

ALLSOPP & ALLSOPP

DUBAI REAL ESTATE

MARKET SNAPSHOT

April 2026

VALUE

₹ 47.2 BN

9% increase
vs March 2026

17% decrease
vs April 2025

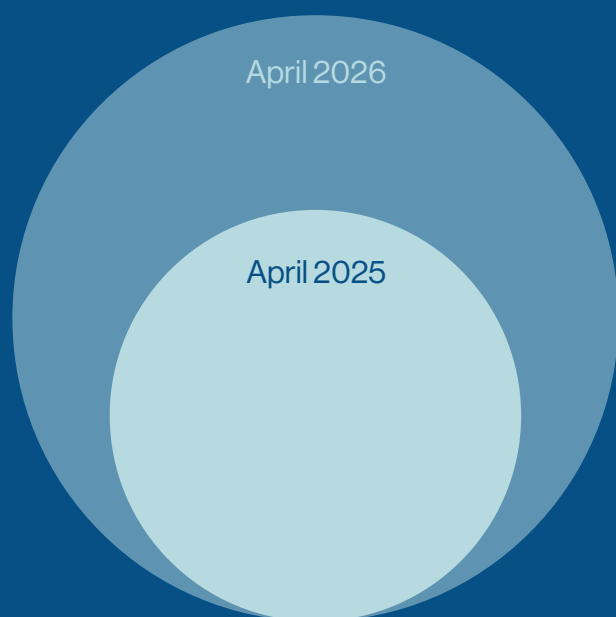
April's data presents a market in transition. While total sales value reached AED 47.2 billion - a strong 9% increase month-on-month from March - the year-on-year comparison reflects the broader recalibration that has characterised the market since the geopolitical uncertainty of early 2026. Volume and value remain below April 2025 levels, down 19% and 17% respectively, however it is important to contextualise this against one of the strongest months on record a year prior.

The more meaningful signal in April's data is the month-on-month recovery. Transaction volume rose to 13,799 - up 3% from March - while total market value climbed by over AED 3.9 billion in a single month. Average sale price increased by 6% month-on-month to AED 3,418,168, and remains 2% ahead of April 2025, confirming that pricing has not only held but continued to edge upward through the adjustment period.

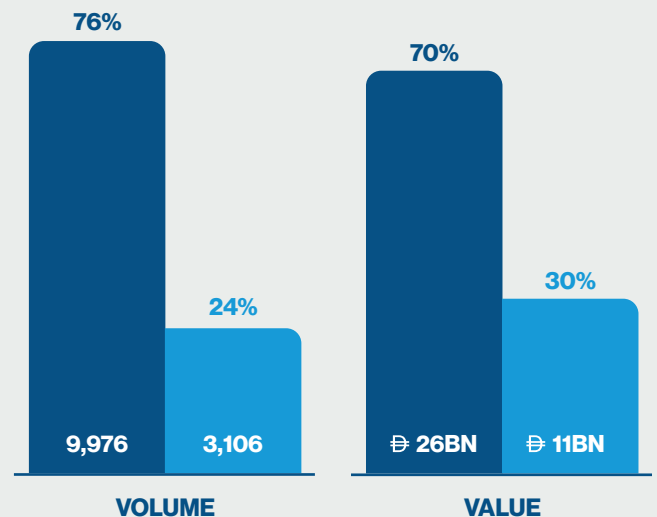
The off-plan segment continues to dominate, accounting for 76% of transaction volume and 70% of total value. Off-plan activity generated AED 26 billion in April alone, up 13% month-on-month, with the market demonstrating continued investor confidence in Dubai's development pipeline. The secondary market, while smaller in volume, contributed AED 11 billion and is showing early signs of renewed momentum as buyer sentiment stabilises.

Average price per square foot for residential property now stands at AED 1,973 - up 3% month-on-month and 8% year-on-year - a metric that perhaps best captures the sustained upward pressure on values that has defined Dubai real estate through this period of adjustment.

▲ 20% increase in off-plan average sales price year-on-year



OFF-PLAN VS SECONDARY



Overall, April's data points to a market that has moved through the cautious phase we saw at the end of Q1 and is beginning to regain its footing, with pricing resilience and improving monthly volumes providing a constructive platform heading into the summer months.

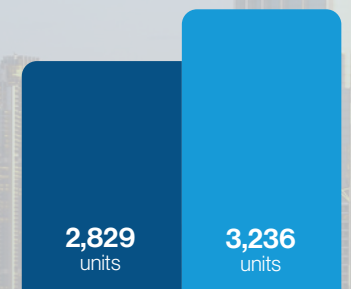


TOTAL COMPLETED UNITS IN APRIL 2026

3,236 units

↑ **14% increase**
in comparison to completed units in
April 2025

OFF-PLAN COMPLETED UNITS



VOLUME

● April 2025 ● April 2026

AVERAGE SALES PRICE

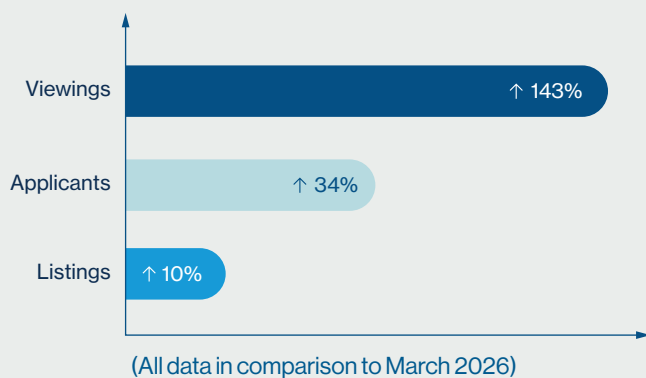
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April was a month of recovery in activity for Allsopp & Allsopp, with transaction volume up 23% compared to March 2026 - a meaningful rebound following the more cautious trading conditions seen in March. That momentum in volume is the standout story of the month, reflecting renewed buyer engagement as sentiment has begun to settle following a strong start to the year. It is worth noting that the softness experienced at the end of Q1 was concentrated in March specifically - the first two months of 2026 saw strong activity, and April's data suggests the market is firmly back on that trajectory.

BUYER'S FINANCE SUMMARY

53%
Finance47%
Cash

MONTH-ON-MONTH RECOVERY



Beyond completed transactions, the broader activity metrics paint an even more compelling picture of recovery. Sales viewings surged 143% month-on-month compared to March, with listings up 10% and applicant registrations up 34%. When measured against the pre-conflict baseline, the recovery is equally encouraging - sales viewings are now just 6% below the January/February average, and sales listings have actually surpassed the pre-conflict baseline by nearly 10%. These are not simply month-on-month rebounds from a low base - they reflect a buyer pool that has genuinely re-engaged with the market and is actively moving toward decisions.

The villa and townhouse segment continued to demonstrate resilience, with villa volume up 62% month-on-month - a significant jump that points to returning confidence among buyers of larger, end-user properties. In terms of value split, villas and townhouses accounted for 64% of total Allsopp & Allsopp sales value in April despite representing just 36% of volume, reflecting their premium price points.

TOP 5 BUYER NATIONALITIES



22%

British

12%

Indian

10%

Russian

3%

Emirati

3%

Brazilian

AVERAGE VILLA/TOWNHOUSE SALES PRICE

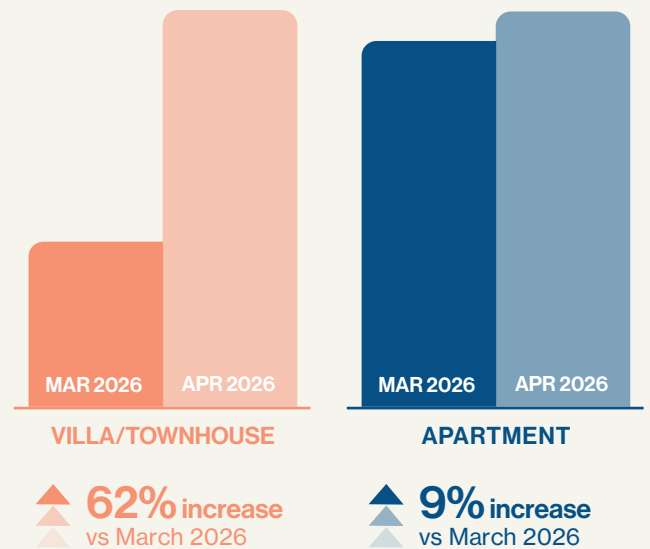


₹ 7,537,381

The apartment segment also showed positive momentum, with volume up 9% month-on-month. The majority of apartment transactions continued to fall within the AED 1M to AED 3M bracket, consistent with patterns seen earlier in the year, and pricing across key locations has remained stable. Jumeirah Beach Residence led transacting areas, while Dubai Marina and Jumeirah Village Circle rounded out the top three.

The buyer finance split remained healthy at 53% finance to 47% cash, indicating a balanced mix of end-users and investors in the market. British buyers continued to lead nationality data at 22%, followed by Indian buyers at 12% and Russian at 10%, with Brazilian and Emirati buyers also featuring in the top five - a reminder of the increasingly diverse international demand underpinning the market.

SALES TRANSACTION VOLUME



AVERAGE APARTMENT SALES PRICE



₹ 2,407,887

TOP TRANSACTING AREAS & AVERAGE PRICES



VILLA/TOWNHOUSE

APARTMENT

1 Green Community DIP
₹ 9,450,000

1 Jumeirah Beach Residence
₹ 2,178,000

2 Damac Hills 2
₹ 1,860,000

2 Dubai Marina
₹ 3,416,667

3 Damac Lagoons
₹ 3,100,000

3 Jumeirah Village Circle
₹ 1,456,667

The highest individual transaction of the month was a villa in Tilal Al Ghaf at AED 37M, with further notable sales including a villa in Al Barari at AED 23.75M and Jumeirah Golf Estates at AED 19M - underscoring continued appetite at the top end of the market. Across key communities, Allsopp & Allsopp maintained strong market share, holding 80% of Green Community volume, 50% of Emirates Hills, and 35% of Arabian Ranches, reinforcing our position in Dubai's most established residential areas.

AVERAGE LETTING PRICE

₪ 228,591

9% decrease
vs March 2026

12% increase
vs April 2025

April delivered a strong month for lettings activity at Allsopp & Allsopp, with total transaction volume up 47% month-on-month and 26% ahead of April 2025. Both figures point to a meaningful acceleration in tenant activity following the quieter conditions seen at the end of March, and the year-on-year growth is particularly encouraging as a signal of sustained underlying demand. Lettings viewings were up 97% month-on-month compared to March, with listings up 29% and applicants up 39% - and when measured against the pre-conflict baseline, the recovery is even more striking.



18%

increase in average
letting price for villa/th
year-on-year

April 2026

April 2025

Lettings viewings are now just 4% below the January/February average - essentially fully recovered - while lettings listings have actually surpassed the pre-conflict baseline by 34.5%, with April's figure of 878 comfortably ahead of the January/February average of 653. These are not just month-on-month rebounds from a low base - they are genuine indicators that the lettings market has returned to, and in some cases exceeded, the strong activity levels seen before the uncertainty of March.

Average letting price was 12% higher than April 2025, confirming that rental values continue to increase year-on-year despite the short-term volume softness seen earlier in 2026. This sustained upward pressure on pricing is particularly evident in the villa and townhouse segment, where average letting price was up 18% year-on-year. As has been the case for much of the past twelve months, demand for quality family homes continues to outpace available supply in prime communities, and landlords in these areas are benefitting accordingly.

TOP 5 TENANT NATIONALITIES



13%

 British

5%

 Russian

5%

 Indian

2%

 Egyptian

2%

 Dominican

The villa and townhouse segment produced some of the month's most notable transactions. A Sanctuary Falls villa in Jumeirah Golf Estates let for AED 3M, with further transactions at AED 680K in Arabian Ranches and AED 625K in Jumeirah Golf Estates - reflecting the premium that tenants are willing to pay for well-located, high-quality residential stock in Dubai's most sought-after communities. Jumeirah Golf Estates led villa transacting areas with five deals, followed by Al Furjan and Dubai Land.

In the apartment segment, Downtown Dubai led top transacting areas, followed by Dubai Creek Harbour, Motor City, and Business Bay. These locations continue to attract consistent tenant demand due to their amenities, connectivity, and lifestyle appeal. British tenants retained the top position by nationality at 13%, with French, Indian, Egyptian and Dominican tenants also featuring - reflecting the continued international character of Dubai's rental market.

AVERAGE APARTMENT LETTING PRICE



₹ 115,119

TOP TRANSACTING APARTMENT AREAS AND AVERAGE RENT



1 ₹ 148,125 — Downtown Dubai

2 ₹ 109,667 — Motor City

3 ₹ 95,600 — Business Bay

4 ₹ 80,500 — Jumeirah Village Circle

5 ₹ 130,500 — Dubai Creek Harbour

AVERAGE VILLA/TOWNHOUSE LETTING PRICE



₹ 403,808

NOTABLE VILLA/TOWNHOUSE LETTING TRANSACTIONS



₹ 3,000,000

Sanctuary Falls Jumeirah Golf Estates

₹ 680,000

Alvorada Arabian Ranches 1

₹ 625,000

Whispering Pines Jumeirah Golf Estates

The overall lettings split in April saw villas and townhouses account for 30% of transactions by volume but 61% of total lettings value - a reflection of the significant price premium that villa and townhouse stock commands relative to apartments. This imbalance between volume and value continues to be a defining characteristic of the A&A lettings portfolio, and underlines why the villa segment remains so commercially significant despite apartments dominating by transaction count. With applicant numbers and viewings both surging heading into May, and supply in the villa segment remaining constrained, the conditions that have driven rental price growth over the past twelve months show little sign of easing in the near term.

TENANT FINANCE SUMMARY

Cheques	1	2	3	4+
APRIL 2026	28%	15%	15%	42%

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