

MARKET FUNDAMENTALS

YoY Chg

12-Month Forecast

AED 1,528

City-Wide Sales Price (AED/sqft)

▲

▼

YoY Chg

12-Month Forecast

AED 88

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

▲

▼

YoY Chg

12-Month Forecast

3.1%

UAE Real GDP Annual Growth (Q1 2026)

▲

▼

YoY Chg

12-Month Forecast

2.2%

UAE Unemployment

▼

▼

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

DELIVERY WAVE BUILDS AS LAUNCH ACTIVITY STRENGTHENS

A total of 2,545 residential units were delivered in Abu Dhabi during the first nine months of 2026, with Q3 completions led largely by Aldar through The Grove – Heart on Saadiyat Island and Yas Park Views – Noya 5. A further 4,412 units are expected in Q4 2026, which would bring full-year completions to c. 6,950, around 60% more than in 2025, although some of these handovers are likely to slip into 2027. The bigger shift begins in 2027, with over 52,000 units scheduled for delivery between 2027 and 2029, making absorption over this period a key test for the market. Launch activity strengthened further in Q3 2026, with nearly 8,400 units announced, up around 40% from the previous quarter. Modon and Aldar together accounted for around 37% of new launches, with activity concentrated on Hudayriyat Island, Yas Island, Al Reem Island and Al Ghadeer.

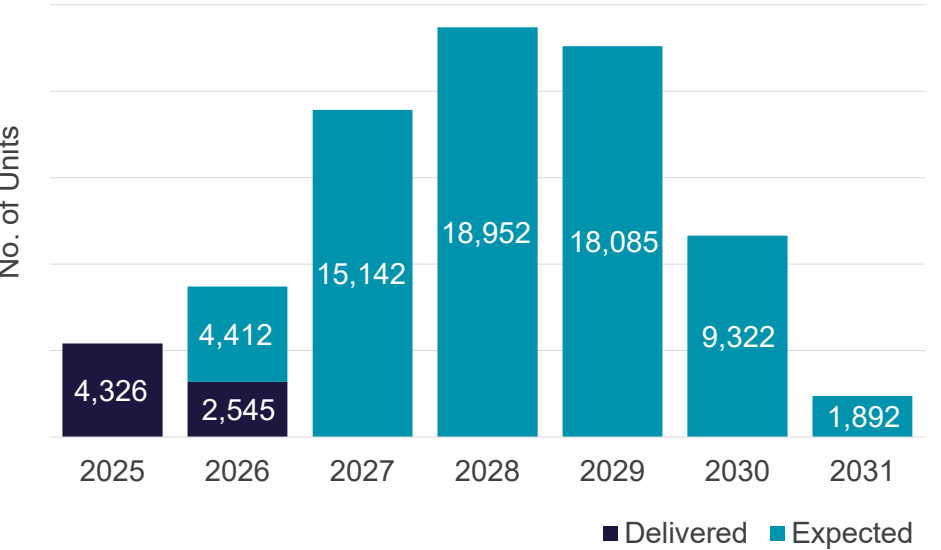
SALES PRICES START TO EASE AFTER YEARS OF STRONG GROWTH

Abu Dhabi’s residential sales market showed early signs of easing in Q3 2026. City-wide prices fell 1% QoQ, marking the first quarterly decline in five years, but remained 22% higher YoY, reflecting strong gains in late 2025 and early 2026. Apartments continued to lead annual growth, with Saadiyat Island up 21% YoY, Al Reef Downtown up 18%, Reem Island up 16%, Al Raha Beach up 10% and Yas Island up 7%. Villa performance was more mixed. Al Reef Villas (+22% YoY), Hudayriyat Island (+20%) and Al Raha Gardens (+11%) recorded strong gains, while prices fell in Khalifa City (-19%) and on Saadiyat Island (-10%). Yas Island was broadly flat (+1%). Hudayriyat Island stood out, with villa prices up by 21% QoQ, likely reflecting the pricing of new project launches.

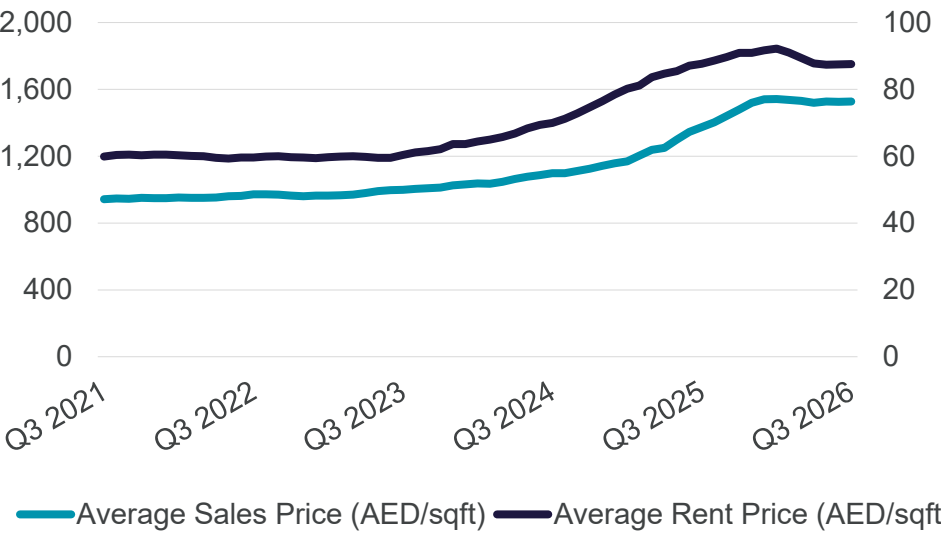
IMPACT OF RENTAL FREEZE BEGINS TO EMERGE

Abu Dhabi’s residential leasing market has started to soften, with city-wide rents down 5% QoQ, the sharpest quarterly decline in the past five years, though still 4% higher YoY. Apartments drove the quarterly decline, led by Saadiyat Island (-8% QoQ), Al Reef Downtown (-6%) and Yas Island (-3%), while Reem Island was flat and Al Raha Beach edged up 1%. Villa rents remained more stable. Saadiyat Island and Al Reef Villas were unchanged, Yas Island eased 1%, and Al Raha Gardens (+1%) and Khalifa City (+5%) recorded gains. The recently introduced rental freeze follows several years of strong rental growth and is expected to give tenants more certainty and support a more stable leasing environment, while underlying demand remains healthy.

RESIDENTIAL HANDOVERS



SALES PRICES/RENTAL VALUES



Source: Dari, ADREC, Quanta

CAPITAL VALUES AS OF Q3 2026

TOP APARTMENT SUBMARKETS	AVERAGE SALE PRICE (AED/SQFT)	YoY CHANGE (%)	QoQ CHANGE (%)
Saadiyat Island	5,583	21%	1%
Yas Island	2,278	7%	1%
Reem Island	1,722	16%	2%
Al Raha Beach	1,861	10%	-1%
Al Reef Downtown	1,020	18%	-2%

TOP VILLA SUBMARKETS	AVERAGE SALE PRICE (AED/SQFT)	YoY CHANGE (%)	QoQ CHANGE (%)
Saadiyat Island	1,475	-10%	-1%
Hudayriyat Island	1,918	20%	21%
Yas Island	1,661	1%	-1%
Khalifa City	1,098	-19%	-1%
Al Reef Villas	1,120	22%	0%
Al Raha Gardens	965	11%	2%

Source: Quanta, ADREC

KEY PROJECTS LAUNCHED IN Q3 2026

PROPERTY	LOCATION	DEVELOPER	TYPE	UNITS
Radiant Terrace	Al Reem Island	Radiant Real Estate	Apartment	618
Bab Al Qasr Garden Residence 65	Masdar City	Burtville Development	Apartment	600
The Canopies 1	Yas Island	Aldar Properties	Apartment	592
River Cove Residences	Al Bahyah	Sobha Realty	Apartment	532
The Wadi	Yas Island	Cosmo Developments/Reportage	Apartment	530
Bloom Living - Alhambra	Zayed City	Bloom Properties	Apartment	456
Bashayer Residences 5 & 6	Hudayriat Island	Modon	Apartment	242
Wadeem Gardens Ph-1	Hudayriat Island	Modon	Villa	238

KEY CONSTRUCTION COMPLETIONS IN Q3 2026

PROPERTY	LOCATION	DEVELOPER	TYPE	UNITS
The Grove - Heart	Saadiyat Island	Aldar	Apartment	612
Fay Alreeman Ph-1	Al Shamkha	Aldar	Villa and Townhouse (UAE Nationals)	554
Yas Park Views - Noya 5	Yas Island	Aldar	Villa and Townhouse	341
Ville 11 by Burtville	Masdar City	Burtville Development	Apartment	111

RENTAL VALUES AS OF Q3 2026

TOP APARTMENT SUBMARKETS	AVERAGE RENTS (AED/SQFT/YEAR)	YoY CHANGE (%)	QoQ CHANGE (%)
Saadiyat Island	182	-2%	-8%
Yas Island	133	-1%	-3%
Reem Island	104	-1%	0%
Al Raha Beach	103	1%	1%
Al Reef Downtown	75	0%	-6%

TOP VILLA SUBMARKETS	AVERAGE RENTS (AED/SQFT/YEAR)	YoY CHANGE (%)	QoQ CHANGE (%)
Saadiyat Island	100	-2%	0%
Yas Island	82	0%	-1%
Al Reef Villas	66	11%	0%
Al Raha Gardens	57	4%	1%
Khalifa City	38	-2%	5%

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