DUBAI RESIDENTIAL REAL ESTATE
MARKET OVERVIEW

July 2026

Monthly Report

REIDIN Data Analytics

KEY HIGHLIGHTS

TOTAL SALES VALUE	TOTAL SALES VOLUME	APARTMENT PRICE TREND	VILLA PRICE TREND	Residential Completions
AED 26.45 Bn	13,397	1,780 per sq ft.	2,305 per sq ft.	29,061 units
▲ +1.6% MoM	▲ +1.0% MoM	▼ -0.6% MoM	▼ -0.9% MoM	Delivered in 2026 YTD

JULY 2026 IN BRIEF

TRANSACTIONS

Residential sales gained in July, with value up 1.6% and volume up 1.0% MoM.

Residential sales totalled AED 26.45 billion across 13,397 transactions in July 2026, representing MoM increases of 1.6% in value and 1.0% in volume. Apartments accounted for 90% of transactions and 69% of sales value.

PRICING

Annual price growth remained stronger for villas

Villa prices were 3.4% higher YoY in July, compared with a 0.1% increase for apartments.

TRANSACTION TYPE

Off-plan remained the larger share of residential sales activity.

Off-plan transactions reached AED 17.45 billion across 9,674 sales in July 2026, accounting for 66.0% of total value and 72.2% of volume. Ready sales totalled AED 9.00 billion across 3,723 transactions.

LUXURY SEGMENT

Luxury transactions accounted for 24.5% of sales value.

Transactions valued at AED 10 million and above generated AED 6.49 billion across 294 sales, representing 24.5% of total value despite accounting for only 2.2% of transactions. Villas contributed AED 3.96 billion, compared with AED 2.53 billion from apartments.

SUPPLY PIPELINE

2026 residential completions reached 29,061 units by July.

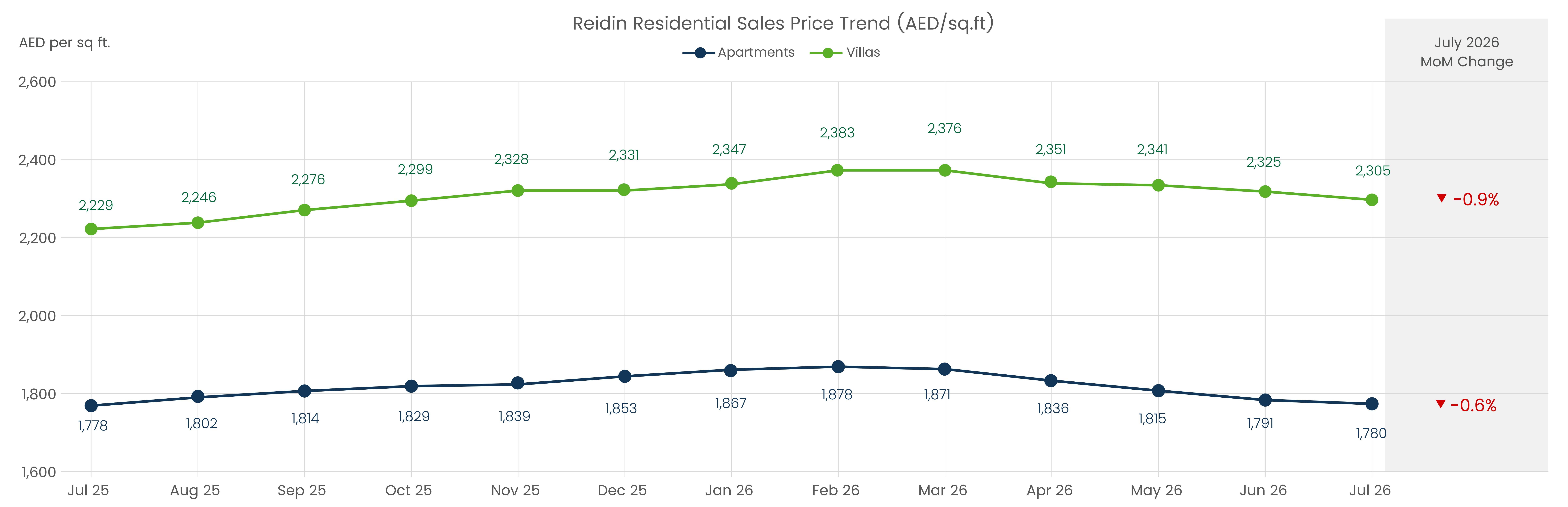
Developers delivered 2,948 units in Q3 to date, taking 2026 completions to 29,061 units. A further 18,667 units are announced for delivery in Q3 and 80,956 units in Q4. Actual handovers may differ from announced schedules as project timelines are updated.

SALES SEQUENCE

Primary sales remained the larger share of July residential activity.

Primary sales generated AED 15.68 billion across 9,216 transactions in July 2026, representing 59.3% of total value and 68.8% of volume. Secondary sales totalled AED 10.77 billion across 4,181 transactions.

CITYWIDE RESIDENTIAL SALES PRICE TREND



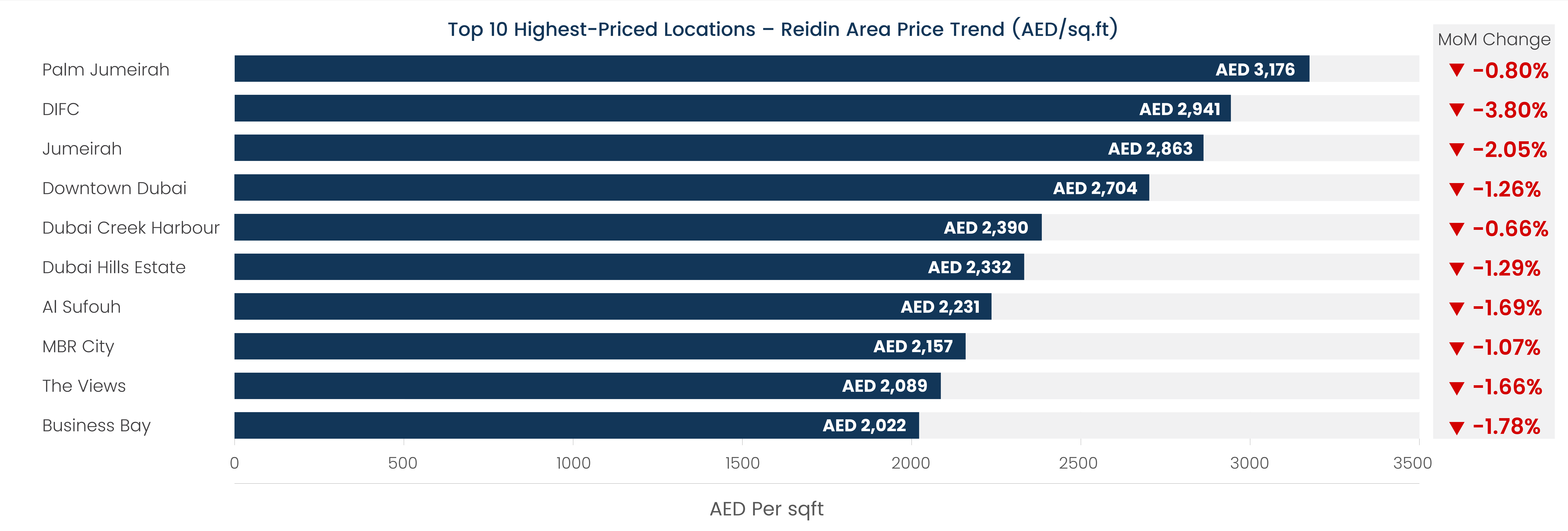
Apartment and villa price indices declined MoM in July, while villas remained 3.4% higher YoY

Apartment prices declined 0.6% MoM to AED 1,780 per sq.ft and were 0.1% higher YoY. Villa prices declined 0.9% MoM to AED 2,305 per sq.ft and remained 3.4% higher YoY.

The gap between villa and apartment price levels widened YoY

The difference between villa and apartment price levels reached AED 525 per sq.ft in July 2026, compared with AED 451 per sq.ft in July 2025. The relative gap increased from 25.4% to 29.5%.

APARTMENT SALES PRICE TREND

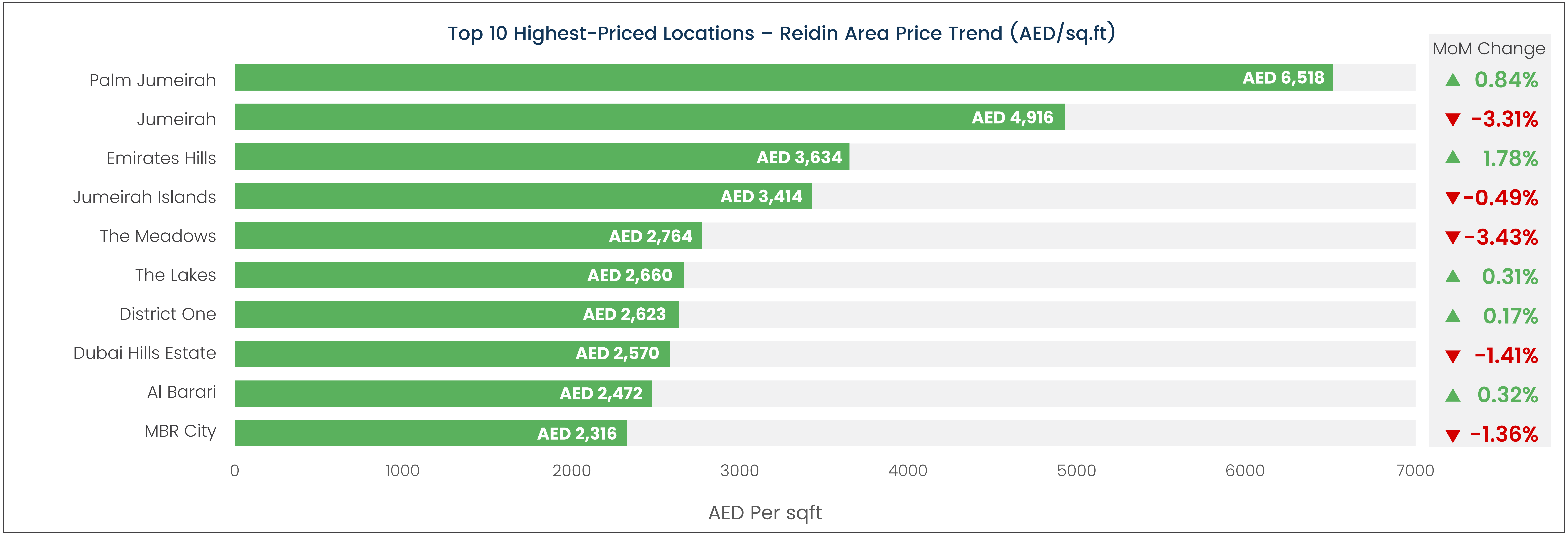


Palm Jumeirah remained the highest-priced apartment location
Based on the Reidin area-wise price trend, Palm Jumeirah recorded AED 3,176/sq.ft in July 2026, followed by DIFC at AED 2,941/sq.ft and Jumeirah at AED 2,863/sq.ft.

All ten highest-priced locations recorded MoM declines
Among the ten locations, Dubai Creek Harbour recorded the smallest MoM decline at 0.66%, while DIFC recorded the largest decrease.

The four highest-priced apartment locations remained above AED 2,700 per sq ft
Palm Jumeirah, DIFC, Jumeirah and Downtown Dubai remained the four highest-priced locations, with Reidin area price trend levels ranging from AED 2,704 to AED 3,176/sq.ft.

VILLA SALES PRICE TREND



Palm Jumeirah remained the highest-priced villa location
Based on the Reidin area-wise price trend, Palm Jumeirah recorded AED 6,518/sq.ft in July 2026, followed by Jumeirah at AED 4,916/sq.ft and Emirates Hills at AED 3,634/sq.ft.

MoM price movements were mixed across the top 10 locations
Five locations increased MoM and five declined. Emirates Hills rose the most, by 1.78%, while The Meadows recorded the largest decline, down 3.43%.

Palm Jumeirah maintained a sizeable premium over other villa locations.
The gap between Palm Jumeirah and Jumeirah, the second-highest location, stood at AED 1,602 per sq ft in July.

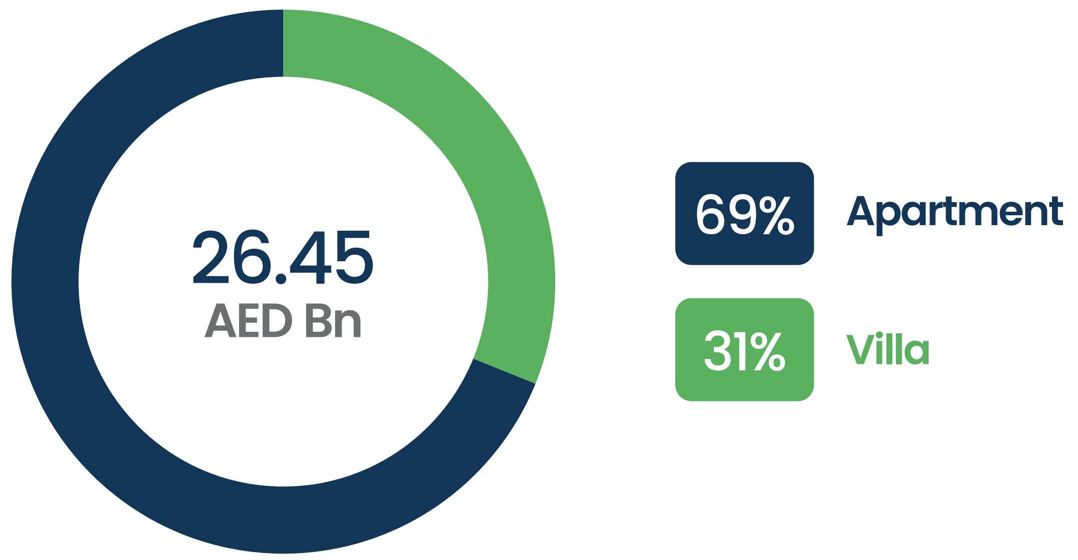
REIDIN Data Analytics

TOTAL RESIDENTIAL SALES BY PROPERTY TYPE & LOCATION

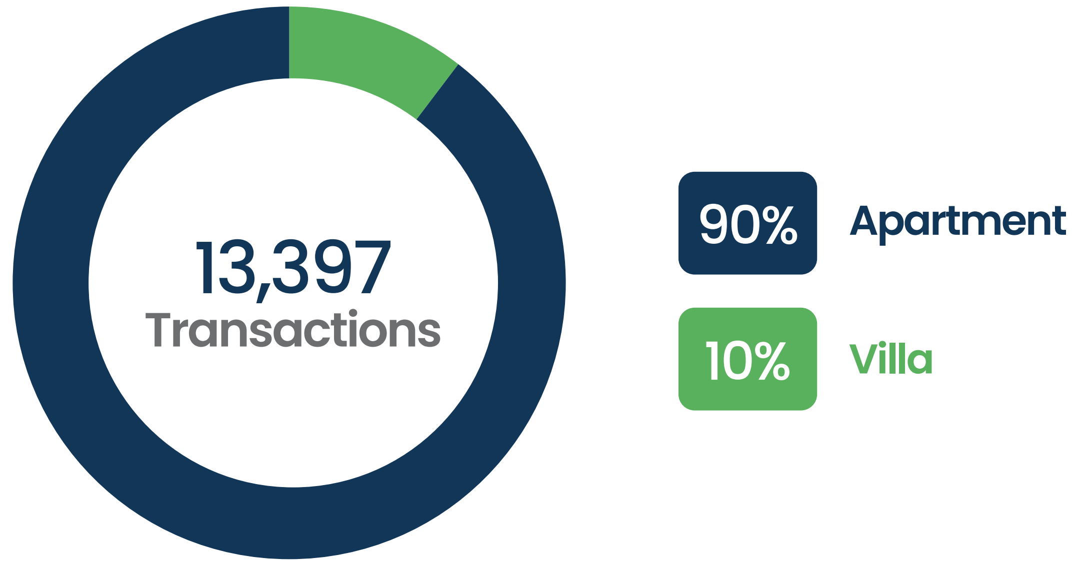
VALUE & VOLUME

Sales Transactions	Total Value (AED Bn)	Total Volume
Apartment Sales	18.12 Bn	12,004
Villa Sales	8.33 Bn	1,393
Grand Total	26.45 Bn	13,397

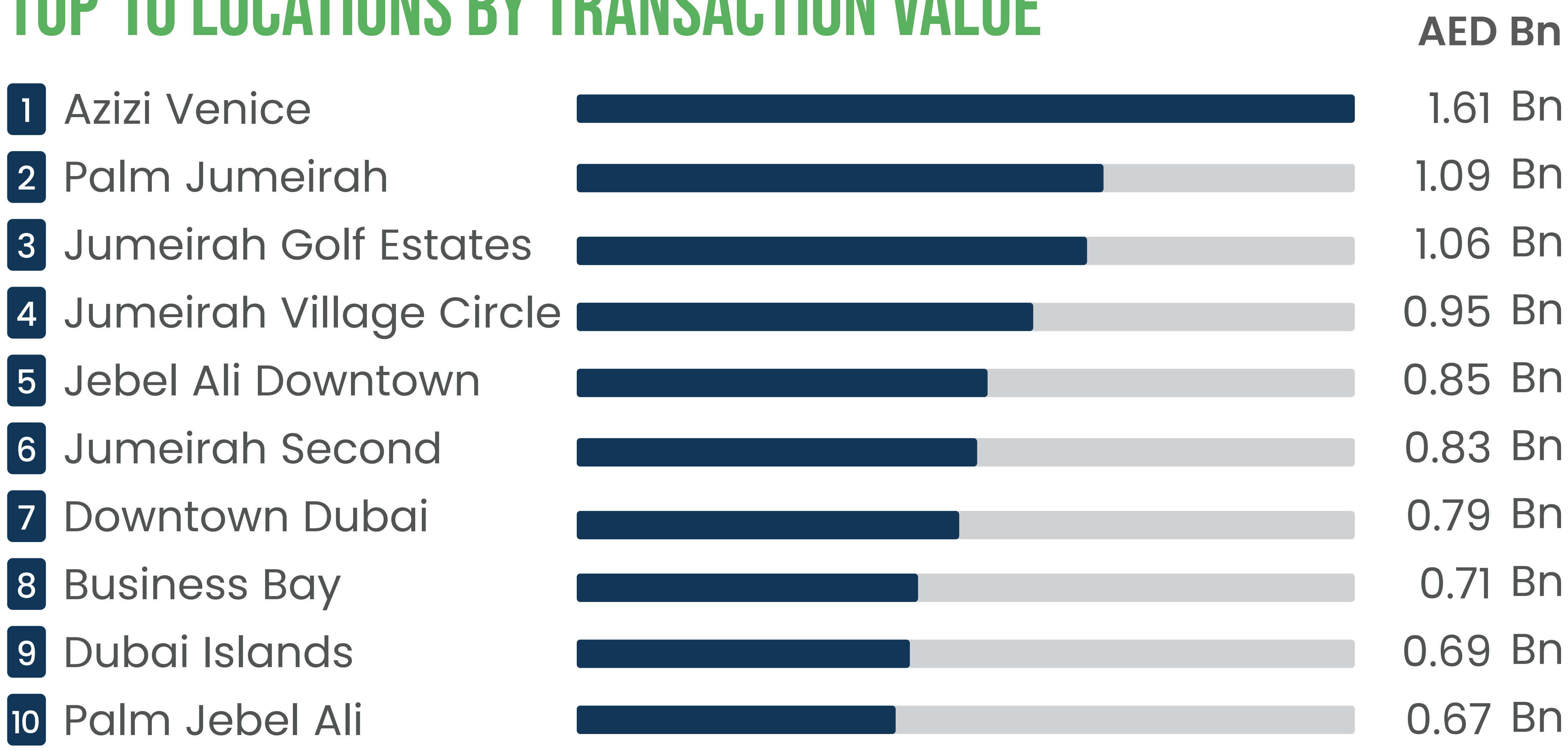
TOTAL VALUE (AED BN)



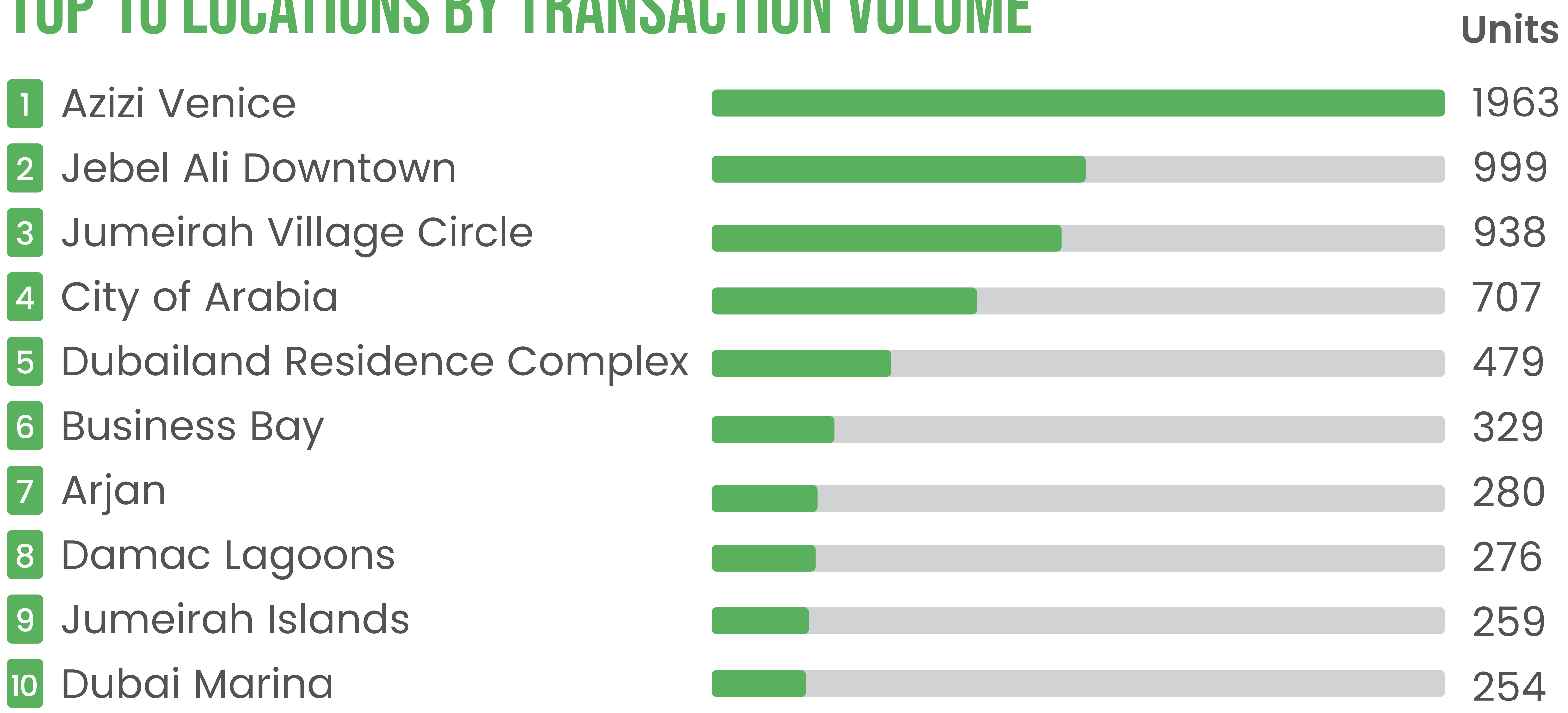
TOTAL VOLUME



TOP 10 LOCATIONS BY TRANSACTION VALUE



TOP 10 LOCATIONS BY TRANSACTION VOLUME



REIDIN
Data Analytics

OFF-PLAN SALES BY PROPERTY TYPE & LOCATION

TOP 5 OFF-PLAN APARTMENT LOCATIONS BY VALUE (AED BN)

1	Azizi Venice	1.61 Bn
2	Jebel Ali Downtown	0.84 Bn
3	Jumeirah Second	0.81 Bn
4	Jumeirah Islands	0.64 Bn
5	Dubai Islands	0.60 Bn

TOP 5 OFF-PLAN VILLA LOCATIONS BY VALUE (AED BN)

1	Jumeirah Golf Estates	0.64 Bn
2	Damac Island City	0.49 Bn
3	The Oasis	0.37 Bn
4	Palm Jebel Ali	0.36 Bn
5	District Eleven	0.17 Bn

TOP 5 OFF-PLAN APARTMENT LOCATIONS BY VOLUME

1	Azizi Venice	1,963
2	Jebel Ali Downtown	989
3	City of Arabia	691
4	Dubailand Residence Complex	435
5	Jumeirah Village Circle	414

TOP 5 OFF-PLAN VILLA LOCATIONS BY VOLUME

1	Damac Island City	124
2	Dubai Investment Park First	91
3	Reportage Hills	41
4	Jumeirah Golf Estates	38
5	Rukan	38

READY SALES BY PROPERTY TYPE & LOCATION

TOP 5 READY APARTMENT LOCATIONS BY VALUE (AED BN)

1	Downtown Dubai	0.56 Bn
2	Dubai Marina	0.48 Bn
3	Jumeirah Village Circle	0.45 Bn
4	Business Bay	0.33 Bn
5	Dubai Creek Harbour	0.23 Bn

TOP 5 READY VILLA LOCATIONS BY VALUE (AED BN)

1	Palm Jumeirah	0.42 Bn
2	Jumeirah Golf Estates	0.41 Bn
3	Dubai Hills Estate	0.32 Bn
4	Arabian Ranches	0.25 Bn
5	Damac Lagoons	0.22 Bn

TOP 5 READY APARTMENT LOCATIONS BY VOLUME

1	Jumeirah Village Circle	504
2	Dubai Marina	237
3	Business Bay	209
4	Downtown Dubai	157
5	Dubai Silicon Oasis	101

TOP 5 READY VILLA LOCATIONS BY VOLUME

1	Damac Hills 2	79
2	Damac Lagoons	72
3	The Springs	38
4	The Valley	28
5	Arabian Ranches Phase 3	28

READY RESIDENTIAL SALES: CASH VS MORTGAGE BACKED SPLIT

Transaction Type	Total Value (AED Bn)	Value%	Total Volume	Volume%
Cash	AED 4.67 Bn	51.9%	2,055	55.2%
Mortgage Backed	AED 4.33 Bn	48.1%	1,668	44.8%
Grand Total	**AED 9.00 Bn**	**100%**	**3,723**	**100.0%**

TOP 5 CASH PURCHASE LOCATIONS BY VALUE

1. Palm Jumeirah 0.58 Bn
2. Downtown Dubai 0.42 Bn
3. Dubai Marina 0.32 Bn
4. Jumeirah Village Circle 0.30 Bn
5. Dubai Hills Estate 0.29 Bn

TOP 5 MORTGAGE-BACKED PURCHASE LOCATIONS BY VALUE

1. Jumeirah Village Circle 0.21 Bn
2. Damac Lagoons 0.20 Bn
3. Dubai Hills Estate 0.20 Bn
4. Arabian Ranches 0.17 Bn
5. Dubai Marina 0.16 Bn

TOP 5 CASH PURCHASE LOCATIONS BY VOLUME

1. Jumeirah Village Circle 356
2. Dubai Marina 171
3. Business Bay 147
4. Downtown Dubai 107
5. International City 71

TOP 5 MORTGAGE-BACKED PURCHASE LOCATIONS BY VOLUME

1. Jumeirah Village Circle 168
2. Damac Lagoons 67
3. Dubai Marina 66
4. Town Square 66
5. Damac Hills 2 62

Methodology: The analysis covers ready residential sales only. Transactions with a recorded finance value are classified as mortgage-backed purchases, while transactions without a recorded finance value are classified as cash purchases. Refinancing, mortgage top-ups and other secured lending transactions are excluded.

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	17.45 Bn	66.0%	9,674	72.2%
Ready Sales	9.00 Bn	34.0%	3,723	27.8%
Grand Total	**26.45 Bn**	100%	**13,397**	100.0%

OFF-PLAN VS READY SALES BY PROPERTY TYPE

Property Type	Off-Plan Value	Off-Plan Volume	Ready Value	Ready Volume
Apartments	13.38 Bn	8,995	4.74 Bn	3,009
Villas	4.07 Bn	679	4.26 Bn	714
Grand Total	**17.45 Bn**	**9,674**	**9.00 Bn**	**3,723**

REIDIN Data Analytics

PRIMARY VS SECONDARY MARKET OVERVIEW

PRIMARY AND SECONDARY SALES SPLIT

Segment	Total Value (AED Bn)	Value%	Total Volume	Volume%
Primary Sales	15.68 Bn	59.3%	9,216	68.8%
Secondary Sales	10.77 Bn	40.7%	4,181	31.2%
Grand Total	**26.45 Bn**	100%	**13,397**	100.0%

PRIMARY VS SECONDARY SALES BY PROPERTY TYPE

Property Type	Primary Value	Primary Volume	Secondary Value	Secondary Volume
Apartments	12.83 Bn	8,737	5.30 Bn	3,267
Villas	2.86 Bn	479	5.48 Bn	914
Grand Total	**15.68 Bn**	**9,216**	**10.77 Bn**	**4,181**

REIDIN Data Analytics

TICKET SIZE DISTRIBUTION BY PROPERTY TYPE

VALUE BY TICKET SIZE BAND (AED BN)

Ticket Size Band	Apartment			Villa		
	June 2026	July 2026	MoM	June 2026	July 2026	MoM
< 1 Mn	3.79	4.01	+5.8%	0.15	0.04	-76.1%
1 – 2 Mn	5.25	5.25	-0.1%	0.26	0.29	+11.2%
2 – 3 Mn	3.10	2.86	-7.9%	0.80	0.79	-2.1%
3 – 5 Mn	2.46	2.42	-1.9%	1.55	1.58	+1.8%
5 – 10 Mn	1.35	1.06	-21.6%	1.74	1.68	-3.6%
> 10 Mn	1.90	2.53	+32.9%	3.66	3.96	+8.3%
Total	**17.86**	**18.12**	**+1.4%**	**8.17**	**8.33**	**+2.0%**

VOLUME BY TICKET SIZE BAND

Ticket Size Band	Apartment			Villa		
	June 2026	July 2026	MoM	June 2026	July 2026	MoM
< 1 Mn	5,609	6,081	+8.4%	241	48	-80.1%
1 – 2 Mn	3,834	3,820	-0.4%	177	192	+8.5%
2 – 3 Mn	1,310	1,191	-9.1%	314	308	-1.9%
3 – 5 Mn	659	645	-2.1%	400	407	+1.8%
5 – 10 Mn	207	160	-22.7%	257	251	-2.3%
> 10 Mn	82	107	+30.5%	169	187	+10.7%
Total	**11,701**	**12,004**	**+2.6%**	**1,558**	**1,393**	**-10.6%**

LUXURY MARKET OVERVIEW

OFF-PLAN AND READY SALES SPLIT

Transaction Type	Total Value (AED Bn)	Value%	Total Volume	Volume%
Off-Plan Sales	AED 4.12 Bn	63.4%	189	64.3%
Ready Sales	AED 2.37 Bn	36.6%	105	35.7%
Grand Total	**AED 6.49 Bn**	100%	**294**	100.0%

OFF-PLAN VS READY SALES BY PROPERTY TYPE

Property Type	Off-Plan Value	Off-Plan Volume	Ready Value	Ready Volume
Apartments	AED 2.04 Bn	84	AED 0.49 Bn	23
Villas	AED 2.08 Bn	105	AED 1.89 Bn	82
Grand Total	**AED 4.12 Bn**	**189**	**AED 2.37 Bn**	**105**

Luxury: AED 10m+

REIDIN Data Analytics

LUXURY MARKET OVERVIEW

TOP 5 APARTMENT TRANSACTIONS

#	Project	Area	Developer	Date	Sales Value	AED/sqft	Status
1	Aman Residences Tower 2	Jumeirah Second	H&H	22nd Jul 2026	AED 166.1 Mn	16,572	Off-Plan
2	Bella - Passo Building 2	Palm Jumeirah	Beyond	2nd Jul 2026	AED 90.0 Mn	7,265	Off-Plan
3	ORLA Infinity by Omniyat	Palm Jumeirah	Omniyat	10th Jul 2026	AED 75.8 Mn	9,864	Off-Plan
4	The Rings 2	Jumeirah Second	P M R	15th Jul 2026	AED 65.0 Mn	7,639	Off-Plan
5	Mansory Residences - AMAAL 8	Horizon	Amaal	17th Jul 2026	AED 62.3 Mn	5,502	Off-Plan

Luxury: AED 10m+

REIDIN Data Analytics

LUXURY MARKET OVERVIEW

TOP 5 VILLA TRANSACTIONS

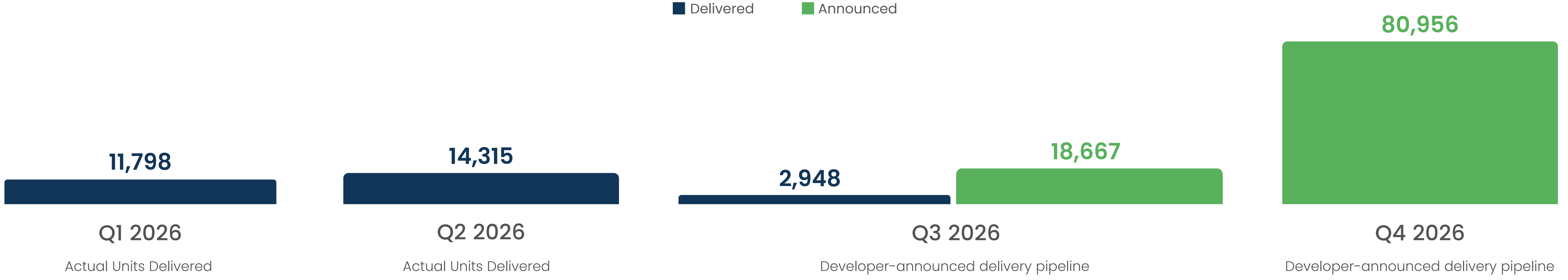
#	Project	Community	Developer	Date	Sales Value	AED/sqft	Status
1	Wild Flower	Jumeirah Golf Estates	Jumeirah	27th Jul 2026	AED 110.0 Mn	9,846	Ready
2	Lavita	The Oasis	Emaar	9th Jul 2026	AED 72.7 Mn	2,536	Off-Plan
3	Signature Villas Frond M (Al Sefri)	Palm Jumeirah	Nakheel	1st Jul 2026	AED 63.0 Mn	9,000	Ready
4	Garden Homes Frond F (Al Yabri)	Palm Jumeirah	Nakheel	8th Jul 2026	AED 56.0 Mn	9,333	Ready
5	Emirates Hills - Sector E	Emirates Hills	Emaar	17th Jul 2026	AED 56.0 Mn	3,981	Ready

Luxury: AED 10m+

REIDIN Data Analytics

COMPLETED & UPCOMING SUPPLY OVERVIEW

2026 SUPPLY PIPELINE - QUARTERLY PROGRESSION



** Q3-Q4 figures represent announced delivery pipeline by developers; actual completions may vary.*

TOP COMPLETED SUPPLY LOCATIONS - 2026 YTD

1	Damac Lagoons	3,540
2	Jumeirah Village Circle	3,106
3	Business Bay	2,853
4	Dubai Hills Estate	2,080
5	Arjan	2,054

TOP HANDOVER LOCATIONS ANNOUNCED BY DEVELOPERS – Q3 2026

1	Jumeirah Village Triangle	2,751
2	Jumeirah Lake Towers	2,617
3	Jumeirah Village Circle	2,400
4	Damac Lagoons	1,003
5	Dubai Silicon Oasis	711

METHODOLOGY AND DEFINITIONS

Sales Value and Volume
Sales value represents the total consideration of residential sales registered with the Dubai Land Department during the reporting period, excluding DIFC transactions. Sales volume represents the corresponding number of transactions.

Reidin Residential Sales Price Trend
Reidin Dubai Residential Sales Price Indices provide a consistent benchmark of apartment and villa price movements across the city, calculated using moving averages of median transaction prices per sq ft across defined locations, enabling residential price trends to be tracked over time.

Location-Level Sales Prices
Location-level values shown in this report represent Reidin area-wise residential sales price trend levels, expressed in AED per sq ft. The trends are derived from transaction data using Reidin’s price-trend methodology.

Off-Plan and Ready Sales
Off-plan sales represent transactions in projects under development at the time of registration. Ready sales represent transactions involving completed residential properties.

Primary and Secondary Sales
Primary sales represent the first registered sale of a property by a developer or project owner. Secondary sales represent subsequent resale transactions.

Cash and Mortgage-Backed Sales
The cash and mortgage analysis is based on ready residential sales. Transactions with a recorded finance value are classified as mortgage-backed purchases, while transactions without a recorded finance value are classified as cash purchases. Refinancing and other secured lending transactions are excluded.

Luxury Transactions
Luxury transactions are defined as residential sales valued at AED 10 million and above.

Completed and Announced Supply
Completed supply represents residential units recorded as completed during the reporting period. Announced supply represents units scheduled for future delivery based on available developer and project information. Delivery schedules are updated as project timelines evolve.

Rounding Conventions
Sales values are generally presented in AED billions and rounded to two decimal places. Percentages are generally rounded to one decimal place. Totals may differ marginally from the sum of displayed components due to rounding.

Data Cut-Off
July 2026 transaction data reflect registrations recorded from 1 July to 31 July 2026. Historical price trends, year-to-date completions and forward supply information are shown for the periods indicated. Supply pipeline information reflects the latest available project and developer information as of 31 July 2026.

REIDIN

Data Analytics

www.reidin.com | info@reidin.com