

MARKET FUNDAMENTALS

YoY Chg 12-Month Forecast

AED 1,480 ▲ ▲
City-Wide Sales Price (AED/sqft)

AED 91 ▲ ▲
City-Wide Average Rents (AED/sqft/year)
(Overall, All Property Classes)

ECONOMIC INDICATORS

YoY Chg 12-Month Forecast

2.82 Mn ▲ ▲
Abu Dhabi City Population

4.8% ▲ ▲
UAE Real GDP Annual Growth (Q3 2025)

2.1% ▼ ▼
UAE Unemployment

Source: IMF, World Bank, Statistics Centre of Abu Dhabi

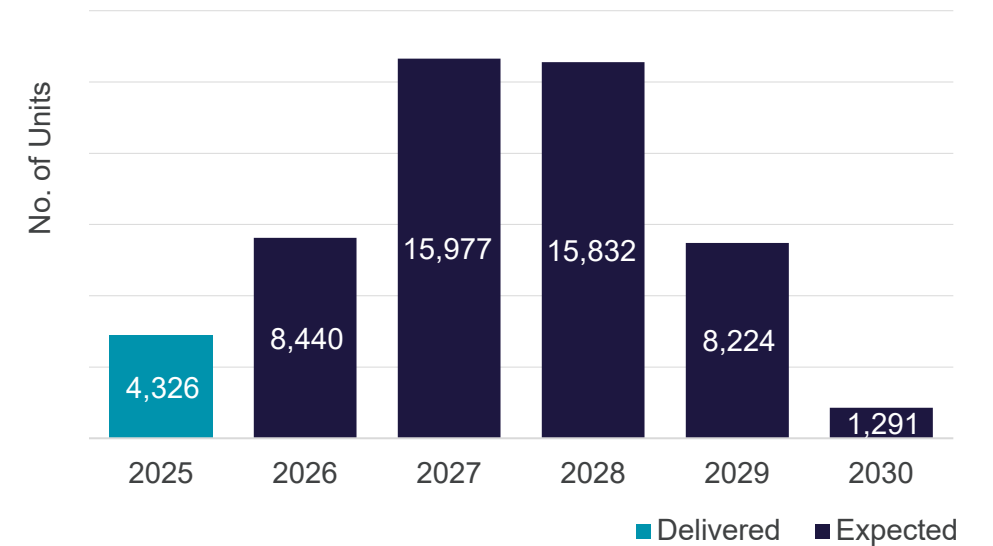
NEW SUPPLY CONCENTRATED ACROSS KEY GROWTH CORRIDORS

Abu Dhabi's residential supply pipeline continued to expand through 2025, with launches accelerating in the second half of the year as developer confidence improved. Completions in 2025 remained moderate and largely apartment-led, with key deliveries including Radiant Square, Yas Golf Collection and Yas Island Phase 2. New launches were heavily concentrated in Hudayriyat Island and Al Reem Island, together accounting for nearly half of total launch activity, reflecting continued developer focus on established lifestyle destinations. Looking ahead, the 2026 pipeline is concentrated across key growth corridors, led by Yas Island and Al Shamkha, followed by Saadiyat Island and Al Reem Island. These locations are expected to continue reinforcing their position as major residential hubs. Key upcoming projects include The Sustainable City, Reem Hills Villas Phases 1 & 2, and The Grove Saadiyat.

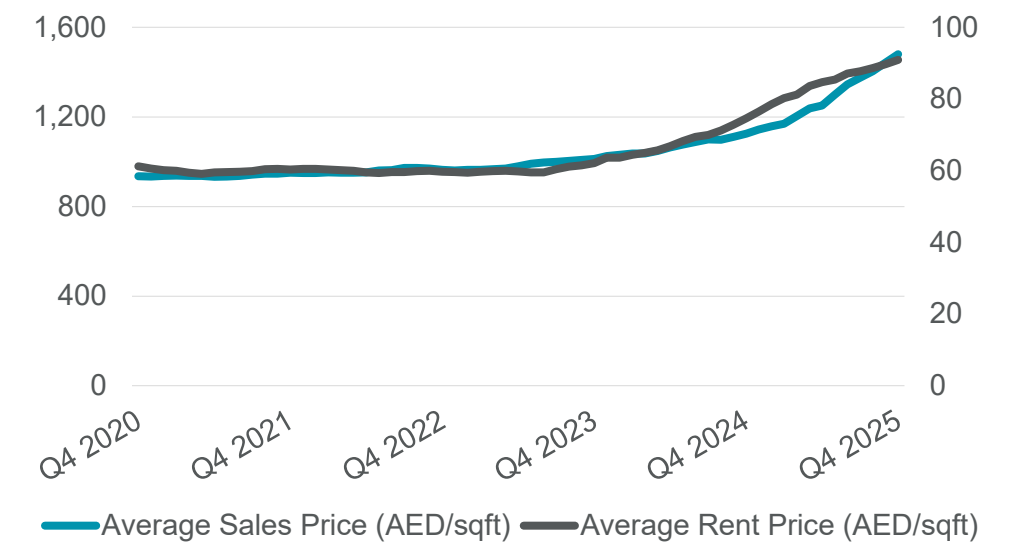
SALES AND RENTAL MARKETS: MAINTAIN STRONG MOMENTUM

Sales prices continued to rise in Q4 2025, recording a 32% YoY increase supported by strong end-user demand, strategic project launches, and favourable macroeconomic conditions. Apartment sales prices increased sharply across prime submarkets, with Saadiyat Island and Yas Island both recording around 33% YoY growth, while Reem Island and Al Raha Beach saw gains of 35% and 36% YoY respectively. Villa prices also strengthened, led by Al Reef Villas (+29% YoY) and Yas Island (+15% YoY), reflecting continued demand for larger family-oriented homes. Rental performance remained positive, with apartments leading growth across prime locations. Apartment rents rose by 25% YoY in Saadiyat Island, 26% in Yas Island, and 27% in Reem Island, reflecting tight supply in key lifestyle destinations. Villa rental growth was more mixed, with strong increases in Al Reef Villas (+40% YoY) and Khalifa City (+13% YoY), while rents in more mature communities such as Yas Island remained broadly stable. Overall, the market continues to be underpinned by structural demand and limited prime supply, with performance increasingly concentrated in established lifestyle and waterfront communities.

RESIDENTIAL HANDOVERS



SALES PRICES/RENTAL VALUES



Source: REIDIN

CAPITAL VALUES AS OF Q4 2025

TOP APARTMENT SUBMARKETS	AVERAGE SALE PRICE (AED/SQFT)	YoY CHANGE (%)	QoQ CHANGE (%)
Saadiyat Island	5,051	33%	9%
Yas Island	2,251	33%	6%
Reem Island	1,628	35%	10%
Al Raha Beach	1,800	36%	6%
Al Reef Downtown	974	38%	13%

TOP VILLA SUBMARKETS	AVERAGE SALE PRICE (AED/SQFT)	YoY CHANGE (%)	QoQ CHANGE (%)
Saadiyat Island	1,661	8%	1%
Hudayriyat Island	1,629	7%	2%
Yas Island	1,752	15%	4%
Khalifa City	1,352	10%	-1%
Al Reef Villas	1,003	29%	9%
Al Raha Gardens	876	0%	-2%

Source: REIDIN, ADREC

KEY PROJECTS LAUNCHED IN Q4 2025

PROPERTY	LOCATION	DEVELOPER	UNITS
Yas Riva Residences	Yas Island	Aldar	950
Bashayer Residences 1 & 2	Al Hudayriyat Island	Modon	330
One Residence	Al Reem Island	One Development	195
Stellar by Ellie Saab	Yas Island	Prime Emirates Real Estate Ltd	144
Juman 3	Al Raha	ICT Real Estate Development	148
Fay Hills	Masdar City	Taraf Holding	130
Four Seasons Private Residences	Saadiyat Island	Al Ain Holding	116
Riviera Residences	Al Reem Island	MERED	411
Radiant Wave	Al Reem Island	Radiant Real Estate	644
Radiant Atrium	Al Reem Island	Radiant Real Estate	211
The Row Saadiyat	Saadiyat Island	Aldar	717
Bloom Living – Malaga	Zayed City	Bloom Properties	138
Brabus Island 2	Al Raha	Reportage Real Estate	92

RENTAL VALUES AS OF Q4 2025

TOP APARTMENT SUBMARKETS	AVERAGE RENTS (AED/SQFT)	YoY CHANGE (%)	QoQ CHANGE (%)
Saadiyat Island	201	25%	9%
Yas Island	142	26%	5%
Reem Island	110	27%	4%
Al Raha Beach	100	13%	-2%
Al Reef Downtown	80	29%	6%

TOP VILLA SUBMARKETS	AVERAGE RENTS (AED/SQFT/YEAR)	YoY CHANGE (%)	QoQ CHANGE (%)
Saadiyat Island	115	22%	13%
Yas Island	95	0%	7%
Al Reef Villas	68	40%	14%
Al Raha Garden	57	1%	5%
Khalifa City	38	13%	-1%

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