment Sales	18.7 Bn	8,907
Villa Sales	18.8 Bn	2,327
Grand Total	37.5 Bn	11,234

SECONDARY SALES SPLIT BY PROPERTY TYPE

Property Type	Total Value (AED Bn)	Total Volume
Apartment Sales	7.6 Bn	3,903
Villa Sales	8.5 Bn	1,169
Grand Total	16.1 Bn	5,072

TRANSACTION TYPE: OFF-PLAN VS READY MARKET OVERVIEW

OFF-PLAN AND READY SALES SPLIT

Transaction Type	Total Value (AED Bn)	Total Volume
Off-Plan Sales	40.5 Bn	11,666
Ready Sales	13.1 Bn	4,640
Grand Total	53.6 Bn	16,306

OFF-PLAN SALES SPLIT BY PROPERTY TYPE

Property Type	Total Value (AED Bn)	Total Volume
Apartment Sales	19.7 Bn	9,034
Villa Sales	20.8 Bn	2,632
Grand Total	40.5 Bn	11,666

READY SALES SPLIT BY PROPERTY TYPE

Property Type	Total Value (AED Bn)	Total Volume
Apartment Sales	6.7 Bn	3,776
Villa Sales	6.4 Bn	864
Grand Total	13.1 Bn	4,640

OFF-PLAN MARKET

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

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	2.66 Bn	3,955
1-2 Mn	6.57 Bn	4,701
2-3 Mn	5.08 Bn	2,093
3-5 Mn	5.08 Bn	1,350
5-10 Mn	3.51 Bn	537
> 10 Mn	3.47 Bn	174

TICKET SIZE SPLIT OF VILLA SALES

Sales Transactions	Total Value (AED Bn)	Total Volume
< 1 Mn	0.03 Bn	44
1-2 Mn	0.20 Bn	136
2-3 Mn	2.69 Bn	970
3-5 Mn	3.83 Bn	974
5-10 Mn	3.73 Bn	568
> 10 Mn	16.77 Bn	804

LUXURY MARKET OVERVIEW

KEY TAKEAWAYS

- Luxury transactions remain off-plan led, accounting for AED 15.8Bn, 78% of total value, across 803 transactions, 82% of volume, significantly exceeding the ready segment at AED 4.5Bn across 175 transactions, highlighting continued investor preference for newly launched ultra-high-value projects.
- Villas dominate the off-plan luxury segment, accounting for AED 13.3Bn across 679 transactions, representing over 80% of total off-plan luxury value, underscoring strong demand for large-format, low-density luxury residences.
- Luxury activity remains highly concentrated geographically, with The Oasis (AED 6.1Bn), Dubai Hills Estate (AED 2.7Bn), and Palm Jebel Ali (AED 1.3Bn) emerging as the largest contributors to off-plan luxury transaction value, reinforcing the dominance of master-planned villa communities.
- January 2026 recorded landmark transactions, including a AED 340Mn beachfront villa on Jumeirah Bay Island (AED 36,980 psf) and an AED 80Mn sale at Bulgari Lighthouse (AED 12,424 psf), highlighting sustained global demand for trophy assets in branded and waterfront developments.
- Villa transactions are overwhelmingly concentrated in the luxury segment, accounting for nearly 83% of total luxury transaction value (AED 16.8Bn of AED 20.2Bn).

* Luxury ≥ AED 10M

LUXURY MARKET OVERVIEW

OFF-PLAN AND READY SALES SPLIT

Transaction Type	Total Value (AED Bn)	Total Volume
Off-Plan Sales	15.8 Bn	803
Ready Sales	4.5 Bn	175
Grand Total	20.2 Bn	978

OFF-PLAN SALES SPLIT BY PROPERTY TYPE

Property Type	Total Value (AED Bn)	Total Volume
Apartment Sales	2.5 Bn	124
Villa Sales	13.3 Bn	679
Grand Total	15.8 Bn	803

READY SALES SPLIT BY PROPERTY TYPE

Property Type	Total Value (AED Bn)	Total Volume
Apartment Sales	0.9 Bn	50
Villa Sales	3.5 Bn	125
Grand Total	4.5 Bn	175

* Luxury ≥ AED 10M

LUXURY MARKET OVERVIEW

TOP 5 TRANSACTIONS -- APARTMENTS

Project Name	Location	Developer	Sale Value (AED)	Average Price/ Sq ft	Transaction Type
Bulgari Lighthouse Dubai	Jumeirah Bay Island	Meraas	80.0 Mn	12,424	Off-plan
Aman Residences Tower 1	Jumeirah Second	H&H	71.6 Mn	12,039	Off-plan
The Royal Atlantis Residences	Palm Jumeirah	Atlantis The Palm 2	65.0 Mn	10,420	Ready
The Royal Atlantis Residences	Palm Jumeirah	Atlantis The Palm 2	63.5 Mn	10,178	Ready
Ocean House	Palm Jumeirah	Ellington	58.3 Mn	7,030	Off-plan

TOP 5 TRANSACTIONS -- VILLAS

Project Name	Location	Developer	Sale Value (AED)	Average Price/ Sq ft	Transaction Type
Jumeirah Bay Island Villas	Jumeirah Bay Island	Meraas	340.0 Mn	36,980	Sales – Ready
Signature Villas Frond G (Al Shishi)	Palm Jumeirah	Nakheel	245.0 Mn	17,509	Sales – Ready
Emirates Hills – Sector R	Emirates Hills	Emaar	100.0 Mn	10,561	Sales – Ready
Eden Hills	Dubai Hills Estate	H&H	96.3 Mn	4,449	Sales – Off-Plan
Signature Villas Frond M (Al Sefri)	Palm Jumeirah	Nakheel	91.0 Mn	13,000	Sales – Ready

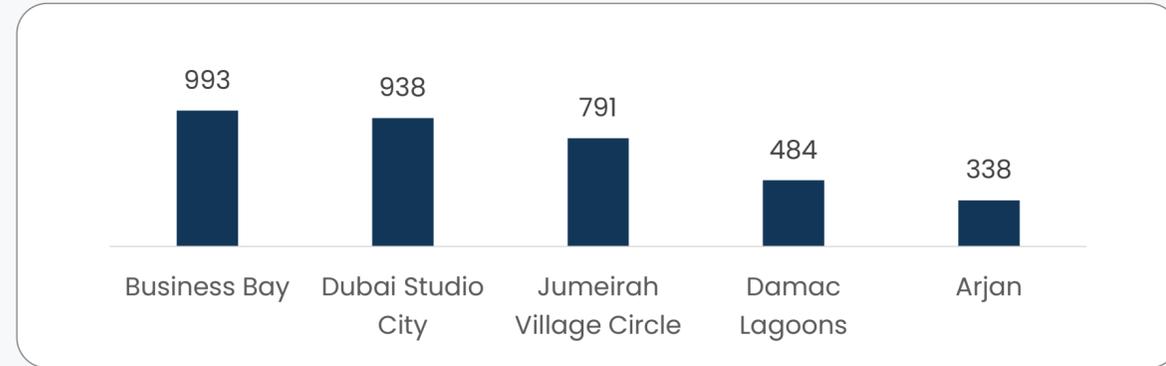
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COMPLETED & UPCOMING SUPPLY OVERVIEW

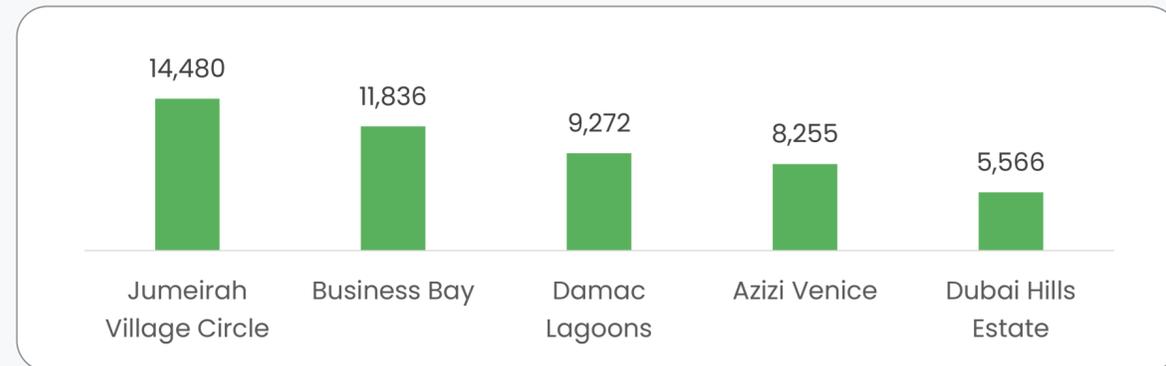
COMPLETED & UNDER CONSTRUCTION UNITS

Status	Q1 2026	Q2 2026	Q3 2026	Q4 2026
Completed	5,225			
Under Construction		40,763	45,869	60,697

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	4,331
Villas	894
Total	5,225

DEVELOPER ANNOUNCED HANDOVER UNITS IN 2026 BY PROPERTY TYPE

Property Type	Under Construction Units
Apartments	122,217
Villas	25,558
Total	147,775

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