

# DUBAI RESIDENTIAL REAL ESTATE APRIL 2026 MARKET OVERVIEW

# KEY HIGHLIGHTS

## **Residential transactions reached AED 38.5 billion across 13,335 sales**

Dubai recorded AED 38.5 billion across 13,335 residential transactions in April 2026. Apartments accounted for 86% of transactions and 64% of sales value, while villas accounted for 14% of transactions and 36% of sales value. The market was apartment-led by transaction count, while villas carried a larger share of total sales value.

## **Citywide average prices declined across apartments and villas**

Citywide average apartment sales prices moved from AED 1,872 per sq ft in March to AED 1,836 per sq ft in April, down 1.9% month-on-month. Citywide average villa prices moved from AED 2,378 per sq ft to AED 2,351 per sq ft, down 1.1%. Despite the monthly decline, both apartment and villa prices remained above 2025 levels.

## **Off-plan transactions accounted for 80% of residential sales value**

Off-plan transactions reached AED 30.8 billion across 10,352 sales in April, accounting for 80% of total sales value and 78% of transaction volume. Ready transactions accounted for AED 7.7 billion across 2,983 sales. Off-plan villa sales alone reached AED 10.7 billion, higher than the full ready market value recorded during the month.

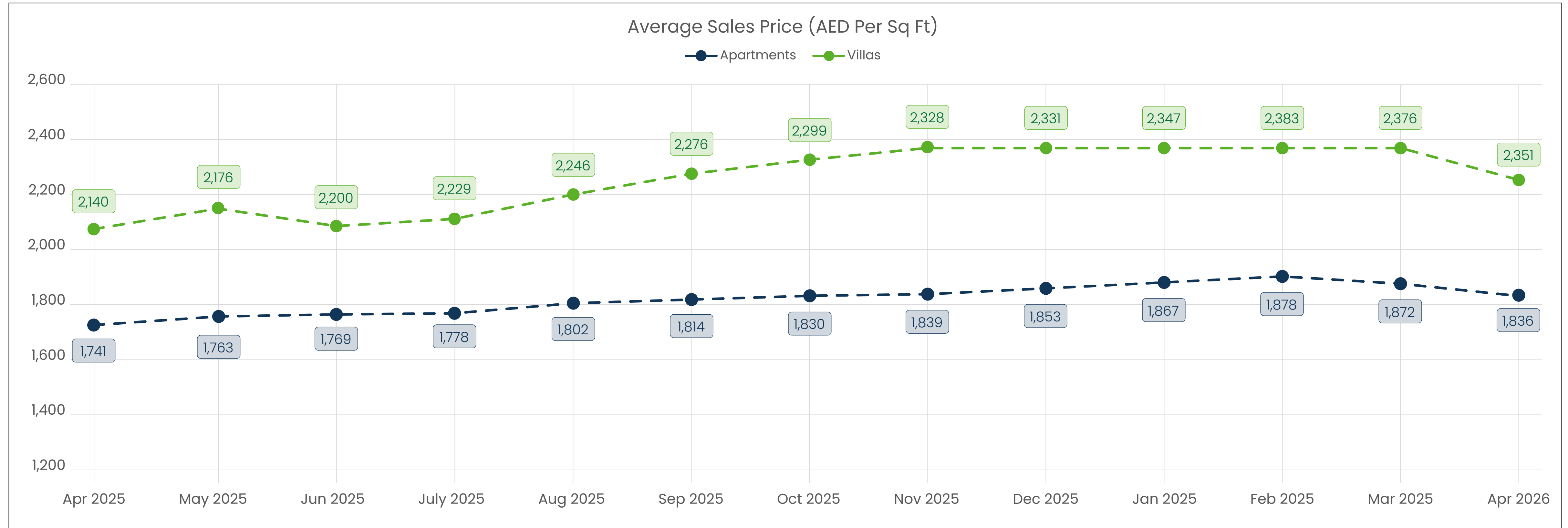
## **Luxury sales accounted for 30% of value from 3.9% of transactions**

Transactions above AED 10 million reached AED 11.5 billion across 520 sales, representing 30% of total residential sales value from 3.9% of total transactions. Off-plan luxury sales accounted for AED 9.6 billion, while ready luxury sales accounted for AED 1.9 billion. Villas contributed AED 7.8 billion of luxury sales value, compared with AED 3.8 billion from apartments.

## **Residential completions reached 9,412 units by April 2026**

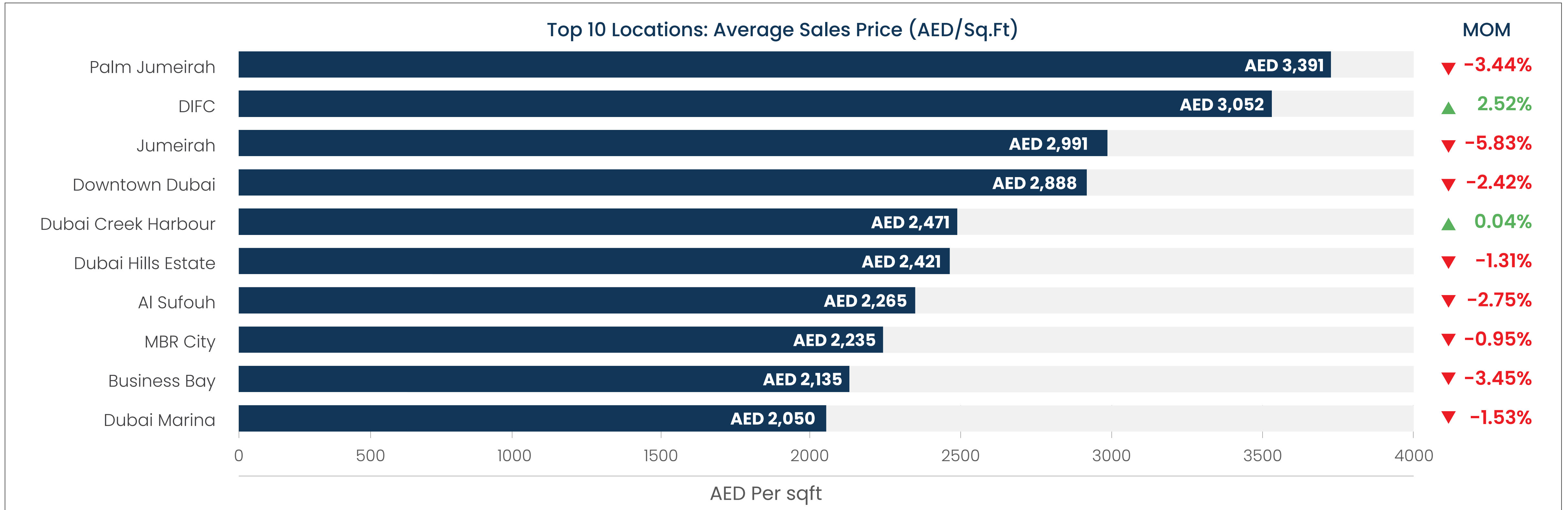
Dubai recorded 1,054 completed residential units in April 2026, taking total residential completions to 9,412 units by the end of April 2026. More than 16,000 units remain under construction for Q2 2026 handover, while Q3 and Q4 account for 57,200 and 68,943 announced units respectively. Actual completions remain dependent on project level delivery progress.

# CITYWIDE RESIDENTIAL SALES PRICE TREND



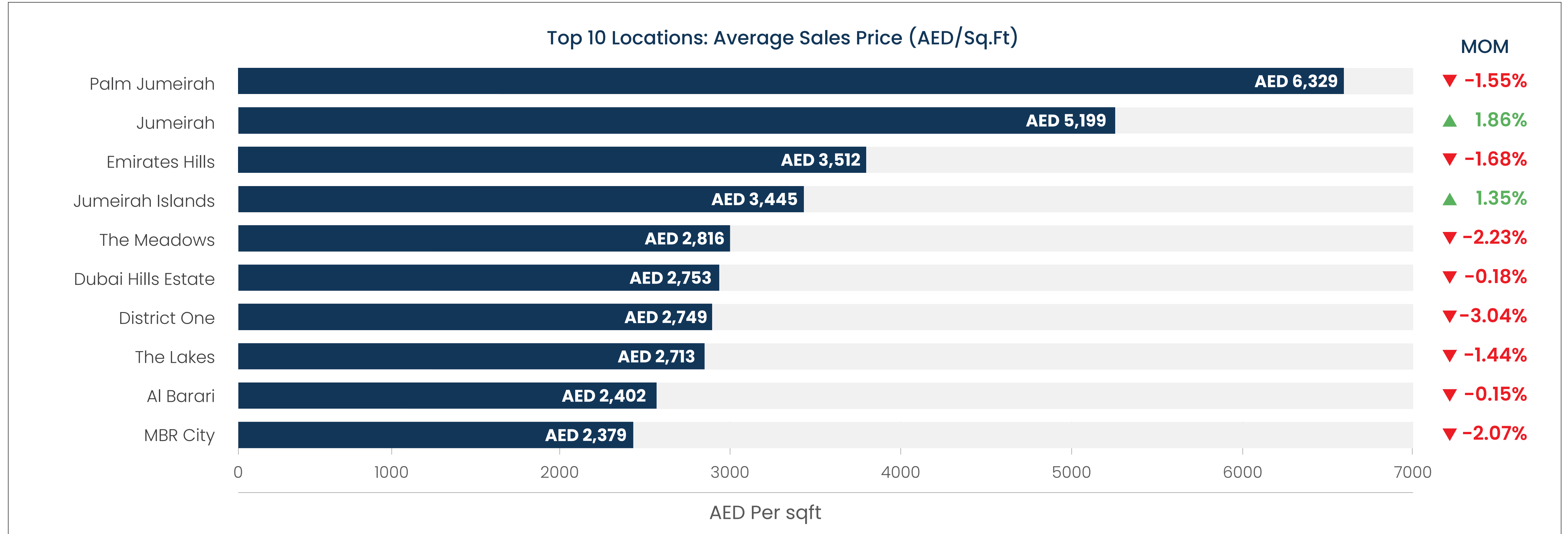
- Citywide average sales prices moved lower in April 2026 after the Q1 2026 peak, with apartments at AED 1,836 per sq ft and villas at AED 2,351 per sq ft.
- Average apartment sales prices moved from AED 1,872 per sq ft in March 2026 to AED 1,836 per sq ft in April 2026. Average villa sales prices moved from AED 2,378 per sq ft to AED 2,351 per sq ft over the same period.
- Villas outpaced apartments over the period, appreciating 29.8% in price per sqft compared to 21.3% for apartments, with the price gap widening from AED 298 to AED 515 per sqft, reflecting stronger demand dynamics and supply constraints in the villa segment.

# APARTMENT SALES PRICE TREND



- Palm Jumeirah recorded the highest average apartment sales price among the top 10 locations at AED 3,391 per sq ft in April 2026, despite a 3.44% decline.
- DIFC, Jumeirah and Downtown Dubai followed, with average apartment sales prices between AED 2,888 and AED 3,052 per sq ft.
- Dubai Creek Harbour was broadly unchanged at AED 2,471 per sq ft, while Jumeirah, Business Bay and Palm Jumeirah recorded the largest declines among the top 10 locations.

# VILLA SALES PRICE TREND



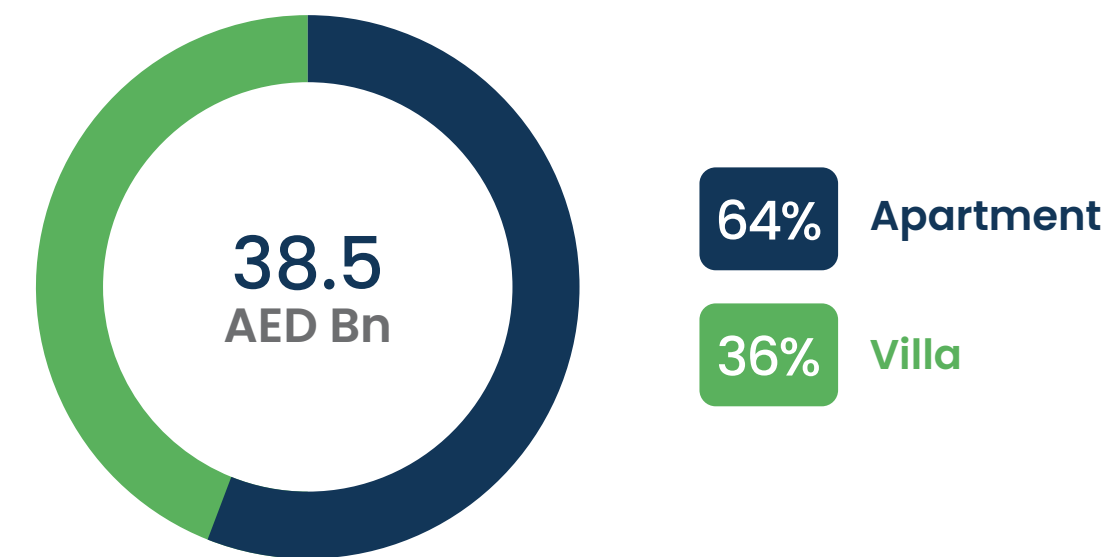
- Palm Jumeirah recorded Dubai’s highest villa pricing at AED 6,329/sq.ft in April 2026, maintaining a pricing premium over all other prime villa locations despite a 1.55% monthly decline.
- Jumeirah and Emirates Hills sustained villa pricing above AED 3,400/sq.ft, while Dubai Hills Estate, District One, The Lakes, and Al Barari remained within the AED 2,400–2,800/sq.ft range.
- District One (-3.04%), The Meadows (-2.23%), and Mohammed Bin Rashid City (-2.07%) recorded the steepest monthly villa pricing corrections in April 2026, while Jumeirah (+1.86%) and Jumeirah Islands (+1.35%) recorded monthly growth.

# TOTAL SALES TRANSACTIONS BY TYPOLOGIES & LOCATIONS

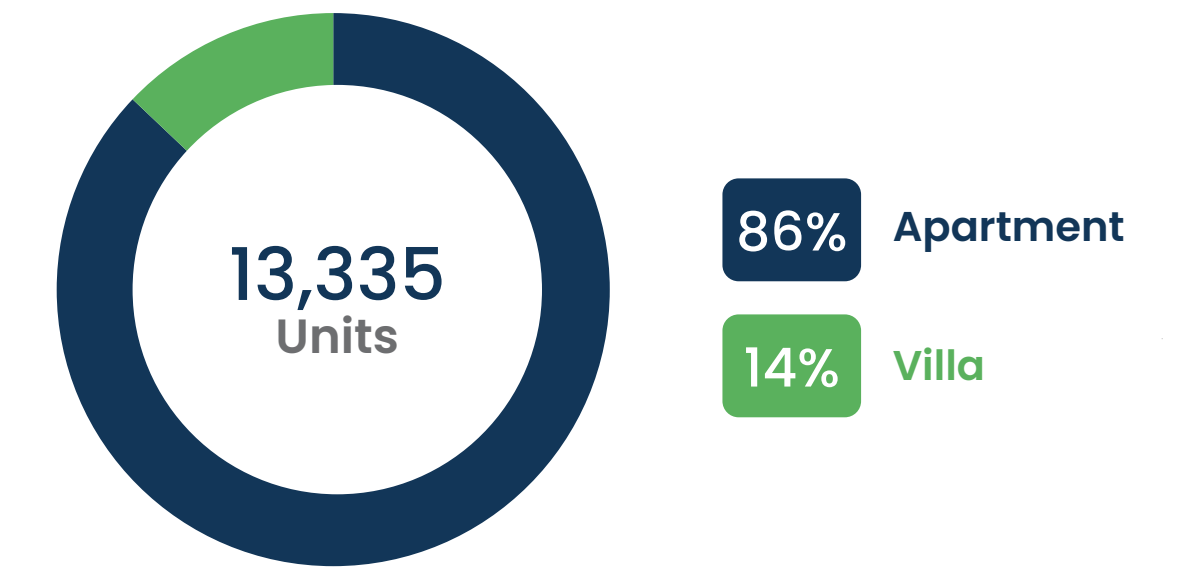
## VALUE & VOLUME

Sales Transactions	Total Value (AED Bn)	Total Volume
Apartment Sales	24.4 Bn	11,465
Villa Sales	14.0 Bn	1,870
<b>Grand Total</b>	<b>38.5 Bn</b>	<b>13,335</b>

## TOTAL VALUE (AED Bn)



## TOTAL VOLUME



## TOP 10 LOCATIONS BY VALUE

1	Dubai Islands	2.8 Bn
2	Jebel Ali Village	2.2 Bn
3	Dubai Hills Estate	1.9 Bn
4	Dubai Creek Harbour	1.8 Bn
5	Palm Jebel Ali	1.2 Bn
6	Damac Island City	1.1 Bn
7	Business Bay	1.0 Bn
8	Jebel Ali First	1.0 Bn
9	Downtown Dubai	1.0 Bn
10	Jumeirah Village Circle	1.0 Bn

## TOP 10 LOCATIONS BY VOLUME

1	Jumeirah Village Circle	811
2	Dubai Islands	731
3	Dubailand Residence Complex	648
4	Damac Lagoons	624
5	Dubai Creek Harbour	595
6	Jebel Ali First	503
7	Dubai South Residential District	390
8	Business Bay	367
9	Damac Island City	325
10	Dubai Investment Park First	306

# OFF-PLAN MARKET ACTIVITY BY SEGMENT AND LOCATION

## TOP 5 OFF-PLAN APARTMENT LOCATIONS BY VALUE



## TOP 5 OFF-PLAN VILLA LOCATIONS BY VALUE



## TOP 5 OFF-PLAN APARTMENT LOCATIONS BY VOLUME



## TOP 5 OFF-PLAN VILLA LOCATIONS BY VOLUME



# READY MARKET ACTIVITY BY SEGMENT AND LOCATION

## TOP 5 READY APARTMENT LOCATIONS BY VALUE



## TOP 5 READY VILLA LOCATIONS BY VALUE



## TOP 5 READY APARTMENT LOCATIONS BY VOLUME



## TOP 5 READY VILLA LOCATIONS BY VOLUME



# 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	30.8 Bn	80.0%	10,352	77.6%
Ready Sales	7.7 Bn	20.0%	2,983	22.4%
<b>Grand Total</b>	<b>38.5 Bn</b>	<b>100%</b>	<b>13,335</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	20.1 Bn	9,038	4.4 Bn	2,427
Villas	10.7 Bn	1,314	3.3 Bn	556
<b>Grand Total</b>	<b>30.8 Bn</b>	<b>10,352</b>	<b>7.7 Bn</b>	<b>2,983</b>

# PRIMARY VS SECONDARY MARKET OVERVIEW

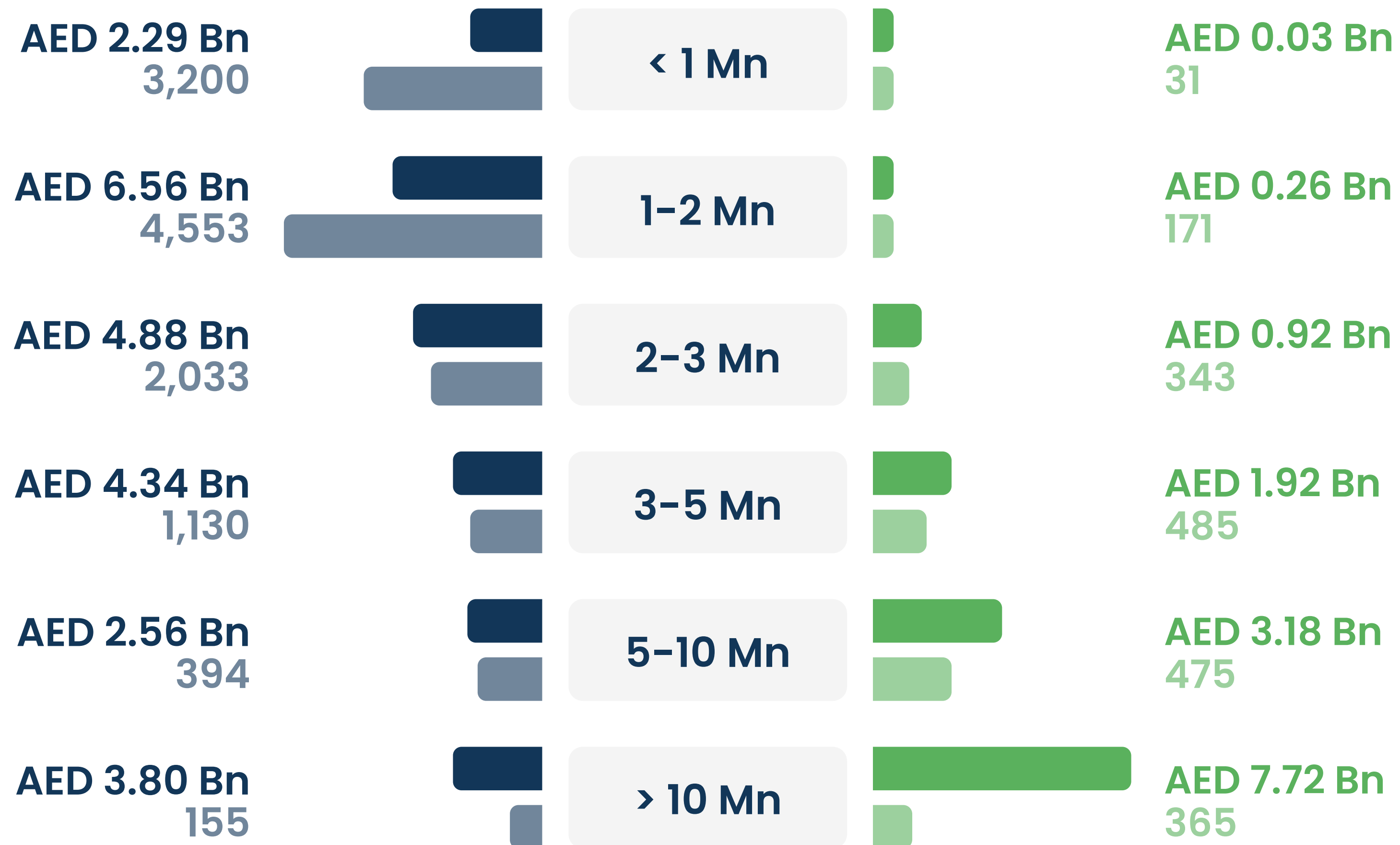
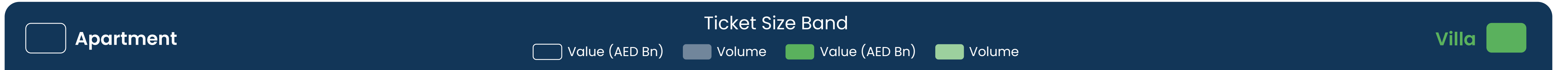
## PRIMARY AND SECONDARY SALES SPLIT

Segment	Total Value (AED Bn)	Value%	Total Volume	Volume%
Primary Sales	28.5 Bn	74.2%	9,947	74.6%
Secondary Sales	9.9 Bn	25.8%	3,388	25.4%
<b>Grand Total</b>	<b>38.5 Bn</b>	<b>100%</b>	<b>13,335</b>	<b>100.0%</b>

## PRIMARY VS SECONDARY SALES BY PROPERTY TYPE

Property Type	Primary Value	Primary Volume	Secondary Value	Secondary Volume
Apartments	18.8 Bn	8,784	5.6 Bn	2,681
Villas	9.7 Bn	1,163	4.3 Bn	707
<b>Grand Total</b>	<b>28.5 Bn</b>	<b>9,947</b>	<b>9.9 Bn</b>	<b>3,388</b>

# 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 9.6 Bn	83.6%	439	84.4%
Ready Sales	AED 1.9 Bn	16.4%	81	15.6%
<b>Grand Total</b>	<b>AED 11.5 Bn</b>	<b>100%</b>	<b>520</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 3.3 Bn	129	AED 0.5 Bn	26
Villas	AED 6.4 Bn	310	AED 1.4 Bn	55
<b>Grand Total</b>	<b>AED 9.6 Bn</b>	<b>439</b>	<b>AED 1.9 Bn</b>	<b>81</b>

\* Luxury ≥ AED 10M

# LUXURY MARKET OVERVIEW

## TOP 5 TRANSACTIONS -- APARTMENT

<b>1</b>	<b>Aman Residences Tower 1</b> Jumeirah Second H&H 10 <sup>th</sup> April 2026	<b>AED 171.0 Mn</b> Sales Value	<b>17,067</b> AED/sqft	<b>Off-Plan</b>
<b>2</b>	<b>Baccarat Residences T1</b> Downtown Dubai Shamal Holding 1 <sup>st</sup> April 2026	<b>AED 121.8 Mn</b> Sales Value	<b>9,197</b> AED/sqft	<b>Off-Plan</b>
<b>3</b>	<b>Aman Residences Tower 2</b> Jumeirah Second H&H 29 <sup>th</sup> April 2026	<b>AED 83.2 Mn</b> Sales Value	<b>13,995</b> AED/sqft	<b>Off-Plan</b>
<b>4</b>	<b>Aman Residences Tower 2</b> Jumeirah Second H&H 2 <sup>nd</sup> April 2026	<b>AED 79.5 Mn</b> Sales Value	<b>13,374</b> AED/sqft	<b>Off-Plan</b>
<b>5</b>	<b>Aman Residences Tower 1</b> Jumeirah Second H&H 6 <sup>th</sup> April 2026	<b>AED 70.2 Mn</b> Sales Value	<b>11,817</b> AED/sqft	<b>Off-Plan</b>

\* Luxury ≥ AED 10M

# LUXURY MARKET OVERVIEW

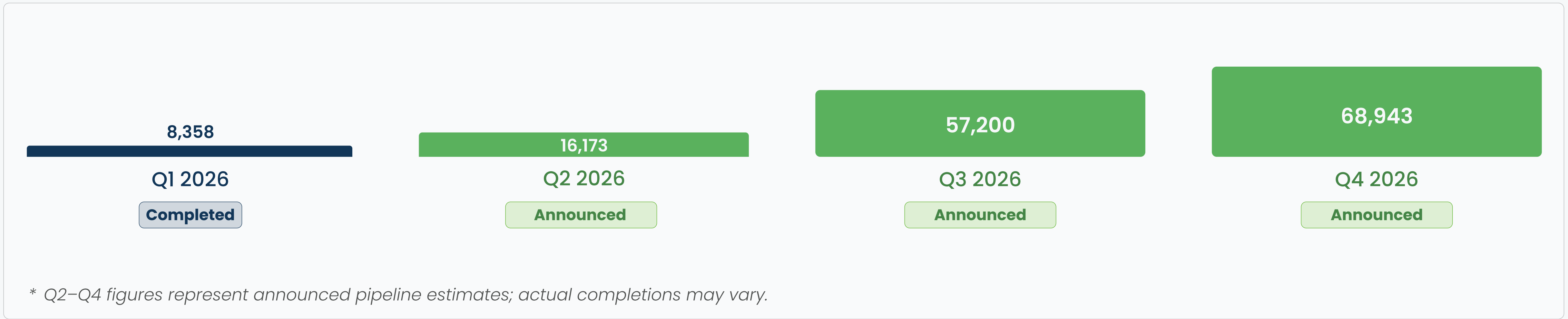
## TOP 5 TRANSACTIONS -- VILLA

1	<b>Eden Hills</b> Dubai Hills Estate	H&H	17 <sup>th</sup> April 2026	<b>AED 76.0 Mn</b> Sales Value	<b>3,285</b> AED/sqft	Off-Plan
2	<b>Al Barari The Nest</b> Al Barari	Al Barari Development	30 <sup>th</sup> April 2026	<b>AED 75.0 Mn</b> Sales Value	<b>8,921</b> AED/sqft	Ready
3	<b>Emerald Hills</b> Dubai Hills Estate	Emaar	16 <sup>th</sup> April 2026	<b>AED 75.0 Mn</b> Sales Value	<b>3,468</b> AED/sqft	Ready
4	<b>Eden Hills</b> Dubai Hills Estate	H&H	29 <sup>th</sup> April 2026	<b>AED 73.4 Mn</b> Sales Value	<b>3,172</b> AED/sqft	Off-Plan
5	<b>Eden Hills</b> Dubai Hills Estate	H&H	24 <sup>th</sup> April 2026	<b>AED 71.6 Mn</b> Sales Value	<b>3,094</b> AED/sqft	Off-Plan

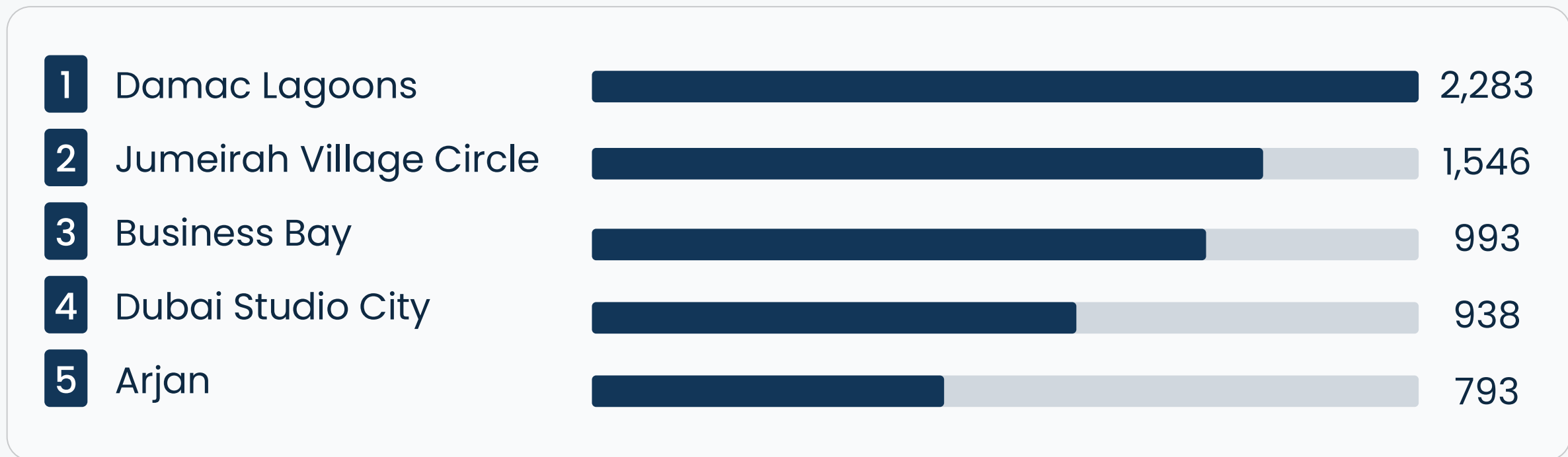
\* Luxury ≥ AED 10M

# COMPLETED & UPCOMING SUPPLY OVERVIEW

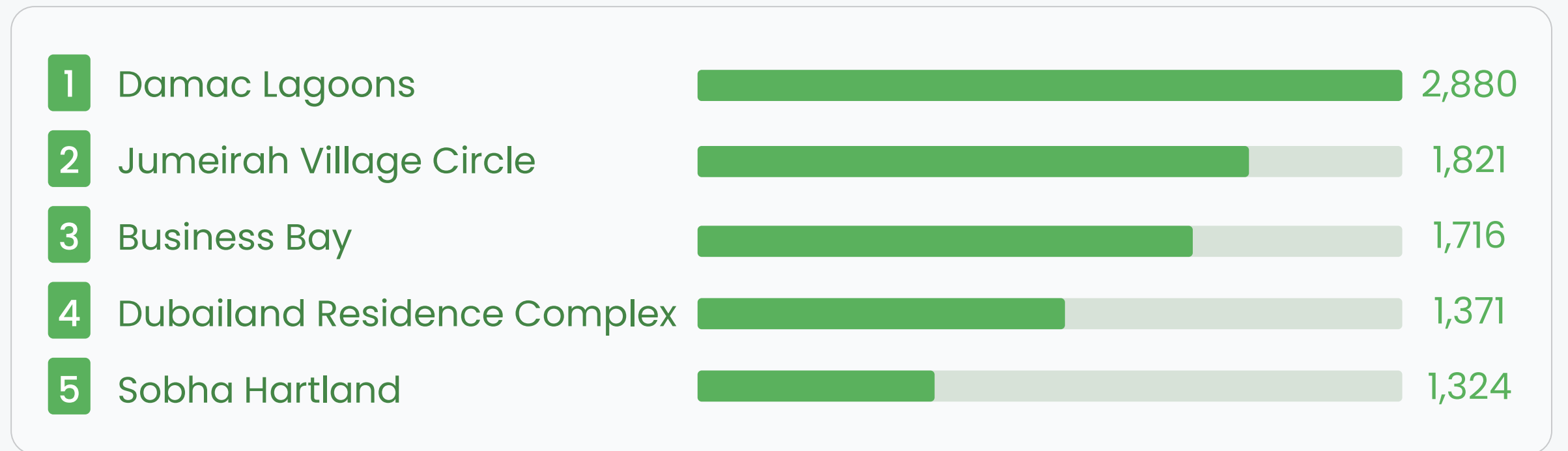
## 2026 SUPPLY PIPELINE - QUARTERLY PROGRESSION



## TOP COMPLETED SUPPLY LOCATIONS - APRIL 2026



## TOP HANDOVER LOCATIONS ANNOUNCED BY DEVELOPERS - Q2 2026



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