Reliant Surveyors
ADVISORY & CONSULTANCY

Q3 2026

ABU DHABI MARKET REPORT RESIDENTIAL



Precision-Derived Decisions.





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Abu Dhabi's residential market recorded a varied performance in Q3 2026, with apartment and villa segments showing differing movements in sales prices and rental values. Apartment capital values increased by 0.7% quarter-on-quarter, while villa prices moderated by 0.5%. Rental performance followed a contrasting trend, with apartment rents declining 0.4% and villa rents increasing 0.9% during the quarter.

The quarterly movements were set against a stronger longer-term performance in apartment capital values, which remained 13.1% above September 2025 levels. Villa sales prices were comparatively stable on an annual basis, highlighting differences in capital value movements across the two residential segments. Gross rental yields stood at 6.26% for apartments and 4.73% for villas, with apartments continuing to offer higher indicative income returns.

Residential supply is expected to expand further, with 10,120 units scheduled for completion in 2026 and the largest annual addition projected for 2027. The pace of delivery and absorption of new inventory will remain important factors in shaping market conditions across residential communities.

This edition examines the relationship between residential supply, sales prices, rental performance and investment yields, providing a balanced assessment of Abu Dhabi's evolving residential market.

Q3 2026 Highlights

Residential Market Performance

Apartment Sales Price
+0.7% QoQ
13.1% above September 2025

Villa Rental Growth
+0.9% QoQ
2.3% higher year on year

Units Scheduled for 2026
10,120 UNITS
Stock rising 10.6% to 105,363

Gross Rental Yields
6.26% I 4.73%
Apartments vs villas, September 2026

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Q3 2026 at a Glance

Abu Dhabi Residential Market Scorecard

APARTMENT SALES PRICE

1,653.2

AED per sq.ft, Sep 2026

▲ +0.7% QoQ ▲ +13.1% YoY

APARTMENT RENTAL PRICE

100.7

AED per sq.ft per year

▼ -0.4% QoQ ▼ -0.5% YoY

VILLA SALES PRICE

1,166.1

AED per sq.ft, Sep 2026

▼ -0.5% QoQ ▲ +0.4% YoY

VILLA RENTAL VALUES

107.2

Index, Sep 2024 = 100

▲ +0.9% QoQ ▲ +2.3% YoY

Movements compare September 2026 with June 2026 (QoQ) and September 2025 (YoY). Source: Reliant Surveyors Research, REIDIN.

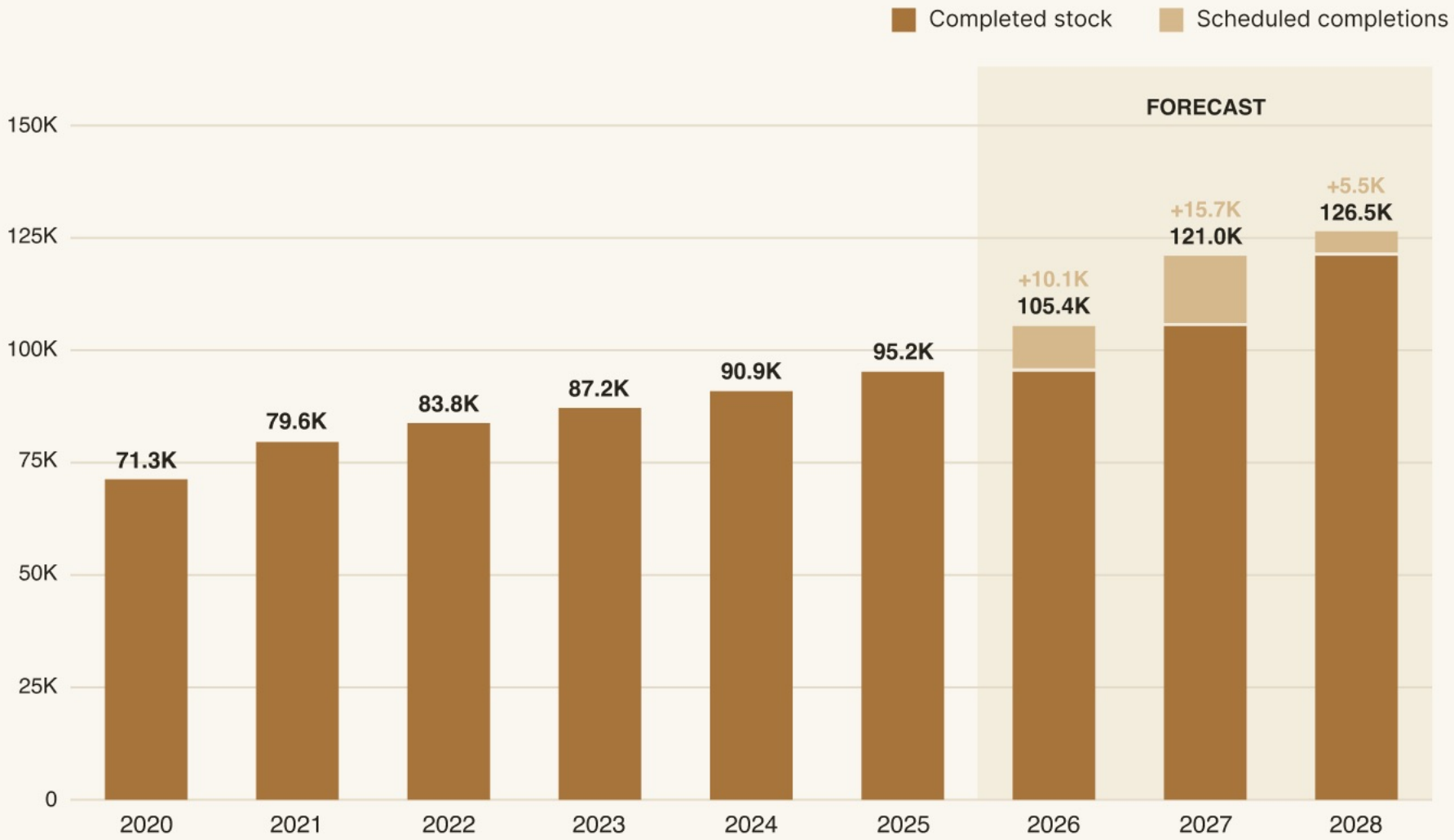
METRIC	SEP 2026	3 MONTHS	1 YEAR	2 YEARS
Apartment sales	AED 1,653.2 /sq.ft	+0.7%	+13.1%	+44.0%
Apartment rents	AED 100.7 /sq.ft/yr	-0.4%	-0.1%	+28.5%
Villa sales	AED 1,166.1 /sq.ft	-0.5%	+0.4%	+12.9%
Villa rents	Index 107.2	+0.9%	+2.3%	+7.2%
Apartment gross yield	6.26%	-0.07%pp	-0.89%pp	-0.78%pp
Villa gross yield	4.73%	+0.07%pp	+0.09%pp	0.26%pp



Abu Dhabi's Residential Supply Enters a New Phase of Expansion

Abu Dhabi Residential Supply

Completed residential stock, units | 2026 to 2028 scheduled completions shown in light beige



Source: Reliant Surveyors Research, REIDIN. Scheduled completions depend on construction progress and handover timelines.

Abu Dhabi's residential supply is forecast to expand in 2026, with 10,120 homes scheduled for delivery, taking projected year-end stock to 105,363 units. This represents 10.6% growth from the 95,243 units recorded in 2025, adding to the emirate's housing inventory as developments reach completion.

The delivery pipeline indicates further expansion, with 15,662 units scheduled for 2027, followed by 5,454 units in 2028. If delivered as planned, residential stock would reach 126,479 units by year-end 2028, with the largest annual addition during the forecast period occurring in 2027. Actual delivery volumes will depend on construction progress and project handover timelines.

10,120 homes are scheduled for 2026, increasing residential stock by 10.6%.

2027 carries the largest annual addition in the forecast period, at 15,662 units.

Actual delivery volumes will depend on construction progress and project handover timelines.

> Stock rises 10.6% in 2026, with the largest annual addition arriving in 2027.

PIPELINE ANALYTICS

6.0%
Stock growth per year, 2020 to 2025

9.9%
Forecast growth per year, 2025 to 2028

50.1%
Share of the 2026 to 2028 pipeline landing in 2027



Supply Composition | Apartments & Villas

Apartments and serviced apartments account for approximately 71% of Abu Dhabi's completed residential inventory, compared with 29% for villas. The composition of developments under construction shows a greater villa contribution, with apartments representing approximately 64% of the pipeline and villas accounting for 36%.

While apartments continue to dominate both existing and upcoming supply, the higher proportion of villas under construction indicates a gradual shift in the residential development mix. This evolving composition is expected to broaden the range of housing options across the emirate, subject to scheduled project completions.

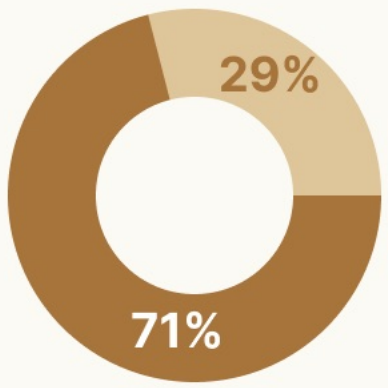
95,243
Completed stock, 2025

10,120
Scheduled for 2026

15,662
Scheduled for 2027

126,479
Projected stock, 2028

Supply by Type (Completed)

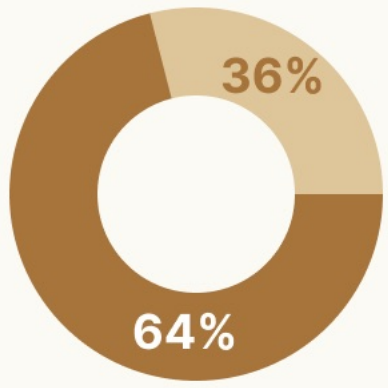


Apartment 71% Villa 29%

95,243 units completed, 2025

Source: Reliant Surveyors Research, REIDIN

Supply by Type (Under Construction)



Apartment 64% Villa 36%

31,236 units in the 2026 to 2028 pipeline

Source: Reliant Surveyors Research, REIDIN

> “ Abu Dhabi's expanding residential pipeline presents opportunities for diversified community development, with apartments and villas contributing to the emirate's evolving housing landscape.



Abu Dhabi Apartment Market Prices & Rental Trends

Capital Values Stabilize While Rents Remain Under Pressure

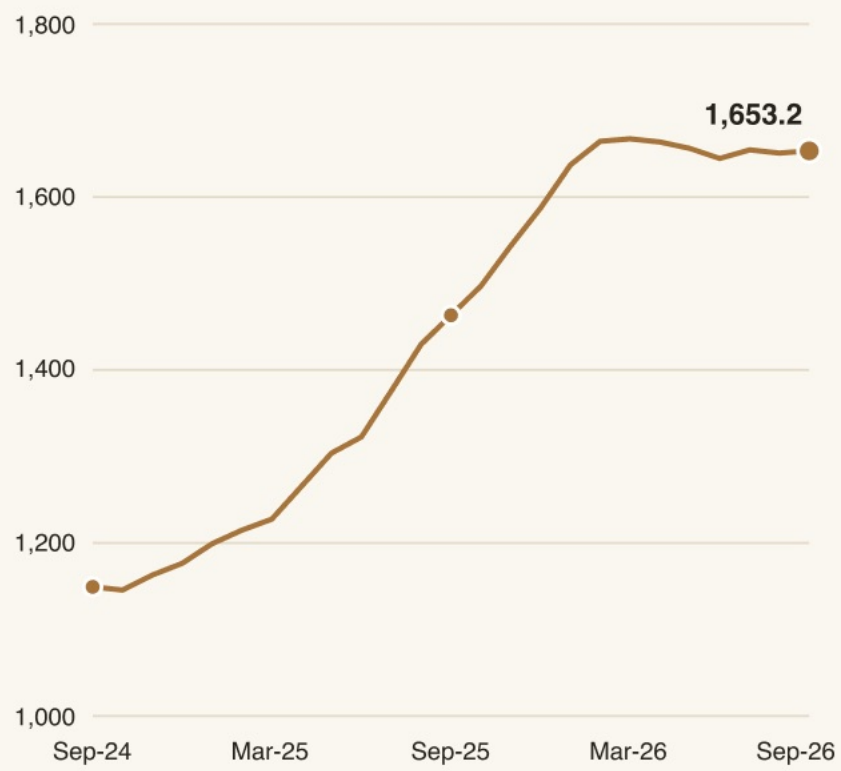
Abu Dhabi apartment sales prices stabilized in Q3 2026, increasing by 0.7% quarter on quarter to AED 1,653.2 per sq. ft. Rental prices were broadly unchanged, declining by 0.4% to AED 100.7 per sq. ft. per year.

Sales prices remained 13.1% higher than in September 2025, while rents were 0.5% lower. Over the six months from March to September, sales prices eased by 0.7%, compared with a 5.4% decline in rents, showing that the leasing market experienced greater correction.

Continued buyer demand helped stabilize apartment sales prices after the Q2 decline. Rental values remained under pressure as greater tenant choice and affordability concerns limited landlords' ability to increase rents. This created a clear divergence between resilient capital values and softer leasing performance.

Abu Dhabi Apartment Sales Price Trend

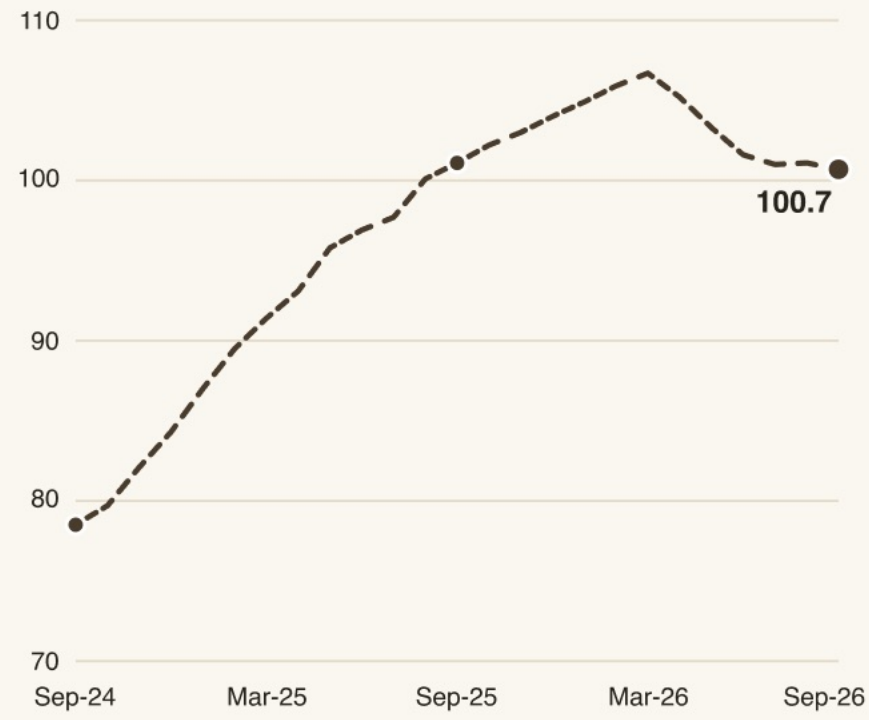
Average sales price, AED per sq ft | monthly, September 2024 to September 2026



Source: Reliant Surveyors REIDIN Data Sets Q3 2026. Monthly series. Axis does not start at zero.

Abu Dhabi Apartment Rental Price Trend

Average rental price, AED per sq ft per year | monthly, September 2024 to September 2026



Source: Reliant Surveyors REIDIN Data Sets Q3 2026. Monthly series. Axis does not start at zero.

1,653.2

AED/sq.ft

AVERAGE SALES PRICE, SEP 2026

+0.7% QoQ, 13.1% above September 2025

100.7

AED/sq.ft/yr

AVERAGE RENTAL PRICE, SEP 2026

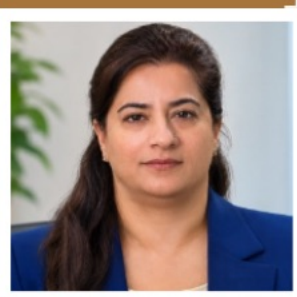
0.4% lower QoQ, 0.5% below September 2025

KEY HIGHLIGHTS	SALES PRICES	RENTAL VALUES
Last 3 Months	+0.7%	-0.4%
Last 6 Months	-0.7%	-5.4%
Last 1 Year	+13.1%	-0.5%
Last 2 Years	+44.0%	+28.5%

"Buyer demand continues to anchor apartment capital values, while tenants benefit from greater choice. As new supply is absorbed through 2027, we expect the gap between sales and leasing performance to narrow."

AMRITA CHANDHOK

Partner & Group Head, Valuation & Advisory Services



Abu Dhabi Villa Market Prices & Rental Trends

Villa Rents Strengthen Amid Stable Annual Capital Values

Villa sales prices in Abu Dhabi witnessed a marginal moderation during Q3 2026, declining by 0.5% quarter-on-quarter to reach AED 1,166.1 per sq.ft in September. In contrast, rental values increased by 0.9% during the quarter, reflecting a divergence between capital and rental performance. On an annual basis, villa sales prices remained broadly stable, registering a 0.4% increase, while rents recorded stronger growth of 2.3%.

The six-month trend reflected a measured adjustment across both indicators, with sales prices and rents moderating by 2.0% and 2.4%, respectively. However, the longer-term trajectory remained positive, with villa capital values increasing by 12.9% over two years, compared with 7.2% growth in rents. The difference between recent and longer-term movements highlights a more moderate pace of capital appreciation, while rental performance has remained comparatively resilient.

1,166.1

AED/sq.ft

AVERAGE SALES PRICE, SEP 2026

0.5% QoQ moderation, 0.4% above Sep 2025

+0.9%

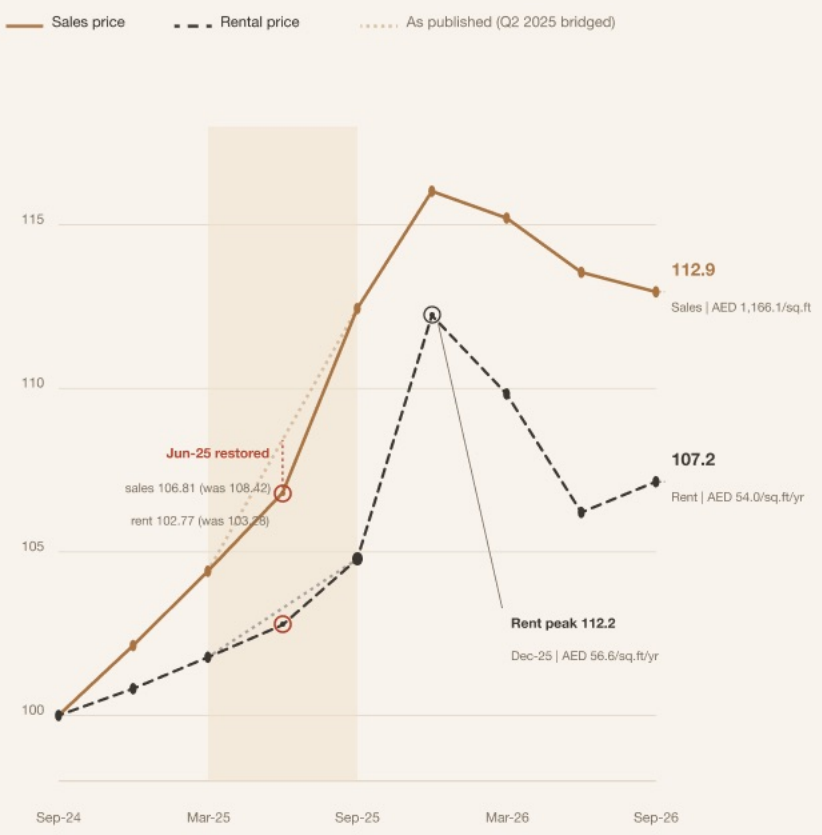
QoQ

RENTAL VALUE MOVEMENT

2.3% higher year-on-year

Abu Dhabi Villa Price Trends

Indexed, September 2024 = 100 | quarter-end readings | corrected series



The published chart carried no June 2025 reading and bridged Mar-25 to Sep-25 in a straight line, flattening the Q3 2025 acceleration.

Rents peaked in December 2025 and sit 4.5% below that level; sales peaked in the same quarter and are 2.7% below.

Source: Reliant Surveyors Research, REIDIN Data Sets Q3 2026. Quarter-end readings.

KEY HIGHLIGHTS	SALES PRICES	RENTAL VALUES
Last 3 Months	-0.5%	+0.9%
Last 6 Months	-2.0%	-2.4%
Last 1 Year	+0.4%	+2.3%
Last 2 Years	+12.9%	+7.2%

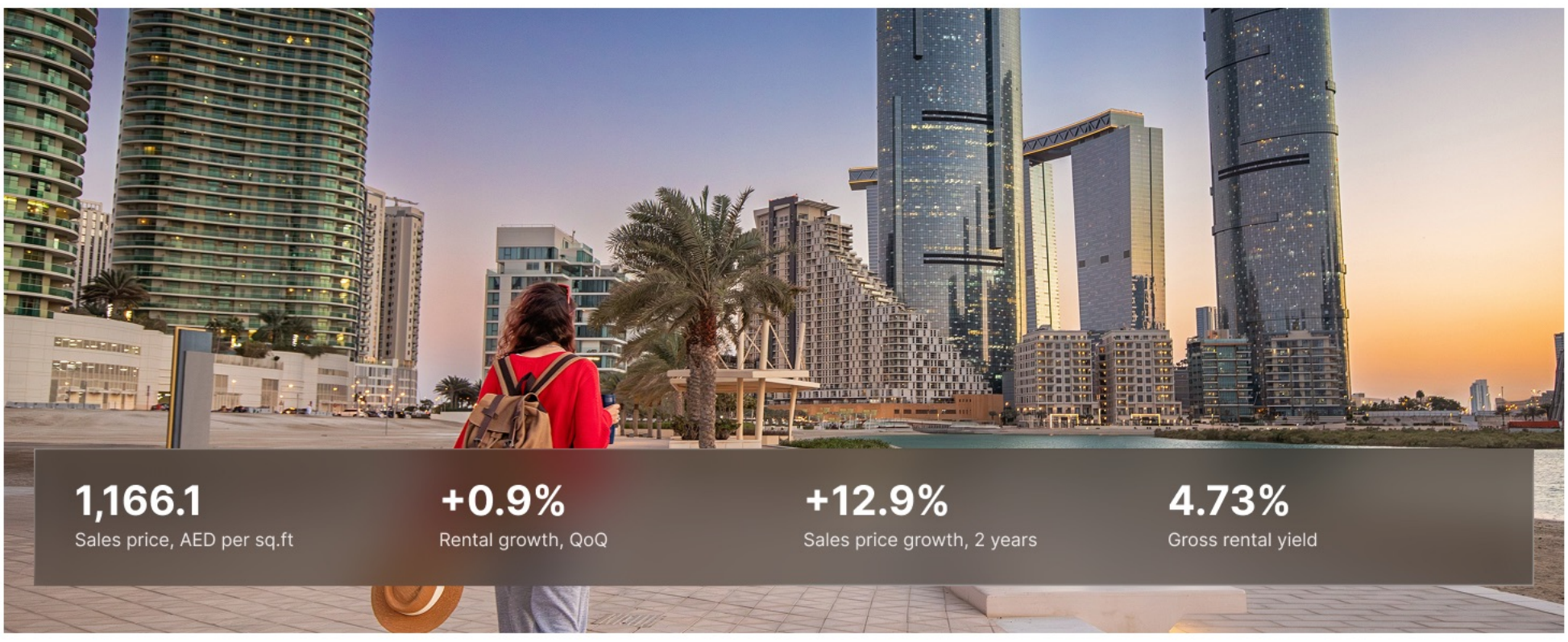
> "Villa rents are strengthening while annual capital values hold broadly stable.

-2.4%

Rental adjustment over six months

+7.2%

Rental growth over two years



The Two Year Trajectory

Sales and Rental Values Rebased to September 2024 = 100

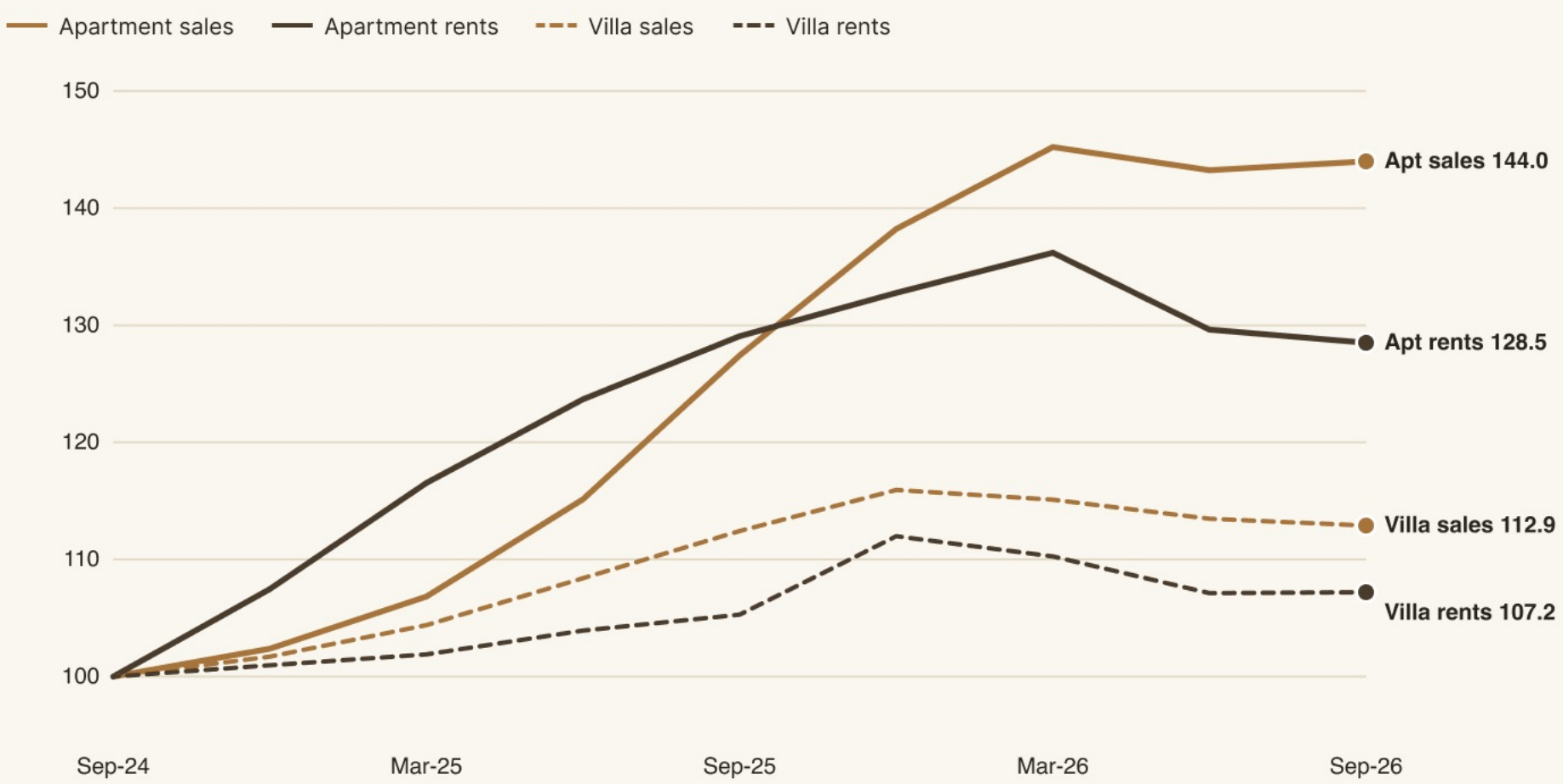
+13.6%
Apartment sales lead over rents, 1 year

+1.9%
Villa rents lead over sales, 1 year

+15.5%
Apartment sales lead over rents, 2 years

+5.7%
Villa sales lead over rents, 2 years

Indexed Price and Rent Paths, Apartments vs Villas



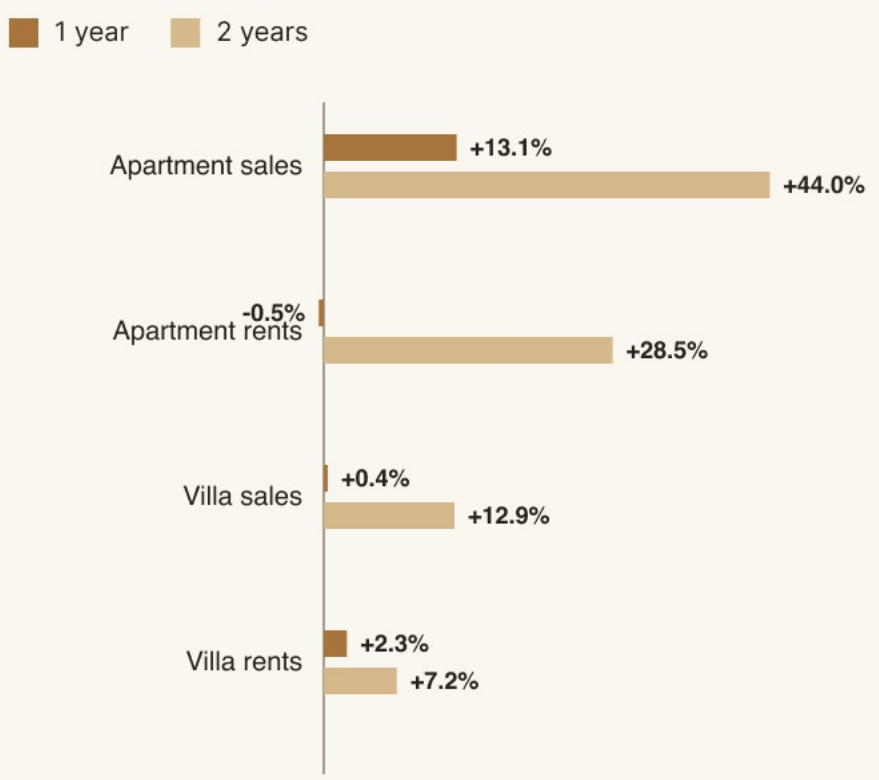
Source: Reliant Surveyors REIDIN Data Sets Q3 2026. Quarter-end readings, anchored to reported quarterly changes.

Measured from September 2024, apartment sales prices are 44.0% higher after two years, at an index of 144.0. They reached their high point in March 2026 and have held within a narrow range since. Apartment rents rose 28.5% over the same period to 128.5, peaking in the same month and easing through the two quarters that followed.

Villas trace a flatter path. Sales values are 12.9% higher at 112.9 and rents 7.2% higher at 107.2, with both peaking in December 2025 and adjusting modestly. Across both segments, capital values moved ahead of rents over the two years, and in each case sales and rents turned in the same quarter.

> “Over two years, apartment prices rose much faster than rents. Villas moved slowly but steadily. The two segments are now telling very different stories.

Change by Segment (%)



Change to September 2026. Source: Reliant Surveyors Research, REIDIN.

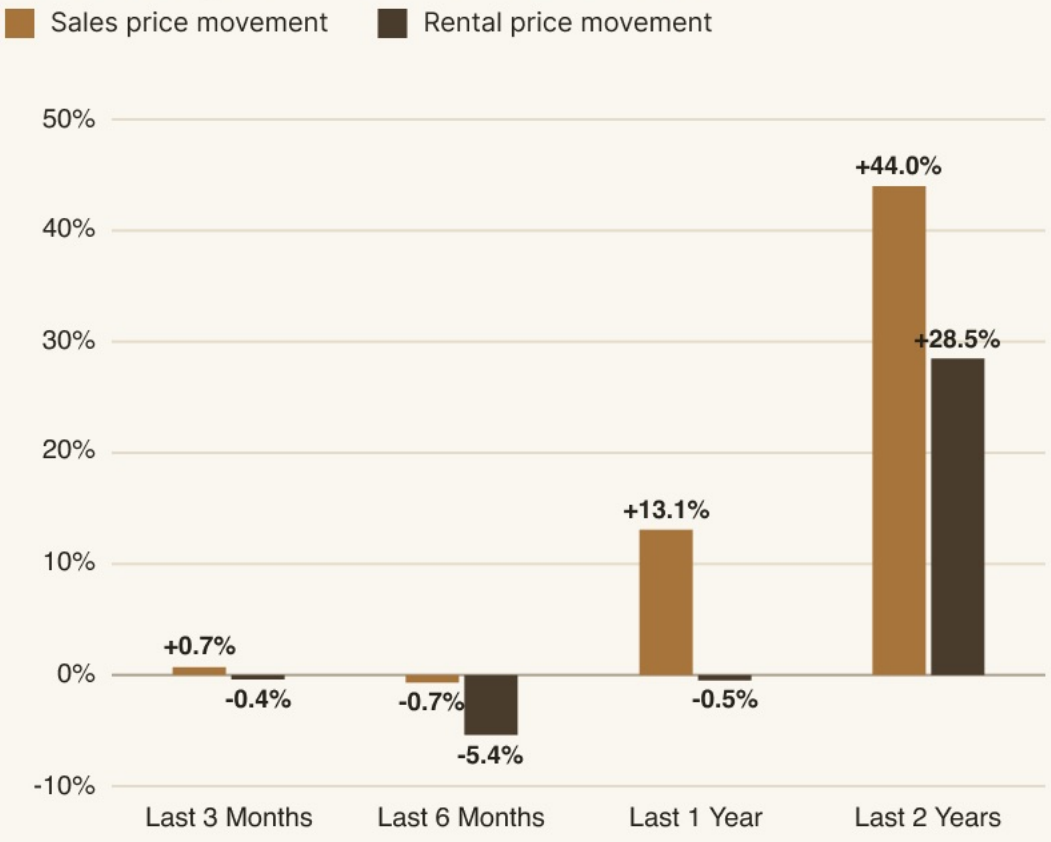
Abu Dhabi Price Movements Across Periods

1. Apartment sales prices increased by 0.7% in Q3 2026, while rental values declined by 0.4%. Villas showed the opposite trend, with sales prices moderating by 0.5% and rental values recording a 0.9% increase.

2. Over the six-month period, apartment rents experienced a sharper correction compared to sales prices. Villa sales prices and rental values, meanwhile, moderated at a relatively similar pace.

3. Despite short-term fluctuations, two-year performance remains positive across both segments, with apartments recording stronger overall gains in both sales prices and rental values compared to villas.

Abu Dhabi Apartment Price Movements (%)

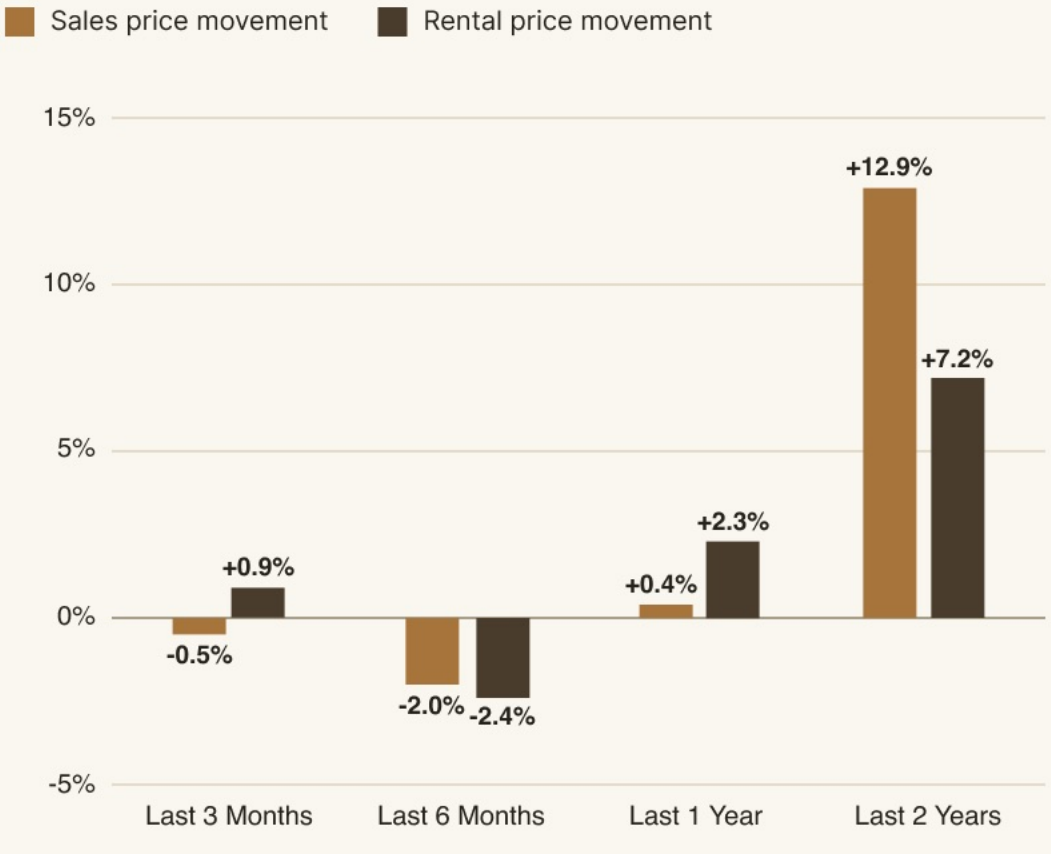


APARTMENTS



- Over six months, sales prices eased by **0.7%** while rents declined **5.4%** , so the leasing market corrected by more.
- Over two years, sales prices are up **44.0%** and rents **28.5%** .
- Rents sit **0.5%** below last September while sales prices are **13.1%** higher, the widest gap in the market.

Abu Dhabi Villa Price Movements (%)



VILLAS



- Over six months, sales prices and rents moderated by **2.0%** and **2.4%**.
- Over two years, sales prices are up **12.9%** and rents **7.2%**.
- Against last September, sales prices are **0.4%** higher with rents up **2.3%**, a steadier income profile.

Source: Reliant Surveyors Research, REIDIN. Change to September 2026 from the corresponding month of each period.

Abu Dhabi Gross Rental Yields

Apartment Yields Maintain a Premium Over Villas

Abu Dhabi's residential gross rental yields continued to vary across property types in Q3 2026, with apartments averaging 6.26% in September, compared with 4.73% for villas. Apartments maintained a yield premium of 1.53 percentage points, reflecting higher indicative gross income returns relative to capital values.

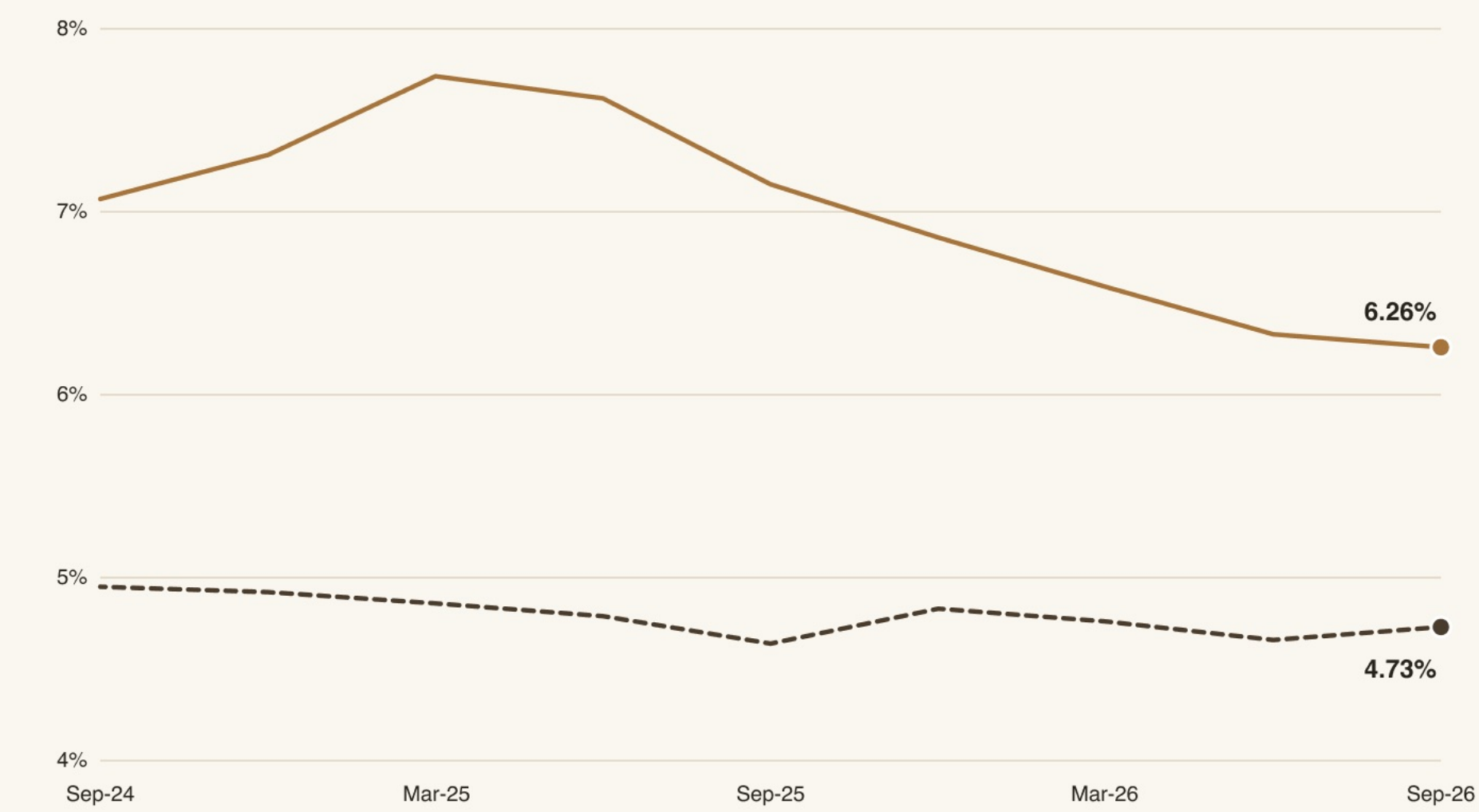
Quarterly trends showed a marginal narrowing of the yield gap, with apartment yields easing from 6.33% to 6.26%, while villa yields increased from 4.66% to 4.73%. On an annual basis, apartment yields moderated by 0.89 percentage points, whereas villa yields improved by 0.09 percentage points, highlighting contrasting income-return trends across the two segments. At 1.53 percentage points, the premium is the narrowest reading in the two year series.

6.26%
APARTMENT YIELD
6.33% in June 2026

4.73%
VILLA YIELD
4.66% in June 2026

1.53%
YIELD PREMIUM
Apartments over villas

Rental Yield Trend, Apartments vs Villas (%)



Source: Reliant Surveyors REIDIN Data Sets Q3 2026

WHAT MOVED YIELDS OVER 12 MONTHS	APARTMENTS	VILLAS
Price effect Movement in capital values	▼ -0.83%	▼ -0.02%
Rent effect Movement in rental values	▼ -0.04%	▲ +0.11%
Net change in gross yield September 2025 to September 2026	-0.89%	+0.09%

Contributions are approximate. Yields are gross, before service charges, vacancy periods and transaction costs, so achievable net returns will be lower.

Methodology

This report examines Abu Dhabi's residential market in Q3 2026 using the Reliant Surveyors REIDIN Data Sets, supported by market observations and internal analytical review. The analysis covers residential supply and its composition, sales prices, rental values and gross rental yields across apartments and villas. Apartment figures include serviced apartments and villa figures include townhouses, in line with REIDIN's classification. Price and rental changes compare September 2026 with the corresponding month of each stated period.

Average sales and rental values reflect the mix of properties recorded in each period and do not necessarily indicate equivalent changes in like-for-like prices. Gross rental yields are indicative and exclude property operating expenses, vacancy and financing costs.

Supply figures distinguish completed stock from units scheduled for completion, and projections remain subject to construction progress and handover timing. Figures should be interpreted within the coverage and methodological detail available in the supplied datasets; individual properties and communities may perform differently from market averages.

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