# More sales at softer prices in October. Is the market broadening?

## Dubai Market Report, October 2026

**The read.** Dubai registered **11,538 sales worth AED 30.79B** in October 2026. Volume rose 1.2% on the month and 14.3% on the year. The median sale was AED 1,377,934, or AED 1,652 per square foot, which slipped 1.5% from last month. Off-plan took 59.7% of the month once developer sales filed as title deed are counted back in, up from a raw Oqood share of 58.4%. Resale was 39.9%. Buyers who borrowed did so at a median 80.0% of price. Priced per square foot, the market now sits 6.7% below its Q1 2026 high, so the read is a market off its peak rather than one turning.

Completed DLD transactions, 1 to 31 October 2026.

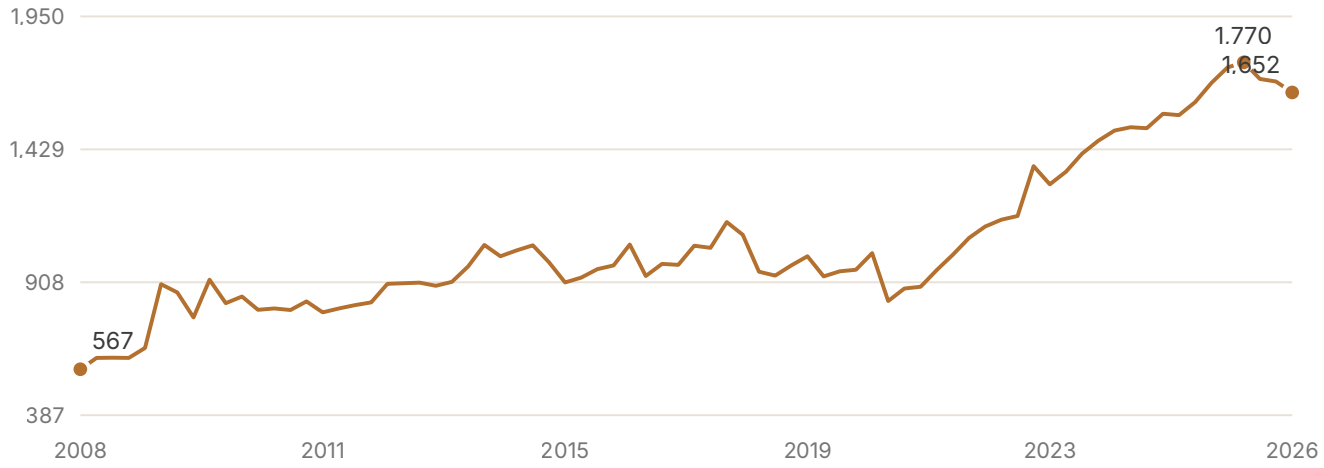
| TRANSACTIONS | TOTAL VALUE | MEDIAN AED PER SQ FT |
|---|---|---|
| 11,538 | AED 30.79B | 1,652 |
| ▲ +1.2% MoM -14.3% YoY | ▲ +10.4% MoM -13.3% YoY | ▼ -1.5% MoM -2.3% YoY |

| APARTMENTS | VILLAS & TOWNHOUSES | COMMERCIAL | PLOTS |
|---|---|---|---|
| 8,501 | 1,168 | 526 | 1,223 |
| ▼ -5.0% MoM | ▲ +12.9% MoM | ▼ -4.2% MoM | ▲ +75.7% MoM |

## Where this sits in the cycle

| VS 2014 PEAK | VS 2020 TROUGH | VS RECENT PEAK |
|---|---|---|
| +56.7% | +98.1% | -6.7% |

# The long view, Dubai since 2008



## Monthly overview, last 13 months

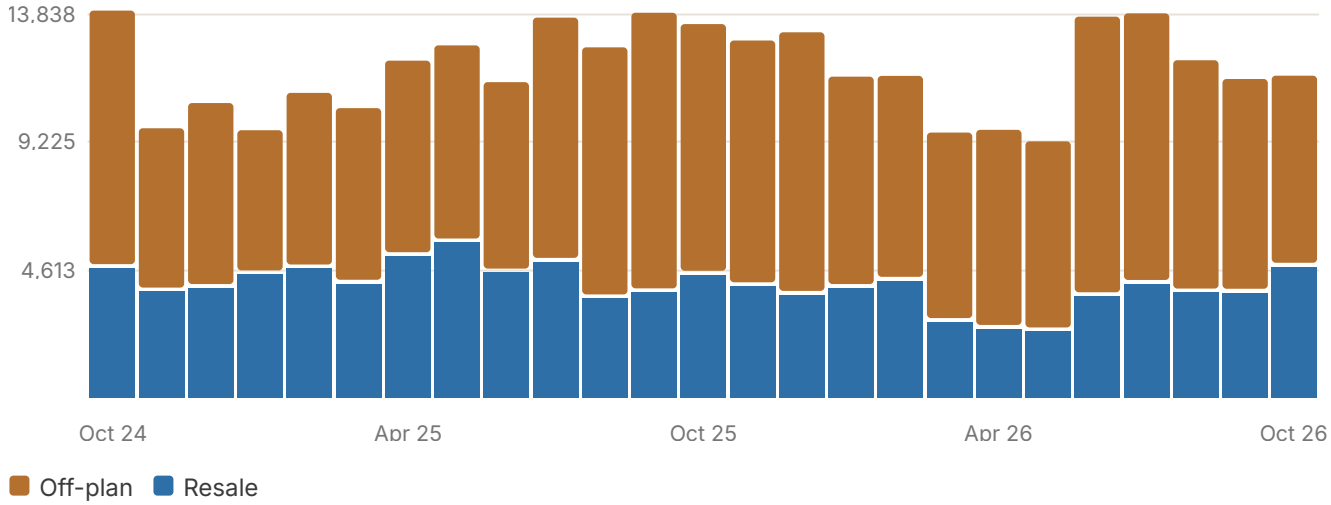
| Month | Median AED/sq ft | MoM | QoQ | YoY |
|---|---|---|---|---|
| October 2026 | **AED 1,652** | -1.6% | -2.7% | -2.3% |
| September 2026 | **AED 1,678** | -1.4% | -0.6% | -1.3% |
| August 2026 | **AED 1,702** | +0.3% | +3.8% | -0.9% |
| July 2026 | **AED 1,697** | +0.5% | -8.0% | +2.4% |
| June 2026 | **AED 1,689** | +3.0% | -2.3% | +2.5% |
| May 2026 | **AED 1,640** | -11.1% | -6.7% | +2.2% |
| April 2026 | **AED 1,845** | +6.7% | +1.4% | +15.8% |
| March 2026 | **AED 1,729** | -1.6% | -4.8% | +8.1% |
| February 2026 | **AED 1,757** | -3.4% | -0.4% | +13.2% |
| January 2026 | **AED 1,820** | +0.2% | +7.6% | +18.0% |
| December 2025 | **AED 1,817** | +2.9% | +6.9% | +14.5% |
| November 2025 | **AED 1,765** | +4.4% | +2.8% | +16.7% |
| October 2025 | **AED 1,691** | -0.5% | +2.0% | +6.3% |

## Off-plan and resale

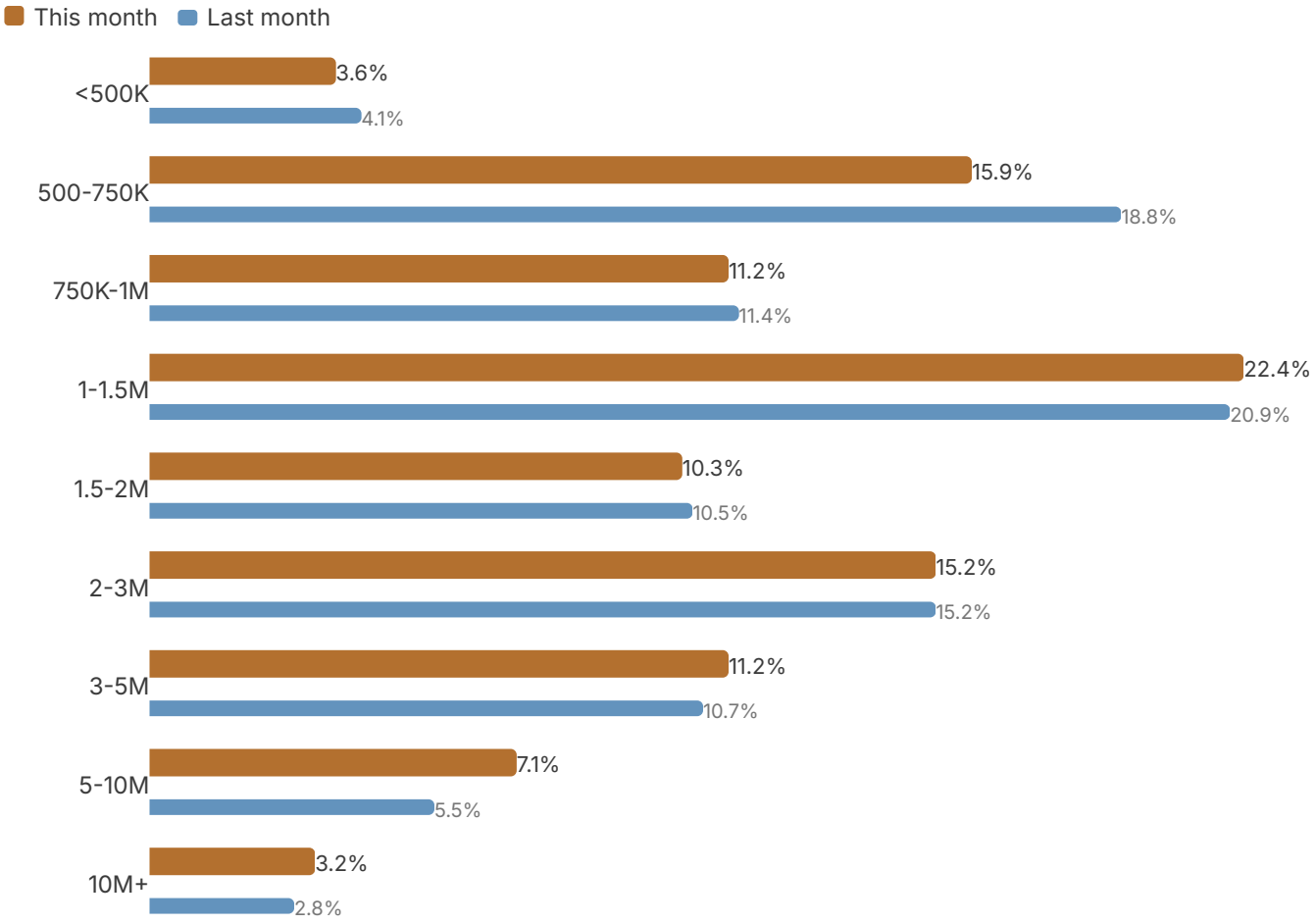
The raw Oqood share puts off-plan at **58.4%**. That undercounts it, because 146 developer-first sales were filed as title deed. Counting those back gives **59.7%**, and the rest of the month is resale at **39.9%**.

| How the month splits | Sales | Share |
|---|---|---|
| Off-plan, adjusted | 6,884 | 59.7% |
| Resale | 4,605 | 39.9% |
| Other procedures | 49 | 0.4% |
| **Total** | **11,538** | **100.0%** |

## Sales volume, last 25 months



## Where the money went, price tiers




## Top areas of the month

| Area | Sales | Value | Median AED/sq ft |
|---|---|---|---|
| **Dubai South** | 824 | AED 1.09B | AED 1,616 |
| **Jumeirah Village Circle** | 821 | AED 961.8M | AED 1,464 |
| **Al Rowaiyah First** | 652 | AED 3.22B | AED 468 |
| **Wadi Al Safa 3** | 556 | AED 1.30B | AED 1,452 |
| **Wadi Al Safa 5** | 494 | AED 815.5M | AED 1,449 |
| **Jabal Ali Industrial Second** | 484 | AED 603.3M | AED 1,816 |
| **Jebel Ali** | 454 | AED 923.3M | AED 1,615 |
| **Business Bay** | 442 | AED 1.72B | AED 2,143 |

## Which areas moved on price

Of 49 areas with enough sales to measure in both months. Areas under 30 cleaned sales in either month are excluded.

### Biggest gains

| Area | Median AED/sq ft | MoM | Sales |
|---|---|---|---|
| **Al Safouh First** | AED 3,820 | +51.0% | 33 |
| **Al Hebiah Second** | AED 2,405 | +50.3% | 70 |
| **Nad Al Shiba First** | AED 3,289 | +29.6% | 190 |
| **Palm Jumeirah** | AED 3,436 | +24.7% | 93 |
| **Al Barshaa South Second** | AED 2,025 | +16.0% | 103 |

### Biggest falls

| Area | Median AED/sq ft | MoM | Sales |
|---|---|---|---|
| **Al Rowaiyah First** | AED 468 | -82.9% | 640 |
| **Wadi Al Safa 2** | AED 1,000 | -27.5% | 200 |
| **International City** | AED 713 | -20.8% | 178 |
| **Al Hebiah First** | AED 1,502 | -18.5% | 299 |
| **Palm Deira** | AED 2,351 | -11.7% | 198 |

## Where the money is, prime and luxury

Sales at **AED 10M and above** were **3.2%** of transactions but **27.6%** of the money spent.

AED 5M AND ABOVE

45.6% of value

AED 10M AND ABOVE

27.6% of value

## What is still being built

**442,953 units** sit in 1,814 projects that are active, pending or not yet started. **57,188 units** are already past the date recorded against them and still not finished. 40,126 of those are in projects already at least half built.

| Planned handover | Projects | Units |
|---|---|---|
| **2026** | 85 | 19,072 |
| **2027** | 454 | 107,020 |
| **2028** | 453 | 99,294 |
| **2029** | 244 | 62,909 |
| **2030** | 88 | 33,043 |
| **2031** | 14 | 6,016 |
| **2032** | 2 | 684 |
| Past their planned date | 265 | 57,188 |
| Cancelled | 14 | 4,675 |
| No date on file | 195 | 53,052 |
| **Total under way** | **1,814** | **442,953** |

## The month's highest sale

HIGHEST RECORDED SALE

AED 79.0M

6 B/R · 41,067 sq ft · World Islands

## Best-selling projects

Ranked on resale only. Developers register off-plan sales in batches, so an off-plan ranking would show which developer filed paperwork rather than which project buyers chose.

| Project | Resales | Median price |
|---|---|---|
| **Tilal Binghatti** | 523 | AED 2,417,505 |
| **QPOINT LIWAN-PLOT R062** | 142 | AED 900,295 |
| **Dune Residency Dubai** | 38 | AED 681,708 |
| **Azizi Riviera Beachfront** | 33 | AED 1,060,880 |
| **Bay Estate** | 29 | AED 9,473,000 |

## Most active developers, last 12 months

| Developer | Sales | Share | Busiest projects |
|---|---|---|---|
| **Azizi Developments** | 15,505 | 11.9% | AZIZI VENICE 14 (2001), Azizi Venice 6 (999), Azizi Venice 15 (790) |
| **Binghatti Developers** | 11,707 | 9.0% | Binghatti Vintage (1078), Binghatti Skyflame 1 (882), Maybach Six (866) |
| **Sobha** | 4,762 | 3.7% | Sobha Central Phase II (482), Skyvue (437), Sobha Central (401) |
| **Emaar Development** | 4,543 | 3.5% | Grand Polo - Equiterra (364), Salva The Heights (272), Grand Polo - Equiterra 2 (270) |
| **Danube Properties Development** | 3,630 | 2.8% | Breez by Danube (629), Serenz by Danube (599), Shahrukhz by Danube (433) |

## The rental market

Over the three months to Oct month-end, 190,604 residential Ejari contracts were registered across Dubai. **48% were new leases** and 52% renewals. Median annual rents came in at AED 70,000 for apartments and AED 180,000 for villas and townhouses.

| APARTMENTS YIELD | VILLAS & TOWNHOUSES YIELD |
| --- | --- |
| 6.1% | 4.8% |

## Mortgages

**3,972 mortgages** were registered in October 2026, at a median of AED 1,360,000. Across the 1,640 purchase mortgages we can match to their own sale, the median loan was **80.0% of the price paid**, with the middle half between 70.0% and 80.0%. Matched purchases are 41.3% of the month's mortgage registrations; refinancing is not included.

## What this means for your property

City-wide medians are a starting point, not a valuation. Send us your building name and we will reply with what actually sold there last month, unit sizes and prices included, or ask for a valuation range on your own unit based on comparable sales. info@yazdan.ae

## Methodology

Figures cover completed DLD transactions dated October 2026 unless a longer window is stated. Rows whose implied price per square metre falls outside 0.25x to 4x of the month's median are treated as share transfers or data artefacts and excluded from headline figures, tiers, charts and lists. Property-type medians are computed on all recorded transactions of that type. The highest recorded sale covers apartments and villas only, never plots or whole buildings. Rental figures are residential Ejari registrations only, so commercial leases and land are excluded. Off-plan versus resale is read from the DLD procedure: pre-registration is a developer's off-plan sale, Sell and Delayed Sell are resale, and a developer selling completed stock is counted on its own line rather than folded into either. Adjusted off-plan share adds back title-deed sales that are developer-first, meaning those filed under a Development or Payment Plan procedure and non-land sales inside a project not yet marked finished. Land is excluded from that adjustment because a plot holds a real title deed even inside an unfinished masterplan. Loan to value covers purchase mortgages matched to their own sale on the same day, area, building and unit size, which is roughly 40% of the month's mortgage registrations. Refinancing and portfolio lending are not included. Villas and townhouses are reported together because DLD does not separate them. Best-selling projects are ranked on resale only, because developers register off-plan sales in batches and an off-plan ranking would reflect when paperwork was filed rather than when units sold. Data current as of 5 November 2026, sourced from Dubai Land Department records. Prepared by Yazdan Properties. yazdanproperties.ae. General market information, not a valuation or investment advice.