

# Off-Plan Residential Market Overview

JANUARY 2026

**ESPACE**  
REAL ESTATE

# Off-Plan Residential

## Market Overview

### Total Dubai Off-Plan Sales Transactions

VALUE

AED **26** B

▲ +73% increase when compared to Jan 2025

VOLUME

**10,623**

▲ +45% increase when compared to Jan 2025

### Total Sales Across The Villa & Townhouse Market

VALUE

AED **6.5** B

▲ +124% increase when compared to Jan 2025

VOLUME

**1,697**

▲ +102% increase when compared to Jan 2025

### Total Sales Across The Apartment Market

VALUE

AED **20** B

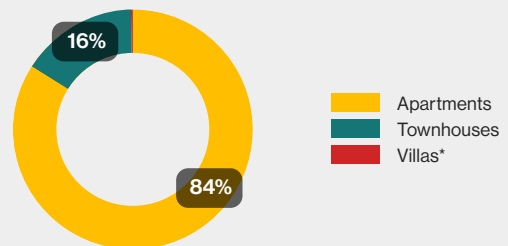
▲ +61% increase when compared to Jan 2025

VOLUME

**8,926**

▲ +37% increase when compared to Jan 2025

### January Off-Plan Sales Volume Breakdown



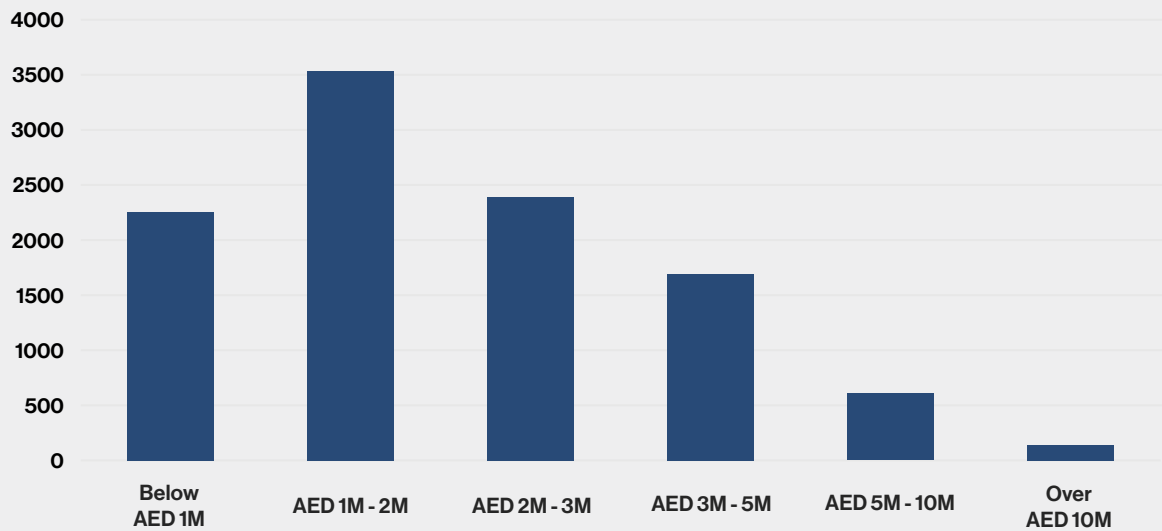
Apartments continue to dominate off-plan transactions, largely due to the composition of new supply. With approximately 85% of stock scheduled for delivery over the next four years comprising apartments, this pipeline continues to underpin the structural undersupply of villas and townhouses, despite sustained demand for larger-format homes.

\*Villa transfers were negligible compared to overall transactions.

# Off-Plan Residential

## Market Overview

### Transactional Volume Breakdown by Price Bracket







### Top 10 Developers (by sales)


DEVELOPER	NO. OF TRANSFERRED SALES	TOTAL SALES VALUE
DAMAC Properties	1,442	AED 4.24B
Emaar	1,352	AED 4.28B
Binghatti	914	AED 1.24B
Ellington	405	AED 1.05B
Meraas	358	AED 2.22B
Sobha	358	AED 1.39B
Beyond	328	AED 985M
Samana Developers	285	AED 285M
Deyaar	275	AED 528M
LEOS Developments	245	AED 321M

# Top 3 Investment Projects

Recommendations from our Off-Plan Director

 **4-5 Bed Independent Villas**  **50/50 Payment Plan**

 **Prices from AED 6.9M**  **Handover in 2029**

 **Yas Canal, Abu Dhabi**



## DIRECTOR'S NOTES



Legendario by Ohana offers very limited 4 and 5 bedroom independent villas on the Yas Canal, directly opposite Yas Island. The development is a premium waterfront destination, integrating hotels and resorts, a landmark sports complex, and a globally branded sports academy, driving long-term lifestyle and rental appeal. With prices starting from AED 6.9 million, now represents an early-cycle entry point into a supply-constrained canal-front location benefiting from ongoing Yas Island expansion and Abu Dhabi's increasing focus on global sports and leisure tourism.




LEGENDARIO

OHANA  
DEVELOPMENT

 **1-3 Bed Apartments and 3-4 Bed Penthouses**  **60/40 Payment Plan**

 **Prices from AED 2M**  **Handover in Q4 2029**

 **Jumeirah Islands**


## DIRECTOR'S NOTES



Eltiera Views captures the strongest opportunity in Dubai's current cycle: a shortage of premium apartments in established prime areas. Ellington's design and delivery record reinforce confidence in product and performance. Priced below comparable waterfront projects like Vida Marina (~AED 3,500/sq.ft.) and Bluewaters (~AED 5,400/sq.ft.), the value is clear. With Espace's exclusive full-floor access and preferential pricing, clients secure rare first-mover advantage in one of Dubai's most coveted residential districts.




ELTIERA  
VIEWS

ELLINGTON  
PROPERTIES

 **3-5 Bed Independent Villas**  **80/20 Payment Plan**

 **Prices from AED 6M**  **Handover in 2030**

 **Dubai Land**

## DIRECTOR'S NOTES

The Heights by Emaar presents a compelling opportunity, offering 3-5-bedroom independent villas within a master-planned growth corridor. Located beside The Oasis and Grand Polo Club & Resort, it benefits from strong end-user demand, limited future villa supply, and Emaar's proven delivery record on quality, planning and long-term value. Priced below established Emaar villa communities, it presents clear value, with Espace's early access giving clients a first-mover advantage in a low-density emerging location.



THE  
HEIGHTS  
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EMAAR

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