Abu Dhabi Q2/'26

ValuStrat

Abu Dhabi, UAE

Real Estate Research
Second Quarter 2026

This quarterly report contains research on Abu Dhabi's residential, office, retail, hospitality and industrial real estate markets.

VALUSTRAT.COM

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Foreword

Abu Dhabi Housing Market Growth Moderates, Commercial Sector Remains Resilient

Haider Tuaima

Managing Director
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Research

In Q2 2026, Abu Dhabi's residential market continued to expand, although the pace of capital value growth moderated following several quarters of strong appreciation. Compared with Dubai, the capital remains at an earlier stage in its property cycle, with relatively more affordable price points continuing to support end-user demand.

Despite ongoing geopolitical uncertainty across the region, Abu Dhabi's residential market has remained resilient, with no material evidence of weakening demand. While Abu Dhabi and Dubai do not move in perfect synchrony, they have historically followed similar long-term market cycles, with changes in sentiment typically reaching the capital after a delay.

The ValuStrat Price Index (VPI) for Abu Dhabi's freehold residential market rose to 151.1 points, increasing 2.1% quarter-on-quarter and 17.8% year-on-year. Although values continued to rise, the slower quarterly increase indicates a gradual moderation following an extended period of rapid growth.

Apartments continued to outperform villas, supported by strong domestic demand for strategically located communities offering ready homes at relatively affordable price points. The apartment VPI increased 2.9% quarterly and 24.1% annually, while villa values rose 1.3% quarter-on-quarter and 12% year-on-year. Among apartment communities, Al Reef recorded the strongest annual capital appreciation, followed by Al Muneera, Al Reem & Saadiyat islands, and Al Bandar.

Beyond the residential market, Abu Dhabi's commercial property sectors continued to demonstrate resilience. The office market remained well supported by sustained business activity and limited availability of high-quality space, allowing both capital values and rents to maintain their upward trajectory.

The industrial sector also continued to perform strongly, underpinned by robust demand from logistics operators, manufacturing businesses, and trade-related occupiers. Growth in industrial and warehousing demand reflects Abu Dhabi's ongoing investment in infrastructure, economic diversification, and supply chain development, with market fundamentals remaining favourable.

Real Estate Performance

SOURCE: VALUSTRAT

VPI
ValuStrat Price Index

ValuStrat Price Index

Residential Capital Values

151.1
BASE: Q1 2021 = 100

↑ 2.1% Q-O-Q

Residential Rental Values

128.6
BASE: Q1 2021 = 100

■ 0.3% Q-O-Q

Key Indicators

SOURCE: VALUSTRAT, REIDIN, QUANTA, SCAD

Residential

Sales Ticket Size		Sales Volume		Asking Rents	
4.14M AED	↓ -12.9% Q-O-Q	7,206 TRANSACTIONS	↓ -8.0% Q-O-Q	164,000 (AED / P.A)	■ 0.3% Q-O-Q

Office

Asking Price		Asking Rents		Asking Ticket Size	
17,929 (AED / SQ M)	↑ 8.3% Q-O-Q	1,095 (AED / SQ M / P.A)	↑ 11.4% Q-O-Q	2.65M AED	↑ 1.3% Q-O-Q

Hotel

Occupancy		ADR		RevPAR	
75.6% YTD MAR 2026	↓ -6.0% Y-O-Y	631 (AED) YTD MAR 2026	↑ 1.7% Y-O-Y	477 (AED) YTD MAR 2026	↓ -3.9% Y-O-Y

↑ INCREASE ■ NO CHANGE ↓ DECLINE

Macro Economic Snapshot

SOURCE: STATISTICS CENTER ABU DHABI, VALUSTRAT

- The Central Bank of the UAE expects economic growth to moderate to 1.7% in 2026 due to regional disruptions affecting trade, shipping, tourism and private sector confidence, before rebounding to 9.8% in 2027. The slowdown is expected to be temporary, supported by higher oil production, continued non-oil sector growth, government spending and infrastructure investment

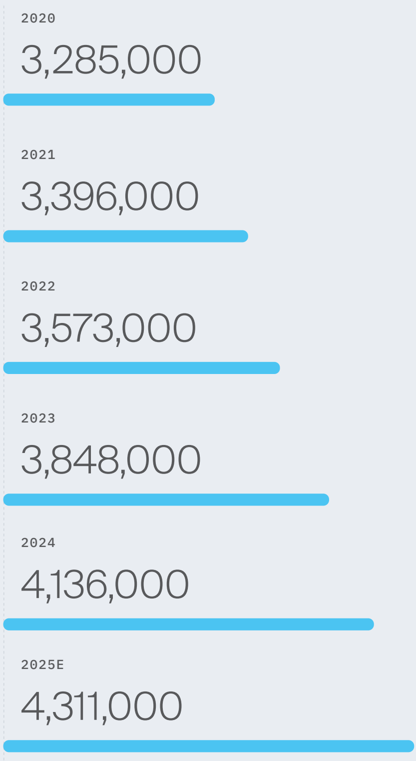
- In June 2026, the US Federal Reserve held interest rates steady at the target range of 3.5% to 3.75%

- Abu Dhabi's Murban crude oil price stood at AED 254 (USD 69.01 per barrel as of 31st June

- Moody's affirmed the UAE's Aa2 sovereign rating with a stable outlook, supported by strong fiscal buffers, low federal debt and economic diversification. While the agency expects near term pressure on hydrocarbon production, trade, tourism, logistics and real estate from regional disruptions, it expects recovery in 2027 as trade flows normalise and non-hydrocarbon activity rebounds

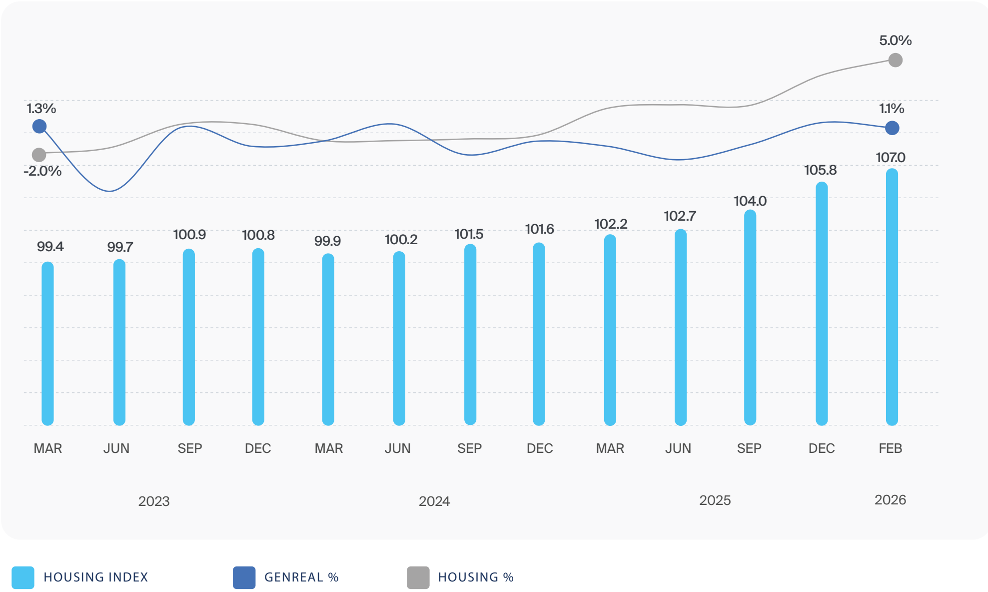
- Business activity remained robust in Abu Dhabi, with new business licences increasing by 21% YoY in Q1 2026 and active licences rising 12% compared with the same period last year, supported by growth across all regions and economic sectors

Abu Dhabi Population



Consumer Price Index Annual Change

SOURCE: STATISTICS CENTRE ABU DHABI

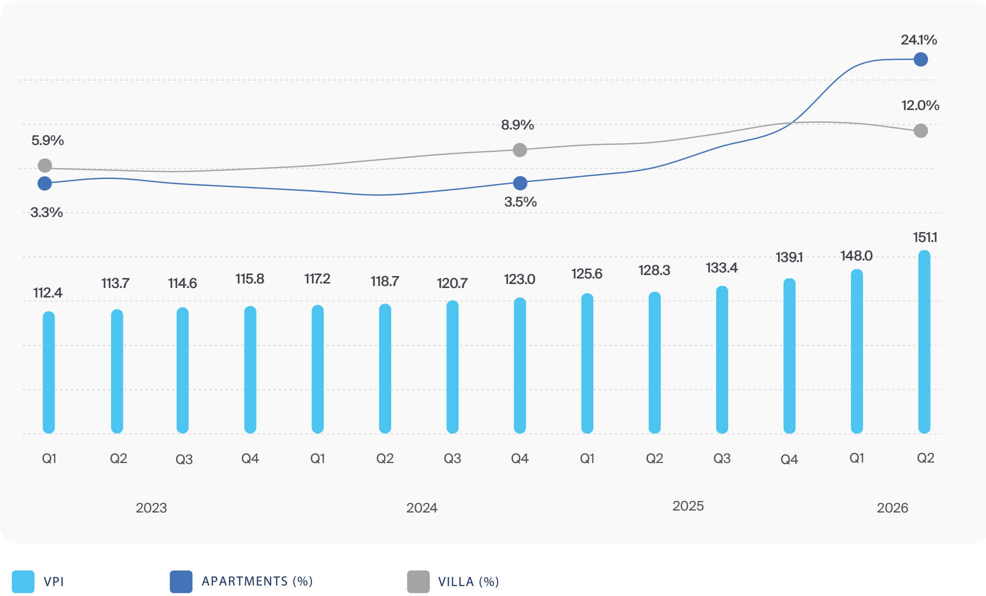


- The Abu Dhabi Consumer Price Index for February 2026 was 107.5 points, up 1.1% annually. Housing and utilities up 5% YoY at 107 points, highest in two years
- The S&P Global UAE PMI fell from 52.6 in May to 50.8 in June, its weakest reading since February 2021, as Middle East conflict pressures slowed private sector activity. Construction, digital services and sales pipelines offered some support, but weaker demand, tourism softness and price pressures led to the first labour market contraction in over four years

Residential Capital Values

SOURCE: VALUSTRAT

ANNUAL GROWTH
[BASE: Q1 2021=100]



ValuStrat Price Index	**Residential** Citywide	**Villa** Citywide	**Apartment** Citywide
	151.1 BASE: Q1 2021=100	154.8 BASE: Q1 2021=100	147.5 BASE: Q1 2021=100

- The ValuStrat Price Index (VPI) increased 2.1% quarter-on-quarter to 151.1 points (Q1 2021 = 100). While residential capital values continued to rise, the pace of growth slowed to its weakest quarterly level in two years, suggesting a gradual moderation following a sustained period of strong appreciation

- Despite the moderation in quarterly growth, annual capital gains remained robust at 17.8%

- Continued growth in the VPI was driven by strong domestic demand for strategically located communities offering ready apartments at relatively affordable price points

- Apartments continued to outperform villas, with the apartment VPI rising 2.9% quarter-on-quarter and 24.1% year-on-year to 147.5 points. By comparison, the villa VPI increased 1.3% quarterly and 12.0% annually to 154.8 points

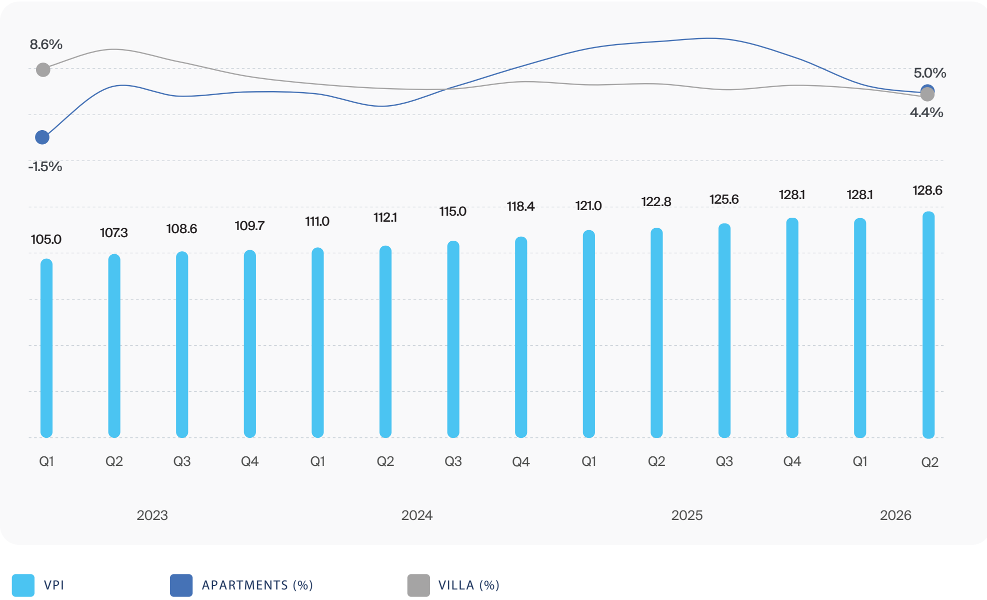
- Within the apartment segment, Al Reef recorded the strongest annual capital growth, with values rising 41.6%, followed by Al Muneera Island (24.7%), Al Reem Island (22.0%), and Al Bandar (21.8%). Saadiyat Island also delivered robust performance, posting an 18.3% annual increase

- In the villa segment, Al Reef also topped performance with a 27.9% annual increase, followed by Saadiyat Island (12%) and Al Raha (4.6%)

Residential Rental Values

SOURCE: VALUSTRAT

ANNUAL GROWTH
[BASE: Q1 2021=100]



ValuStrat Price Index	**Residential** Rental	**Villa** Rental	**Apartment** Rental
	128.6 BASE: Q1 2021=100	131.5 BASE: Q1 2021=100	126.0 BASE: Q1 2021=100

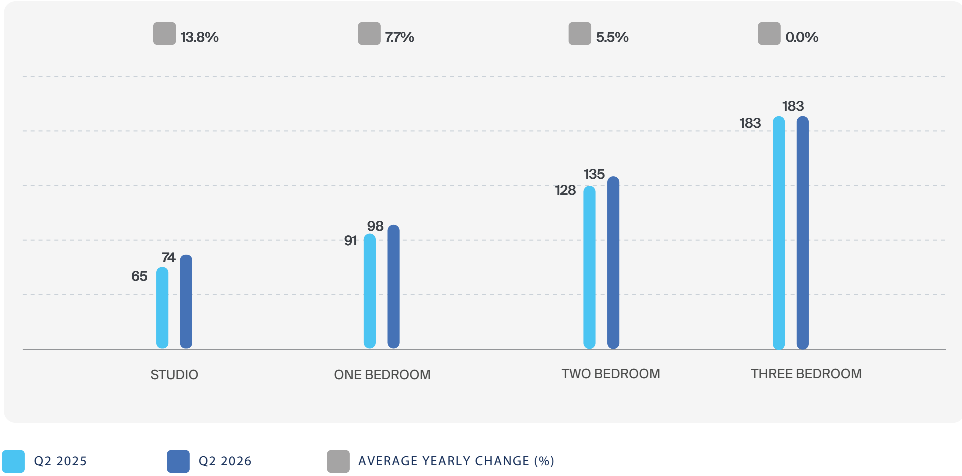
- The VPI for rental values in Abu Dhabi grew by 4.7% annually and stable quarterly to reach 128.6 points, compared to a baseline of 100 points in Q1 2021
- Villas achieved 131.5 points with rents rising 4.4% annually and stable quarterly, while apartments reached 126 points, up by 5% YoY and stable QoQ
- The average annual residential asking rent in Abu Dhabi stood at AED 163,700. Apartment asking rents in Abu Dhabi City averaged AED 122,500 per annum, while citywide villa asking rents averaged AED 260,000 per year
- As of 2nd June 2026, Abu Dhabi implemented a temporary 0% rent increase cap, replacing the previous 5% annual limit on residential, commercial, and industrial properties until further notice

Residential Rents - Apartment

SOURCE: REIDIN, VALUSTRAT

Apartment Average Asking Rent

‘000 AED per annum and Yearly Change (%)



Apartment Asking Rents	Last Year	Last Quarter
	↑ 5.0%	0.9%

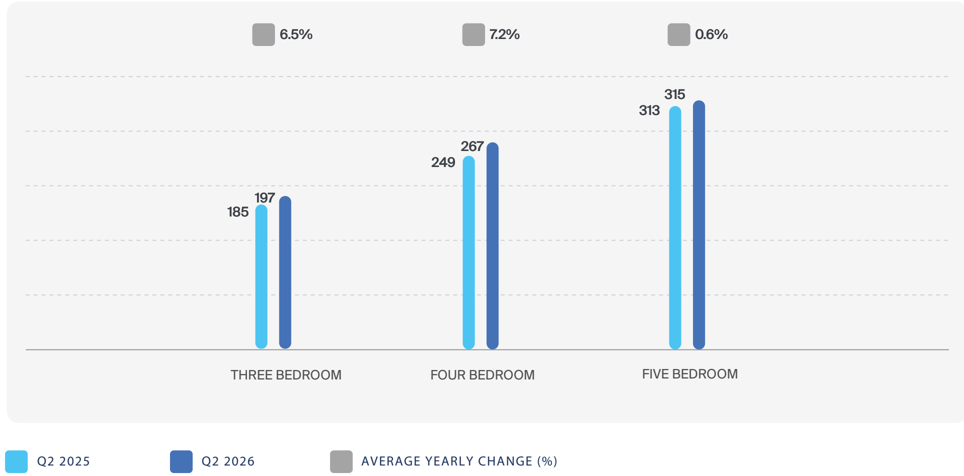
- Studio apartments recorded the strongest annual rental growth, with asking rents increasing 13.8%, followed by one-bedroom units, which rose 7.7% year-on-year
- Among tracked apartment locations, quarterly rental growth was highest in Al Reef at 4.1%, followed by Al Muneera at 3.3%
- Rents on Saadiyat Island and Al Reem remained stable over the quarter, while Al Bandar recorded a 2% decline
- Average annual apartment asking rents were AED 74,000 for studios, AED 98,000 for one-bedroom units, AED 135,000 for two-bedroom units and AED 183,000 for three-bedroom units

Residential Rents - Villa

SOURCE: VALUSTRAT

Villa Average Asking Rent

'000 AED per annum and Yearly Change (%)



Villa Median Asking Rents

Last Year ↑ **4.4%**

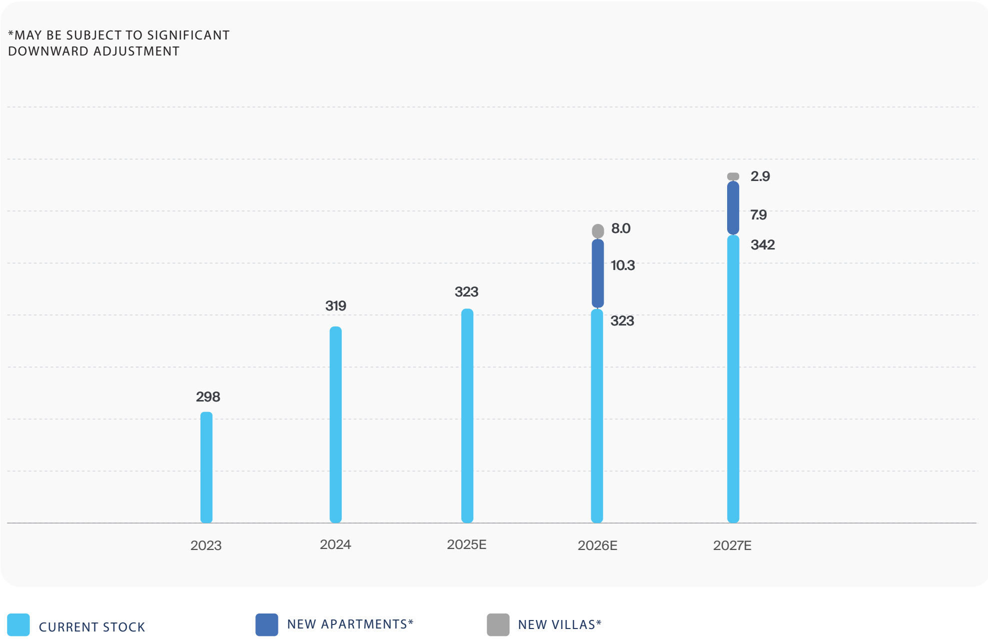
Last Quarter **-0.3%**

- Four-bedroom villas recorded the strongest annual growth in asking rents, rising 7.2% year-on-year, followed by three-bedroom villas, with rents increasing 6.5%
- Citywide villa asking rents averaged AED 260,000 per year
- On a quarterly basis, villa rents rose most in Al Raha, increasing by 2.5%
- Villa rents remained stable on Saadiyat Island, but declined by 1.3% in Mohammed Bin Zayed City and 2% in Al Reef
- Average annual rents were AED 197,000 for three-bedroom villas, AED 266,000 for four-bedroom villas and AED 314,000 for five-bedroom villas

Residential Supply

SOURCE: URBAN PLANNING COUNCIL, REIDIN, MEED PROJECTS, VALUSTRAT

2023-2027
'000 UNITS



- Abu Dhabi saw the completion of 1,834 apartments and 1,620 villas during the first half of 2026, representing 18.8% of the expected residential pipeline for the whole of 2026
- An estimated 37,700 new residential units are scheduled to be delivered by 2030
- 18,339 new homes are projected to enter the capital's housing supply in 2026, with apartments accounting for 51% of additions and villas and townhouses making up the remaining 49%
- Sobha Realty announced its entry into the Abu Dhabi residential market with the launch of Sobha City, a AED 40 billion mixed residential development in Al Bahia spanning 38 million sq ft. The project will comprise 4,000 apartments, 2,500 villas and 80 mansions, with the first phase expected to be completed by Q4 2029
- Object 1 announced its first Abu Dhabi project, A1LA Residence, a 171 unit residential development on Al Reem Island due for completion in Q4 2028
- Aldar launched Yas Point, a AED 6 billion waterfront development on Yas Island comprising 1,600 branded residences, a five star resort, and retail and leisure facilities across 600,000 sq m (6.4 million sq ft)

Residential Off-Plan Sales Transactions

SOURCE: QUANTA, VALUSTRAT

TOTAL VOLUME & AVERAGE PRICE

Off-plan Sales Volume

21.2% LAST YEAR

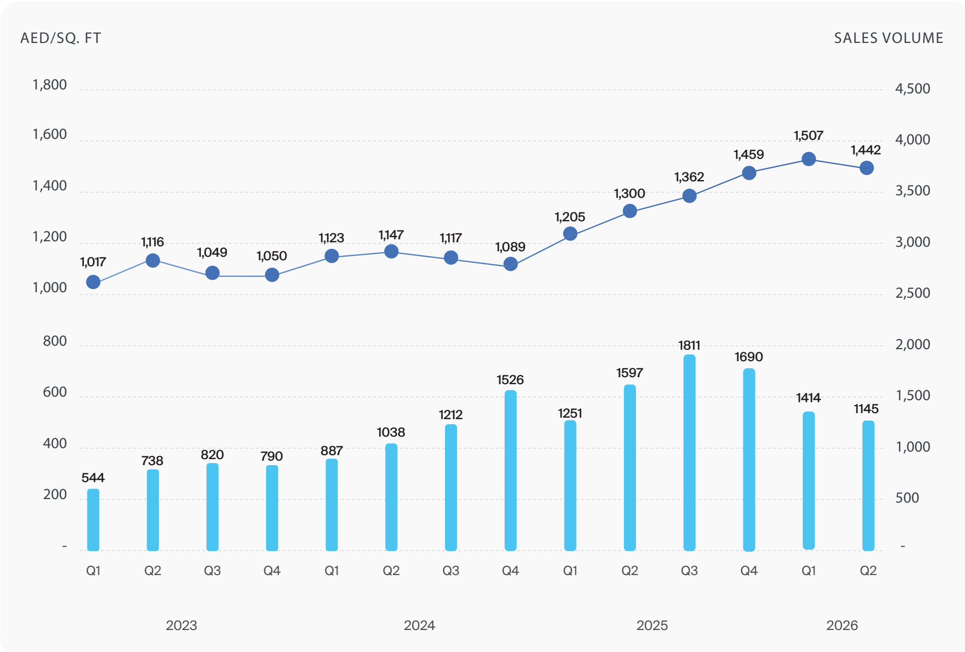
-4.0% LAST QUARTER

- Abu Dhabi recorded another strong quarter for off-plan transaction volumes, with 6,061 properties sold, representing 84% of total sales and 156% annual growth
- Off-plan prices averaged AED 22,647 per sq m (AED 2,104 per sq ft), down 4% quarterly but up 21.2% annually
- The average ticket size for off-plan homes rose 25.9% year on year but fell 15.7% quarter on quarter to AED 4.4 million, reflecting developers continued focus on high-end residential offerings

Residential Ready Sales Transactions

SOURCE: QUANTA, VALUSTRAT

TOTAL VOLUME & AVERAGE PRICE



AVERAGE PRICE (AED /SQ FT)   VOLUME

Ready Sales Volume

10.9% LAST YEAR

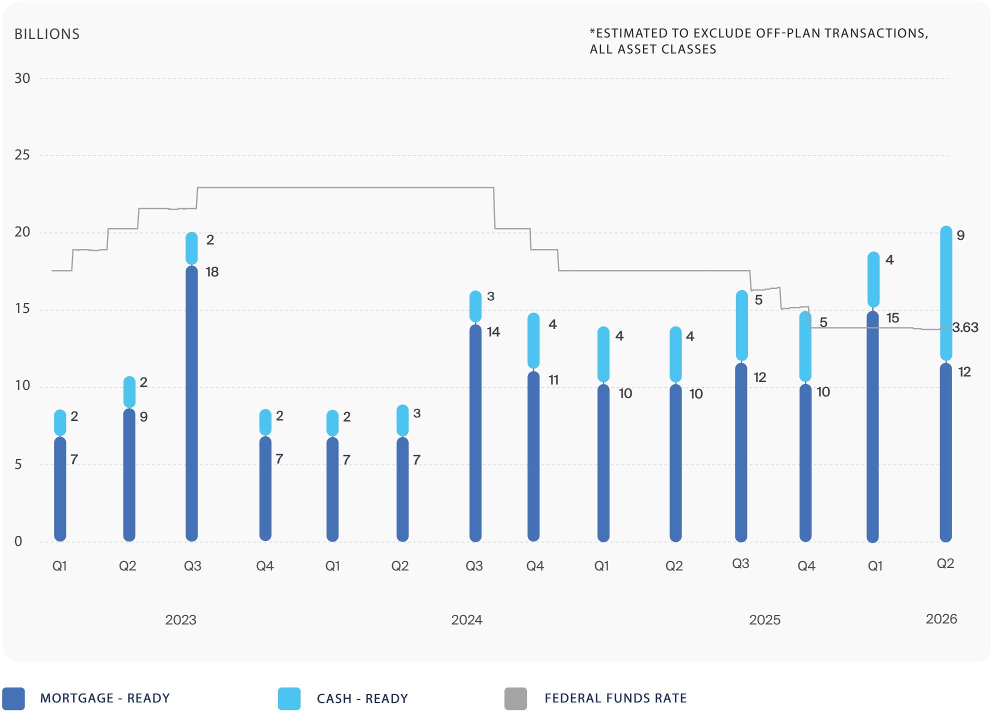
-4.3% LAST QUARTER

- Ready property transaction volumes declined 28.3% year on year and 19% quarter on quarter
- Ready home prices averaged AED 15,522 per sq m (AED 1,442 per sq ft), up 10.9% annually but down 4.3% quarterly
- The average ready home ticket size reached AED 2.8 million, rising 18.8% annually and 4.7% quarterly

Mortgage Transcations

SOURCE: QUANTA, MACROTRENDS, VALUSTRAT

MORTGAGE/CASH SALES VS INTEREST RATES TRANSACTION VALUE (AED BN)*

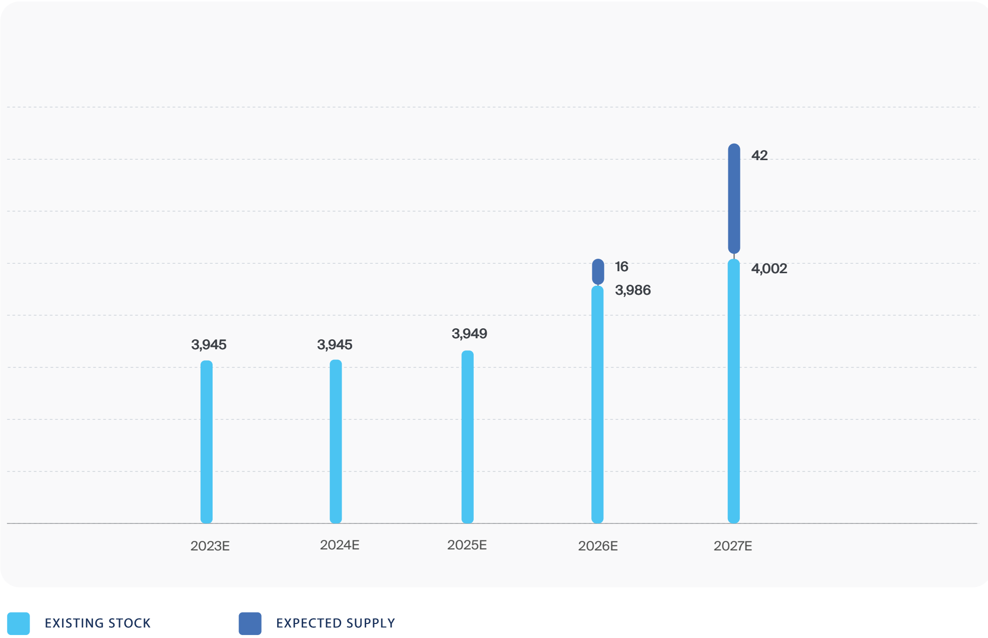


- In the second quarter of 2026, the Abu Dhabi real estate market witnessed 3,873 mortgage transactions across all asset classes compared to 1,661 cash transactions of ready properties
- The total sales value attributed to mortgage transactions stood at AED 11.6 billion, with cash transactions totalling AED 8.9 billion
- The US Federal Open Market Committee held interest rates steady during the quarter, setting the target range at 3.5% - 3.75% as of June 2026

Office Supply

SOURCE: MEED PROJECTS, VALUSTRAT

THOUSAND SQ M GLA



Office Asking Rents

↑ **27.3%** LAST YEAR

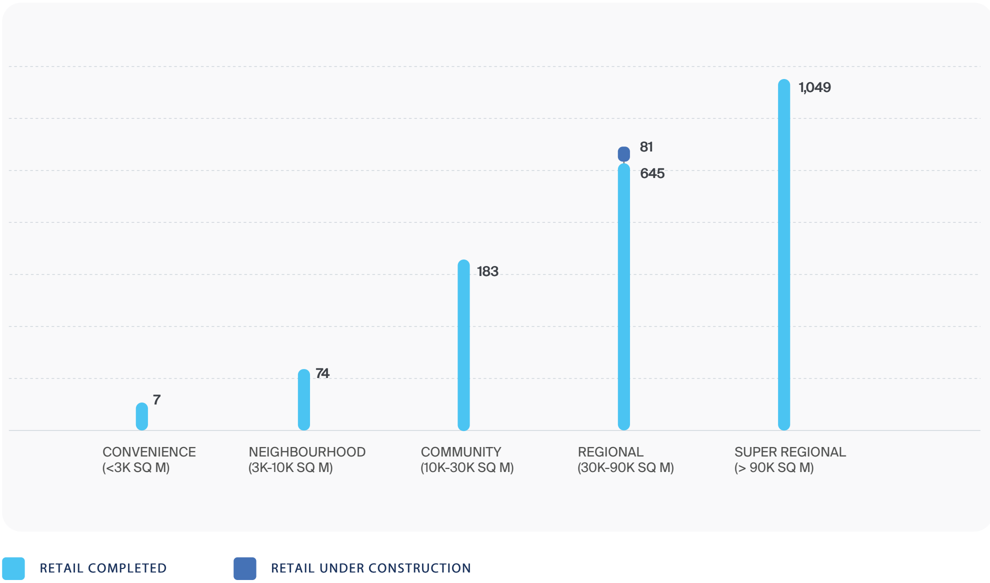
↑ **11.4%** LAST QUARTER

- During the second quarter, the city's estimated office stock stood at 3.9 million sq m (42 million sq ft) of Gross Leasable Area (GLA)
- Mubadala Investment Company and Aldar Properties announced a AED 60 billion expansion of Al Maryah Island, expected to add over 1.5 million sq m (16 million sq ft) of mixed-use gross floor area, including new office space that will expand ADGM's overall commercial capacity
- Average asking prices for offices in Abu Dhabi grew 1.3% quarterly and 16.3% annually to reach AED 2.7 million
- Median asking pricing for offices in Abu Dhabi stood at AED 17,929 per sq m (AED 1,666 per sq ft), up 8.3% on a quarterly basis
- Office asking rents in primary commercial districts within the city grew by 11.4% quarterly and 27.3% annually
- Average occupancy among buildings within the city's central business districts stood at 90%

Retail Supply

SOURCE: REIDIN, VALUSTRAT

MALLS & SHOPPING CENTERS
('000 SQ M GLA)

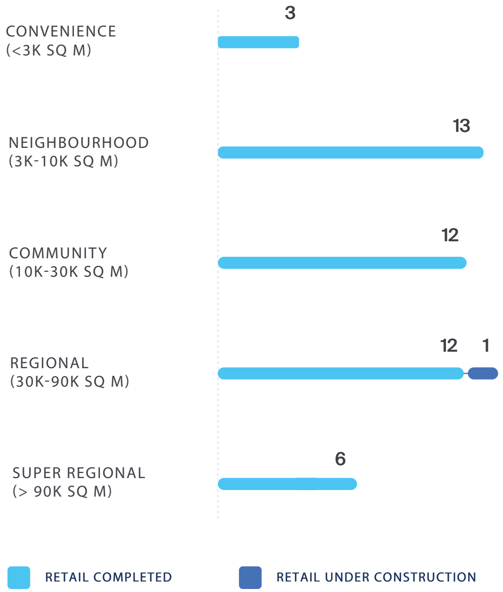


- In the second quarter, shopping centre stock stood at 1.95 million sq m (20.9 million sq ft) GLA
- The Link at Masdar City was acquired for AED 654 million through the Aldar–Mubadala joint venture, adding a fully leased mixed-use asset anchored by innovation and education tenants within Masdar City's sustainable urban and retail ecosystem

Retail Performance

SOURCE: MEED, VALUSTRAT

NUMBERS OF MALLS & SHOPPING CENTRES



- Abu Dhabi's retail sector demonstrated resilience in Q1 2026, with revenue generated from Aldar's retail assets increasing 51% year on year to AED 319 million. Performance was supported by the contribution from The Galleria Luxury Collection following the Mubadala retail joint venture, alongside improved rental rates at Yas Mall and Al Jimi Mall following its transformation

- Occupancy across Aldar's retail portfolio stood at 89% during Q1 2026, with all major retail destinations remaining operational, while footfall normalised following an initial decline in early March

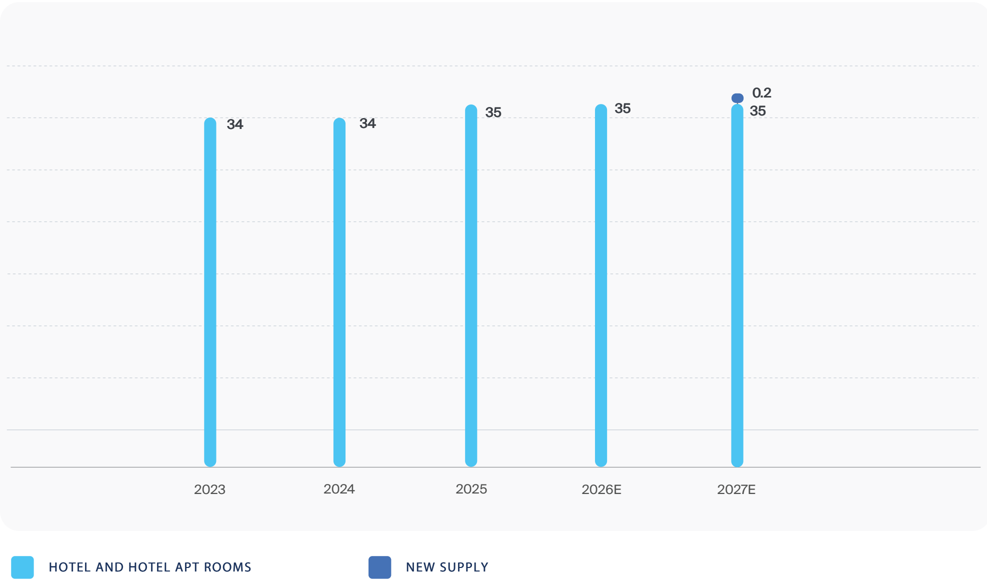
- Yas Mall continues to excel as a premier shopping destination in Abu Dhabi, with overall occupancy reaching 96%

- My City Centre Masdar recorded an occupancy rate of 85% during 2025

Hospitality Supply

SOURCE: DCTAD, MEED PROJECTS, VALUSTRAT

HOTEL ROOM SUPPLY
2023-2027 | '000 KEYS

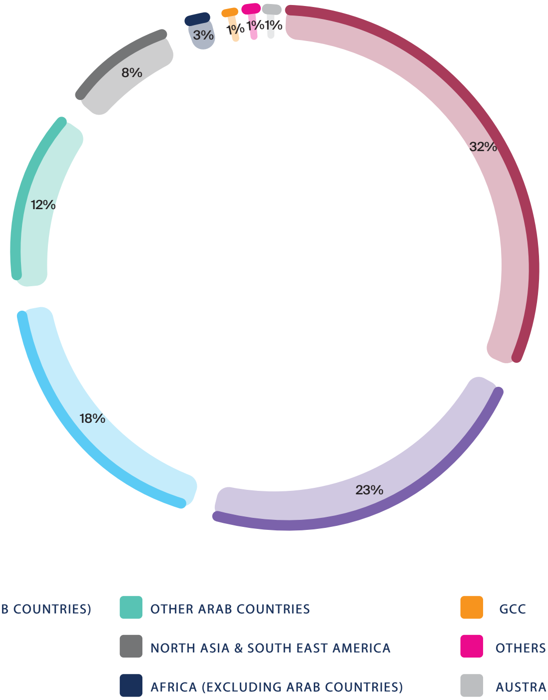


- As of March 2026, the emirate had a total of 28,549 hotel rooms and 5,977 hotel apartments according to the Department of Culture and Tourism
- Upcoming hotels include Mondrian, Olympia Resort, The Mangroves and LXR Hotels & Resorts
- Abu Dhabi reaffirmed its commitment to its 2030 Tourism Strategy, maintaining its target of attracting 39.3 million visitors annually and increasing the sector's contribution to GDP to AED 90 billion by the end of the decade, despite recent regional geopolitical disruption

Hospitality Performance

SOURCE: DCTAD

SOURCE OF ABU DHABI VISITORS BY REGION
YTD MAR 2026

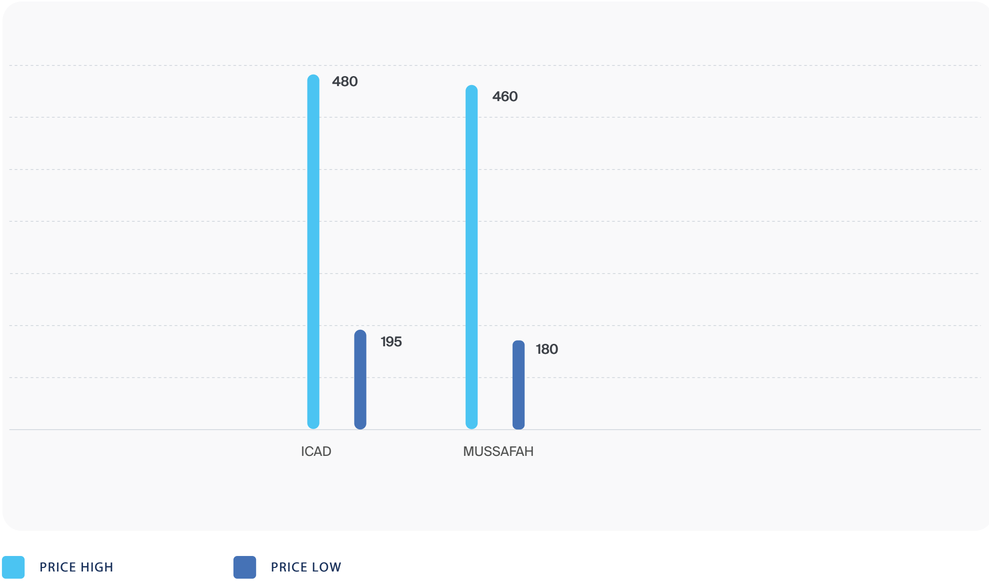


- The Department of Culture and Tourism Abu Dhabi (DCT Abu Dhabi) recorded a hotel occupancy rate of 75.6% in Q1 2026, down 6% year on year, with the quarterly average weighed down by a sharp decline in March, when occupancy fell to 52%, decreasing 27% compared to the same month in 2025
- The Average Room Rate (ARR) for hotels in Abu Dhabi stood at AED 631 in Q1 2026, up 1.7% year on year, while Revenue per Available Room (RevPAR) declined 3.9% annually to AED 477
- Abu Dhabi hotels welcomed a total of 1.1 million guests during the first quarter of 2026 according to data from the Statistics Centre Abu Dhabi
- According to STR, Abu Dhabi's hotel market is expected to face near-term demand pressure through summer 2026, with occupancy forecast at around 60%. A recovery is anticipated from Q4 2026 as international demand improves, although ADR recovery is expected to lag as hotels initially rely on promotional pricing to stimulate demand

Industrial Investment/ Supply

SOURCE: VALUSTRAT

INDUSTRIAL RENTAL RATES
AED/SQ FT/ P.A



- Abu Dhabi's industrial and logistics sector continued to demonstrate resilient fundamentals, supported by strong occupier demand, limited availability of quality stock and ongoing infrastructure investment. Similar to Dubai, a shortage of Grade A facilities supported elevated occupancy levels across key industrial hubs, with KEZAD reporting occupancy of approximately 98%

- Industrial property asking prices remained stable quarterly but recorded average annual growth of 1.7%, reflecting continued demand for modern and well-located facilities

- In established industrial areas, warehouse asking prices generally ranged between AED 1,938 and AED 5,167 per sq m (AED 180 to AED 480 per sq ft). Modern facilities with enhanced specifications, including cold storage capabilities, achieved the upper end of the range, while older properties traded at lower levels

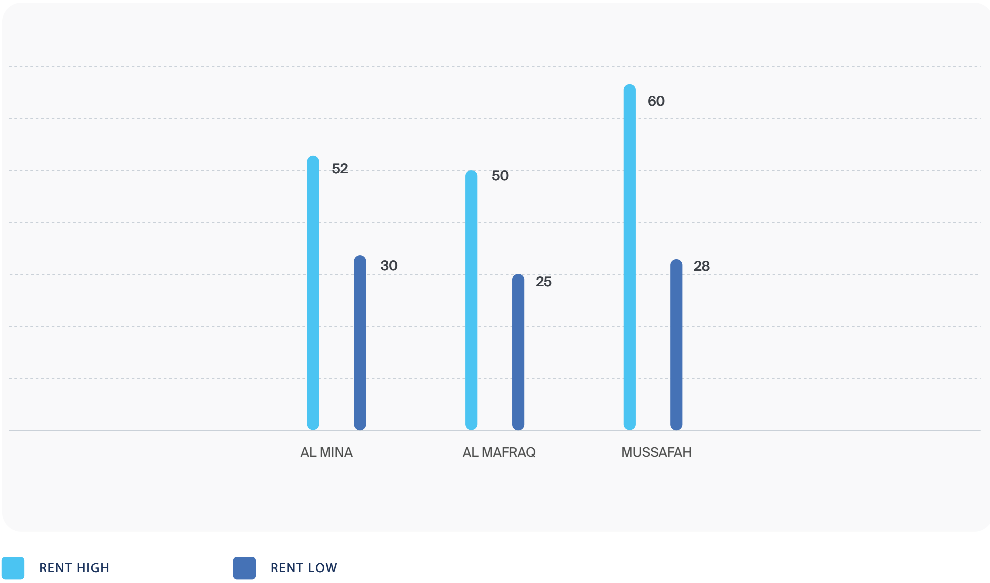
- Market performance continued to reflect two tier dynamics, with newer assets offering superior infrastructure, higher operational efficiency and improved specifications outperforming ageing industrial stock

- Supply additions focused on modern logistics and manufacturing facilities, including expansions within KEZAD, Khalifa Logistics Park and Metal Park Production Hub, supporting occupier requirements for larger floorplates, higher eaves heights and specialised facilities

Industrial Performance

SOURCE: VALUSTRAT

INDUSTRIAL RENTAL RATES
AED/SQ FT/ P.A



- Industrial rental performance highlighted increasing divergence between modern and older assets. Asking rents declined by 10.7% annually at the lower end of the market but increased 6.4% at the upper end, reflecting stronger demand for Grade A facilities

- Overall industrial asking rents typically ranged between AED 269 and AED 646 per sq m per annum (AED 25 to AED 60 per sq ft per annum), influenced by location, specification, age, condition, facility size and suitability for specialised uses such as temperature controlled and cold storage

- Demand remained driven by 3PL operators, e-commerce companies, essential goods sectors (pharmaceuticals and food & beverage), and hydrocarbon-related occupiers

- Pre-leasing activity and build to suit developments supported absorption, with new facilities being rapidly occupied upon completion

- Infrastructure improvements, including the Etihad Rail freight network, are expected to enhance connectivity between Khalifa Port and wider GCC markets.

- Government initiatives, including Abu Dhabi Industrial Strategy and Make it in the Emirates, are expected to support industrial growth through increased manufacturing activity and supply chain localisation

- As demand continues to outweigh Grade A availability, the performance gap between modern and ageing assets is expected to widen, increasing the need for landlords to upgrade specifications and ESG credentials

ValuStrat
In The Media

Khaleej Times

Abu Dhabi's property market: Is it the UAE's next investment

11 MAY 2026

The ValuStrat Price Index for Abu Dhabi's freehold residential market rose 6.4 per cent quarterly and 17.8 per cent yearly to 148 points in Q1 2026, compared to increases of 4.3 per cent and 13.1 per cent respectively in the previous quarter.

Abu Dhabi's residential market maintained its upward trajectory, with capital values accelerating from the previous quarter. This partly reflects Abu Dhabi's later position in the property cycle relative to Dubai, alongside comparatively more accessible price points that continue to support end-user demand," said Haider Tuaima, managing director and head of real estate research at ValuStrat.

ConsultancyME

Abu Dhabi's residential property market showed no signs of cooling in first

10 MAY 2026

While the residential property markets of Dubai and Qatar have been affected by regional uncertainty, Abu Dhabi's market so far appears to be bucking the trend. Despite some more caution among private buyers and investors, prices continued to rise in the first quarter of the year.

In the first quarter of 2026, the capital value of Abu Dhabi's residential property market grew by 6.4% quarter-on-quarter. As a result, the ValuStrat Price Index (VPI) – an index developed by ValuStrat that tracks changes in property values over time – rose to 148 points, a record high.

Apartments led the capital growth cycle in Q1, with values increasing significantly by 10.4% quarter-on-quarter and 22.7% year-on-year. Villa prices recorded more moderate but steady gains of 2.7% quarterly and 13.4% annually.

Middle East Economy

Abu Dhabi real estate in 2026: Apartment values projected to outshine villas as residential capital growth hits 16 percent

28 JANUARY 2026

According to a new report from global consulting and valuation firm ValuStrat, the residential market is forecast to maintain its upward trajectory, with capital value growth accelerating to 16 percent in 2026, compared to 13 percent the previous year.

A notable shift in market dynamics is emerging, indicating that apartments are projected to outperform villas in terms of capital appreciation. This trend reflects a growing preference among buyers for modern, lifestyle-oriented communities that offer superior value and convenience. Average residential rents are expected to rise by 6 percent, further supporting this trend. Although the development pipeline for 2026 appears substantial, historical patterns suggest that actual handovers will be lower than anticipated. This expected supply tightness is likely to maintain upward pressure on both rental rates and sales prices.

GULF NEWS

Abu Dhabi: How the 'capital of capital' became a magnet for UHNWs

4 DECEMBER 2025

The UK may face a millionaire exodus as Henley & Partners report 16,500 millionaires relocating over seven years, seeking wealth-friendlier environments. The UBS Global Wealth Report predicts a 17% drop in the UK's millionaire population by 2029. Abu Dhabi emerges as a prime destination, with its millionaire population rising 75% since 2013 and centimillionaires expected to grow 150% by 2040. Factors driving this migration include Abu Dhabi's low-tax regime, high living standards, and investor-friendly initiatives like the Golden Visa and ADGM's legal framework. Boasting the world's largest sovereign wealth capital and a thriving real estate and cultural scene, Abu Dhabi is solidifying its appeal to global high-net-worth individuals.

VPI
ValuStrat Price Index

ValuStrat Price Index (VPI) 10 Indices Across UAE And Qatar

With the launch of the Ras Al Khaimah Residential VPI, the platform now features 10 proprietary indices covering real estate markets across the UAE and Qatar.

These indices measure capital values, rental trends, and sector performance across residential, office, and industrial segments providing investors, lenders, and policymakers with transparent, data-driven insights to support informed decision-making.

About VPI

The ValuStrat Price Index (VPI) regularly marks to market a sample of properties that represent more than 90% of the Abu Dhabi residential market and is built by our expert RICS Registered Valuers.

Research Methodology

Every effort has been made to ensure the accuracy of this document. New supply data covers 62 defined districts in Abu Dhabi City including non-investment zones. Only completed and under construction projects are included. The new supply data does not include announced projects and projects in design phase. The supply database does not take into account most private building projects. Sales data is sourced from actual citywide transactions. Rental data is derived from carefully chosen listings that have been properly cleansed to exclude duplicates and outliers within predetermined areas and districts for office and residential properties.

Premium Subscription

ValuStrat offers premium subscription reports for clients granting them access to in-depth, statistical analysis of what is happening in residential real estate; allowing for more informed decision making and forward planning. The full in-depth 100+ page Dubai report includes citywide analysis of freehold districts, including the ValuStrat Price Index, transaction volumes, service charges, Price to Rent Ratios and Net Yields.

Residential Capital Values
Quarterly

Residential Rental Values
Quarterly

Office Capital Values
Quarterly

Industrial Logistics Capital Values
Quarterly

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Since 1977

Strategy determines outcome.
No matter what industry you're in,
we're here to help you win.

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