Dubai Property Monthly
Market Intelligence Report
January 2026

Dubai Residential Sales Analysis

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01 Executive Overview

January 2026 recorded strong residential activity across Dubai, with off-plan transactions continuing to dominate overall market share.

KEY HIGHLIGHTS:

Total **Residential** Sales: **17,121 transactions**	Off-Plan Share: **65%**	Off-Plan **Average** Price: **AED 2,149** per sqft

Apartment Transactions: **15,448**	Villa Transactions: **2,738**	Ready Share: **35%**	Ready **Average** Price: **AED 1,655 per sqft**

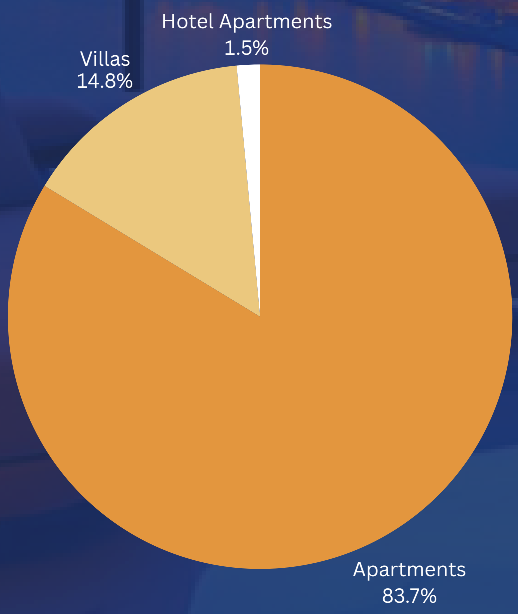
The market continues to reflect investor confidence in future inventory, while select ready markets show potential value positioning.

02 Residential Market Structure

Property Type **Breakdown**

Property Type	Transactions
Apartments	15,448
Villas	2,738
Hotel Apartments	274

Apartments continue to dominate transaction volume, reinforcing their role as the primary investor asset class.



03 Most Sold Communities
(By Volume)

RANK	COMMUNITY	TRANSACTIONS
01	Jumeirah Village Circle	1,467
02	Business Bay	1,163
03	Al Yelayiss 1	1,104
04	Madinat Al Mataar	837
05	Arjan	798

JVC remains Dubai's liquidity leader, while Business Bay reflects continued premium positioning

04 Fastest Absorbing Off-Plan Projects (January 2026)

Based on transaction count and **off-plan** activity:

1. Binghatti Vintage
346 transactions
Strong absorption driven by mid-premium positioning and developer brand presence.

2. Shahrukhz by Danube
229 transactions
High early traction, indicating investor appetite for structured payment plans.

3. DAMAC Islands 2 – Bahamas 2
185 transactions
Strong master-planned villa demand driving volume.

4.Nourelle
178

5. Hado by Beyond
173

These projects **demonstrate strong launch momentum** and active investor participation.

Top 5 Off-Plan Zones January 2026

From a zone perspective, off-plan activity was highest in these areas:

Al Yelayiss 1	1,081 off-plan deals
Dubai Land Residence Complex	631
JVC	578
Madinat Al Mataar	574
Business Bay	427

Here, looking at absorption alone is not enough.
We also need to evaluate supply concentration.

05 Price Per Sqft Intelligence
(Apartments Only)

Overall Market

Off-Plan: **AED 2,149 per sqft**

Ready: **AED 1,655 per sqft**

Market Premium: +30%
This premium reflects investor willingness to price in future appreciation and structured payment benefits.

06 Safest Entry Gaps

(Lowest Off-Plan Premium vs Ready – Apartments)
These areas show controlled pricing and lower speculative risk.

Community	Off-Plan Avg	Ready Avg	Premium
Jumeirah Village Triangle	1,584	1,467	+8%
Al Furjan	1,423	1,237	+15%
Jumeirah Village Circle	1,535	1,255	+22%
Arjan	1,691	1,378	+23%
Dubai South	1,282	1,036	+24%

These markets indicate balanced pricing between current stock and future supply.

07 Undervalued Ready Markets

(Low Ready Pricing with High Off-Plan Premium)

Community	Ready Avg	Off-Plan Avg	Premium
Liwan	863	1,271	+47%
Dubai Land Residence Complex	867	1,413	+63%
Dubai Production City	942	1,403	+49%
Silicon Oasis	946	1,489	+57%
Motor City	1,027	1,850	+80%

These areas may reflect repositioning or new-launch pricing that has moved ahead of existing stock.

08 Correction Risk Zones

(High Premium + Off-Plan Dominance)

Community	Premium	Off-Plan Share	Risk Indicator
Motor City	+80%	74%	High
Business Bay	+71%	62%	Moderate-High
Dubai Land Residence Complex	+63%	91%	High
Jumeirah Lakes Towers	+63%	58%	Moderate
Silicon Oasis	+57%	43%	Moderate

High premiums combined with supply-heavy off-plan activity may increase sensitivity to sentiment shifts.

09 Strategic Interpretation

The January 2026 data suggests:

01 Off-plan inventory continues to command premium pricing.

02 Mid-market communities show healthier price alignment.

03 Select ready markets may present relative value.

04 Luxury-core districts reflect stronger speculative pricing.

05 Master-planned villa communities continue to attract volume.

Investors should evaluate:

1. Entry premium vs resale liquidity
2. Developer track record
3. Absorption speed
4. Supply pipeline concentration

10 Data Methodology

Source: Dubai Land Department

Scope: Residential sales only

Focus: Apartment transactions for price comparisons

Area converted from sqm to sqft

Median values used where relevant to reduce luxury skew impact