ABU DHABI RESIDENTIAL

Market performance · Q3 2026

Abu Dhabi City · Sales, prices, rents, supply

TRANSACTIONS	SALES VALUE	APARTMENT PRICES	VILLA PRICES
5,900	**AED 26.4 bn**	**+11.0%**	**+8.9%**
–7.5% Y-o-Y	+39.2% Y-o-Y	Y-o-Y	Y-o-Y

Q3 2026 AT A GLANCE

SALES TRANSACTIONS

5,900

–7.5% Y-o-Y · 3rd quarterly decline

SALES VALUE

AED 26.4 bn

+39.2% Y-o-Y

APARTMENT PRICES

+11.0%

Y-o-Y, growth slower than 2025

VILLA PRICES

+8.9%

Y-o-Y

APARTMENT RENTS

+3.5%

Y-o-Y, rental freeze in effect

VILLA RENTS

+1.8%

Y-o-Y

COMPLETED IN 2026

9,900

units, year to date

DUE BY YEAR-END

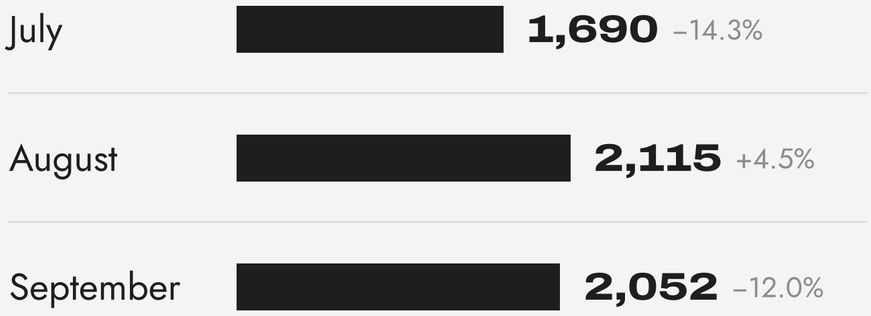
5,500

units scheduled

EXECUTIVE SUMMARY

- **Fewer deals, bigger tickets.** Volumes fell 7.5% Y-o-Y, while value rose 39.2% as the mix moved to off-plan villas and townhouses.
- **Two-speed market.** Apartment deals –31.1% Y-o-Y; villas and townhouses +89.4% on the back of new launches.
- **Demand is concentrated.** Al Reem and Yas take 60.6% of apartment sales; Al Hudayriyat — 45.5% of villa sales.
- **Prices still rising, more slowly.** Apartments +11%, villas +8.9% Y-o-Y.
- **Rents capped.** +3.5% apartments, +1.8% villas as the rental freeze takes hold.
- **Supply ahead.** ~14,600 units due in 2027 and ~24,200 in 2028; historically, delivery runs behind schedule.

MONTHLY TRANSACTIONS



Y-o-Y change. Source: Cavendish Maxwell, Quanta

MACRO BACKDROP

- Regional disruption hit the UAE economy in H1, hardest in hospitality, transport, manufacturing and trade.
- Q3 indicators improved: PMI firmly above 50, with output and new orders growing.
- Abu Dhabi outperforms the wider UAE thanks to higher oil output, capex and support measures; exit from OPEC+ and the Fujairah pipeline underpin the 2027 outlook.
- Business formation slowed: 9,600 new licences in Q3 vs 10,600 a year earlier. Investors stay cautious until geopolitics clear up.

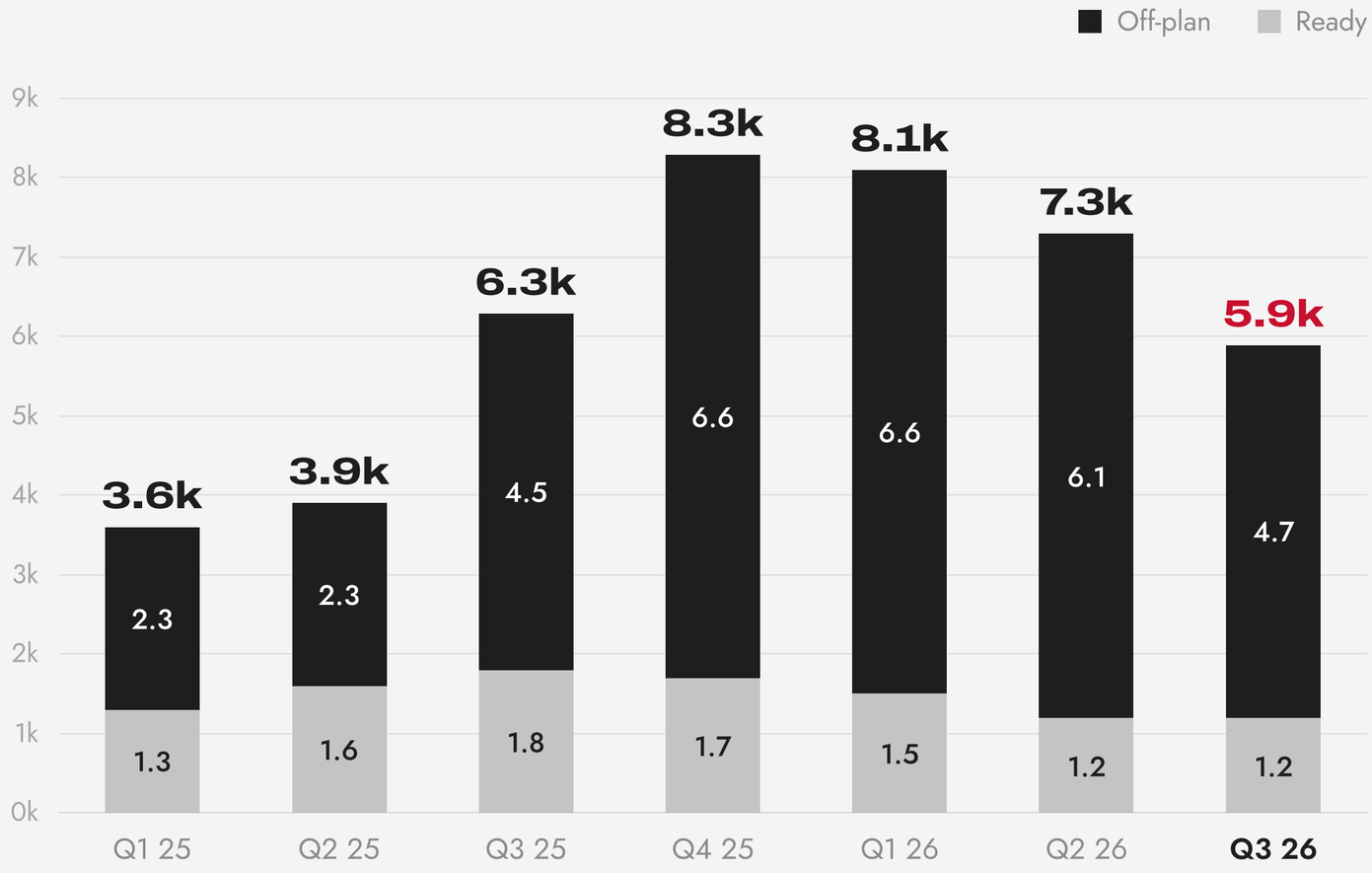
UAE real GDP, H1 2026 non-oil +1.8%; Q2 –2.1%	**+0.4%**
UAE PMI, Aug–Sep 2026 up from 50.8 in June	**55.3**
Abu Dhabi GDP, Fitch 2026; +15.1% forecast for 2027	**+3.7%**
UAE GDP, IMF 2026; +7.7% rebound in 2027	**–3.9%**
New licences, 9M 2026 vs 27,500 in 9M 2025	**27,300**

Sources: IMF, Fitch Ratings, S&P Global, via Cavendish Maxwell

SALES VOLUME

Q3 deals fell to ~5,900 — down for the third quarter in a row. Off-plan still leads with ~4,700 deals, but its growth has slowed sharply from 185% and 175% in Q1–Q2 as registration lags unwind. Ready sales: ~1,200.

	Q-O-Q	Y-O-Y
Off-plan	**–24.4%**	**+4.0%**
Ready	**+0.9%**	**–35.3%**
Total	**–20.3%**	**–7.5%**

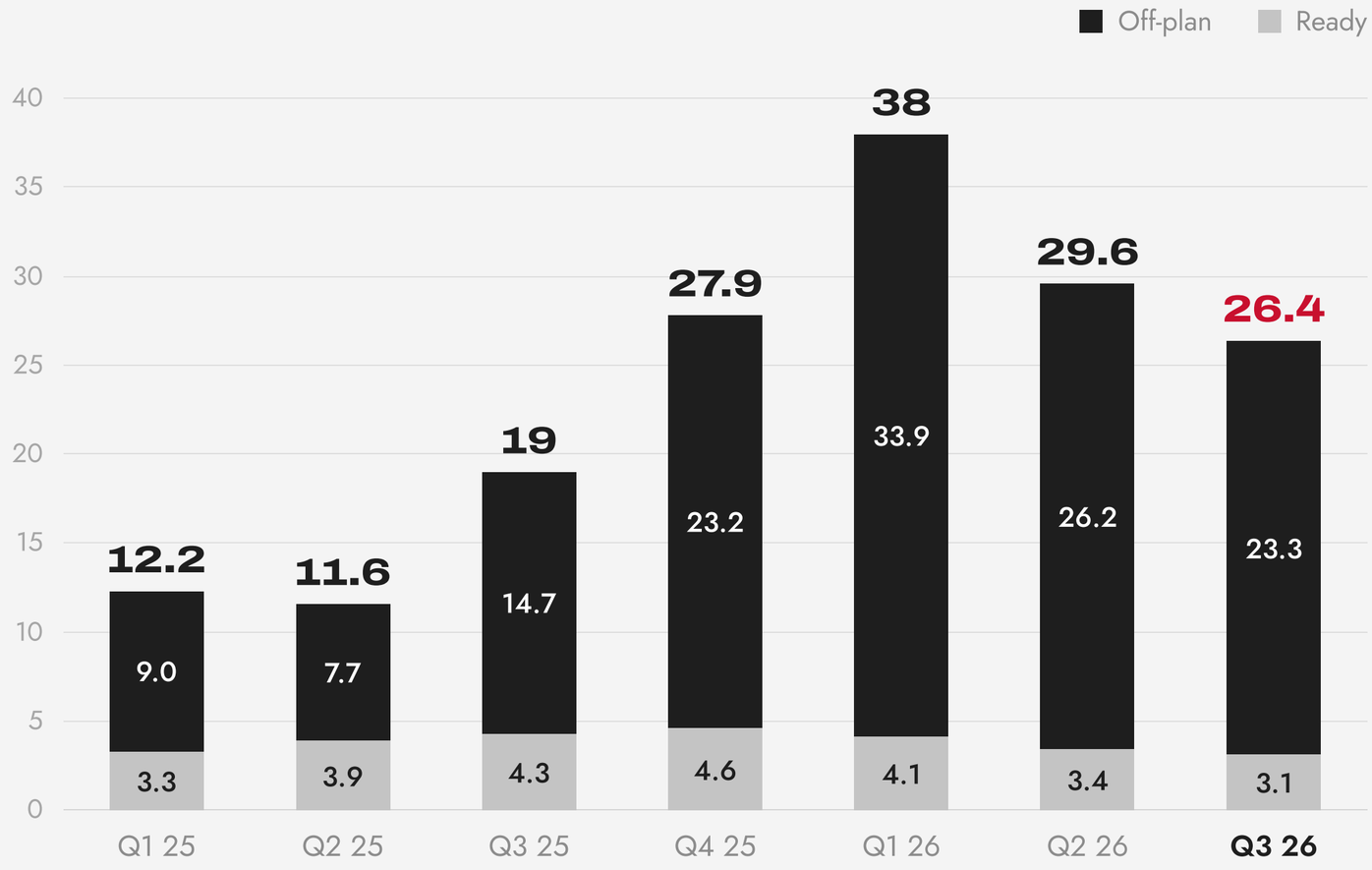


Transactions, thousands. Source: Cavendish Maxwell, Quanta. Residential unit sales, Abu Dhabi City

SALES VALUE

AED 26.4 bn in Q3 — 39.2% above last year on fewer deals, so the average ticket grew. Off-plan reached AED 23.3 bn: off-plan villas and townhouses up 289% Y-o-Y, off-plan apartments down 29%.

	Q-O-Q	Y-O-Y
Off-plan	**–11.1%**	**+58.4%**
Ready	**–8.2%**	**–26.9%**
Total	**–10.8%**	**+39.2%**

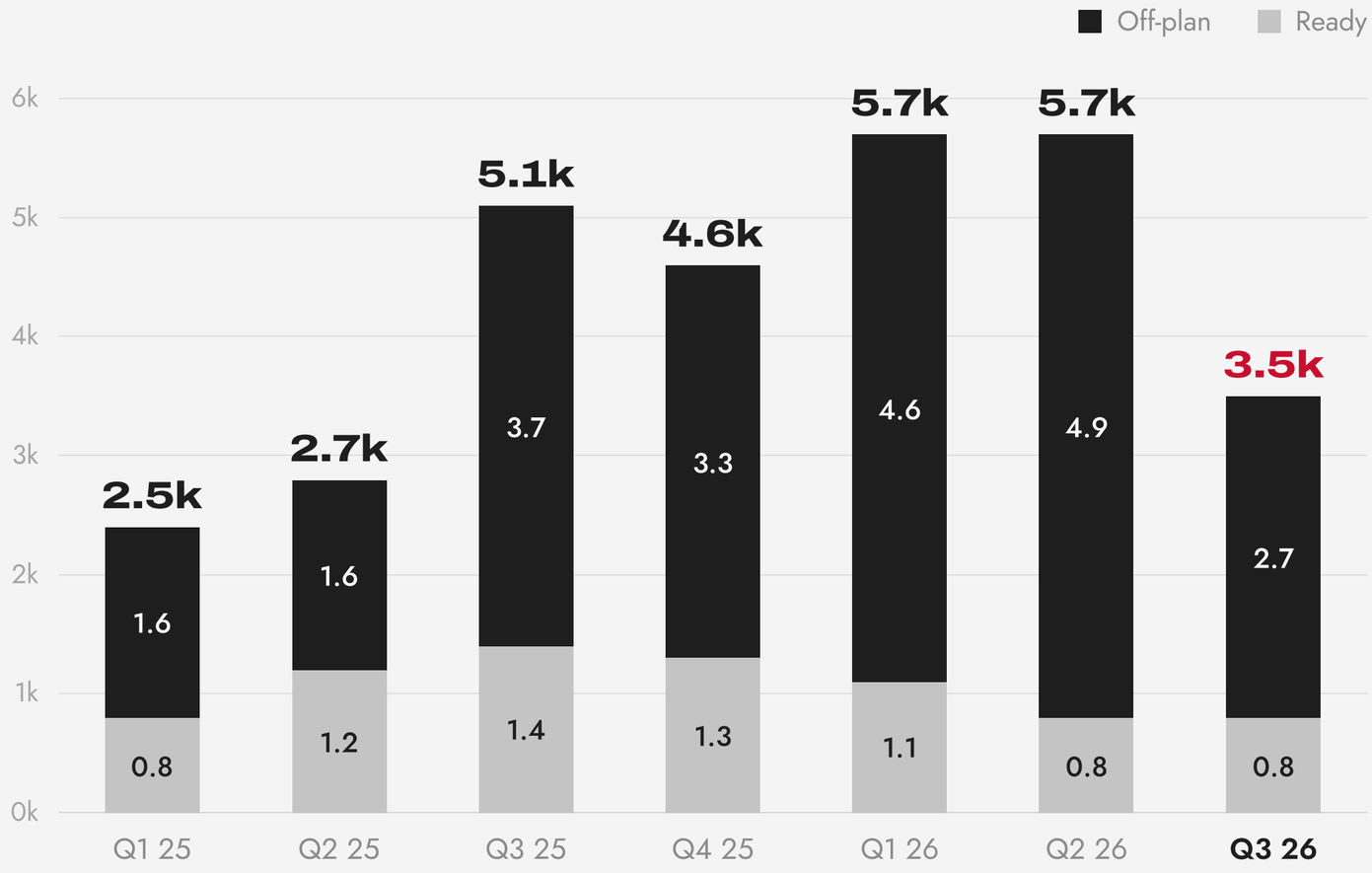


AED billion. Source: Cavendish Maxwell, Quanta. Residential unit sales, Abu Dhabi City

APARTMENTS

~3,500 deals, down across both segments. Off-plan ~2,700 — mostly because fewer apartment projects launched in 2026, not weaker buyer appetite. Ready ~800, –42% Y-o-Y.

	Q-O-Q	Y-O-Y
Off-plan	**–44.4%**	**–27.1%**
Ready	**–1.2%**	**–42.0%**
Total	**–38.3%**	**–31.1%**

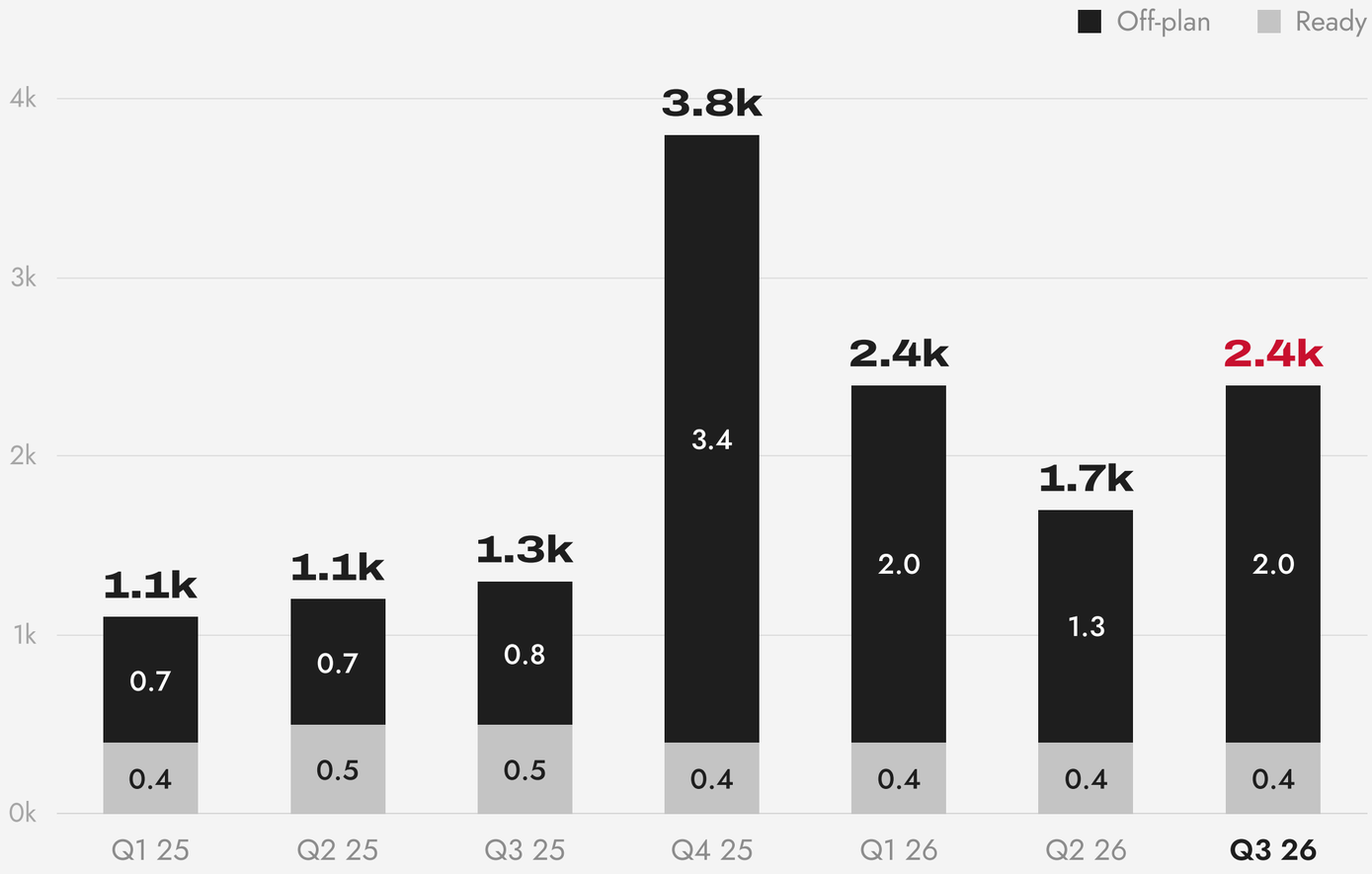


Transactions, thousands. Excl. duplexes and penthouses. Source: Cavendish Maxwell, Quanta. Residential unit sales, Abu Dhabi City

VILLAS AND TOWNHOUSES

~2,350 deals, nearly double last year. Growth comes from off-plan (~1,950, +153% Y-o-Y), driven by more villa and townhouse launches in 2026. Ready stable at ~400.

	Q-O-Q	Y-O-Y
Off-plan	**+51.1%**	**+153.4%**
Ready	**+5.6%**	**–15.5%**
Total	**+40.8%**	**+89.4%**

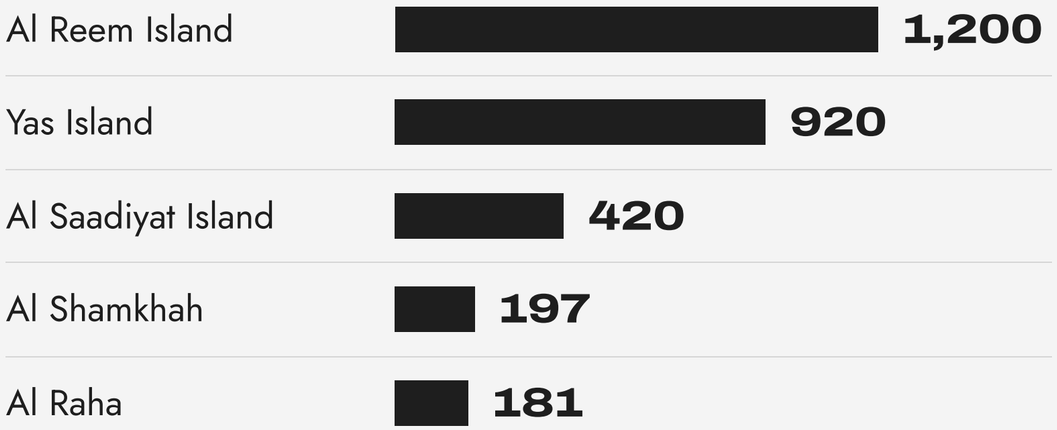


Transactions, thousands. Source: Cavendish Maxwell, Quanta. Residential unit sales, Abu Dhabi City

WHERE BUYERS BUY

APARTMENTS · TOP 5

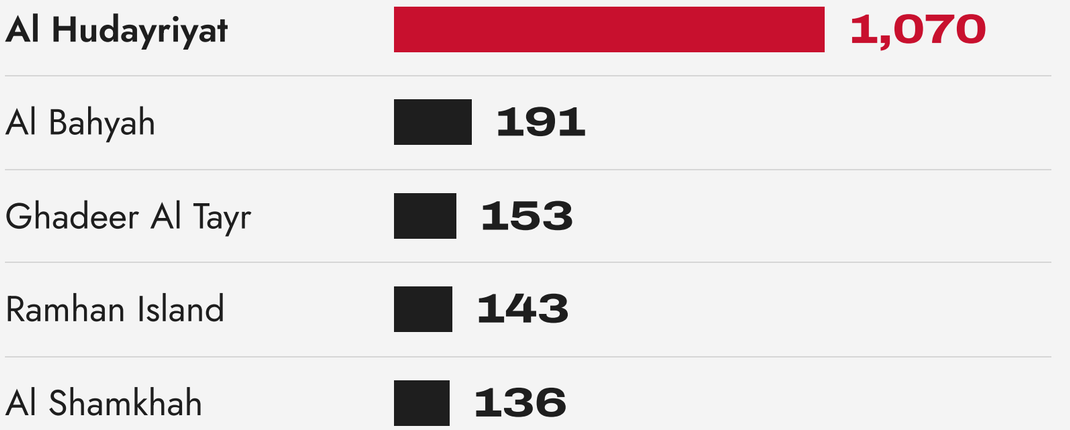
83.4% of apartment deals



Al Reem + Yas = 60.6% of apartment sales

VILLAS AND TOWNHOUSES · TOP 5

45.5% in Al Hudayriyat alone



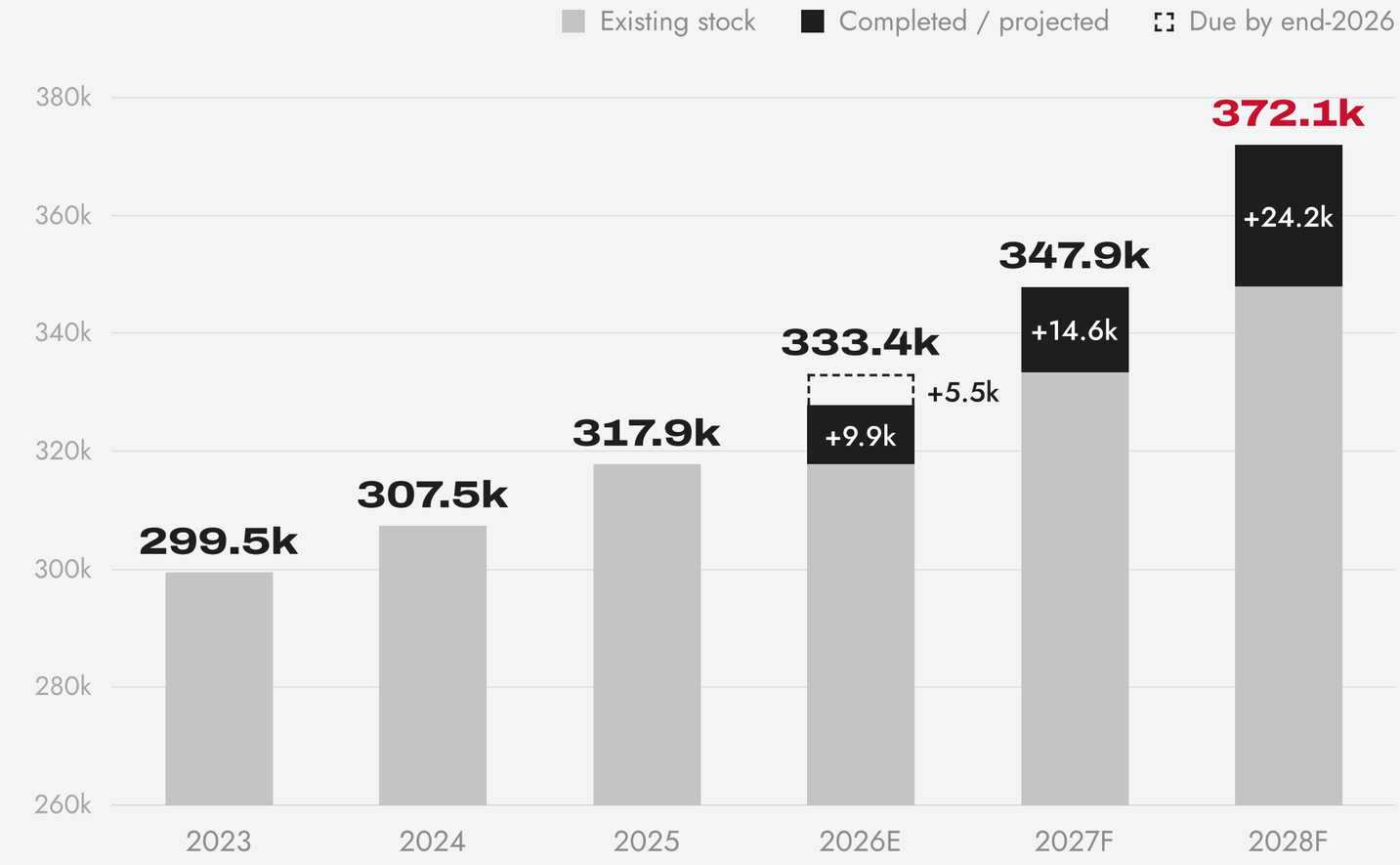
Hudayriyat Golf Estates — 36.5% of all villa deals

Transactions, Q3 2026. Source: Cavendish Maxwell, Quanta. Residential unit sales, Abu Dhabi City

SUPPLY PIPELINE

9,900 units delivered in 2026 so far, 5,500 more scheduled by year-end — though past delivery rates suggest only 1,700–3,300 of them will complete on time.

- ~14,600 units due in 2027, ~24,200 in 2028 — stock could reach ~372,000.
- Rising costs and material sourcing may push part of the 2027–28 pipeline back.
- With the rental freeze, the gap between new and older stock will widen: quality and amenities decide.

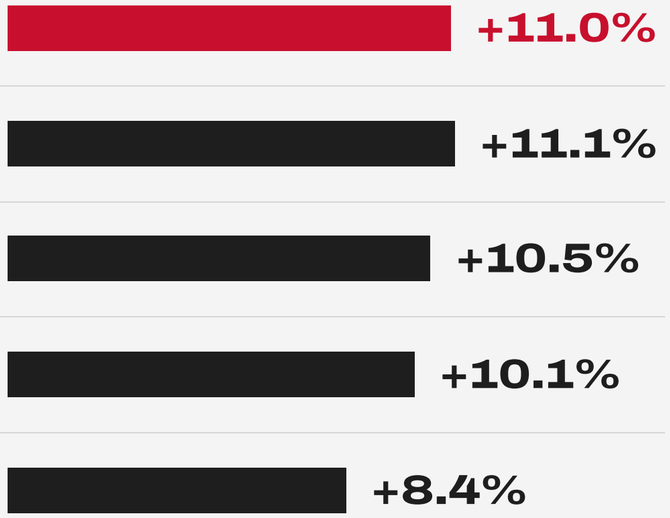


Residential units, Abu Dhabi City. Projections subject to revision. Source: Cavendish Maxwell, ADREC, MEED Projects

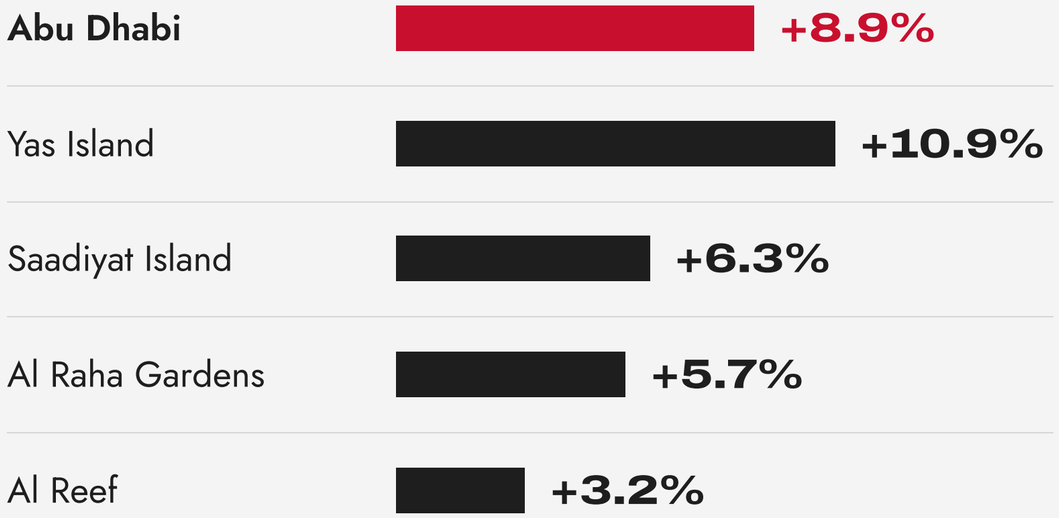
SALE PRICES

Prices rose in every key district despite fewer deals — but slower than in 2025, as buyers grow more cautious.

APARTMENTS · Y-O-Y



VILLAS · Y-O-Y



Q3 2026 vs Q3 2025. Abu Dhabi — emirate-wide average. Source: Cavendish Maxwell

RENTS

Rental growth is modest and the freeze is starting to bite. With new supply concentrated in a few areas, tenants there get more choice and landlords less room to raise rents.

APARTMENTS · Y-O-Y

Abu Dhabi	**+3.5%**
Yas Island	+7.9%
Al Reem Island	+5.5%
Al Raha Beach	~+4.4%
Al Reef	~+4.1%

VILLAS · Y-O-Y

Abu Dhabi	**+1.8%**
Al Raha Gardens	+5.1%
Al Reef	~+3.1%
Yas Island	~+2.8%
Saadiyat Island	~+0.9%

Q3 2026 vs Q3 2025. Values marked ~ are read from the source chart. Source: Cavendish Maxwell

OUTLOOK

Abu Dhabi enters a more cautious phase: last year's sales pace is unlikely to hold in the near term.

SALES

Volumes will track new launches — their number and type — and buyer confidence amid regional risks.

PRICES

Still growing, but moderating as demand and supply rebalance.

RENTS

Freeze plus new supply cap growth, most of all where completions cluster.

SUPPLY

38,800 units scheduled for 2027–28; actual delivery likely lower and later.

FOR INVESTORS

Pick quality, location and differentiation: well-positioned prime stock stays competitive.

INSIDE
REALTY

Buying, selling or renting in Abu Dhabi?
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Market data: Cavendish Maxwell, Quanta, Abu Dhabi Real Estate Centre, MEED Projects (Q3 2026 report). Summarised and presented by Inside Realty. For information only; not investment, legal or financial advice.