

PREVIEW UAE REAL
ESTATE BRAND INDEX
2026

FIRST EDITION



REBI™ — Real Estate Brand Index is an independent annual publication created to benchmark, document and preserve the evolution of real estate developer brands.

Every edition combines structured research, visual analysis, expert review and market intelligence into a long-term benchmark designed for developers, investors and industry leaders.

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WHY THE UAE PROVIDES AN UNUSUALLY DEMANDING TEST OF DEVELOPER BRAND PERFORMANCE.

The UAE combines rapid urban development with an international customer base, high project visibility and continuous competition across residential, hospitality, retail and mixed-use destinations. Few markets require developer brands to communicate simultaneously to local buyers, global investors, brokers, institutional partners and international media. This creates an unusually demanding environment in which brand performance is exposed to multiple audiences at the same time.

The pace of launch and expansion creates opportunity, but it also exposes inconsistency quickly. New projects are compared not only with neighbouring developments, but with global standards of architecture, service, placemaking and communication. This makes reputation portable: performance in one project can strengthen—or weaken—confidence across an entire portfolio. In a market where buyers often make decisions before delivery, the credibility accumulated by the developer itself becomes especially important.

The competitive environment is also highly visible. Major launches are amplified through international sales networks, digital media, exhibitions and brokerage channels, meaning that brand signals travel far beyond the physical location of a project. Developers are therefore judged not only by what they build, but by how clearly they position it, how consistently they present it and how effectively that promise is sustained through delivery and operation.

The market also demonstrates how developers can contribute to the identity of cities. Large-scale communities, waterfronts, cultural districts and lifestyle destinations become part of the international image of Dubai, Abu Dhabi and the wider UAE. Developer brands therefore operate within a broader national reputation for ambition, delivery and innovation. At this scale, corporate brand, destination brand and city brand become increasingly interconnected.

For REBI, the UAE is a useful benchmark because it contains several development models within one market: globally recognised leaders, institutional master developers, high-growth challengers, premium specialists and emerging community brands. Comparing them through one methodology reveals how different combinations of scale, product, visibility and reputation create competitive strength, and why similar commercial ambitions can produce very different brand outcomes.

The first edition should therefore be read as a baseline rather than an endpoint. Future editions will make it possible to track how positions evolve as projects are delivered, portfolios diversify, new destinations mature and brands expand into additional asset classes and international markets. Over time, this continuity will allow REBI to distinguish temporary market momentum from more durable forms of developer brand strength.

“ In the UAE, developer brands are tested simultaneously by speed, international visibility and the obligation to deliver lasting places.

DIVERSITY

200+

Nationalities living and working in the UAE

ECONOMY

\$517B

UAE GDP, 2025

REAL ESTATE

\$288B+

Dubai + Abu Dhabi real estate transactions, 2025

Six Pillars. One Score.

THE SIX SCORING PILLARS ARE GOVERNED BY FIVE METHODOLOGY PRINCIPLES.

REBI converts a broad and partly intangible subject into a comparable 100-point framework. Every company is assessed across the same six pillars, allowing different developer brands to be evaluated through a consistent structure while preserving the differences in how their strength is built. The weighted REBI Score brings together market presence, public expression, reputation and the quality of the delivered product into a single comparative measure. It is designed to reflect the combined strength of the developer brand rather than any one aspect in isolation. The separate REBI Investor Confidence Index adds an investment-oriented perspective to the assessment and is reported independently, without altering the REBI Score.

15%

SCALE

Portfolio significance, market reach and the visible scale of development activity.

15%

BRAND AWARENESS

Familiarity, recognition and the extent to which the developer name is established in the market.

15%

VISUAL IDENTITY

Distinctiveness and consistency across corporate identity, project presentation and core touchpoints.

15%

MEDIA PRESENCE

Visibility, continuity and quality of communication across owned, earned and public media.

20%

REPUTATION

Delivery confidence, stakeholder perception, trust signals and the durability of public credibility.

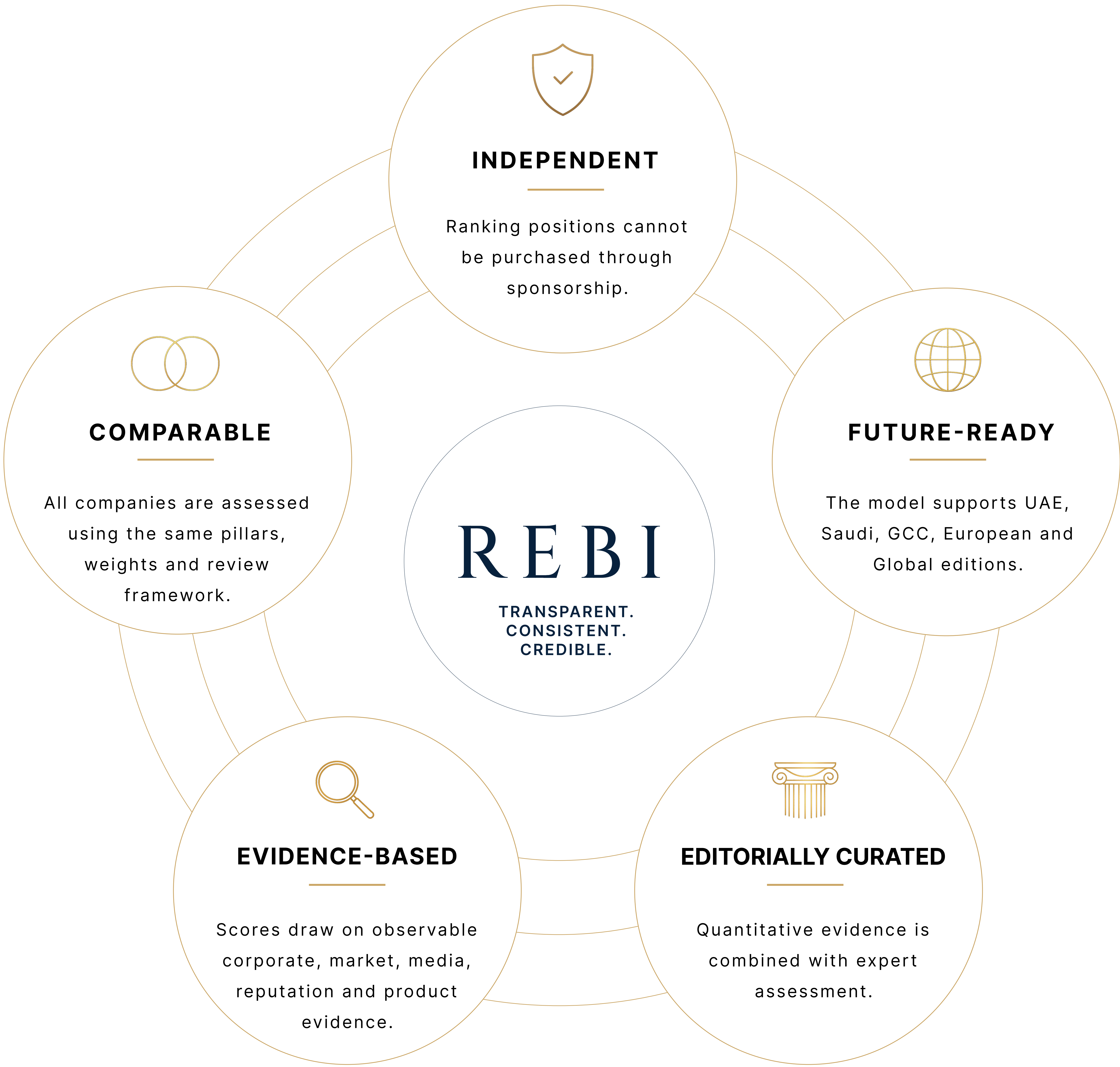
20%

PRODUCT & ARCHITECTURE

Architecture, planning, design quality, placemaking and the coherence of the customer-facing product.

Methodology Principles

Scores are based on evidence available during the assessment period and calibrated comparatively across the full 100-company field. The methodology is designed to be consistent enough for ranking, transparent enough to interpret and flexible enough to develop as the evidence base and geographic coverage expand.



Rankings Overview

TOP 100 Developers

BRAND STRENGTH / INVESTOR CONFIDENCE
RANK 01–25

#	DEVELOPER	SCALE	AWARENESS	VISUAL	MEDIA	REPUTATION	PRODUCT	REBI SCORE	INVESTOR CONFIDENCE INDEX	TRUST RANK	Δ ▼
01	Available in Full Report	100	100	95	99	97	98	98.1	98.0	01	0
02	Available in Full Report	96	94	92	92	96	94	94.1	97.6	02	0
03	Available in Full Report	91	91	93	89	93	95	92.2	96.4	03	0
04	Available in Full Report	94	96	89	96	88	90	91.8	90.1	07	-3
05	Available in Full Report	94	94	93	95	82	88	90.4	84.2	12	-7
06	Available in Full Report	92	92	86	88	88	90	89.3	94.1	04	+2
07	Available in Full Report	76	82	97	84	92	98	88.8	90.4	06	+1
08	Available in Full Report	84	85	93	86	89	94	88.8	91.7	05	+3
09	Available in Full Report	88	77	83	83	85	89	84.5	84.7	11	-2
10	Available in Full Report	88	78	85	80	84	87	83.8	85.5	10	0
11	Available in Full Report	80	76	86	75	88	89	83.0	89.5	08	+3
12	Available in Full Report	80	80	84	79	85	87	82.8	86.6	09	+3
13	Available in Full Report	91	85	80	86	74	79	81.9	77.4	18	-5
14	Available in Full Report	82	78	85	78	81	86	81.8	79.8	16	-2
15	Available in Full Report	86	88	77	88	75	76	81.0	77.2	19	-4
16	Available in Full Report	68	72	92	73	84	90	80.5	82.7	13	+3
17	Available in Full Report	76	74	74	70	77	75	74.5	81.4	14	+3
18	Available in Full Report	76	72	74	72	75	76	74.3	79.4	17	+1
19	Available in Full Report	64	63	73	62	76	80	70.5	77.1	20	-1
20	Available in Full Report	70	61	64	57	77	78	68.8	80.1	15	+5
21	Available in Full Report	54	59	76	58	76	79	68.0	72.3	23	-2
22	Available in Full Report	55	52	77	55	76	84	67.8	70.6	24	-2
23	Available in Full Report	57	57	79	60	66	82	67.5	66.3	31	-8
24	Available in Full Report	52	52	80	55	72	86	67.5	67.5	28	-4
25	Available in Full Report	45	53	84	60	68	87	67.3	63.4	39	-14

Δ = movement in Investor Confidence Rank vs REBI Rank

OMNIYAT
07

ULTRA-LUXURY DESIGN
SPECIALIST

OMNIYAT occupies a specialist position at the highest end of the UAE luxury market, built around rarity, architecture and hospitality-led service. FY2025 generated USD 2.5 billion in sales under the OMNIYAT brand and USD 5.4 billion across the wider group. In H1 2026, LUMENA and ENARA produced approximately USD 1.55 billion in sales and captured 43.4% of Dubai’s primary off-plan office market by value. Its influence remains disproportionate to project count because product and design equity are exceptionally strong.

REBI BRAND
SIGNALS

/// MOMENTUM



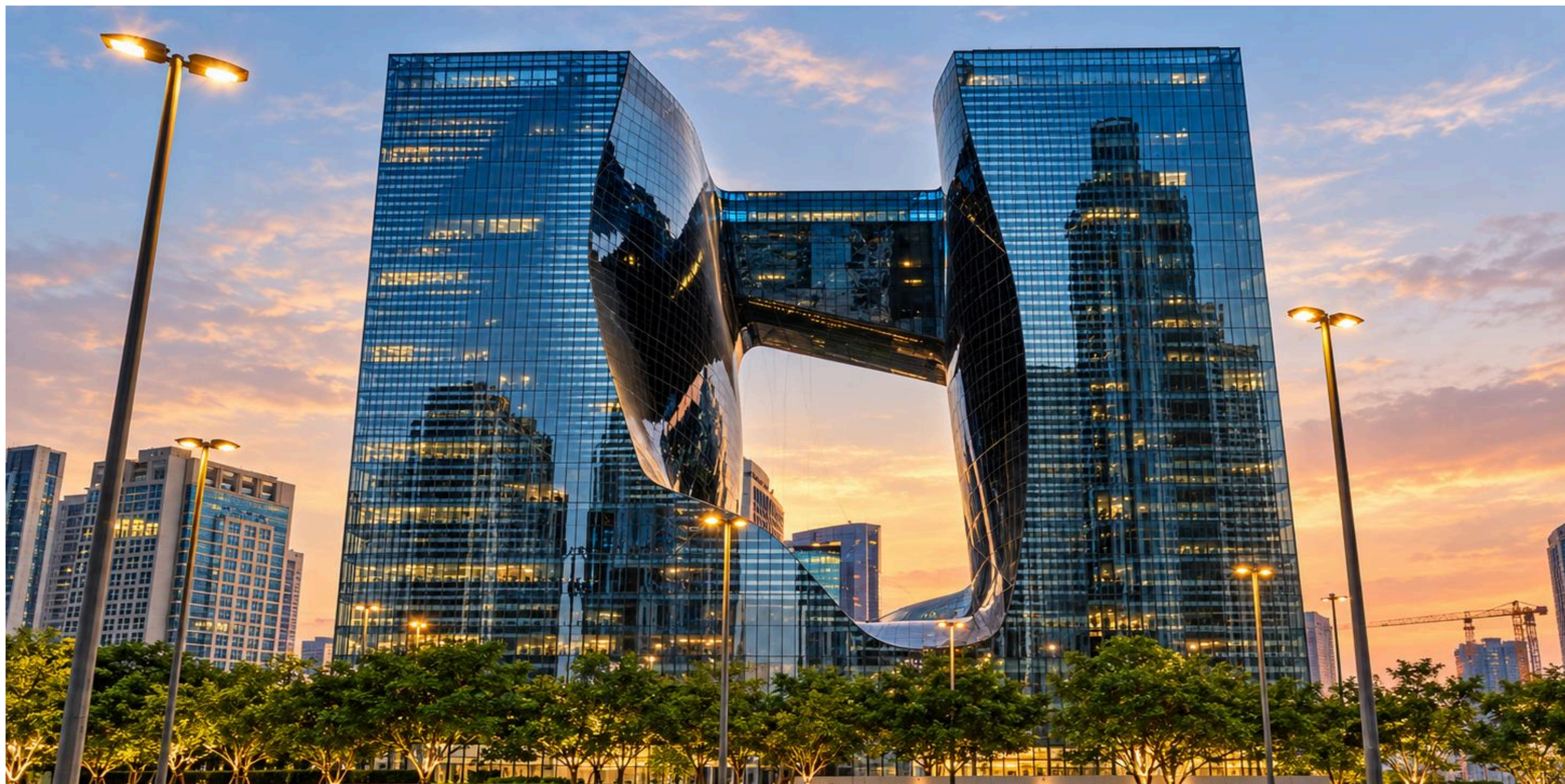
RESILIENCE



INFLUENCE



REBI qualitative assessment



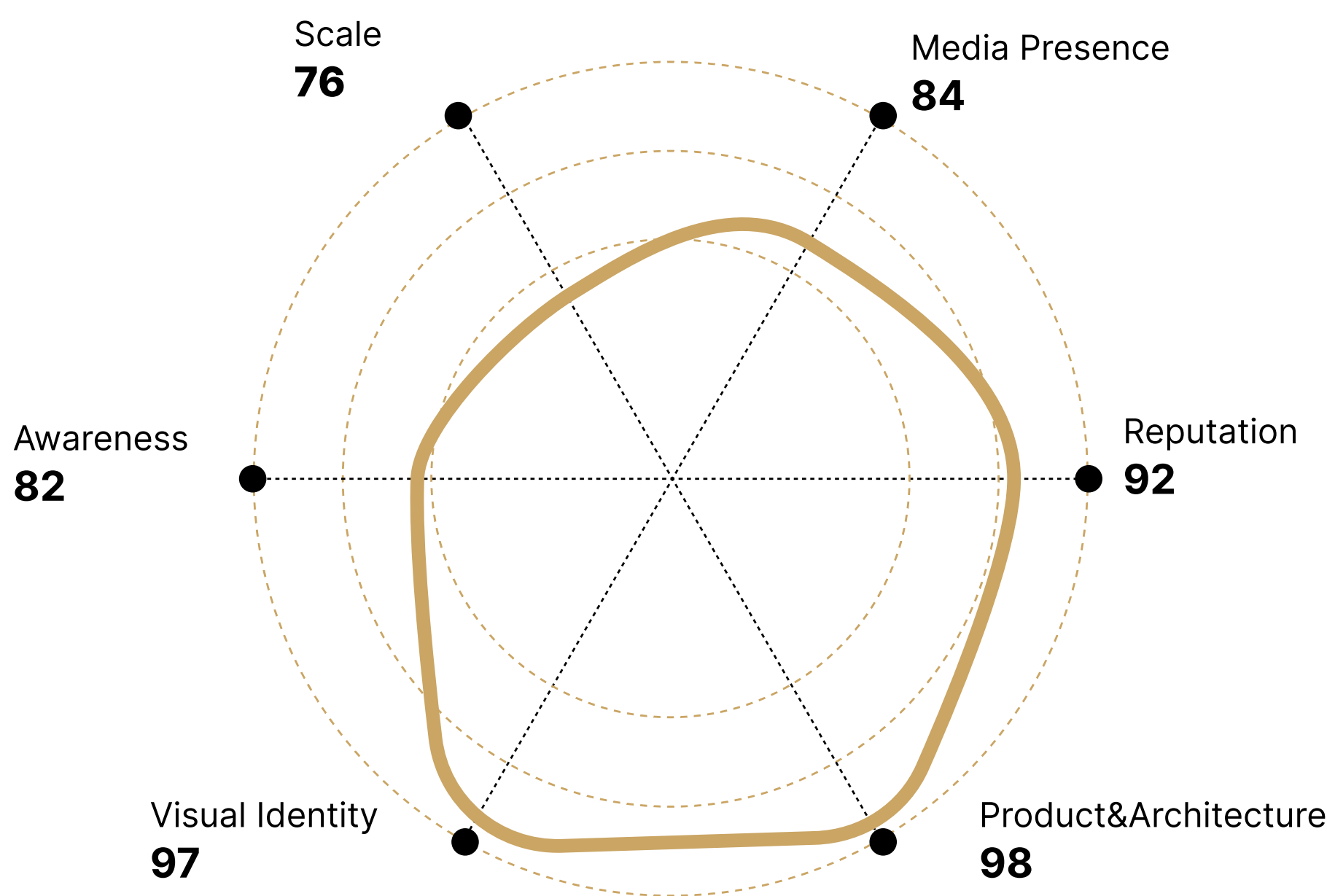
KEY HIGHLIGHTS

- Ultra-luxury positioning
- Exceptional design quality
- Selective project portfolio

REBI BRAND ASSESSMENT

OMNIYAT demonstrates that influence can be built through rarity rather than scale. Exceptional design and curation create one of the market’s most differentiated premium brands, with selective awareness aligned to its ultra-luxury position.

PERFORMANCE METRICS



REBI SCORE

88.9 /100

INVESTOR
CONFIDENCE
RANK

6

KEY PROJECTS

The Opus

One At Palm Jumeirah, Dorchester Collection

The Lana Residences, Dorchester Collection

ORLA, Dorchester Collection

VELA, Dorchester Collection

ACHIEVEMENTS

- LUMENA + ENARA H1 2026 sales USD 1.55B
- 43.4% of Dubai primary off-plan office market by value
- ENARA entered main construction phase

INVESTMENT LENS

HIGH DEMAND

ULTRA-PRIME BUYER
INTEREST

PROVEN DELIVERY

CURATED FLAGSHIP
EXECUTION

STRONG TRACK RECORD

BOUTIQUE LUXURY
CREDIBILITY

ESTABLISHED BRAND

DESIGN-LED PRESTIGE
POSITIONING

POSITIVE OUTLOOK

SCARCITY-SUPPORTED
UPSIDE

REBI Investor Confidence Index

A SECOND LENS ON DEVELOPER STRENGTH

Investor confidence matters most when the finished product cannot yet be evaluated. In that moment, the developer becomes part of the proposition. Previous performance, market standing and the strength of the wider platform help buyers form an expectation about something that may not yet exist.

Confidence is cumulative. Each completed project and market cycle influences how the next one is received. Consistent performance allows credibility to travel across projects and locations; inconsistency forces every new launch to rebuild conviction. But confidence is not the same as visibility. A developer may be highly recognised while still building the evidence required for deeper trust. Another may have substantial experience and a strong operating platform while remaining comparatively understated as a brand. Nor is confidence simply a function of scale. A large pipeline creates presence, but scale becomes persuasive only when the organisation behind it appears capable of supporting that growth.

Investor confidence therefore has its own structure. It is shaped not by a single measure of reputation, but by the interaction of delivery reliability, market demand, track record, investor experience and brand confidence. A developer may be strong in some of these areas and less established in others, creating a profile that cannot be understood from overall brand strength alone.

This is why the **REBI Investor Confidence Index** sits alongside the REBI Score rather than inside it. One measures overall brand strength; the other isolates confidence supported by evidence around the developer. Read together, they show whether brand presence and investor confidence are aligned or developing at different speeds. A fast-growing developer may build recognition ahead of its track record, while a mature platform may hold credibility not yet reflected in brand equity. The Index is comparative, not predictive: it does not forecast returns or replace financial, legal or technical due diligence. Its purpose is to make confidence in the developer behind the project more visible.

WHO IS THE REBI INVESTOR CONFIDENCE INDEX FOR?

INVESTORS & BUYERS

HOW MUCH CONFIDENCE SITS BEHIND THE PROJECT I AM CONSIDERING?

The Index provides an additional perspective beyond location, price and product specification. It helps distinguish between short-term project momentum and broader confidence in the developer platform.

RELEVANT FACTORS:

- Market Demand
- Delivery
- Track Record
- Outlook

BANKS, LENDERS & CAPITAL PROVIDERS

HOW ESTABLISHED AND CREDIBLE IS THE DEVELOPMENT PLATFORM BEHIND THE OPPORTUNITY?

The Index provides a comparative market perspective on developer standing. It can complement — but never replace — formal financial, legal and credit due diligence.

RELEVANT FACTORS:

- Delivery
- Track Record
- Brand Establishment
- Outlook

BROKERS, SALES NETWORKS & ADVISERS

HOW CONFIDENTLY CAN THIS DEVELOPER BE POSITIONED TO CLIENTS?"

Developer reputation increasingly affects conversion, objection handling and buyer confidence. A stronger confidence profile can make the developer itself part of the sales proposition rather than relying entirely on the individual project.

RELEVANT FACTORS::

- Market Demand
- Brand Establishment
- Delivery

One developer. Two different questions.

REBI INVESTOR CONFIDENCE INDEX

How strongly does the available evidence support confidence in the developer?

- Delivery & Reliability
- Market Demand & Liquidity
- Reputation & Track Record
- Investor Experience & Transparency
- Brand Confidence

REBI SCORE

How strong is the developer brand overall?

- Brand Awareness
- Reputation
- Product & Architecture
- Visual Identity
- Media Presence
- Scale



CONTRACTORS, SUPPLIERS & REAL-ESTATE PARTNERS

IS THIS RELATIONSHIP CONNECTED TO A SUSTAINABLE DEVELOPMENT PIPELINE?

The Index helps place individual opportunities within a broader view of the developer's market position, delivery record and future pipeline.

RELEVANT FACTORS:

- Delivery
- Track Record
- Outlook

BRAND, MARKETING & COMMUNICATIONS TEAMS

IS MARKET VISIBILITY TRANSLATING INTO GENUINE CONFIDENCE?

For developers themselves, the Index exposes one of the most important gaps in brand performance: the difference between being highly visible and being highly trusted.

RELEVANT FACTORS:

All five measures

ARCHITECTS, DESIGNERS & CONSULTANTS

WHAT KIND OF CLIENT PLATFORM ARE WE ASSOCIATING OUR REPUTATION WITH?

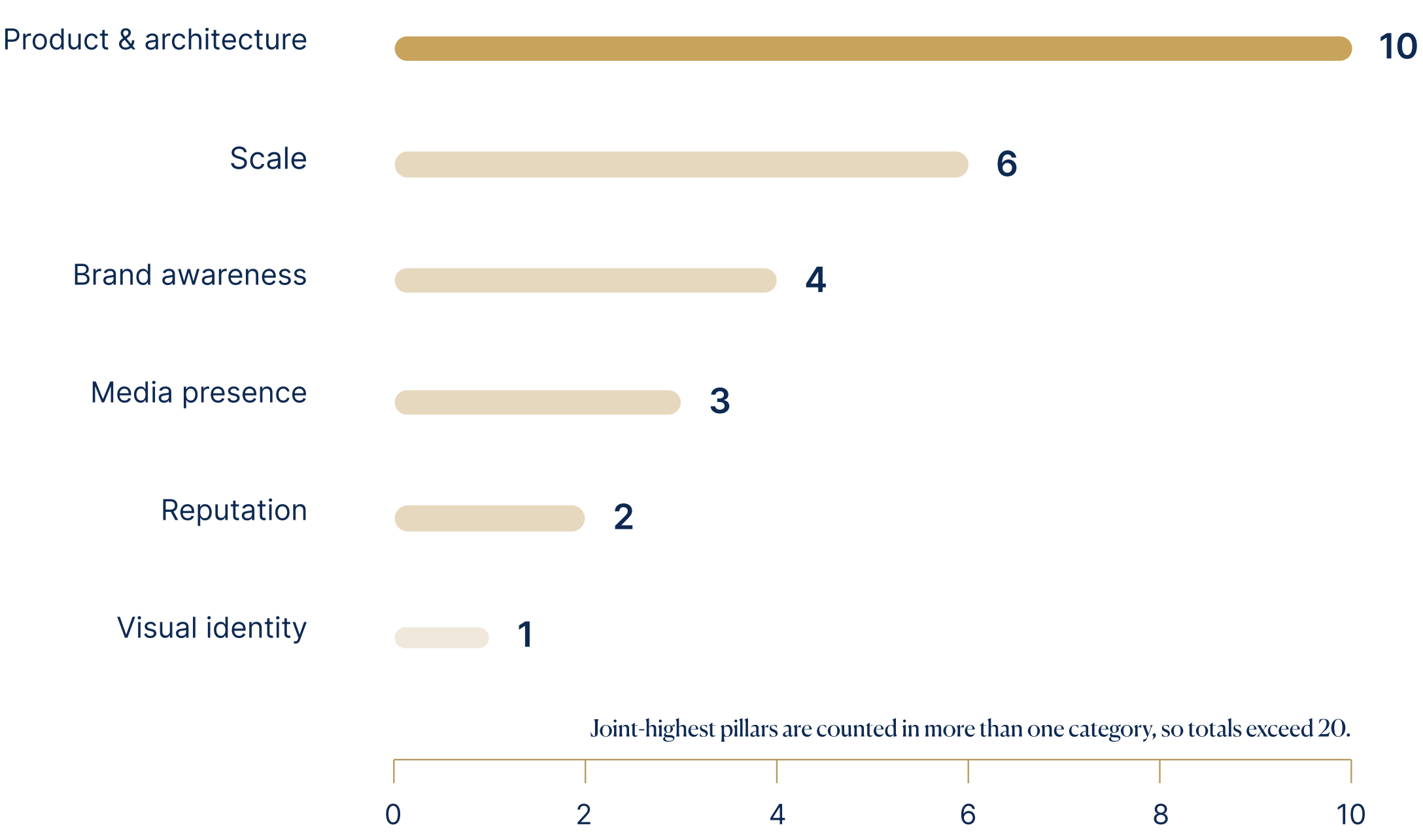
For professional partners, developer confidence provides context around the scale, maturity and future direction of a potential client. Stronger platforms may also provide greater opportunity for repeat collaboration across a portfolio.

RELEVANT FACTORS:

- Track Record
- Brand Establishment
- Outlook

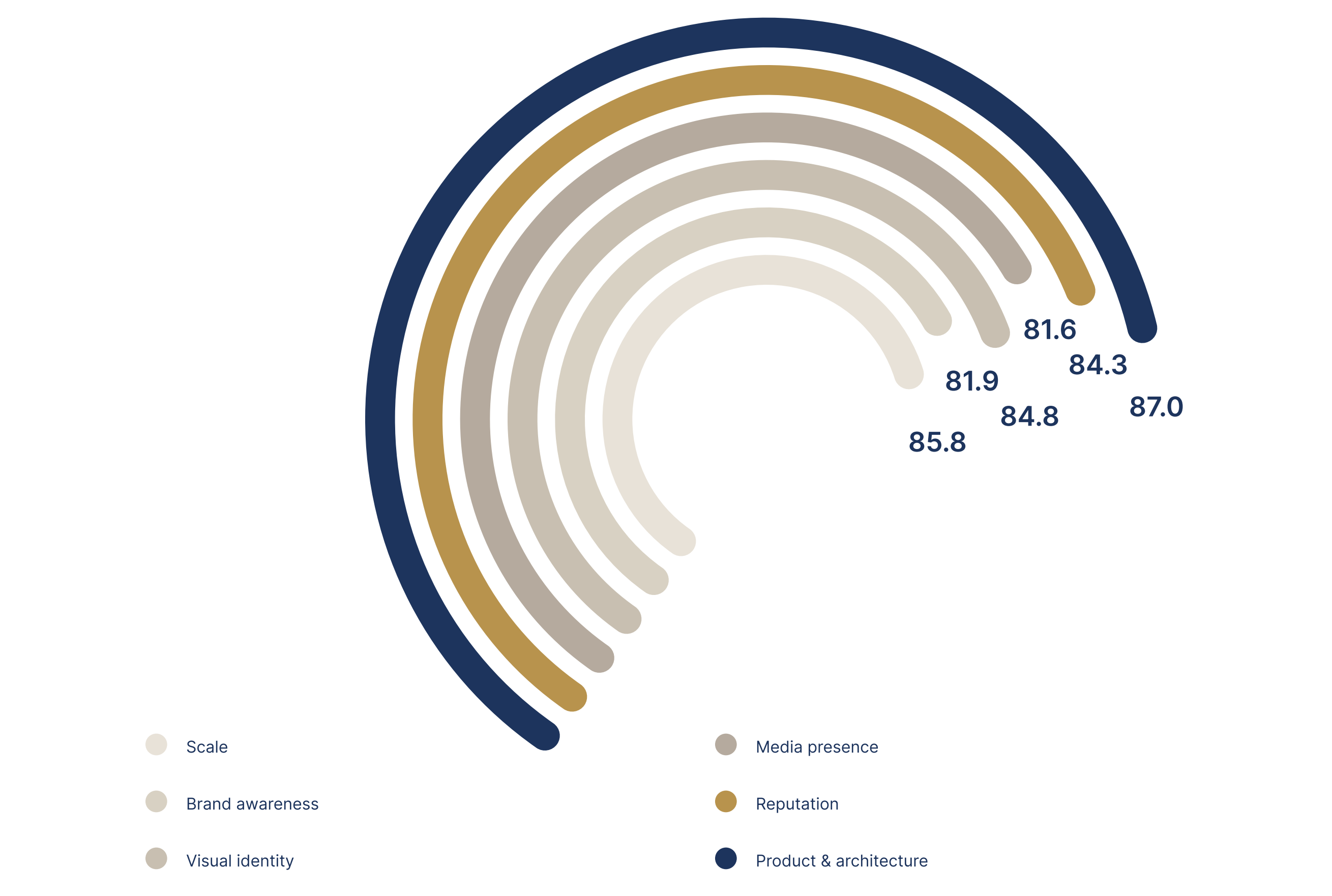
The Top 20 data reveals both a common foundation and substantial variation. Product strength is widespread, but the way it combines with scale, visibility and reputation determines the character of each leadership position. The figures below describe the group as a market tier rather than diagnosing individual companies.

Where leadership most often begins



Product is the most frequent source of standout strength, while scale remains another common route into the leadership tier.

Average Top 20 pillar profile



No pillar falls below 80 on average. Product & architecture leads the group, showing why tangible product quality remains the most common foundation of Top 20 strength.

Top 10 vs ranks 11–20



The upper half of the Top 20 is stronger across every pillar. The step into the very top is systemic rather than driven by a single metric.

Four Routes To Leadership

Balanced Market Leaders

These brands combine substantial market presence with strong product, recognition and reputation. Their advantage is not concentrated in one pillar; it comes from the absence of a major structural weakness across the wider brand system.

ILLUSTRATIVE EXAMPLES:



Product-Led Specialists

Product, architecture and visual distinction carry exceptional weight. These brands demonstrate that a focused proposition can create leadership without matching the scale of the largest development platforms.

ILLUSTRATIVE EXAMPLES:



Visibility-Led Commercial Brands

High awareness, active communications and strong market visibility accelerate recognition. The model is particularly effective in high-frequency launch environments where the developer name needs to remain continuously present.

ILLUSTRATIVE EXAMPLES:



Platform & Reputation Brands

Institutional depth, accumulated credibility and broader operating platforms create strength that may exceed consumer-facing visibility. These brands show how reputation and organisational substance can support a developer position even when communications are more restrained.

ILLUSTRATIVE EXAMPLES:



REBI INSIGHT



There is no single formula for a Top 20 developer brand. But the higher the position, the harder it becomes for one exceptional strength to compensate for weaknesses elsewhere.

Founder Interview

A CONVERSATION WITH
ALEXANDRE USHAKOV,
FOUNDER OF REBI

WHY DID YOU DECIDE TO LAUNCH REBI?

Real estate has always been measured through numbers: sales, square metres, delivery volume, transactions and financial indicators. These numbers are important, but they do not explain everything. In premium real estate, people also buy trust, reputation, architecture, lifestyle, location narrative and confidence in a developer's brand. REBI was created to measure that part of the market — the intangible strength that influences real decisions. The idea was to create a structured way of comparing something the industry already recognises intuitively. Buyers, investors and partners form opinions about developers long before every project is completed. Brand strength captures how previous performance, visibility and reputation shape expectations about what a developer will do next.

WHY START WITH THE UAE?

The UAE is one of the most visible real estate markets in the world. It is international, competitive, design-driven and closely connected to tourism, hospitality, investment and lifestyle. Dubai and Abu Dhabi have shown that real estate can become part of a country's global image. For a brand index, the UAE is the natural first edition.

WHAT SHOULD DEVELOPERS TAKE FROM THE REPORT?

Developers should see REBI as a mirror. It shows where their brand is strong, where it is visible, where it has trust and where it can improve. The goal is not only to rank brands, but to raise the level of brand thinking in the real estate industry.



“

REBI is not built as a popularity contest or paid nomination programme. The index is based on a methodology and a comparative scoring model.

WHAT MAKES A STRONG REAL ESTATE BRAND TODAY?

A strong developer brand is not only famous. It has to be trusted. It has to communicate clearly and deliver a recognisable product experience. It has to create confidence before purchase and pride after purchase. The strongest brands combine scale, reputation, media visibility, design quality and long-term consistency. What matters most is continuity. Confidence created by one successful development should strengthen the perception of the next. When product, communication and customer experience remain coherent across a portfolio, the developer name itself begins to carry value beyond any individual project.

I often ask emerging developers a simple question: what do you want to bring to the market? The first answer is often growth, sales or returns. But those are outcomes, not a proposition. The more important question is what will be better because you are here — the product, the customer experience, the city, the standard of delivery. That is where a strong brand begins: with a clear reason to exist beyond simply selling square metres.

WHAT DOES REBI ADD THAT TRADITIONAL REAL ESTATE DATA DOES NOT?

Real estate is already rich in data — prices, sales, yields, transactions and development pipelines. What is much harder to measure is the confidence attached to the developer behind those numbers. REBI adds that missing layer. Alongside the REBI Score, we introduced the REBI Investor Confidence Index to examine how delivery evidence, market demand, track record, investor experience and brand confidence combine to shape confidence in the developer behind a project. That combination is what makes the product different. REBI does not replace financial or market analysis; it adds a structured view of an intangible factor that can materially influence demand, pricing power, resilience and investment decisions.

HOW IS REBI DIFFERENT FROM A REGULAR AWARD?

REBI is not built as a popularity contest or paid nomination programme. The index is based on a methodology and a comparative scoring model. Awards may be created from the results, but the ranking itself must remain independent. That is essential for credibility. The purpose is also different. An award often recognises a particular achievement or project. REBI compares developer brands through one framework and provides a broader view of their current competitive position. Over time, repeated editions should also make it possible to observe how that position changes.

WHAT COMES NEXT AFTER THE UAE EDITION?

The UAE edition is the first step. REBI is designed as an international platform. Future editions can cover Saudi Arabia, the GCC, Europe and global real estate brand leaders. The long-term goal is to create a serious benchmark for how real estate brands are built, perceived and trusted across markets.

Pre-Order The Professional Report

A premium physical edition of REBI UAE 2026

The REBI UAE 2026 Professional Report is conceived as a premium editorial object — produced in a limited print run, presented in a bespoke bronze case and designed to the standard of a collectible business publication. From its material finish and typography to the presentation case and editorial detailing, every element has been developed to reflect the quality and ambition of the research inside.

INSIDE THE FULL REBI UAE 2026 PROFESSIONAL REPORT

- Top 100 ranking
- REBI Scores
- REBI Investor Confidence Index | Rank
- Top 20 brand profiles
- REBI Signals
- 12 analytical chapters
- Brand Watch & Outlook 2027

Pre-sale opens 29 September • \$790

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Regular publication price • \$990

Following publication, the Professional Report will be available at the regular price of \$990. The first edition is produced in a limited printed run.

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About REBI | 3CUBA



REBI™ — Real Estate Brand Index is an independent annual benchmarking platform dedicated to documenting and comparing the evolution of real estate developer brands across international markets. The UAE 2026 edition establishes the first reference point in a programme designed to build a consistent long-term record of developer brand performance.

Future editions will track movement over time, expand the comparative framework into additional markets and create a growing body of evidence on how developer brands evolve across different economic, cultural and competitive environments.

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3CUBA is the publisher and founding organisation behind REBI. The international branding agency works across brand strategy, corporate identity, websites and digital strategy, and editorial systems for companies and institutions operating internationally.

REBI draws on 3CUBA's experience in building and evaluating complex brands while maintaining a clear separation between commercial participation, editorial activity and ranking outcomes.

REBI DEVELOPMENT PATH

UNITED ARAB EMIRATES ► SAUDI ARABIA ► ASIA ► EUROPE ► AMERICA ► GLOBAL

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Measuring brand strength. Documenting change.
Building a long-term record of real estate development.