

**DUBAI RESIDENTIAL REAL ESTATE  
Q1 2026 MARKET OVERVIEW**

# KEY HIGHLIGHTS

## **Residential sales volumes declined in Q1 2026, but transaction value remained near Q4 2025 levels**

Dubai recorded AED 137.3 billion in residential sales across 45,221 transactions in Q1 2026. Compared to Q4 2025, transaction volumes fell by 17.1%, while total sales value edged down by 0.4%, reflecting continued activity in higher-value transactions.

## **Residential price trends remained positive, with slower quarterly gains**

Dubai's residential price trend continued upward in Q1 2026 across both apartments and villas. Apartment values rose from AED 1,853 per sq ft in December 2025 to AED 1,871 per sq ft in March 2026, while villa values increased from AED 2,331 per sq ft to AED 2,376 per sq ft. The market remained on a growth path, although quarterly gains were lower than in Q4 2025.

## **Off-plan activity continued to drive the market in Q1 2026**

Off-plan sales accounted for AED 103.4 billion of total residential sales value and 32,608 transactions during the quarter, representing three-quarters of total market value and nearly three-quarters of total volume. This remained the clearest driver of overall market activity in Q1 2026.

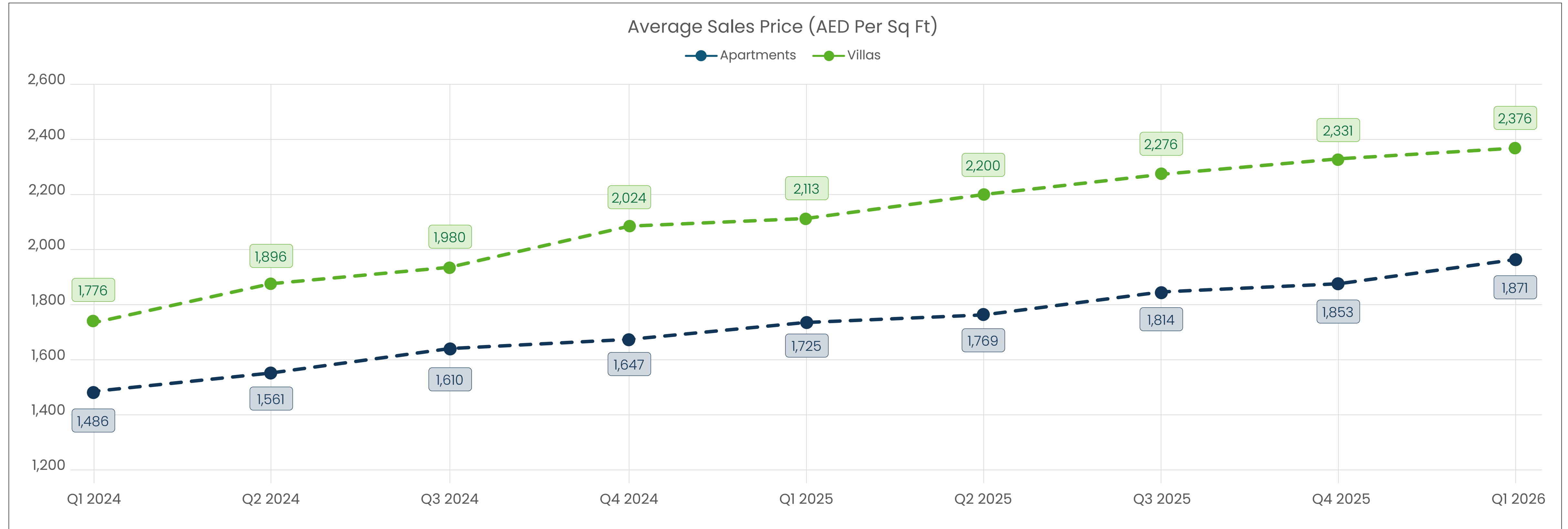
## **Luxury value remained highly concentrated in off-plan villas**

The luxury segment recorded 2,076 transactions worth AED 43.7 billion in Q1 2026. Off-plan transactions accounted for 77% of luxury sales value, while villas contributed 73%, underscoring the concentration of high-value activity within these segments. The Oasis by Emaar alone represented AED 9.7 billion in transaction value during the quarter.

## **Q1 completions remain modest against the broader 2026 delivery pipeline**

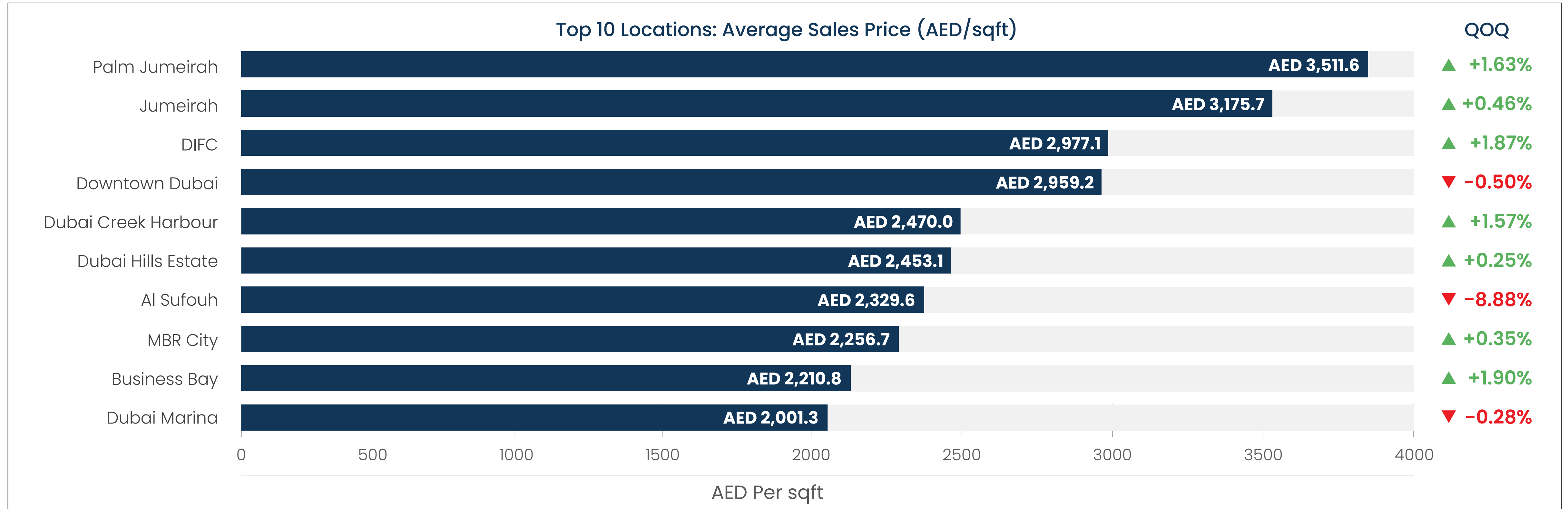
A total of 7,676 residential units were completed in Q1 2026. Based on current developer-announced timelines, a further 145,809 units are slated across Q2 to Q4 2026, although actual market entry will depend on project progress, with handover schedules typically evolving over time.

# CITYWIDE RESIDENTIAL SALES PRICE TREND



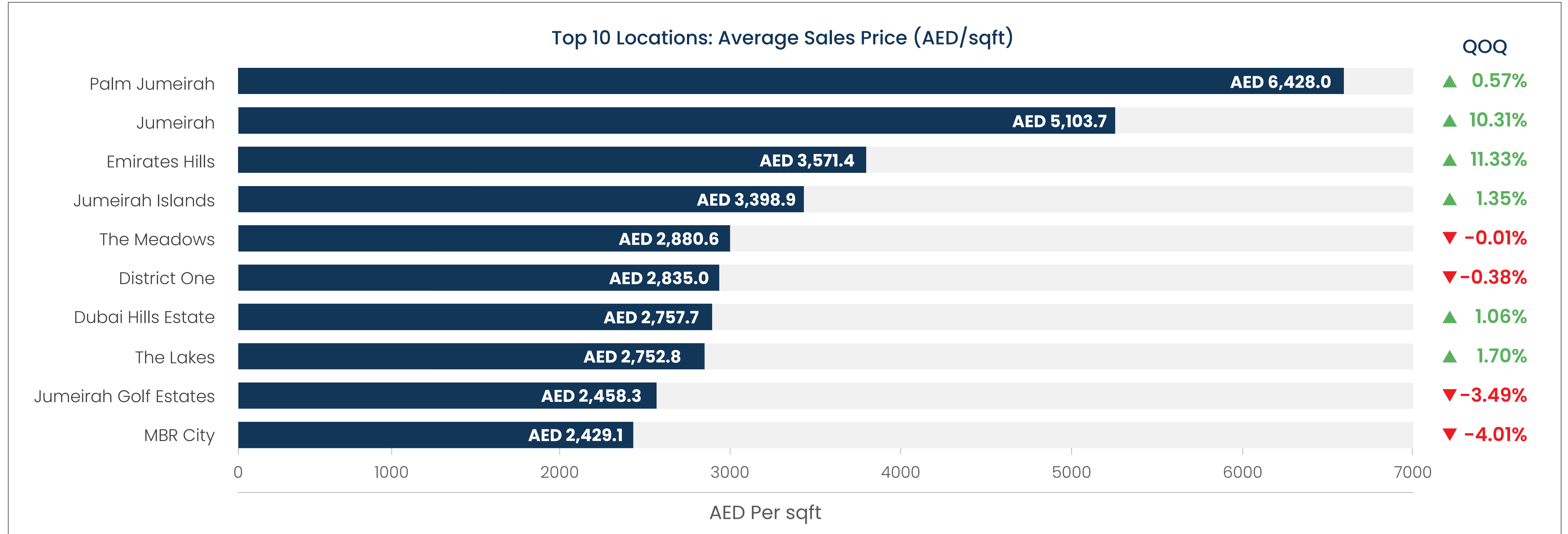
- Residential sales prices closed Q1 2026 above December 2025 levels across both segments, with apartment values rising by 1.0% quarter on quarter to AED 1,871 per sq ft and villa values increasing by 1.9% to AED 2,376 per sq ft.
- Villas continued to trade at a widening premium to apartments, with the price gap increasing from AED 478 per sq ft in December 2025 to AED 505 per sq ft in March 2026.
- Price momentum softened in March, with apartment values edging down 0.3% month on month and villa values easing 0.3% from February levels.

# APARTMENT SALES PRICE TREND



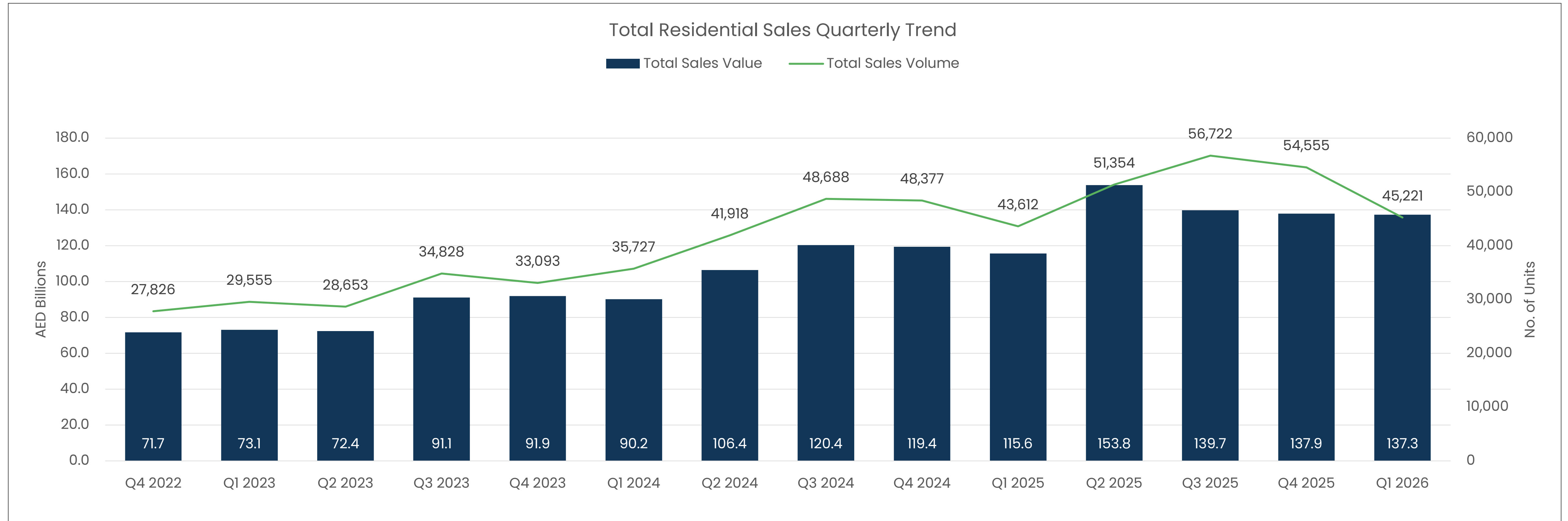
- Palm Jumeirah remained the highest-priced apartment market in Q1 2026 at AED 3,511.6 per sq ft, followed by Jumeirah at AED 3,175.7 per sq ft and DIFC at AED 2,977.1 per sq ft.
- Among the top apartment locations, Business Bay and DIFC recorded the strongest quarterly price growth at 1.90% and 1.87% respectively, while Al Sufouh recorded the sharpest decline at 8.88%.
- Most of the Top 10 Areas recorded quarter on quarter price growth in Q1 2026, while three locations posted declines, indicating that pricing remained positive across most prime apartment markets despite some pockets of correction

# VILLA SALES PRICE TREND



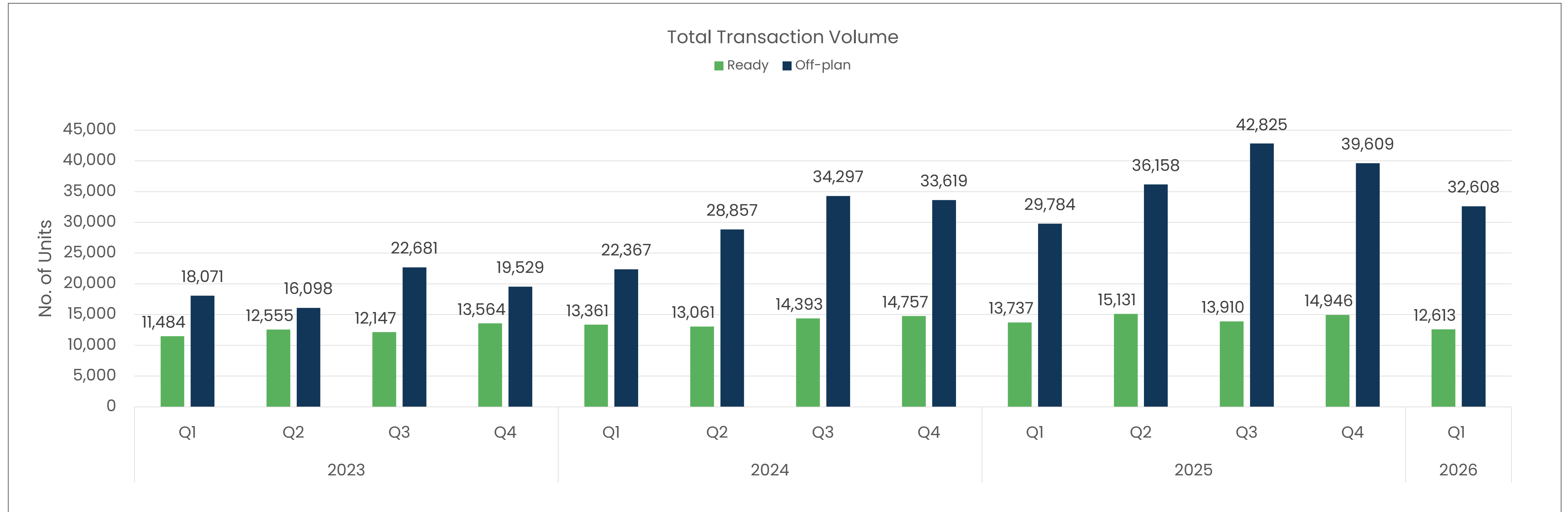
- Palm Jumeirah remained the highest-priced villa market in Q1 2026 at AED 6,428/sqft, followed by Jumeirah at AED 5,103.7/sqft and Emirates Hills at AED 3,571.4/sqft.
- Price growth was higher in premium locations, with Emirates Hills at +11.33% and Jumeirah at +10.31% recording the strongest quarterly increases.
- Mohammed Bin Rashid City recorded the largest decline at -4.01%, followed by Jumeirah Golf Estates at -3.49%, while District One recorded a marginal decline.

# TOTAL SALES TRANSACTIONS QUARTERLY TREND



- Total residential sales value reached AED 137.3 billion in Q1 2026, broadly in line with Q4 2025's AED 137.9 billion despite a 17% drop in transaction volumes from 54,555 to 45,221 units, confirming that buyer confidence and pricing power remain intact.
- On a YoY basis, Q1 2026 sales value is up 18.8% against Q1 2025's AED 115.6 billion, while volumes grew only 3.7%, confirming that value growth is significantly outpacing volume growth
- Total sales value has nearly doubled from AED 71.7 billion in Q4 2022 to AED 137.3 billion in Q1 2026, reflecting sustained and compounding growth in Dubai's residential market over a three-year period

# TOTAL SALES TRANSACTIONS QUARTERLY TREND - VOLUME



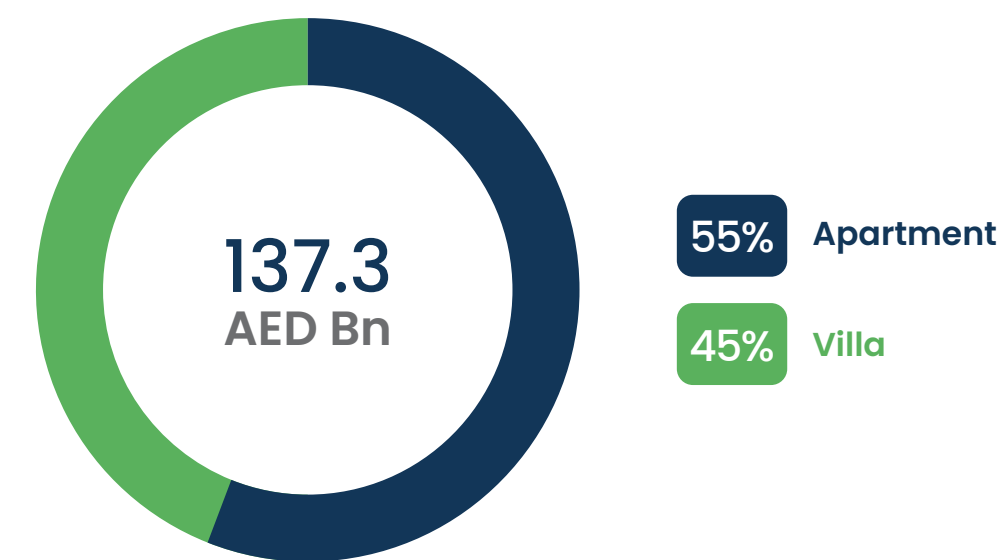
- Total transaction volumes declined 17.1% QoQ from 54,555 in Q4 2025 to 45,221 in Q1 2026, with off-plan and ready segments easing 17.7% and 15.6% respectively, while on a year-on-year basis off-plan volumes grew 9.5% against a decline of 8.2% in ready transactions.
- Over a three year horizon, off-plan volumes have expanded 80.4% from 18,071 in Q1 2023 to 32,608 in Q1 2026, against a modest 9.8% expansion in ready transactions, reflecting the clear dominance of off-plan activity across Dubai's residential market.
- Ready transactions have consistently stayed within the 11,000 to 15,000 unit range every quarter from 2023 through Q1 2026, indicating stable and steady secondary market demand over the period.

# TOTAL SALES TRANSACTIONS BY TYPOLOGIES & LOCATIONS

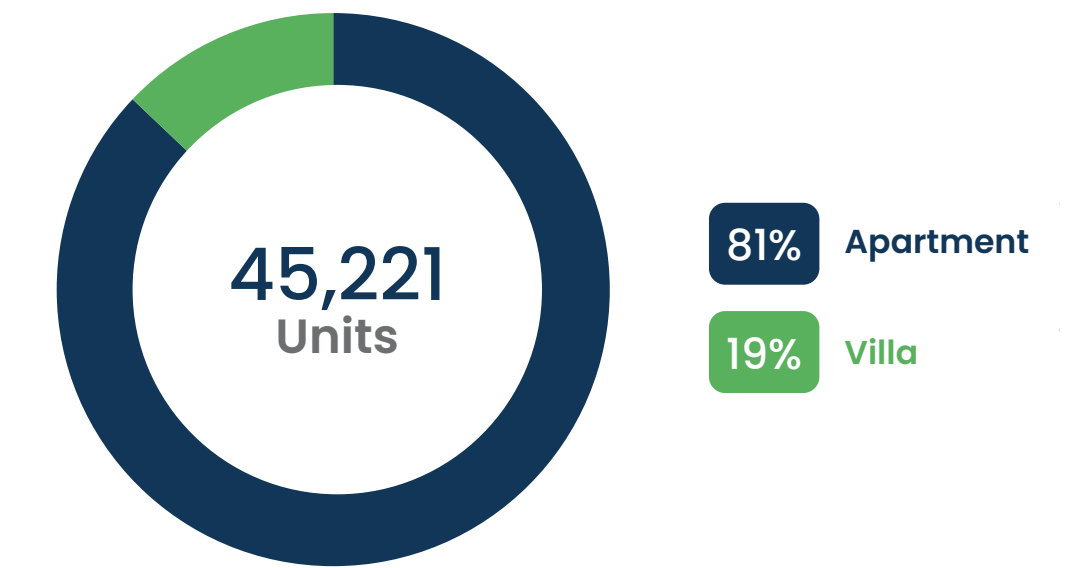
## VOLUME AND VALUE

Sales Transactions	Total Value (AED Bn)	Total Volume
Apartment Sales	76.0 Bn	36,613
Villa Sales	61.3 Bn	8,608
<b>Grand Total</b>	<b>137.3 Bn</b>	<b>45,221</b>

## TOTAL VALUE (AED Bn)



## TOTAL VOLUME



## TOP 10 LOCATIONS BY VALUE

1	The Oasis	9.7 Bn
2	Damac Island City	9.4 Bn
3	Dubai Hills Estate	6.8 Bn
4	The Heights	5.8 Bn
5	Dubai Islands	5.6 Bn
6	Business Bay	5.2 Bn
7	Palm Jumeirah	5.1 Bn
8	Dubai Creek Harbour	3.7 Bn
9	Jumeirah Village Circle	3.7 Bn
10	Palm Jebel Ali	3.6 Bn

## TOP 10 LOCATIONS BY VOLUME

1	Jumeirah Village Circle	3,162
2	Damac Island City	2,822
3	Dubailand Residence Complex	2,303
4	Business Bay	1,837
5	Dubai Islands	1,694
6	Majan	1,646
7	Dubai Creek Harbour	1,222
8	Jumeirah Village Triangle	1,087
9	Meydan City	1,080
10	Dubai Hills Estate	1,022

# OFF-PLAN MARKET ACTIVITY BY SEGMENT AND LOCATION

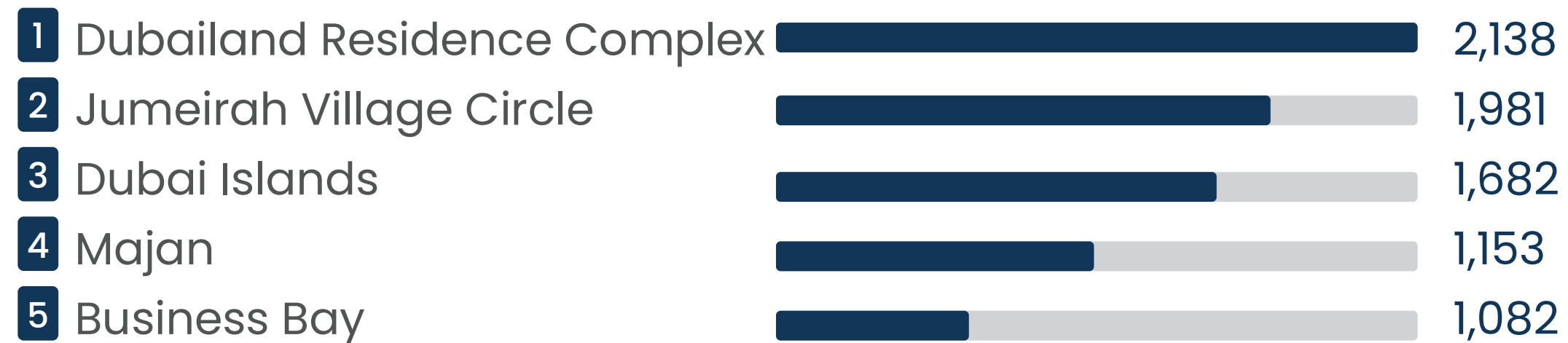
## TOP 5 OFF-PLAN APARTMENTS' LOCATIONS BY VALUE



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



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

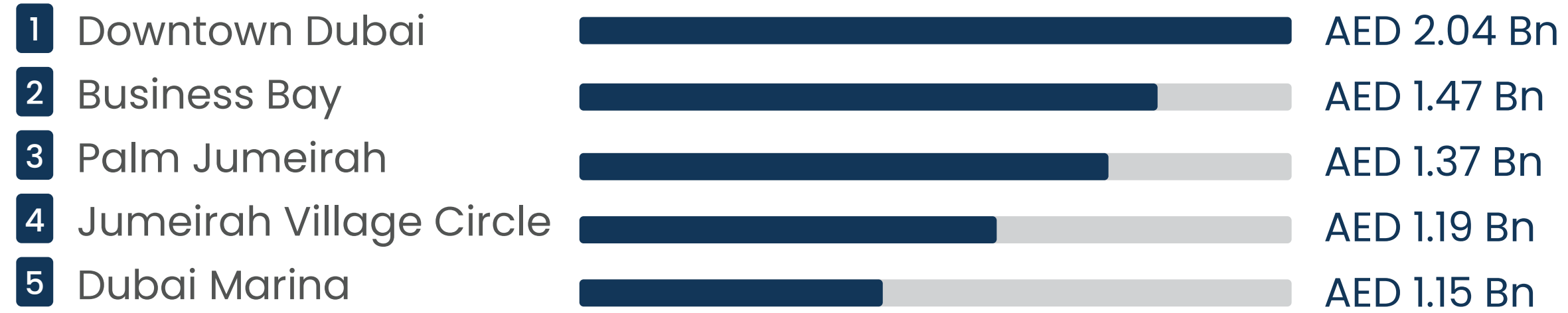


## TOP 5 OFF-PLAN VILLAS' LOCATIONS BY VOLUME

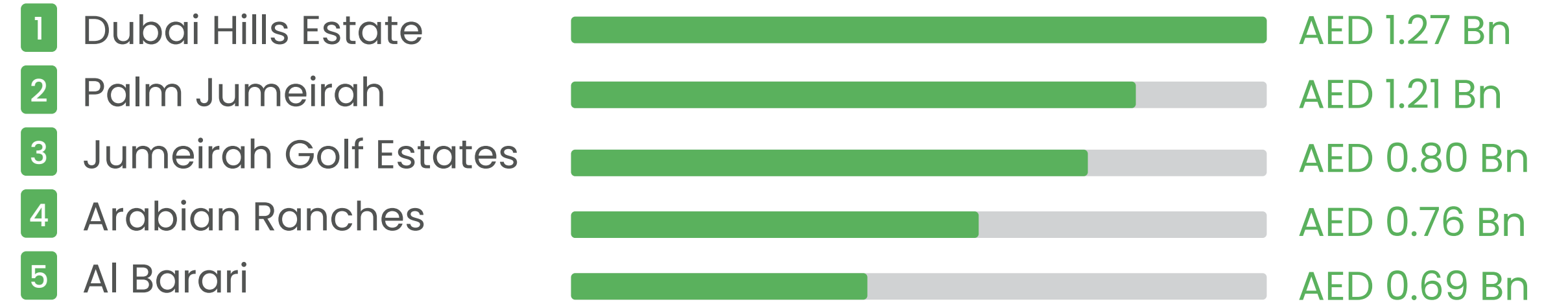


# READY MARKET ACTIVITY BY SEGMENT AND LOCATION

## 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



# PRIMARY VS SECONDARY MARKET OVERVIEW

## PRIMARY AND SECONDARY SALES SPLIT

Segment	Total Value (AED Bn)	Value%	Total Volume	Volume%
Primary Sales	95.3 Bn	69.4%	31,641	70.0%
Secondary Sales	42.0 Bn	30.6%	13,580	30.0%
Grand Total	137.3 Bn	100%	45,221	100.0%

## PRIMARY VS SECONDARY SALES BY PROPERTY TYPE

Property Type	Primary Value	Primary Volume	Secondary Value	Secondary Volume
Apartments	54.1 Bn	25,995	21.9 Bn	10,618
Villas	41.2 Bn	5,546	20.1 Bn	2,962
Grand Total	95.3 Bn	31,641	42.0 Bn	13,580

# OFF-PLAN VS READY MARKET OVERVIEW

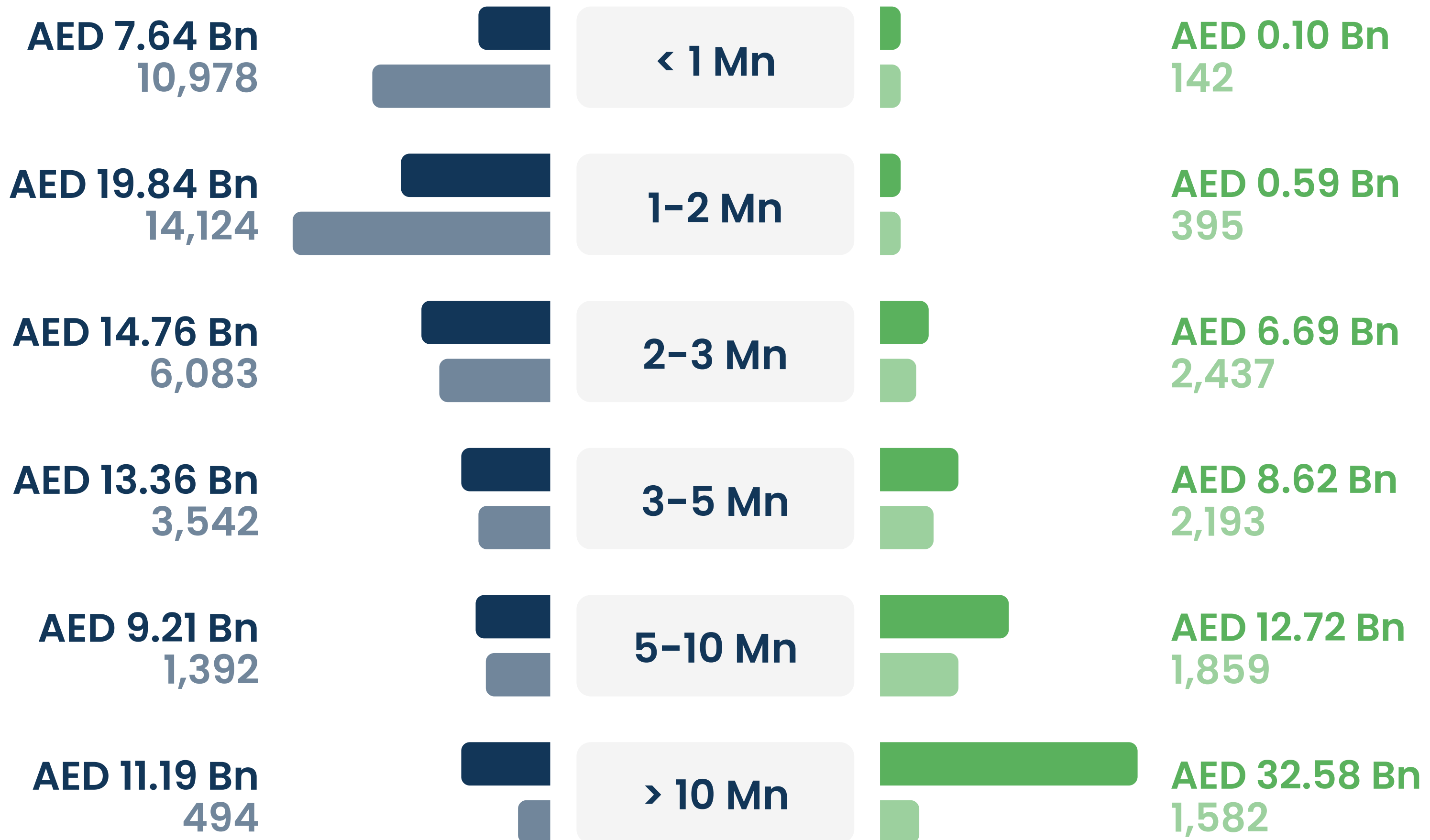
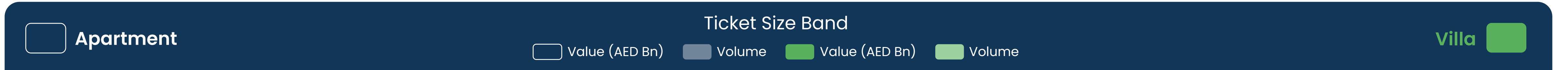
## OFF-PLAN AND READY SALES SPLIT

Transaction Type	Total Value (AED Bn)	Value%	Total Volume	Volume%
Off-Plan Sales	103.4 Bn	75.3%	32,608	72.1%
Ready Sales	33.9	24.7%	12,613	27.9%
Grand Total	137.3 Bn	100%	45,221	100.0%

## OFF-PLAN VS READY SALES BY PROPERTY TYPE

Transaction Type	Off-Plan Value	Off-Plan Volume	Ready Value	Ready Volume
Apartments	57.2 Bn	26,233	18.8 Bn	10,381
Villas	46.2 Bn	5,376	15.1 Bn	2,232
Grand Total	103.4 Bn	32,608	33.9 Bn	12,613

# OVERALL TICKET SIZE SPLIT BY TYPOLOGIES



# LUXURY MARKET OVERVIEW

## OFF-PLAN AND READY SALES SPLIT

Transaction Type	Total Value (AED Bn)	Value%	Total Volume	Volume%
Off-Plan Sales	AED 33.7 Bn	77.1%	1,630	78.5%
Ready Sales	AED 10.1 Bn	29.9%	446	21.5%
<b>Grand Total</b>	<b>AED 43.7 Bn</b>	<b>100%</b>	<b>2,076</b>	<b>100.0%</b>

## OFF-PLAN VS READY SALES BY PROPERTY TYPE

Transaction Type	Off-Plan Value	Off-Plan Volume	Ready Value	Ready Volume
Apartments	AED 8.8 Bn	362	AED 2.4 Bn	132
Villas	AED 24.9 Bn	1,268	AED 7.7 Bn	314
<b>Grand Total</b>	<b>AED 33.7 Bn</b>	<b>1,630</b>	<b>AED 10.1 Bn</b>	<b>446</b>

\* Luxury ≥ AED 10M

# LUXURY MARKET OVERVIEW

## TOP 5 TRANSACTIONS -- APARTMENTS

<b>1</b>	<b>Aman Residences Tower 1</b> Jumeirah Second H&H 04 Mar 2026	<b>AED 422.0 Mn</b> Sales Value	<b>13,525</b> AED/sqft	<b>Off-Plan</b>
<b>2</b>	<b>Aman Residences Tower 1</b> Jumeirah Second H&H 26 Mar 2026	<b>AED 356.2 Mn</b> Sales Value	<b>11,417</b> AED/sqft	<b>Off-Plan</b>
<b>3</b>	<b>The Alba Residences 1</b> Palm Jumeirah Omniyat 17 Feb 2026	<b>AED 226.0 Mn</b> Sales Value	<b>7,199</b> AED/sqft	<b>Off-Plan</b>
<b>4</b>	<b>Peninsula Dubai Residences Tower 2</b> Jumeirah Second H&H 05 Feb 2026	<b>AED 210.0 Mn</b> Sales Value	<b>9,628</b> AED/sqft	<b>Off-Plan</b>
<b>5</b>	<b>Fairmont Residences Solara Tower</b> Downtown Dubai SOL 19 Feb 2026	<b>AED 113.7 Mn</b> Sales Value	<b>5,496</b> AED/sqft	<b>Off-Plan</b>

\* Luxury ≥ AED 10M

# LUXURY MARKET OVERVIEW

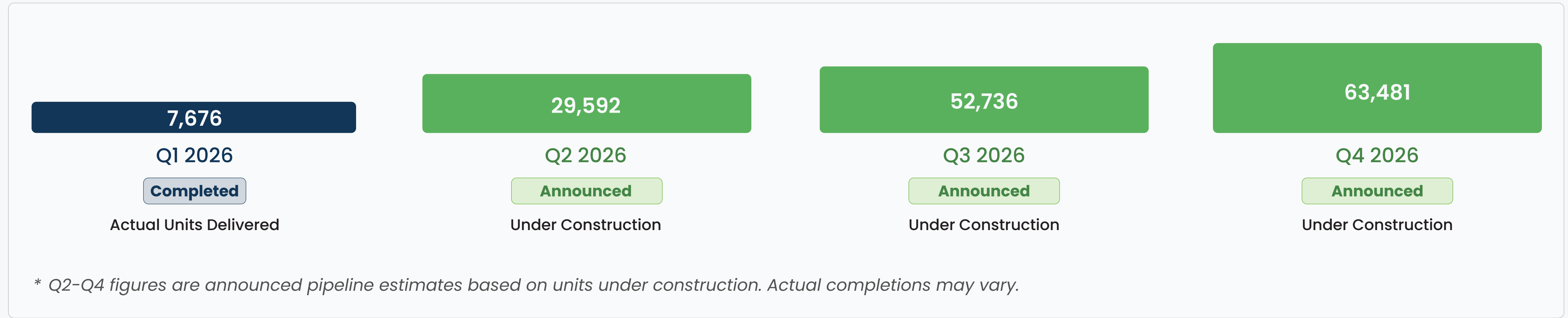
## TOP 5 TRANSACTIONS -- VILLAS

1	<b>Asora Bay Ocean Mansions</b> La Mer Meraas 09 Feb 2026	<b>AED 350.0 Mn</b> Sales Value	<b>12,985</b> AED/sqft	Off-Plan
2	<b>Jumeirah Bay Island Villas</b> Jumeirah Bay Island Meraas 26 Jan 2026	<b>AED 340.0 Mn</b> Sales Value	<b>36,980</b> AED/sqft	Ready
3	<b>Signature Villas Frond G (Al Shishi)</b> Palm Jumeirah Nakheel 29 Jan 2026	<b>AED 245.0 Mn</b> Sales Value	<b>17,509</b> AED/sqft	Ready
4	<b>Signature Villas Frond G (Al Shishi)</b> Palm Jumeirah Nakheel 26 Feb 2026	<b>AED 130.0 Mn</b> Sales Value	<b>18,571</b> AED/sqft	Ready
5	<b>EOME</b> Palm Jumeirah Blue Haven 19 Feb 2026	<b>AED 115.0 Mn</b> Sales Value	<b>7,390</b> AED/sqft	Off-Plan

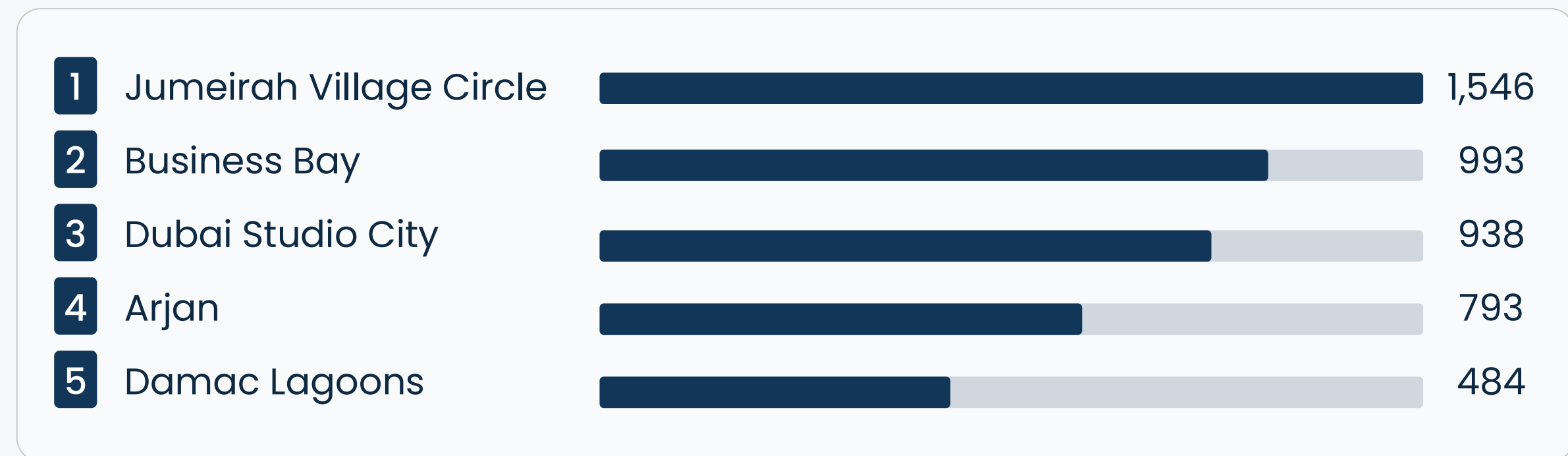
\* Luxury ≥ AED 10M

# COMPLETED & UPCOMING SUPPLY OVERVIEW

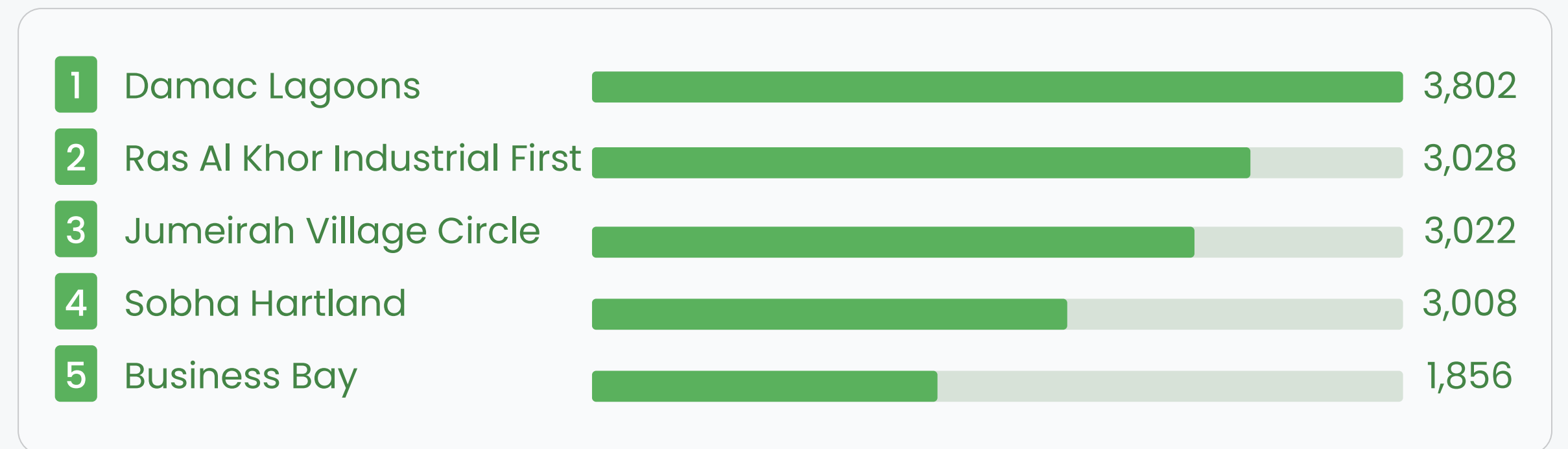
## 2026 SUPPLY PIPELINE - QUARTERLY PROGRESSION



## TOP COMPLETED SUPPLY LOCATIONS - Q1 2026



## TOP HANDOVER LOCATIONS ANNOUNCED BY DEVELOPERS - Q2 2026





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[www.reidin.com](http://www.reidin.com) | [info@reidin.com](mailto:info@reidin.com)