ENGEL&VÖLKERS



Residential market snapshot

DUBAI | JANUARY 2026

Residential market snapshot



15,981 Sales transactions +20.8% YOY

55.9Bn Residential value sold (AED) +55.3% YOY

6.9% Average gross rental yield +2% YOY

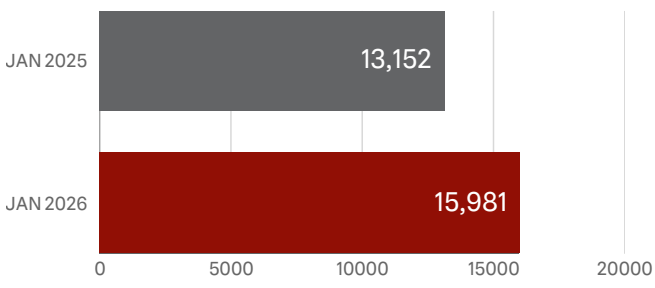
Dubai's residential real estate market began 2026 with solid year-on-year growth, recording 15,981 sales transactions in January, up 20.8% YOY. Total sales rose sharply to AED 55.9 billion, up 55.3% year over year, highlighting continued pricing strength and a shift toward higher-value purchases across the market.

Primary market activity continued to dominate, accounting for over two-thirds of all transactions, as buyers remained active in new developments across a range of price points. Apartments led activity, supported by sustained demand for mid-range and well-located projects. Notably, the share of higher-value transactions increased, with sales above AED 10 million accounting for 6.3% of sales, compared with 2.6% a year earlier, reflecting growing participation in the premium and luxury market.

Price performance remained positive across many key communities. Apartment prices recorded steady monthly and annual gains in established, investor-led locations, while villa and townhouse communities popular with end users continue to outperform, with several areas registering double-digit year-on-year growth. Average gross rental yields edged higher to 6.9%, underpinned by a thriving rental market and sustained tenant demand.

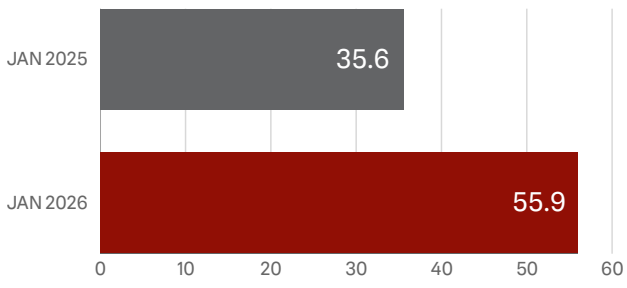
Overall, January's performance reinforces the resilience of Dubai's residential market as it enters 2026. While monthly activity moderated from late-2025 highs, year-on-year growth in both transactions and value, rising participation at higher price points, and stable rental yields point to a market underpinned by depth of demand, selective price growth, and increasing maturity across buyer segments.

Total sales transactions



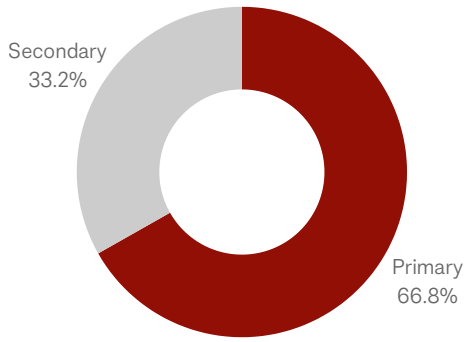
Source: Property Monitor

Total sales value (AED billion)



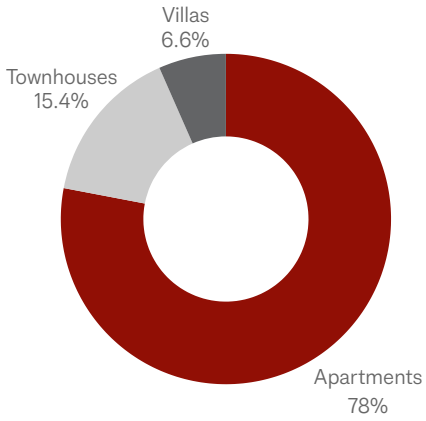
Source: Property Monitor

Primary vs secondary sales



Source: Property Monitor

Sales by property type



Source: Property Monitor



Sales price changes in key communities

Apartments

Community	Last month	Last 12 months
Bluewaters Island	+2.7%	+28.2%
Business Bay	+0.3%	+5.5%
Damac Hills	+0.5%	+5.4%
Downtown Dubai	+2.2%	+7.5%
Dubai Creek Harbour	+0.6%	+6.5%
Dubai Hills Estate	+1.3%	+7.5%
Dubai Marina	0.0%	+15.2%
Jumeirah Lakes Towers	+0.9%	+9.1%
Jumeirah Village Circle	+2.1%	+14.1%
JVT	+1.7%	+26.2%

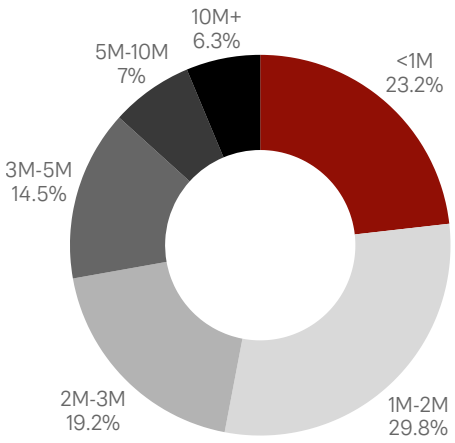
Source: Property Monitor

Villas & townhouses

Community	Last month	Last 12 months
Arabian Ranches 1	-1.2%	+12.6%
Damac Hills	-0.5%	+2.2%
Dubai Hills Estate	+0.1%	+16.6%
Jumeirah Golf Estates	+2.3%	+13.0%
Jumeirah Park	+1.4%	+15.0%
Jumeirah Village Triangle	+1.1%	+5.0%
Nad Al Sheba	+2.3%	+19.2%
Palm Jumeirah	+6.5%	+19.0%
The Springs	+1.6%	+14.1%
The Valley	+1.8%	+15.1%

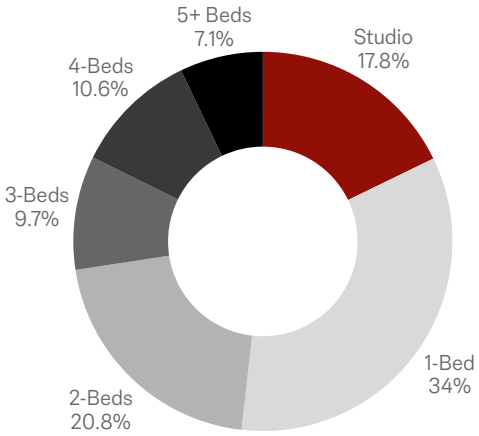
Source: Property Monitor

Sales price mix (AED)



Source: Property Monitor

Bedroom mix



Source: Property Monitor

Top communities by sales transactions

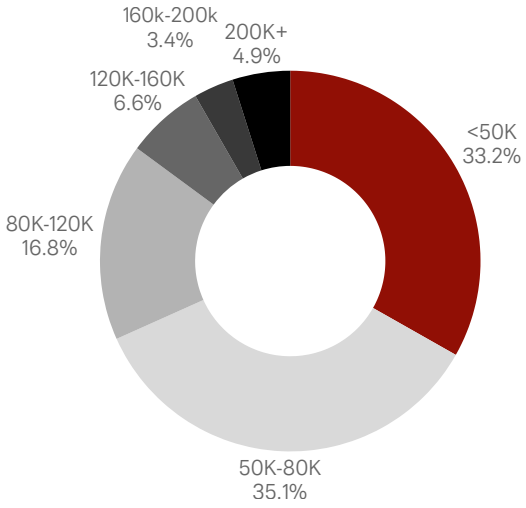
NUMBER OF UNITS SOLD + AVERAGE PRICE (/SQ.FT.)



Residential leasing

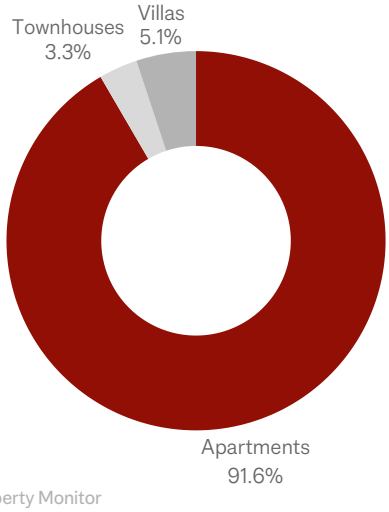


Rental price mix



Source: Property Monitor

Property type mix



Source: Property Monitor

New & renewed rental contracts

Type	New	Renewal
Apartments	16,314	29,968
Townhouses	924	749
Villas	904	1,654
Total	18,142	32,371

Source: Property Monitor



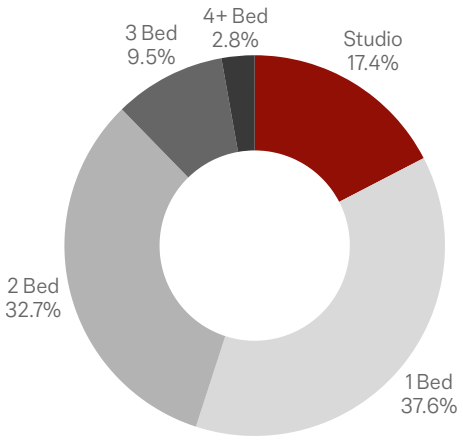


Average apartment rents by community

Community	Contracts	Average Rent (AED)
Palm Jumeirah	238	234,571
Downtown Dubai	607	171,060
Dubai Creek Harbour	391	155,565
Dubai Marina	895	131,598
Business Bay	1,178	109,962
Jumeirah Village Circle	1,994	73,473

Source: Property Monitor

Bedroom mix



Source: Property Monitor



Top communities | Villas & townhouses

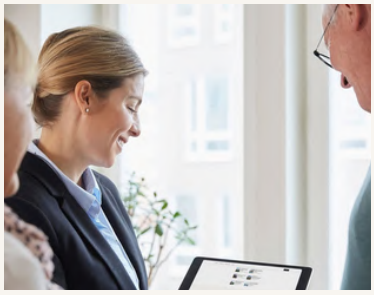
Community	Contracts	Average Rent (AED)
Dubai South	169	141,598
Dubai Hills Estate	120	429,933
Arabian Ranches	93	315,578
The Springs	150	197,052
Town Square	152	151,389

Source: Property Monitor

Next steps to make smarter property decisions

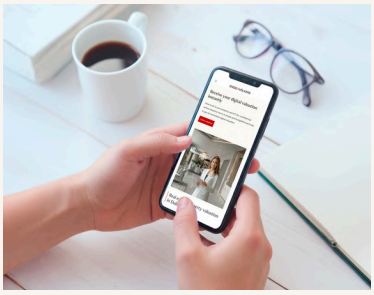
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Instant property valuation

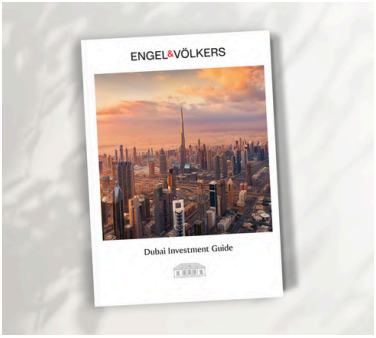
Free valuation



Market Research Hub

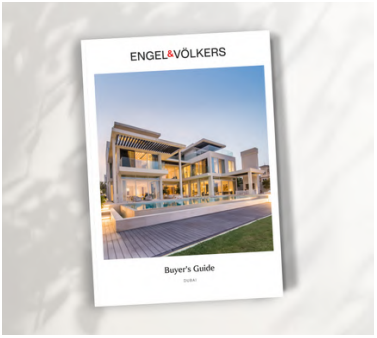
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> 35
COUNTRIES
Ensure our presence across five continents

> 45
YEARS
Successful in global real estate since 1977

> 200
AGENTS
Professional real estate consultants in Dubai

> 16,700
PEOPLE
Work under the brand around the world

> €1.3 Bn
REVENUE
The total turnover (gross) in 2025

> 1,100
LOCATIONS
Provide local market expertise from experts

Methodology

Our market experts have taken a holistic approach to provide a comprehensive overview of Dubai's residential real estate market for January 2026. We have used the Property Monitor Intelligence Platform, which contains detailed DLD transaction information, alongside our internal sales and leasing data, to build a full picture of market trends and dynamics. This rigorous analysis ensures an in-depth understanding of the residential real estate market in Dubai.



Meet the team



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