

Hamptons
INTERNATIONAL

Dubai Residential

Market Review | October 2026

A monthly review of Dubai residential market's performance and key real estate trends

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- Internal Purposes
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Market Highlights

General Market

October 2026 delivered the market's strongest monthly performance since April's pre-disruption levels, with total transaction value of AED 35.0B across 11,944 deals a 17.45% value recovery and 5.3% volume increase from September. The rebound was broad-based and compelling: villas surged 30.68% in value to AED 11.5B as cash buyers returned to the segment for the first time at scale since the disruption began; land activity nearly doubled in volume to 427 transactions with a 48.65% value advance to AED 5.5B; and commercial leasing delivered an exceptional month with office contracts rising 20.31%.

Year-on-year, October 2026 (AED 35.0B) sits 41% below October 2025's AED 59.1B an improvement from September's 46% YoY gap and the fifth consecutive month of narrowing annual shortfall. Year-to-date 2026 cumulative value now stands at approximately AED 418.3 B.

The October data carries a signal that has been building through the second half of 2026: cash buyers are returning, land market confidence is recovering, and the differential between headline value weakness and underlying demand strength is narrowing.

Apartments

Apartment transactions registered 8,946 sales worth AED 15.7B in October a 3.97% value gain from September's AED 15.1B against a modest volume easing of 2.05%. Off-plan apartments dominated at 5,262 transactions (AED 8.1B, 66.8% of volume), while ready stock contributed 2,610 deals (AED 5.8B, 33.2%) the highest ready apartment market share of the disruption cycle. Azizi Venice reasserted off-plan leadership at 525 sales, followed by JVC (424), Dubailand Residence (339), Tilal Binghatti (336), and Jebel Ali Downtown (330).

Average off-plan pricing continued its post-April correction to AED 1,813.1 per square foot while ready stock eased to AED 1,654.1 both reflecting the mix of competitive new-launch pricing and selective secondary market activity that is defining the recovery phase.

Villas and Townhouses

The villa segment's October performance is the month's defining story. Transactions surged to 2,028 deals worth AED 11.5B a 38.9% volume increase and 30.68% value advance from September, the segment's strongest monthly reading of the disruption cycle.

Critically, the financing composition confirms a structural market shift: mortgage transactions of 1,503 and cash transactions of 525 represent a 74.1% mortgage rate a dramatic reversal from September's 98.9%, which means 525 cash villa buyers returned to the market in a single month after their near-total absence since Q2.

This return of discretionary cash capital to the villa segment is the most significant demand-side development of the second half of 2026, signalling that international and local high-net-worth buyers are re-engaging as regional risk premiums decline. Off-plan villa sales reached 1,073 transactions (AED 5.2B) and ready contributed 686 deals (AED 4.6B).



Market Highlights



Commercial

Commercial property maintained steady momentum in October with 543 transactions worth AED 2.3B a modest 4.55% value advance from September's AED 2.2B at near-identical volume. The headline commercial sales figure was supported by an exceptional performance in the leasing market, where office registrations surged 20.31% to 8,185 contracts the highest office leasing month of the entire disruption cycle.

This exceptional leasing metric confirms that corporate occupier demand is not only stable but actively expanding, as businesses pursue Q4 operational positioning and capitalise on the improved certainty around regional logistics and trade flows. The combination of stable commercial sales with an office leasing record delivers the clearest evidence yet that Dubai's commercial real estate fundamentals are structurally sound.

Land

Land transactions is the month's most dramatic recovery, with 427 deals registering AED 5.5B a 105.3% volume increase and 48.65% value advance from September's 208 transactions and AED 3.7B. This is the second-highest monthly land value of 2026, exceeded only by July's AED 6.6 B. The volume doubling confirms that developer land acquisition activity has decisively reaccelerated as construction material supply chains normalise and strategic corridor confidence returns. The volume concentration in established growth corridors supported by Jebel Ali Downtown's continued off-plan presence at 330 transactions suggests institutional developers are securing infill parcels and phase-extension plots rather than pursuing speculative greenfield positions. The land market's October resurgence is a leading indicator of project launch pipeline expansion through H1 2027.

Off-Plan

Off-plan sales registered 6,335 residential transactions valued at AED 13.3B in October an average transaction value of AED 2.097M at an average price of AED 1,806.3 per sq.ft., the latter a slight variation from the price trend series figure of AED 1,813.1 reflecting different residential mix compositions in each calculation.

The segment's volume share eased to 65.8% of residential transactions and value share to 56.1% the lowest off-plan value dominance of the disruption cycle as the ready market continues to reclaim value share.

Azizi Venice returned to off-plan leadership at 525 transactions, with JVC (424), Dubailand Residence (339), Tilal Binghatti (336), and Jebel Ali Downtown (330) completing the top five. The ready market continued its expansion to 3,296 residential transactions (AED 10.4B), representing 34.2% of residential volume a structural gain that reflects both deepening secondary inventory and improving buyer appetite for immediate-occupancy product.



Rental Transactions

Rental Transactions

Dubai's leasing market maintained near-cycle-high levels in October with 48,095 new rental contracts a 2.03% increase from September's 47,137, itself a record. The modest sequential growth masks a compositional shift: residential leasing softened slightly (apartments -2.43% to 28,264, villas-10.89% to 3,199) as September's seasonal back-to-business surge normalised, while commercial leasing advanced 14.09% to 16,632 contracts. October's 48,095 total is the highest calendar-month total of the cycle, confirming that the September peak was not a one-month seasonal anomaly but the commencement of a new elevated leasing plateau. At these volumes, Dubai's leasing market is operating at approximately pre-disruption run rates the clearest demand-side validation available in the current data set.

Commercial Leasing Breakdown

Commercial leasing registered 16,655 new contracts in October the highest commercial leasing total of the disruption cycle led by an exceptional office market rebound to 8,185 contracts, a 20.31% advance from September's already-recovered 6,803.



The office surge reflects companies finalising Q4 space requirements and activating expansions deferred through the mid-year disruption. Retail and showroom registrations rose 6.75% to 1,978 deals as Q4 consumer market positioning accelerated.

Industrial leasing advanced 3.74% to 333 contracts and the 'others' category expanded 10.14% to 6,159 leases. The breadth of October's commercial leasing advance growth across all four subcategories represents the most convincing commercial demand signal of the current cycle.

Sales Transactions

Apartments

Dubai's apartment segment recorded 8,946 transactions worth AED 15.7B in October, with off-plan sales leading at 66.8% of the volume (5,262 deals, AED 8.1B). Ready properties captured a cycle-high 33.2% share (2,610 units, AED 5.8B), driven by improved secondary inventory and a historically narrow 9.6% price premium for off-plan properties over ready stock.

Azizi Venice retook off-plan leadership with 525 transactions, proving sustained structural demand despite easing from its August high. JVC showcased unmatched market liquidity by capturing balanced activity with 424 off-plan and 405 secondary deals. Meanwhile, Liwan entered the secondary top five at 187 transactions, signaling that demand for affordable options is expanding beyond traditional hubs like Business Bay and Downtown.

Villa & Townhouses

Villa transactions reached a landmark 2,028 deals worth AED 11.5B in October, marking the segment's highest monthly volume of the current cycle. Off-plan sales led volume dominance at 61% with 1,073 transactions (AED 5.2B), while ready stock contributed 686 deals (AED 4.6B).

The most significant shift was the return of cash buyers. There were 525 cash transactions compared to just 16 in September, bringing the mortgage rate down to 74.1% from an extraordinary 98.9%. This surge signals that international and domestic high-net-worth capital is rapidly re-entering the market as regional uncertainty abates. Note that the official off-plan/ready breakdown total (1,759) is lower than the overall sales figure (2,028), with both presented as reported.

Commercial Properties

Commercial sales registered 543 transactions worth AED 2.3B in October a marginal volume increase and 4.55% value advance from September. While the sales metrics remain range-bound, the leasing performance transforms October's commercial narrative entirely: 8,185 office leases represent the highest single-month office leasing volume of the disruption cycle, confirming that corporate occupier demand has not only recovered but reached a new structural high. Business Bay and DIFC maintained their institutional office transactional primacy, with retail assets in established corridors benefiting from Q4 pre-positioning.

The commercial segment's October contribution of AED 2.3B to total transaction value is supported by the exceptional leasing data that confirms income-generating properties across the office, retail, and industrial spectrum are experiencing occupier demand well in excess of what the sales activity alone might suggest.

Land Plots

Land transactions accelerated to 427 deals registering AED 5.5B in October a 105.3% volume surge from September's 208 deals and a 48.65% value increase. The doubling of land transaction volumes is the month's most forward-looking indicator: developer land acquisition at this scale, combined with Jebel Ali Downtown's continued off-plan leadership and broad-based new project registrations in emerging corridors, signals a meaningful expansion of the 2027 off-plan launch pipeline. The institutional character of October's land activity average deal size of approximately AED 12.M suggests structured developer acquisitions of infill and phase-extension parcels rather than speculative retail-level purchases, consistent with developer confidence in medium-term demand visibility but continued caution about committing to ultra-large-scale new masterplan commitments.

Sales Transactions

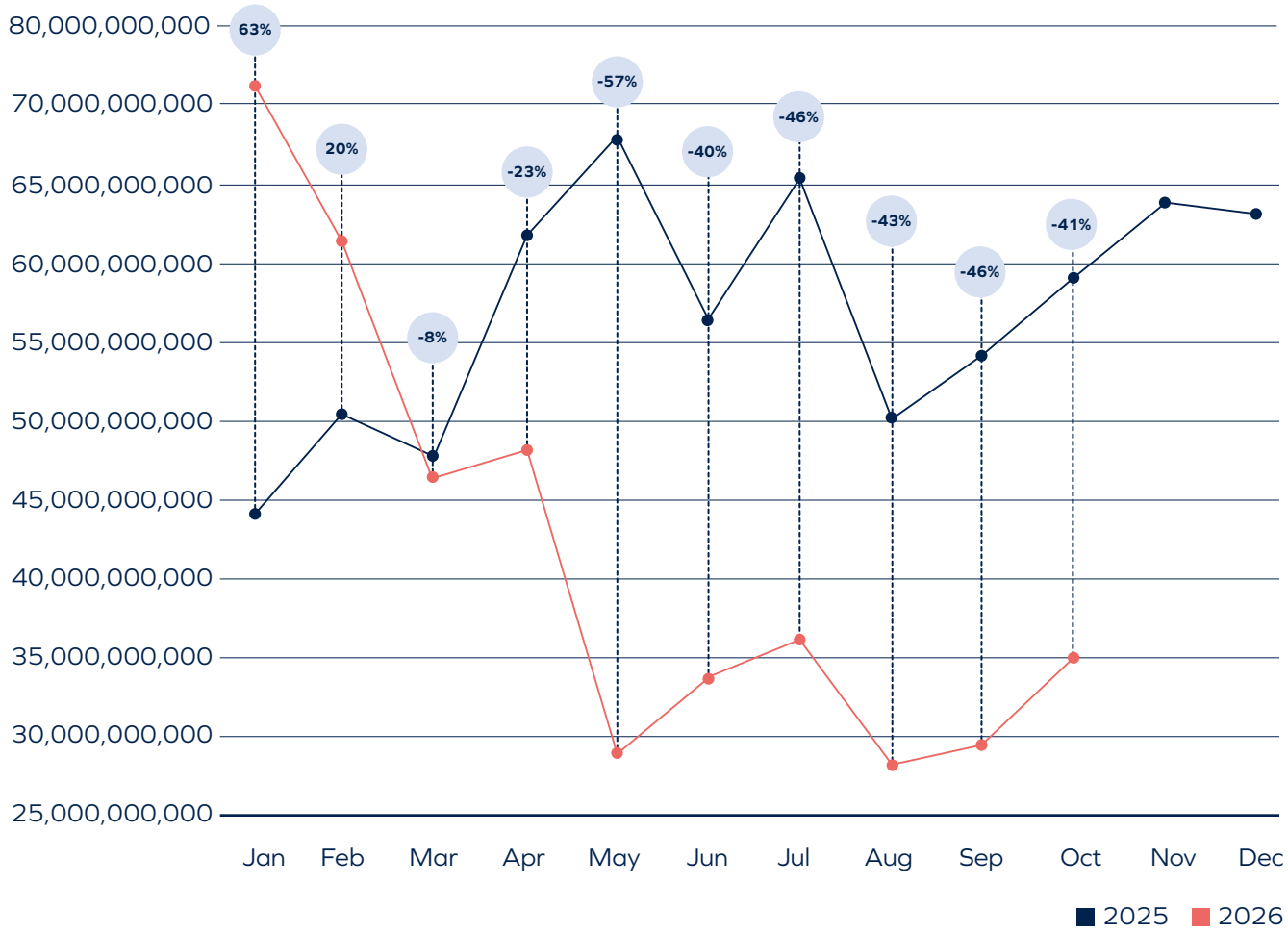
Month on Month | September 2026 - October 2026

	Sep Transactions	Sep Value (AED)	Oct Transactions	Oct Value (AED)	Value Change %
Apartments	9,133	15,100,000,000	8,946	15,700,000,000	3.97%
Villas	1,460	8,800,000,000	2,028	11,500,000,000	30.68%
Commercial	540	2,200,000,000	543	2,300,000,000	4.55%
Plots	208	3,700,000,000	427	5,500,000,000	48.65%
Total	**11,341**	**29,800,000,000**	**11,944**	**35,000,000,000**	**17.45%**



Transactions Value - Graph

2025 v/s 2026



October 2026 recorded AED 35B in total transaction value the highest monthly reading since April's AED 48.6B and the fifth consecutive month of year-on-year gap narrowing, with the annual deficit at 41% versus October 2025's AED 59.1B, compared to September's 46 % gap.

Year-to-date 2026 cumulative value now stands at approximately AED 418.3B against 2025's equivalent AED 562.5B a 25.7% shortfall that largely reflects the concentrated Q2 disruption against 2025's exceptional baseline. The month's AED 35B total represents a significant step-up from the AED 28.8–34B monthly range that characterised May through September, suggesting the market may be transitioning from stabilisation into a more active recovery phase as regional conditions improve.

Transactions Value

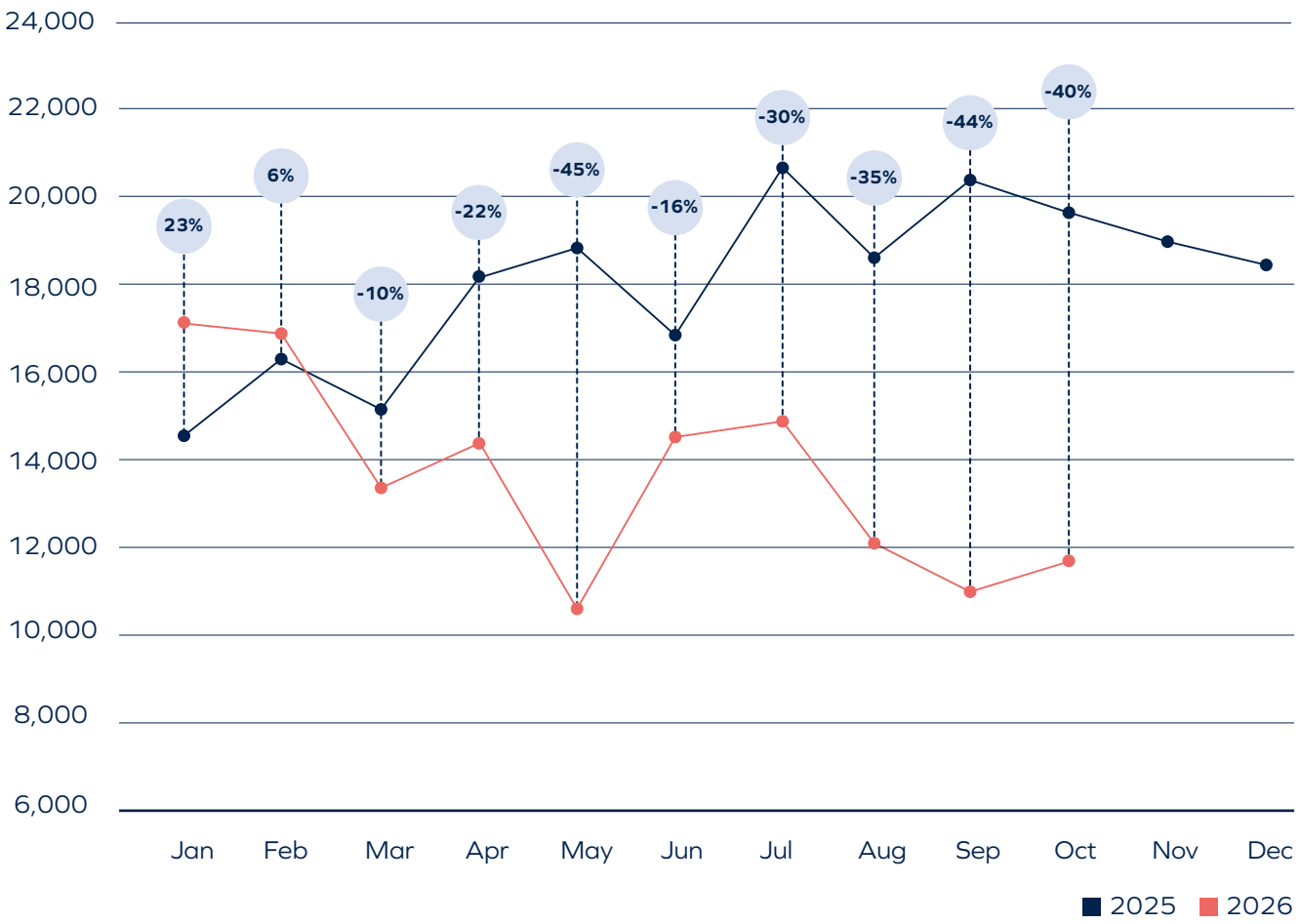
2025 v/s 2026

2025	Value	2026	Value
January	44,600,000,000	**January**	**72,500,000,000**
February	51,000,000,000	**February**	**61,400,000,000**
March	47,300,000,000	**March**	**43,700,000,000**
April	62,800,000,000	**April**	**48,600,000,000**
May	66,900,000,000	**May**	**29,100,000,000**
June	56,300,000,000	**June**	**34,000,000,000**
July	65,100,000,000	**July**	**35,400,000,000**
August	50,800,000,000	**August**	**28,800,000,000**
September	54,700,000,000	**September**	**29,800,000,000**
October	59,100,000,000	**October**	**35,000,000,000**
November	64,800,000,000	**November**	
December	63,400,000,000	**December**	



Transactions Volume - Graph

2025 v/s 2026



Dubai registered 11,944 property transactions in October 2026 up 5.3% from September's 11,341 and 40% below October 2025's 19,852 transactions. The YoY volume gap of 40%is the tightest since March 2026 and continues the gradual narrowing trend established since September 2025's anomalous 44% deficit.

Year-to-date 2026 transaction volume stands at approximately 136,283 against 2025's equivalent 177,036 a 23% shortfall. October's volume recovery particularly concentrated in the villa and land segments confirms that the market's stabilisation range of 11,000–14,000 monthly transactions established through Q3 is evolving rather than remaining static, with upside pressure building as regional conditions normalise.

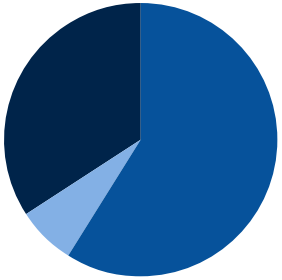
Transactions Volume

2025 v/s 2026

2025	Volume	2026	Volume
January	14,247	**January**	**17,477**
February	16,106	**February**	**17,120**
March	15,150	**March**	**13,565**
April	18,044	**April**	**14,086**
May	18,697	**May**	**10,301**
June	16,765	**June**	**14,104**
July	20,322	**July**	**14,263**
August	18,493	**August**	**12,082**
September	20,360	**September**	**11,341**
October	19,852	**October**	**11,944**
November	19,024	**November**	
December	18,680	**December**	



New Rental Transactions



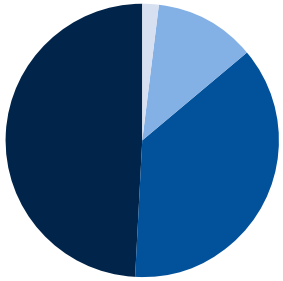
Apartments	59%
Villas	7%
Commercial	34%

	Sep	Oct	Volume Change %
Apartments	28,969	28,264	-2.43%
Villas	3,590	3,199	-10.89%
Commercial	14,578	16,632	14.09%
Total	**47,137**	**48,095**	**2.03%**

October's leasing market delivered 48,095 new contracts a 2.03% advance from September's 47,137 and a new cycle high for total leasing volume. The sequential growth is remarkable given September's exceptional seasonal surge: sustaining near-record volumes into October confirms that the leasing demand is structural rather than seasonal.

The compositional shift residential leasing easing modestly as seasonal back-to-business demand normalises, offset by commercial leasing reaching a new cycle high at 16,632 contracts reflects a market in which business activity is accelerating while residential occupier demand remains at a durably elevated level. At 48,095 monthly contracts, Dubai's leasing market is running at its highest sustained volume of the disruption cycle.

Commercial Rental Breakdown



Shops/Showroom	12%
Office	49%
Industrial	2%
Others	37%

	Sep	Oct	Volume Change %
Shops/Showroom	1,853	1,978	6.75%
Office	6,803	8,185	20.31%
Industrial	321	333	3.74%
Others	5,592	6,159	10.14%
Total	**14,569**	**16,655**	**14.32%**

Commercial leasing registered 16,655 new contracts in October the highest commercial leasing month of the disruption cycle with offices delivering the standout performance at 8,185 contracts, a 20.31% advance. The office surge reflects Q4 space commitment activity as corporate occupiers finalise their operational footprints following the mid-year disruption pause.

Retail and showroom registrations grew 6.75% to 1,978 deals, industrial leasing advanced 3.74% to 333 contracts, and the 'others' category expanded 10.14% to 6,159 leases. The uniformity of growth across all commercial subcategories the first month in the disruption cycle where every commercial leasing segment advanced simultaneously is a significant indicator of broad-based business activity normalisation across Dubai's commercial ecosystem.

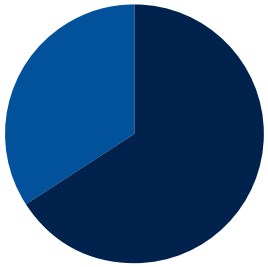
Residential Off Plan v/s Secondary Sales

Sales Volume		
	Off-Plan	6,335
	Ready	3,296

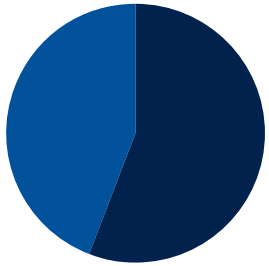
Sales Value (AED)		
	Off-Plan	13,300,000,000
	Ready	10,400,000,000

Residential Breakdown	Off Plan	Ready
Apartments	5,262	2,610
Villas	1,073	686

Residential Breakdown	Off Plan	Ready
Apartments	8,100,000,000	5,800,000,000
Villas	5,200,000,000	4,600,000,000



Off-Plan	66%
Ready	34%



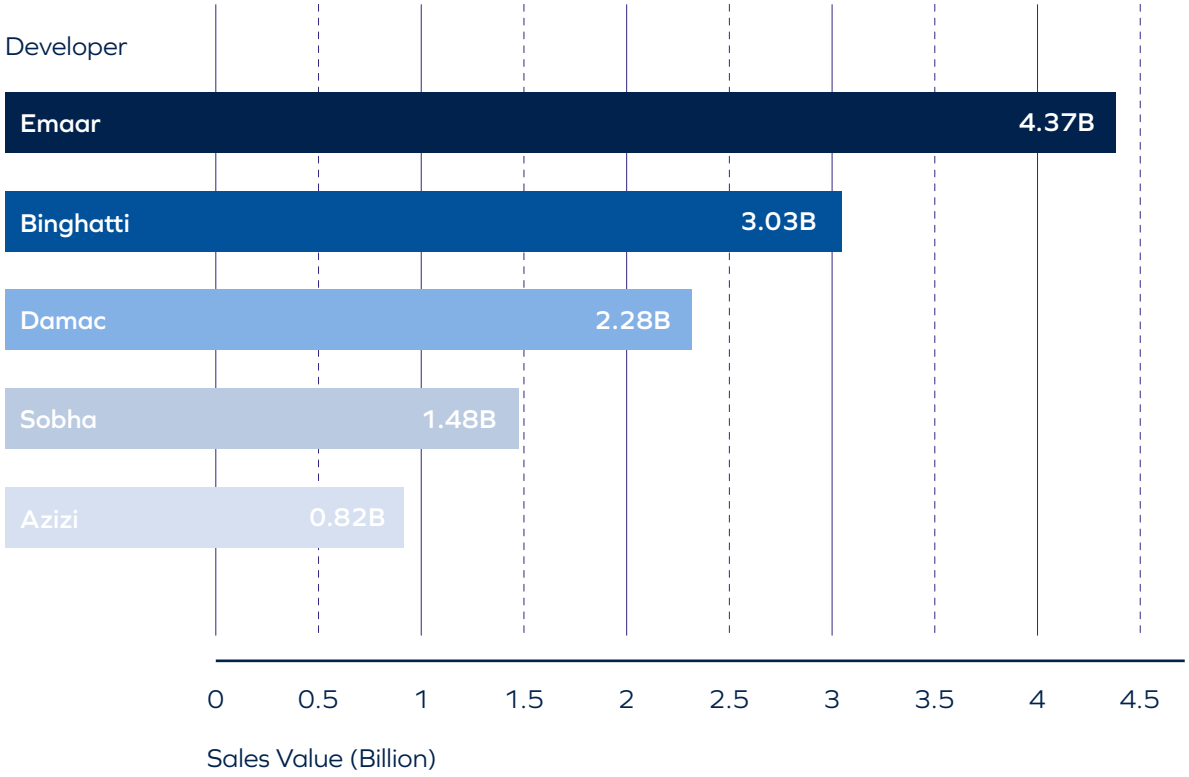
Off-Plan	56%
Ready	44%

Off-plan sales registered 6,335 residential transactions valued at AED 13.3B versus 3,296 ready sales worth AED 10.4B. Off-plan volume share eased to 65.8% its lowest of the cycle while value share fell to 56.1% as the ready market's premium for immediate occupancy compressed the off-plan value advantage to its narrowest point since the disruption began.

Average off-plan transaction values reached AED 2.097M per deal at an average price of AED 1,806.3 per sq.ft., with a variation to AED 1,813.1 in the standardised price trend series. Cash buyers maintained dominance at approximately 61.6% of residential transactions (6,756 cash versus 4,218 mortgage), though mortgage activity expanded with AED 8.6B in mortgage value sustaining the elevated engagement seen since August.

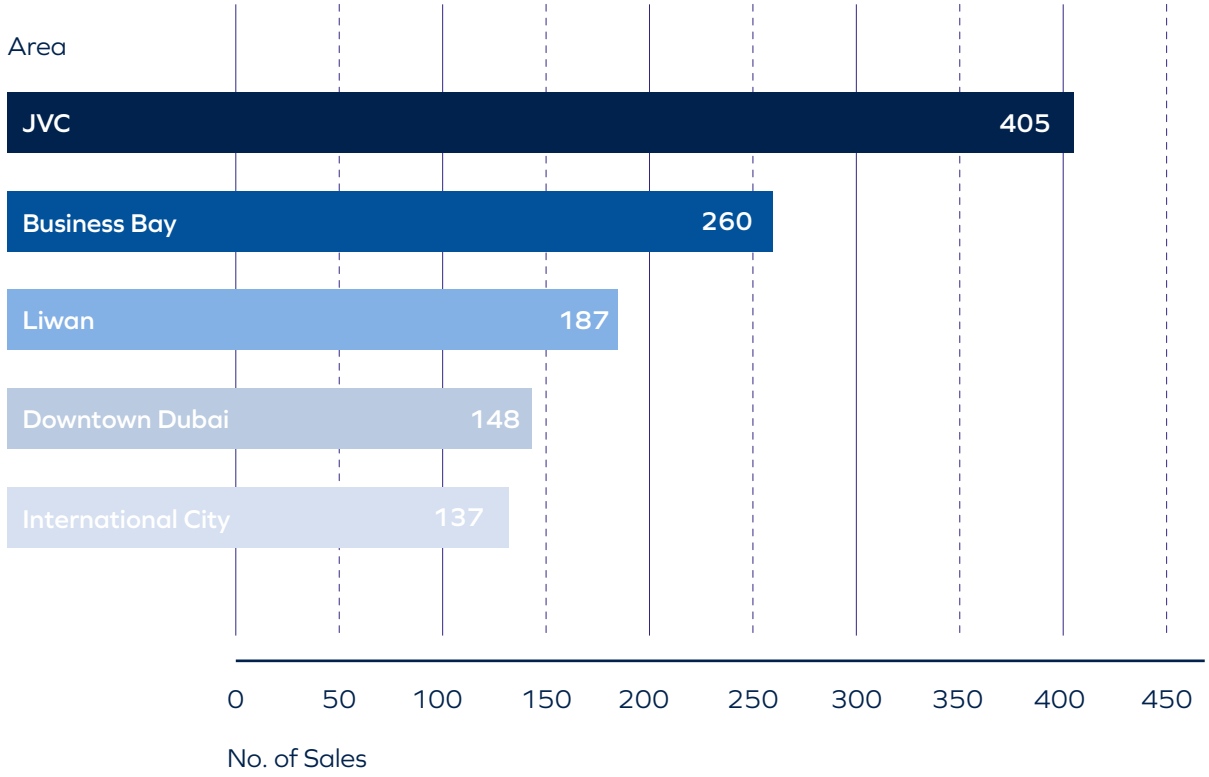
Top 5 Developers- Off Plan Sales





Top 5 Performing Areas - Secondary Sales





Residential Breakdown

Apartments led October's residential activity with 8,946 transactions totalling AED 15.7B, split between 5,262 off-plan deals (AED 8.1B) and 2,610 ready transactions (AED 5.8B). Villas registered 2,028 transactions worth AED 11.5B comprising 1,073 off-plan sales (AED 5.2B) and 686 ready transactions (AED 4.6B). The villa segment's 30.68% value surge drove villas to 32.9% of total transaction value the highest villa value share of the disruption cycle as the segment's October resurgence elevated its strategic weight within the market.

Apartments retained 82.6% of residential volume while generating 57.7% of residential value, reflecting the segment's role as the market's volume engine against the villa market's elevated average deal size. Note: the off-plan/ready villa breakdown total (1,759) differs from the sales table villa total (2,028); both sets are presented as received.



Top Performing Areas – October 2026

Off-Plan Sales

Off-plan market in October was led by Azizi Venice with 525 transactions, demonstrating sustained demand as it recovered from September's dip. JVC secured the second spot with 424 off-plan sales while simultaneously leading the secondary market with 405 deals, cementing its status as Dubai's most liquid residential community. Dubailand Residence Complex entered the top five with a cycle-high 339 transactions as buyers increasingly migrated toward affordability-positioned master plans. Tilal Binghatti also debuted in the top five at 336 transactions, reflecting strong initial absorption for the newly launched Dubailand villa community, while Jebel Ali Downtown maintained its steady demand corridor in fifth place with 330 transactions. Together, these top five communities registered 1,954 transactions, commanding 30.8% of the total off-plan volume.

Secondary Sales

In October, Dubai's secondary residential market achieved 3,296 transactions, keeping it firmly above the 3,000-deal baseline seen throughout the third quarter and accounting for a cycle-high 38.6% share of total residential volume.

Jumeirah Village Circle (JVC) led this ready-property market with a cycle-record 405 deals, driven by its high liquidity and appeal to both renters and buyers. Business Bay followed with 260 transactions, while Liwan unexpectedly took third place with 187 sales, signaling that affordable-housing capital is moving outward into non-core communities. Rounding out the top locations, Downtown Dubai recorded 148 sales and International City secured 137, altogether proving that the secondary market is building significant momentum alongside the leading off-plan sector.

New Apartment Rentals

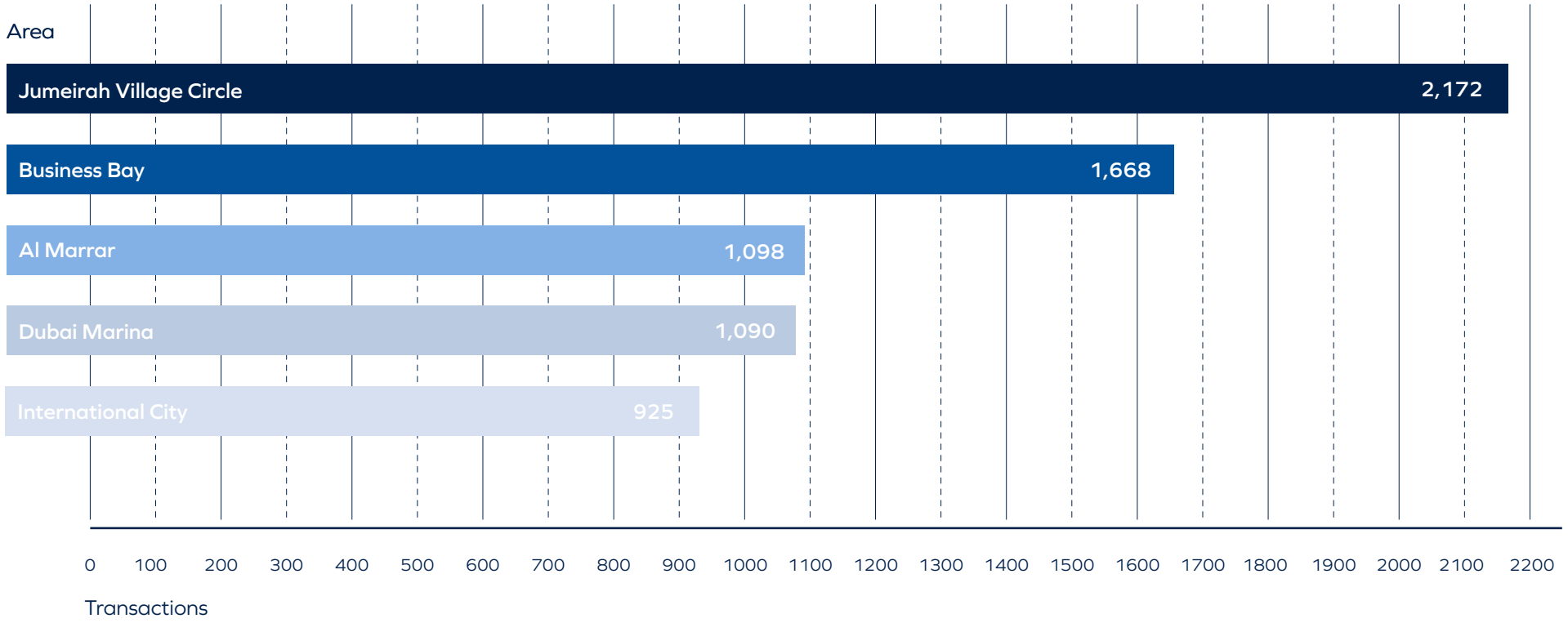
Apartment rental registrations softened modestly to 28,264 contracts in October a 2.43% easing from September's cycle-high 28,969 representing a normalisation of the extraordinary seasonal surge rather than a demand retreat. JVC extended its leadership to 2,172 new leases down from September's exceptional 2,562 but still the second-highest monthly total of the disruption cycle for the community. Business Bay delivered 1,668 contracts, Al Marrar surged to third at 1,098 leases (a new entry, reflecting demand for centrally located and price-competitive product)

Dubai Marina registered 1,090 leases, and International City contributed 925. The October top-five composition with Al Marrar displacing Downtown Dubai and Arjan, which appeared in September reflects demand diversification into value-positioned central communities as tenants balance connectivity requirements with rental cost management.

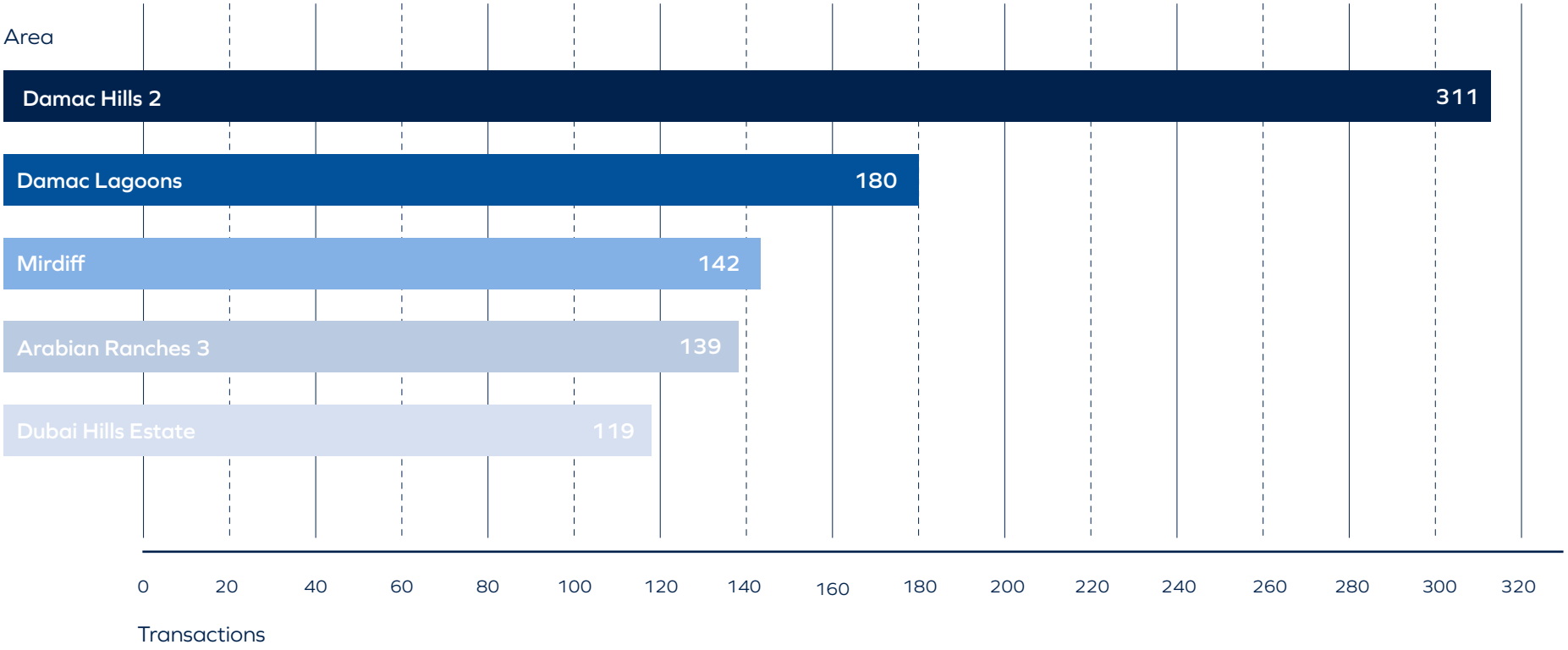
New Villa Rentals

In October, villa rental registrations moderated to 3,199 contracts, marking a 10.89% sequential decline from September's cycle high of 3,590 as the peak school-year relocation wave concluded. Damac Hills 2 led the segment with 311 new leases, while Damac Lagoons secured second place with 180 contracts, cementing its status as a top villa community within just two months of entering the top five. Mirdif followed with 142 leases, Arabian Ranches 3 logged 139, and Dubai Hills Estate rounded out the top five with 119. Despite the monthly drop in activity, the demand-supply ratio remains strong at approximately 3.7:1 against an incoming November pipeline of 857 villas, which will provide firm structural support for rental rates through the end of the year.

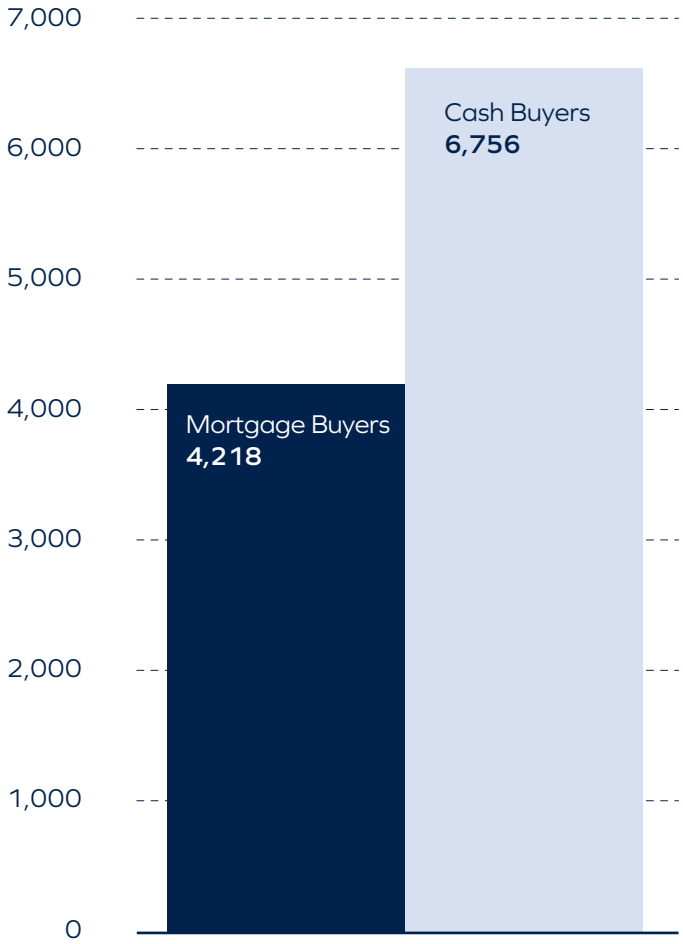
Top 5 Performing Areas - New Apartment Rentals



Top 5 Performing Areas - New Villa Rentals



Residential Mortgage Buyers v/s Cash Buyers



	Mortgage Sales	Cash Sales
Apartments	2,715	6,231
Villas	1,503	525

Mortgage Transaction Value: AED 8,600,000,000



Mortgage Buyers v/s Cash Buyers

October's mortgage data, sourced from Reidin and verified by DXB Interact, confirms the mortgage market's sustained high-engagement phase while revealing a significant structural shift in the villa segment. Total mortgage transactions reached 4,218 worth AED 8.6B near September's cycle-high AED 9.5B with mortgage market share advancing to 38.4% of residential transactions. The apartment segment registered 2,715 mortgage transactions against 6,231 cash sales, a 30.4% mortgage rate consistent with the apartment market's established financing pattern.

The villa segment's data is October's most consequential figure: 1,503 mortgage transactions alongside 525 cash villa purchases produce a 74.1% villa mortgage rate down dramatically from September's 98.9% (16 cash buyers). The return of 525 cash villa buyers in October the highest cash villa activity in any month of the post-disruption period represents the re-entry of discretionary capital into the segment and is the single most important leading indicator for villa market recovery in the data set.



Price Trends and New Supply

Dubai's residential pricing extended its post-disruption correction in October, with both off-plan and ready metrics declining from September's already-reduced levels. Off-plan rates eased to AED 1,813.1 per square foot down 0.6% from September's AED 1,824.7 and the seventh consecutive monthly decline from April's cycle peak of AED 2,085, representing a total peak-to-current correction of 13.0%. Ready property values softened to AED 1,654.1 per sq.ft. from September's AED 1,685.6 a 1.8% monthly decline that marks the first meaningful ready-price retreat after several months of relative resilience. Year-on-year, off-plan pricing sits 9.4% below October 2025's AED 2,001.5 while ready stock is 0.3% below October 2025's AED 1,659.7 the YoY ready price gap having collapsed from May's significant positive spread, indicating that the secondary market's earlier price resilience has been absorbed.

The November supply pipeline is defined by one dominant delivery: Arabian Ranches 3's Anya Phase 1 and 2, contributing 810 of the total 857 villa handovers.

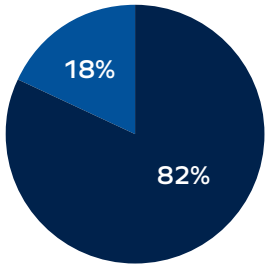
Apartment deliveries are exceptionally thin at just 184 units from three projects Lucky Royal Residence in JVC (146), Bella Vida at Dubai Science Park (47), and Luce at Palm Jumeirah (38). Against October's 48,095 total rental registrations and a villa leasing market running at 3,199 monthly contracts, the 1,041-unit combined November supply will be absorbed rapidly. The Arabian Ranches 3 delivery in particular a community that already held fourth place in October's villa rental top five at 139 contracts should find strong immediate leasing demand, limiting the downward pricing pressure that a large supply injection might otherwise generate in a thinner market environment.





Sales Price Trend (AED per sq.ft.)

2025	Off-plan	Ready	2026	Off-plan	Ready
January	1,694.3	1,609.1	**January**	**2,021.5**	**1.695.7**
February	1,782.2	1,600.7	**February**	**2,030.8**	**1,647.9**
March	1,938.0	1,651.4	**March**	**2,032.6**	**1,648.6**
April	1,903.0	1,674.8	**April**	**2,085.0**	**1,786.8**
May	1,912.1	1,656.8	**May**	**1,838.0**	**1,732.0**
June	1,914.7	1,693.7	**June**	**1,848.8**	**1,754.6**
July	2,010.9	1,611.5	**July**	**1,850.0**	**1,716.0**
August	2,024.1	1,698.3	**August**	**1,840.8**	**1,681.8**
September	2,009.0	1,613.8	**September**	**1,824.7**	**1,685.6**
October	2,001.5	1,659.7	**October**	**1,813.1**	**1,654.1**
November	2,064.5	1,669.0	**November**		
December	2,015.1	1,706.2	**December**		



October Residential Supply

Apartments	184
Villa	857

Arabian Ranches 3 (Anya 1/2)	810
JVC (Lucky Royal Residence)	146
Dubai Science Park (Bella Vida)	47
Palm Jumeirah (Luce)	38
Total	**1041**

New Launches October 2026

Developer	Project	Community	Unit Types	Starting Price	Payment Plan	Handover
Emaar	Beachgate By Address	Dubai Harbour	1–4 BR Apts	AED 10.5M	TBC	Q4 2026
Emaar	Grand Polo Club	Dubai Investment Park 2	3–5 BR Villas / Townhouses	AED 3.6M	80/20	Q2 2029
Emaar	Avarra by Palace	Business Bay	1–3 BR Apts	AED 2.7M	90/10	Q2 2031
Emaar	Creek Bay	Dubai Creek Harbour	1–3 BR Apts	AED 1.8M	80/20	Q2 2030
Emaar	Terra Woods	Expo City	1–3 BR Apts	AED 1.6M	80/20	Q1 2030
Nakheel	Chelsea Residences	Maritime City	1–3 BR Apts	AED 2.17M	60/40	Q4 2029
Beyond	Golf Gate 2	DAMAC Hills	1–3 BR Apts	AED 1.2M	60/40	Q1 2027
Beyond	Palm Central	Palm Jebel Ali	2–4 BR Apts	AED 2.7M	TBC	Q3 2030
Omniyat	Hartland II	Mohammed Bin Rashid City	Studios–3 BR	AED 1.28M	60/40	Q4 2027–2029
Sobha	Everly Place	Meydan Horizon, MBR City	1–3 BR Apts	AED 2.0M	TBC	TBC
Ellington	Etherea	JVC	Studios–2 BR	AED 765K	70/30	Q4 2027
Waslx	Boulevard Living 1 & 2	Jebel Ali	1–3 BR Apts	TBC	TBC	Q4 2029

New Launches October 2026

October's launch landscape reflects a market in which developer confidence is rebuilding selectively, with product activation spanning ultra-luxury waterfront living through to commercial offices a breadth of asset types that signals genuine recovery in developer risk appetite. Emaar continues to dominate in both scale and range, running five concurrent launches across multiple master-plan communities. Nakheel advances the Dubai Islands corridor with Bay Estate, Beyond activates a dual residential and commercial platform in Dubai Land, and Omniyat enters commercial off-plan for the first time this cycle. Sobha, Ellington, and Wasl each maintain consistent product pipelines, reflecting the depth and quality of Dubai's developer activation this month.

Emaar's October launch profile is the month's defining story: five active projects spanning Dubai Harbour's ultra-luxury waterfront Beachgate By Address, priced from AED 10.5M to affordable master-plan living at Expo City through Terra Woods at AED 1.6M, with the Grand Polo Club villa community at DIP 2 signalling renewed developer confidence in the mid-to-upper villa segment.

Emaar's 80/20 payment structure is deployed across most of its portfolio, offering buyers maximum leverage with limited upfront commitment a deliberate strategy to sustain absorption velocity while mortgage rates remain a headwind for the broader market. Across five communities and four asset sub-types, no other developer matches Emaar's October launch breadth.

Nakheel's Bay Estate on Dubai Islands marks a significant new chapter for what was formerly known as the Deira Islands master-plan corridor. Now fully established as Dubai Islands, the community is transitioning from a large-scale reclamation concept into an activated residential destination with confirmed infrastructure investment and a developing secondary market. Bay Estate's villa and townhouse product targets the buyer seeking a northern waterfront alternative to the Palm premium, positioned at pricing that reflects the corridor's emerging but strengthening market credibility. Beyond's dual activation in Dubai Land is the month's most commercially versatile launch: Yards brings townhouse product at a mid-market entry point to a master-plan market that has proven consistent off-plan absorption depth throughout the disruption cycle, while the accompanying commercial office launch targets investors seeking yield-generating assets in a month where office leasing hit its cycle high at 8,185 contracts direct demand validation for the product being launched.

Omniyat's entry into commercial off-plan properties anchored October's theme of market diversification, leveraging the developer's luxury reputation from iconic projects like The Opus, One at Palm Jumeirah, and AVA to draw institutional investors and family offices rather than standard retail buyers. Concurrently, Sobha's Hartland II maintained its status as a top off-plan performer by capitalizing on MBR City's strong infrastructure to attract both end-users and yield-seeking investors. The high-quality tier of the month's launches was finalized by Ellington's Everly Place and Wasl's Boulevard Living. Collectively, the entire month's launch register reflected a deliberate, premium-led strategy focused on asset variety and stable commercial products over high-volume, opportunistic residential developments.

Expert Insights

October 2026 delivered the clearest evidence to date that Dubai's real estate market is transitioning from stabilisation to selective recovery. Total transaction value of AED 35B the highest since April's AED 48.6B was accompanied by structural improvements that headline figures alone cannot capture: cash villa buyers returned at scale, land market confidence reached a new cycle high, commercial leasing broke records, and the YoY annual value gap narrowed to its tightest reading since before the disruption. These are not coincident metrics they collectively describe a market in which the drivers of recovery are assembling simultaneously.

The villa segment's October data warrants particular attention. The surge to 2,028 transactions and AED 11.5B in value would be notable in any context, but the financing shift transforms its significance: 525 cash villa buyers in October versus just 16 in September constitutes a 3,181% increase in a single month. This is not a statistical rounding effect it is the return of discretionary investment capital to the villa market, the buyer cohort whose absence through Q2–Q3 has been the single largest suppressor of luxury segment activity.

When international high-net-worth buyers re-engage after extended absence as they appear to have begun doing in October their participation compresses the market's time to recovery for the villa segment materially. The villa mortgage rate easing from 98.9% to 74.1%, while still elevated, marks the beginning of a compositional normalisation that should continue through Q4 if regional conditions permit.

The land market's 105.3% volume surge to 427 transactions is the other critical leading indicator. Developer land acquisition at this pace combined with the institutional average deal size of approximately AED 12.9M signals that masterplan developers are building their 2027 and 2028 project pipelines actively. The consequence for the off-plan market is a meaningful expansion of launch product through H1 2027, which, if absorbed well, would validate the underlying demand depth that the leasing market has been signalling for the past four months. The real estate market is undergoing an active pricing correction, with off-plan averages falling for a seventh straight month to AED 1,813.1 per sq.ft. and ready stock softening to AED 1,654.1.

This decline marks a significant 13.0% correction from April's peak for off-plan properties, essentially resetting the sharp price appreciation seen in the first quarter of 2026 due to earlier demand disruptions and highly competitive new launch pricing. Encouragingly, these downward adjustments are happening against a strong backdrop of record-high leasing volumes, near-peak mortgage lending values, and returning cash buyers. This resilient demand foundation, paired with an exceptionally tight incoming November apartment supply of only 184 units, is expected to stabilize the ready market and halt further price deterioration through the end of the year.

Dubai's commercial leasing hit a record 16,655 contracts, led by a cycle-high 8,185 office leases. Since commercial leasing serves as a leading indicator of business expansion 3 to 6 months ahead of residential demand, this October surge points to a powerful pipeline building for Q1 2027. This record performance signals strong structural economic health and positions Q4 2026 as the decisive inflection point the market has been building toward since July.



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