DUBAI RESIDENTIAL REAL ESTATE
MARKET OVERVIEW

August 2026

Monthly Report

EXECUTIVE SUMMARY

Transactions

Residential sales totalled AED 24.43 billion across 11,440 transactions in August, compared with AED 26.49 billion across 13,398 transactions in July. Sales value declined by AED 2.05 billion, representing a 7.8% monthly decrease, while transaction volume decreased by 1,958 transactions, a decline of 14.6%. Apartments accounted for 10,039 transactions worth AED 15.78 billion, contributing approximately 88% of total volume and 65% of sales value. Villas recorded 1,401 transactions worth AED 8.65 billion, representing approximately 12% of total volume and 35% of sales value.

Price movements

Residential sales price indices continued to moderate from their February 2026 peaks. The apartment index stood at AED 1,779/sq ft, 5.2% below the February peak of AED 1,878/sq ft, while the villa index stood at AED 2,297/sq ft, 3.6% below its peak of AED 2,383/sq ft. Apartments were 1.3% lower YoY, while villas remained 2.3% higher. Price movements have become increasingly location-specific, with mixed performance across prime and established communities. Palm Jumeirah remained the highest-priced villa location at AED 6,593/sq ft.

Sales composition and geography

Primary sales represented 69.3% of transactions, with apartments accounting for 92.2% of primary volume. Villas contributed AED 5.32 billion of AED 10.10 billion in secondary sales. Azizi Venice led off-plan apartment activity with AED 1.20 billion across 1,481 transactions, while Sobha Sanctuary led off-plan villa activity with AED 971 million across 169 transactions. In ready sales, Downtown Dubai led apartment value, Jumeirah Village Circle led apartment volume, and Palm Jumeirah led villa value.

Ticket sizes and luxury

Apartment sales below AED 2 million totalled 8,073 transactions, while villa activity was concentrated in the AED 3–10 million bands. Luxury transactions of AED 10 million and above generated AED 5.71 billion across 253 sales, including AED 3.57 billion from 156 villas. Off-plan accounted for 60.1% of luxury value and 65.2% of volume. District One recorded the largest villa transaction at AED 160 million. Palm Jumeirah accounted for three of the five largest villa transactions, ranging between AED 110 million and AED 125 million.

Supply and delivery

Residential completions reached 33,500 units by end-August. Developers announced 1,152 units for the remainder of Q3 and 84,885 for Q4. JVC, Business Bay, Damac Lagoons, Azizi Venice and Dubai Hills Estate represent the largest concentrations of upcoming supply, making actual handover rates an important factor to monitor over the remainder of the year.

KEY INDICATORS & AUGUST EVENTS

Key Indicator	August 2026	Change / Period
Total residential sales value	AED 24.43 billion	-7.8% MoM
Total residential sales volume	11,440 transactions	-14.6% MoM
Apartment sales price index	AED 1,779/sq ft	-0.03% MoM
Villa sales price index	AED 2,297/sq ft	-0.34% MoM
Residential completions	33,500 units	January–August 2026

6 August 2026 — Valia at Dubai Creek Harbour

By 6 August, expressions of interest were open for Valia by Emaar at Dubai Creek Harbour, offering one- to four-bedroom apartments ahead of the official sales launch. The date refers to published coverage of the project's marketing stage.

13 August 2026 — Groundworks contract awarded for Atelis at Dubai Design District

Meraas awarded International Foundation Group a contract covering site preparation, excavation, soil improvement, dewatering, shoring and piling. The works prepare the site for subsequent construction phases.

17 August 2026 — Handovers commenced at Jebel Ali Village

Nakheel began handing over 892 homes at the redeveloped Jebel Ali Village community, with residents starting to move into their homes. The announcement marks the start of handovers and occupation at the development.

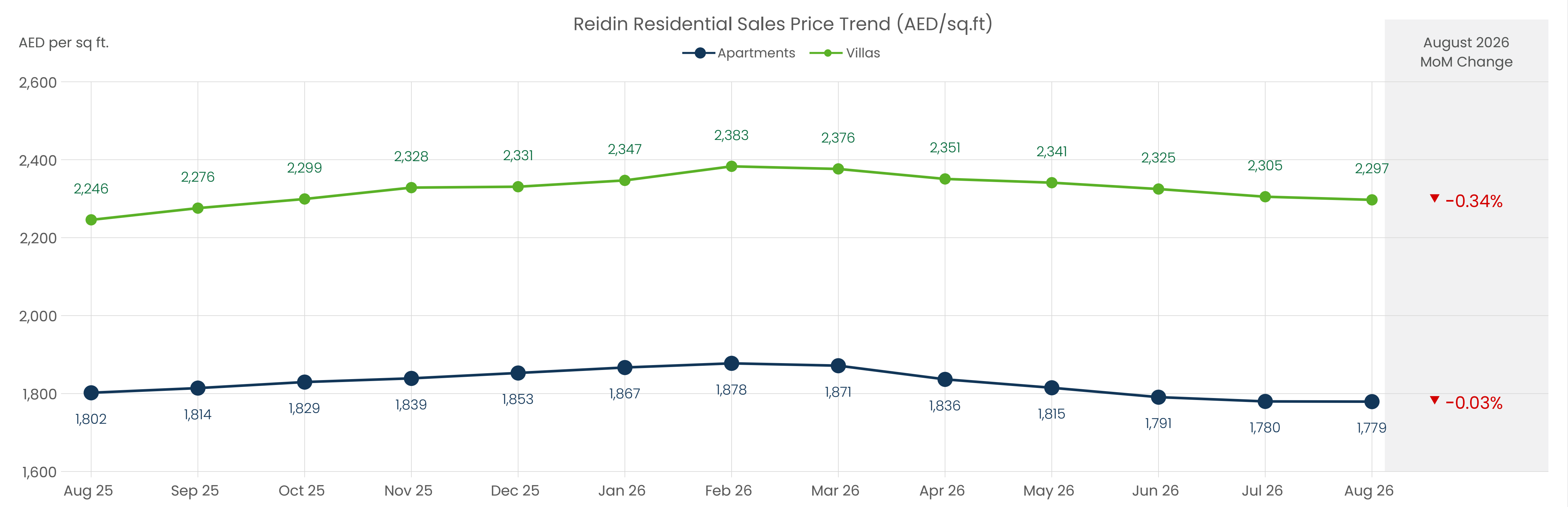
20 August 2026 — Further beachfront villas released at Palm Jebel Ali

Nakheel released 44 beachfront villas on Frond F, comprising five-, six- and seven-bedroom homes. Across the wider development, phased handovers of the first villas were scheduled to begin in late 2026 and continue through 2027.

30 August 2026 — Al Meydan Street development contracts awarded

RTA awarded two contracts totalling AED 1.161 billion for the Al Meydan Street Development Project. The works comprise 3.7 km of bridges and 17 km of roads, alongside cycling connections. Completion is scheduled for the end of 2028.

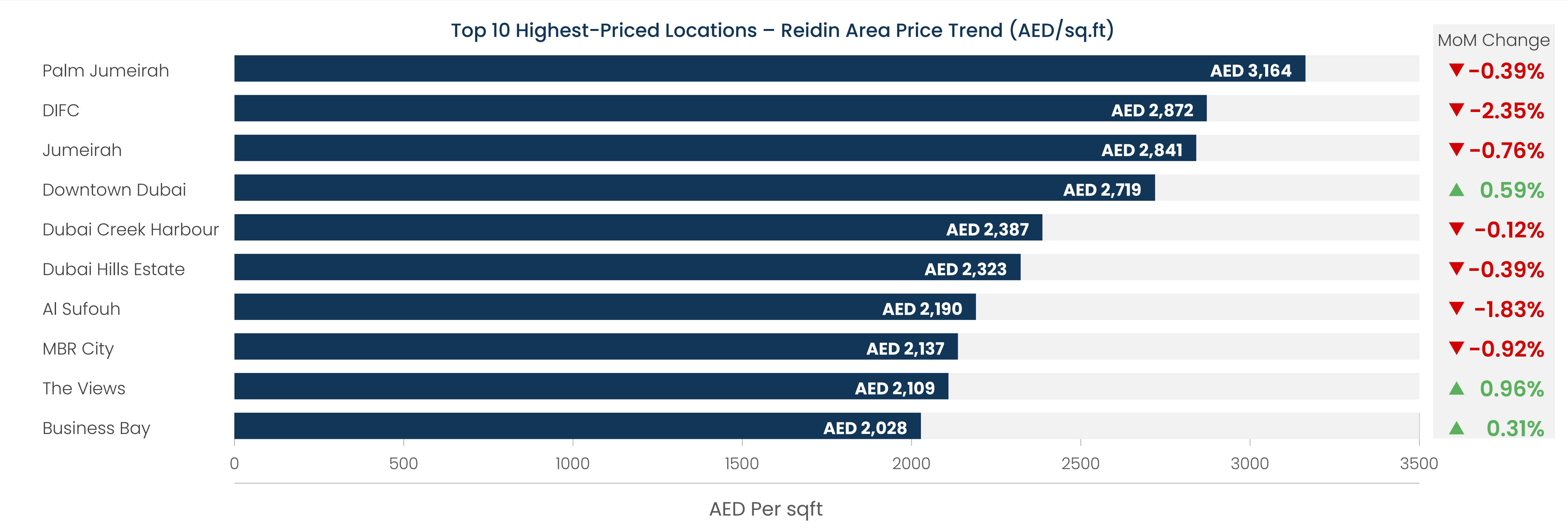
CITYWIDE RESIDENTIAL SALES PRICE TREND



Residential prices continued to moderate from their February 2026 peaks
Apartment prices were broadly stable in August at AED 1,779 per sq ft, declining 0.03% MoM, while villa prices decreased 0.34% MoM to AED 2,297 per sq ft. Since February, apartment and villa prices have corrected by approximately 5% and 4%, respectively.

Annual performance diverged, widening the villa–apartment price gap
Apartment prices were 1.3% lower YoY, while villa prices remained 2.3% higher YoY. Consequently, the price gap increased from AED 444 per sq ft in August 2025 to AED 518 per sq ft in August 2026.

APARTMENT SALES PRICE TREND

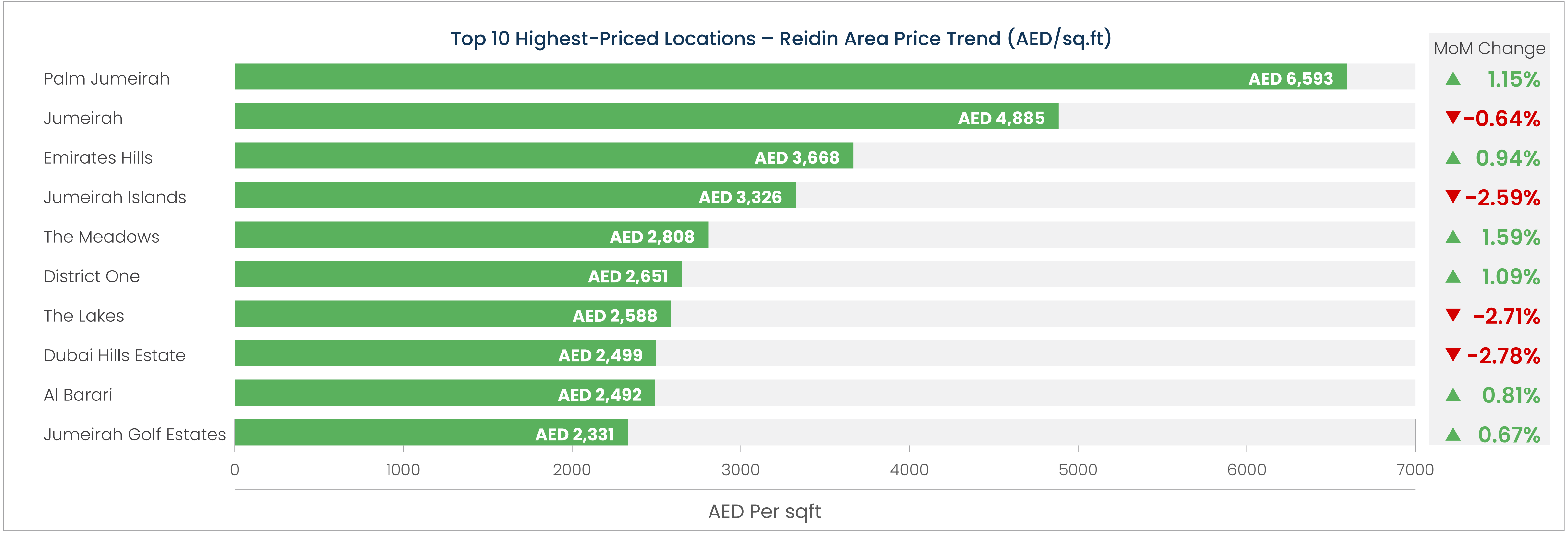


Palm Jumeirah remained the highest-priced apartment location
Palm Jumeirah recorded AED 3,164 per sq ft, followed by DIFC at AED 2,872 and Jumeirah at AED 2,841 per sq ft.

Monthly price declines were widespread across leading apartment locations
Seven of the ten displayed locations declined MoM. DIFC registered the largest decrease at 2.35%, followed by Al Sufouh at 1.83% and MBR City at 0.92%.

Price increases were limited to three of the top ten locations
The Views recorded the strongest increase at 0.96% MoM, followed by Downtown Dubai at 0.59% and Business Bay at 0.31%, highlighting selective price growth across apartment locations.

VILLA SALES PRICE TREND



A wide pricing premium separated Palm Jumeirah from the wider villa market
Palm Jumeirah recorded AED 6,593 per sq ft, substantially above Jumeirah at AED 4,885 and Emirates Hills at AED 3,668 per sq ft. Its premium over Jumeirah reached AED 1,708 per sq ft.

The sharpest corrections occurred in Dubai Hills Estate and The Lakes
Dubai Hills Estate recorded the largest decline at 2.78% MoM, followed by The Lakes at 2.71% and Jumeirah Islands at 2.59%. Jumeirah declined more moderately by 0.64%.

Price gains across six locations reflected continued villa market resilience
The Meadows recorded the strongest increase at 1.59% MoM, followed by Palm Jumeirah at 1.15%, District One at 1.09% and Emirates Hills at 0.94%.

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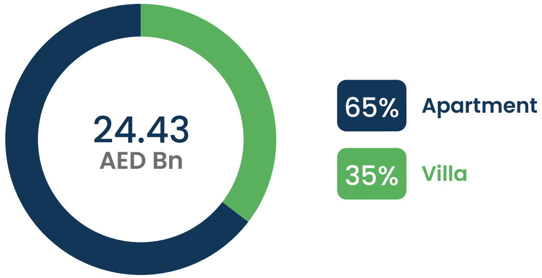
TOTAL RESIDENTIAL SALES BY PROPERTY TYPE & LOCATION

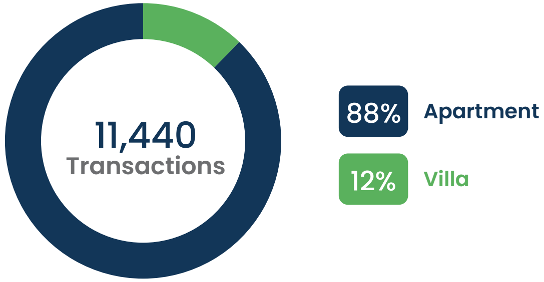
VALUE & VOLUME

Sales Transactions	Total Value (AED Bn)	Total Volume
Apartment Sales	15.78 Bn	10,039
Villa Sales	8.65 Bn	1,401
Grand Total	24.43 Bn	11,440

TOTAL VALUE (AED BN)



TOTAL VOLUME



TOP 10 LOCATIONS BY TRANSACTION VALUE

#	Location	AED Bn
1	Azizi Venice	1.20 Bn
2	Sobha Sanctuary	1.09 Bn
3	Business Bay	1.08 Bn
4	Palm Jumeirah	0.97 Bn
5	Jumeirah Village Circle	0.79 Bn
6	Palm Jebel Ali	0.77 Bn
7	City of Arabia	0.77 Bn
8	Downtown Dubai	0.75 Bn
9	Dubai Creek Harbour	0.63 Bn
10	Dubai Hills Estate	0.62 Bn

TOP 10 LOCATIONS BY TRANSACTION VOLUME

#	Location	Units
1	Azizi Venice	1481
2	City of Arabia	820
3	Jumeirah Village Circle	741
4	Jebel Ali Downtown	718
5	Dubailand Residence Complex	351
6	Business Bay	324
7	Emaar South	285
8	Sobha Sanctuary	275
9	Damac Lagoons	272
10	Majan	248

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OFF-PLAN SALES BY PROPERTY TYPE & LOCATION

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

1	Azizi Venice	1.20 Bn
2	City of Arabia	0.72 Bn
3	Business Bay	0.72 Bn
4	Palm Jebel Ali	0.60 Bn
5	Jebel Ali Downtown	0.59 Bn

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

1	Sobha Sanctuary	0.97 Bn
2	Damac Island City	0.54 Bn
3	Commercial District	0.42 Bn
4	Jumeirah Golf Estates	0.40 Bn
5	The Oasis	0.25 Bn

TOP 5 OFF-PLAN APARTMENT LOCATIONS BY VOLUME

1	Azizi Venice	1,481
2	City of Arabia	795
3	Jebel Ali Downtown	713
4	Jumeirah Village Circle	356
5	Dubailand Residence Complex	309

TOP 5 OFF-PLAN VILLA LOCATIONS BY VOLUME

1	Sobha Sanctuary	169
2	Damac Island City	163
3	Dubai Investment Park First	82
4	Commercial District	76
5	Damac Lagoons	32

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READY SALES BY PROPERTY TYPE & LOCATION

TOP 5 READY APARTMENT LOCATIONS BY VALUE (AED BN)

1	Downtown Dubai	0.51 Bn
2	Dubai Marina	0.47 Bn
3	Business Bay	0.36 Bn
4	Jumeirah Village Circle	0.34 Bn
5	Palm Jumeirah	0.28 Bn

TOP 5 READY VILLA LOCATIONS BY VALUE (AED BN)

1	Palm Jumeirah	0.50 Bn
2	Emirates Hills	0.31 Bn
3	Damac Lagoons	0.25 Bn
4	Mudon	0.21 Bn
5	Dubai Hills Estate	0.19 Bn

TOP 5 READY APARTMENT LOCATIONS BY VOLUME

1	Jumeirah Village Circle	370
2	Business Bay	203
3	Dubai Marina	196
4	Downtown Dubai	133
5	Arjan	105

TOP 5 READY VILLA LOCATIONS BY VOLUME

1	Damac Lagoons	69
2	Damac Hills 2	63
3	Mudon	53
4	The Springs	28
5	The Valley	26

READY RESIDENTIAL SALES: CASH VS MORTGAGE BACKED SPLIT

Transaction Type	Total Value (AED Bn)	Value%	Total Volume	Volume%
Cash	AED 4.24 Bn	50.9%	1,704	53.0%
Mortgage Backed	AED 4.09 Bn	49.1%	1,512	47.0%
Grand Total	AED 8.33 Bn	100%	3,216	100.0%

TOP 5 CASH PURCHASE LOCATIONS BY VALUE

1. Palm Jumeirah 0.62 Bn
2. Downtown Dubai 0.38 Bn
3. Dubai Marina 0.28 Bn
4. Jumeirah Village Circle 0.23 Bn
5. Dubai Hills Estate 0.22 Bn

TOP 5 MORTGAGE-BACKED PURCHASE LOCATIONS BY VALUE

1. Damac Lagoons 0.22 Bn
2. Mudon 0.20 Bn
3. Dubai Hills Estate 0.19 Bn
4. Dubai Marina 0.19 Bn
5. Jumeirah Village Circle 0.16 Bn

TOP 5 CASH PURCHASE LOCATIONS BY VOLUME

1. Jumeirah Village Circle 252
2. Business Bay 130
3. Dubai Marina 120
4. Downtown Dubai 92
5. International City 83

TOP 5 MORTGAGE-BACKED PURCHASE LOCATIONS BY VOLUME

1. Jumeirah Village Circle 133
2. Dubai Marina 76
3. Business Bay 73
4. Damac Lagoons 64
5. Dubai Hills Estate 60

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	16.10 Bn	65.9%	8,224	71.9%
Ready Sales	8.33 Bn	34.1%	3,216	28.1%
Grand Total	**24.43 Bn**	100%	**11,440**	100.0%

OFF-PLAN VS READY SALES BY PROPERTY TYPE

Property Type	Off-Plan Value	Off-Plan Volume	Ready Value	Ready Volume
Apartments	11.35 Bn	7,423	4.43 Bn	2,616
Villas	4.75 Bn	801	3.90 Bn	600
Grand Total	**16.10 Bn**	**8,224**	**8.33 Bn**	**3,216**

PRIMARY VS SECONDARY MARKET OVERVIEW

PRIMARY AND SECONDARY SALES SPLIT

Segment	Total Value (AED Bn)	Value%	Total Volume	Volume%
Primary Sales	14.34 Bn	58.7%	7,925	69.3%
Secondary Sales	10.10 Bn	41.3%	3,515	30.7%
Grand Total	**24.43 Bn**	100%	**11,440**	100.0%

PRIMARY VS SECONDARY SALES BY PROPERTY TYPE

Property Type	Primary Value	Primary Volume	Secondary Value	Secondary Volume
Apartments	11.00 Bn	7,304	4.78 Bn	2,735
Villas	3.33 Bn	621	5.32 Bn	780
Grand Total	**14.34 Bn**	**7,925**	**10.10 Bn**	**3,515**

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TICKET SIZE DISTRIBUTION BY PROPERTY TYPE

VALUE BY TICKET SIZE BAND (AED BN)

Ticket Size Band	Apartment			Villa		
	July 2026	August 2026	MoM	July 2026	August 2026	MoM
< 1 Mn	4.01	3.09	-22.9%	0.04	0.01	-77.5%
1 – 2 Mn	5.25	4.61	-12.1%	0.29	0.20	-30.4%
2 – 3 Mn	2.86	2.74	-4.3%	0.79	0.67	-15.0%
3 – 5 Mn	2.42	2.02	-16.2%	1.58	2.02	+28.2%
5 – 10 Mn	1.06	1.18	+11.1%	1.68	2.18	+30.1%
> 10 Mn	2.53	2.14	-15.5%	3.99	3.57	-10.7%
Total	**18.12**	**15.78**	**-12.9%**	**8.36**	**8.65**	**+3.5%**

VOLUME BY TICKET SIZE BAND

Ticket Size Band	Apartment			Villa		
	July 2026	August 2026	MoM	July 2026	August 2026	MoM
< 1 Mn	6,081	4,664	-23.3%	48	14	-70.8%
1 – 2 Mn	3,820	3,409	-10.8%	192	130	-32.3%
2 – 3 Mn	1,191	1,147	-3.7%	308	264	-14.3%
3 – 5 Mn	645	546	-15.3%	407	511	+25.6%
5 – 10 Mn	160	176	+10.0%	251	326	+29.9%
> 10 Mn	107	97	-9.3%	188	156	-17.0%
Total	**12,004**	**10,039**	**-16.4%**	**1,394**	**1,401**	**+0.5%**

LUXURY MARKET OVERVIEW

KEY TAKEAWAYS

Dubai's luxury residential market recorded approximately AED 5.71 billion across 253 transactions in August 2026, with off-plan sales accounting for 60.1% of total value and 65.2% of transaction volume.

Luxury demand remained concentrated within the villa segment, accounting for 53.1% of off-plan value and 57.6% of off-plan volume, and a higher 76.7% of ready value and 69.3% of ready volume, reinforcing continued demand for larger-format, low-density residences.

Off-plan luxury activity was distributed across both established and emerging locations, led by Business Bay at AED 485.5 million, followed by Jumeirah Golf Estates at AED 368.1 million, Palm Jebel Ali at AED 308.5 million and The Oasis at AED 233.7 million.

The ready luxury market remained concentrated within established prime villa communities, with Palm Jumeirah leading at AED 619.4 million, followed by Emirates Hills at AED 307.8 million and District One at AED 180.0 million, highlighting continued demand for completed ultra-prime homes.

Ultra-prime villa transactions significantly exceeded apartment ticket sizes during the month. The highest-value transaction was a AED 160 million ready villa in District One, while Palm Jumeirah accounted for three of the five largest villa transactions at AED 125 million, AED 117 million and AED 110 million. The highest-value apartment transaction was AED 86 million at The Address Jumeirah Resort Tower 2.

TOP 5 OFF-PLAN LUXURY LOCATIONS BY VALUE

Location	Value (AED Mn)	Volume
Business Bay	485.5	18
Jumeirah Golf Estates	368.1	18
Palm Jebel Ali	308.5	17
The Oasis	233.7	13
Jumeirah Second	210.8	5

TOP 5 READY LUXURY LOCATIONS BY VALUE

Location	Value (AED Mn)	Volume
Palm Jumeirah	619.4	13
Emirates Hills	307.8	4
District One	180.0	2
Dubai Hills Estate	126.6	7
Jumeirah Beach Residence	96.4	2

Luxury: AED 10m+

LUXURY MARKET OVERVIEW

OFF-PLAN AND READY SALES SPLIT

Transaction Type	Total Value (AED Bn)	Value%	Total Volume	Volume%
Off-Plan Sales	AED 3.43 Bn	60.1%	165	65.2%
Ready Sales	AED 2.28 Bn	39.9%	88	34.8%
Grand Total	**AED 5.71 Bn**	**100%**	**253**	**100.0%**

OFF-PLAN VS READY SALES BY PROPERTY TYPE

Property Type	Off-Plan Value	Off-Plan Volume	Ready Value	Ready Volume
Apartments	AED 1.61 Bn	70	AED 0.53 Bn	27
Villas	AED 1.82 Bn	95	AED 1.75 Bn	61
Grand Total	**AED 3.43 Bn**	**165**	**AED 2.28 Bn**	**88**

Luxury: AED 10m+

REIDIN Data Analytics

LUXURY MARKET OVERVIEW

TOP 5 APARTMENT TRANSACTIONS

#	Project	Location	Developer	Date	Sales Value	AED/sqft	Status
1	The Address Jumeirah Resort Tower 2	Jumeirah Beach Residence	Alain	26th Aug 2026	AED 86.0 Mn	4,751	Ready
2	ORLA Infinity by Omniyat	Palm Jumeirah	Omniyat	11th Aug 2026	AED 79.0 Mn	9,414	Off-Plan
3	Jumeirah Residences Asora Bay	La Mer	Meraas	5th Aug 2026	AED 65.0 Mn	8,326	Off-Plan
4	Bugatti Residences	Business Bay	Binghatti	17th Aug 2026	AED 63.0 Mn	9,282	Off-Plan
5	Aman Residences Tower 1	Jumeirah Second	H&H	11th Aug 2026	AED 57.6 Mn	15,050	Off-Plan

Luxury: AED 10m+

LUXURY MARKET OVERVIEW

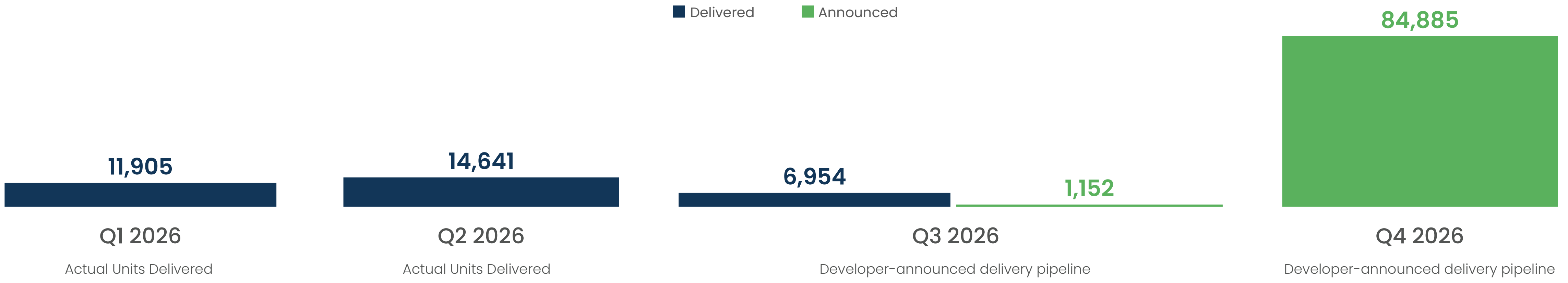
TOP 5 VILLA TRANSACTIONS

#	Project	Area	Developer	Date	Sales Value	AED/sqft	Status
1	District One Villas - Cluster B	District One	Meydan Sobha	25th Aug 2026	AED 160.0 Mn	18,382	Ready
2	Signature Villas Frond J (Al Anwan)	Palm Jumeirah	Nakheel	5th Aug 2026	AED 125.0 Mn	17,857	Ready
3	Garden Homes Frond G (Al Shishi)	Palm Jumeirah	Nakheel	4th Aug 2026	AED 117.0 Mn	21,425	Ready
4	Signature Villas Frond K (Al Khisab)	Palm Jumeirah	Nakheel	14th Aug 2026	AED 110.0 Mn	15,714	Ready
5	Emirates Hills - Sector L	Emirates Hills	Emaar	6th Aug 2026	AED 97.8 Mn	2,561	Ready

Luxury: AED 10m+

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	Business Bay	3,883
2	Damac Lagoons	3,540
3	Jumeirah Village Circle	3,298
4	Dubai Hills Estate	2,272
5	Arjan	2,054

TOP HANDOVER LOCATIONS ANNOUNCED BY DEVELOPERS – Q3 2026

1	Dubai Media City	438
2	Jumeirah Village Circle	424
3	Mudon	248
4	Arjan	42

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
August 2026 transaction data reflect registrations recorded from 1 August to 31 August 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 August 2026.

Market and Project Events
Market and project highlights are compiled from DLD and REIDIN data, developer statements, RTA disclosures, and published real estate media coverage for the reporting period.

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