

A photograph of the Dubai skyline at dusk, featuring numerous skyscrapers with illuminated windows. In the foreground, a person wearing a white cap and a light blue shirt is blurred, walking across the frame. The text "Dubai Residential" is overlaid in a large, white, serif font.

Dubai Residential

Market Review | September 2026

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

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General Market

September 2026 delivered a market in which value and volume moved in opposite directions total transaction value rose 3.5% to AED 29.8B while volume declined 6.1% to 11,341 deals, a divergence driven primarily by the plots segment's 85.0% value surge to AED 3.7B.

Year-on-year, the market recorded 45.5% below September 2025's AED 54.7B in value and 44.3 % below the year-ago volume of 20,360 transactions among the widest annual gaps of the disruption cycle, partly reflecting September 2025's exceptional baseline. Year-to-date 2026 cumulative value stands at AED 383.3B against 2025's equivalent AED 499.5B, a 23.3% shortfall.

Against these challenging headline metrics, September delivered three structural positives of significant forward importance: the leasing market surged 13.0% to a new cycle high of 47,137 contracts as Dubai's back-to-business season drove exceptional occupier demand; mortgage activity reached AED 9.5B the highest value of the cycle confirming sustained banking sector engagement; and the off-plan market showed meaningful geographic rebalancing as Azizi Venice's dominance moderated and Majan and Jebel Ali Downtown jointly led the segment.

Apartments

Apartment transactions eased to 9,133 sales worth AED 15.1B in September a 9.6% volume decline and 5.6% value contraction from August's 10,100 deals and AED 16.0B. Off-plan apartments led with 6,544 transactions valued at AED 10.3B, while ready stock contributed 2,589 deals worth AED 4.7B. Azizi Venice's decline to third position at 454 off-plan sales down from 1,481 in August marks a significant shift in off-plan market structure, with Majan (492) and Jebel Ali Downtown (491) assuming joint market leadership for the first time in the current cycle. Off-plan pricing eased to AED 1,824.7 per sq.ft. the first reading below the AED 1,838 floor level that held through May–August signalling that the pricing base is still being tested rather than firmly established. The apartment leasing market recorded its strongest month of the cycle at 28,969 new contracts as September's back-to-business demand surge came through emphatically.

Villas and Townhouses

The villa segment continued its positive trajectory in September with 1,460 transactions generating AED 8.8B a 5.0% volume increase and 2.3% value gain from August, representing a fourth consecutive month of value growth.

The most extraordinary feature of September's villa data was the financing composition: mortgage buyers accounted for 98.9% of all villa transactions (1,444 versus just 16 cash), confirmed by Reidin data and verified by DXB Interact the most extreme cash-buyer withdrawal recorded in the current cycle and a figure that underscores the near-complete exit of discretionary international investor capital from the segment. A notable structural shift also occurred in the channel mix: ready villa transactions (719 units, AED 4.9B) generated higher value than off-plan (784 units, AED 4.1B) the first instance of ready channel value dominance in the villa segment during the disruption cycle indicating that immediate occupancy premium is accruing to established community assets over future-delivery product.





Commercial

Commercial property produced a flat value result in September despite a significant volume recovery, a 540 transactions generating AED 2.2B a 27.1% volume increase from August's 425 deals at an unchanged value. Average commercial deal size contracted AED 4.07M from August's AED 5.18M, continuing the oscillation in deal quality that has characterised commercial activity since the disruption began. Commercial leasing provided a more constructive reading, with office registrations recovering 10.1% to 6,803 contracts after August's 5.9% decline and July's sharp 23.9% drop the second consecutive month of deceleration in the office correction and a potentially early signal of leasing demand stabilisation. Industrial leasing advanced 11.5% to 321 contracts, reflecting continued logistics activity in the Jebel Ali corridor.

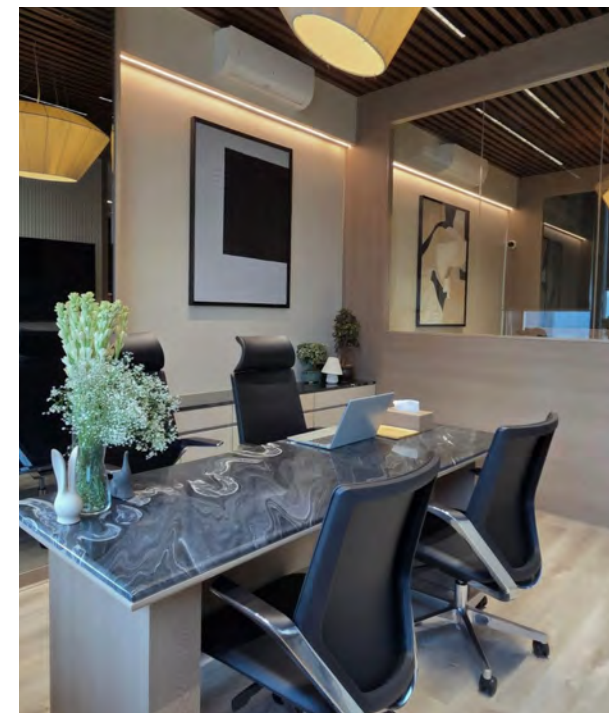
Land

Land transactions staged a broad-based recovery in September, with 208 deals registering AED 3.7B a 25.3% volume increase and 85.0% value surge from August's 166 transactions and AED 2.0B. The rebound follows August's post-July normalisation and confirms that the land market is operating in a sustained AED 2.0–3.7B monthly range rather than reverting to the ultra-low levels of Q2. Jebel Ali Downtown's continued off-plan strength at 491 transactions suggests that developer land acquisition in the corridor over recent months is translating directly and consistently into active project launches, providing progressive confirmation of the area's structural demand thesis.

Off-Plan

Off-plan sales registered 7,328 residential transactions valued at AED 14.4B in September a 10.9% volume decline from August's 8,223 deals and a 10.6% value reduction. The segment's volume share eased to 68.9% of residential transactions as the ready market continued gaining ground, with value share at 60.0% the lowest off-plan value dominance of the cycle as ready product commanded an increasing premium.

Average off-plan transaction values held near August's level at AED 1.968M per deal, though average price per sq.ft. slipped to AED 1,824.7 breaking the AED 1,838 floor that had held since May and representing a new trough in off-plan pricing. The segment's geographic rebalancing is the month's most positive structural development: Azizi Venice's retreat to third position allows a more diversified leadership from Majan, Jebel Ali Downtown, JVC, and City of Arabia.



Rental Transactions

Dubai's leasing market delivered its most impressive monthly performance of the cycle in September, with 47,137 new rental contracts a 13.0% surge from August's 41,703 and a new cycle high by a substantial margin. Apartment leases surged 17.4% to 28,969 contracts a figure approaching pre-disruption monthly benchmarks driven by the full return of Dubai's corporate and family population from summer. Villa rentals advanced 13.9% to 3,590 contracts as school year household relocations completed, and commercial leasing rose 5.1% to 14,578 contracts as business occupiers activated deferred decisions across all subcategories. The September leasing surge is partly attributable to the seasonal back-to-business effect, but the magnitude 47,137 contracts versus June 2025's equivalent period confirms that Dubai's demand base is actively growing in real population and business formation terms, not merely recovering seasonally.

Commercial Leasing Breakdown

Commercial leasing registered 14,569 new contracts in September, advancing broadly across three of four subcategories.



Office leases recovered 10.1% to 6,803 contracts after two months of decline, providing initial evidence that the corporate occupier correction may be finding its floor. Retail and showroom registrations rose 13.4% to 1,853 deals as consumer-facing businesses activated Q4 positioning. Industrial leasing advanced 11.5% to 321 contracts.

The 'others' category eased modestly 3.3% to 5,592 leases a minor pullback from August's elevated level but still representing 38.4% of commercial leasing, confirming the structural shift toward flexible workspace and accommodation formats that has emerged through the disruption cycle.

Apartments

The apartment segment registered 9,133 transactions totalling AED 15.1B in September, as off-plan accounting for 71.7% of volume at 6,544 deals, AED 10.3B) and ready contributing 2,589 units at AED 4.7B. The ready apartment market's sustained above 25% volume share 26.5% in August and 28.3% in September marks a structural expansion of the secondary channel as cumulative handover deliveries deepen the available stock base. Off-plan pricing eased to AED 1,824.7 per sq.ft., the first reading below the May-August AED 1,838-1,850 range, while ready stock edged up to AED 1,685.6 from August's AED 1,681.8 a divergence that confirms the secondary market is finding pricing support while new-launch product adjusts to demand conditions. Majan led the off-plan chart at 492 transactions returning to leadership after a multi-month absence followed by Jebel Ali Downtown (491), Azizi Venice (454), JVC (429), and City of Arabia (331). JVC maintained its secondary market dominance at 360 transactions, with Business Bay (222) and Dubai Marina (144) sustaining their positions.

Villa & Townhouses

Villa transactions advanced to 1,460 deals a worth of AED 8.8B in September, with the channel value composition inverting for the first time in the cycle:

ready transactions (719 units, AED 4.9B) surpassed off-plan (784 units, AED 4.1B) in value terms, with average ready villa values of approximately AED 6.81M per deal vs AED 5.23M for off-plan. This premium for immediate occupancy reflects sustained demand for established, deliverable villa product in quality communities. The financing data, sourced from Reidin and verified by DXB Interact, shows 1,444 mortgage transactions versus just 16 cash villa sales a 98.9% mortgage rate that represents the most extreme cash-buyer absence recorded in any residential segment during the current cycle. Damac Hills 2 led villa leasing at 332 contracts, with Damac Lagoons rising to second at 194 consolidating its emergence as a premium rental destination followed by Arabian Ranches 3 (192), Mirdiff (163), and Dubai Hills Estate (149). Note: a minor 43-unit discrepancy exists between villa transactions in the sales table (1,460) and the sum of off-plan/ready villa figures (1,503); both sets of figures are presented as received.

Commercial Properties

Commercial sales registered 540 transactions worth AED 2.2B in September volume up 27.1% from August's 425 deals but value flat at AED 2.2B, leaving average deal size at AED 4.07M vs August's AED 5.18M.

The month-on-month oscillation in average commercial deal size between AED 3.60M in July, AED 5.18M in August, and AED 4.07M in September suggests the institutional commercial market is characterised by sporadic larger transactions against a backdrop of sustained smaller-ticket activity. The positive development is that commercial volume has now remained above 400 transactions for four consecutive months a baseline that was not achieved through Q2 providing evidence of improving transactional depth even if value metrics remain volatile.

Land Plots

Land transactions rebounded to 208 deals totaling AED 3.7B in September, marking a 25.3% volume and 85% value surge from August. This recovery brings plot activity back to its typical AED 3.0-4.0B monthly range. Developer activity remains concentrated near Jebel Ali, where sustained off-plan leadership indicates that recent land acquisitions are successfully feeding the current launch pipeline. Developer focus is now progressively shifting away from new site acquisitions and toward project activation and sales preparation. This transition comes as the upcoming October supply pipeline prepares to introduce 1,337 apartments and 479 villas to the market.

Sales Transactions

Month on Month | August 2026 - September 2026

	Aug Transactions	Aug Value (AED)	Sep Transactions	Sep Value (AED)	Value Change %
Apartments	10,100	16,000,000,000	9,133	15,100,000,000	-5.63%
Villas	1,391	8,600,000,000	1,460	8,800,000,000	2.33%
Commercial	425	2,200,000,000	540	2,200,000,000	-----
Plots	166	2,000,000,000	208	3,700,000,000	85.00%
Total	12,082	28,800,000,000	11,341	29,800,000,000	3.47%

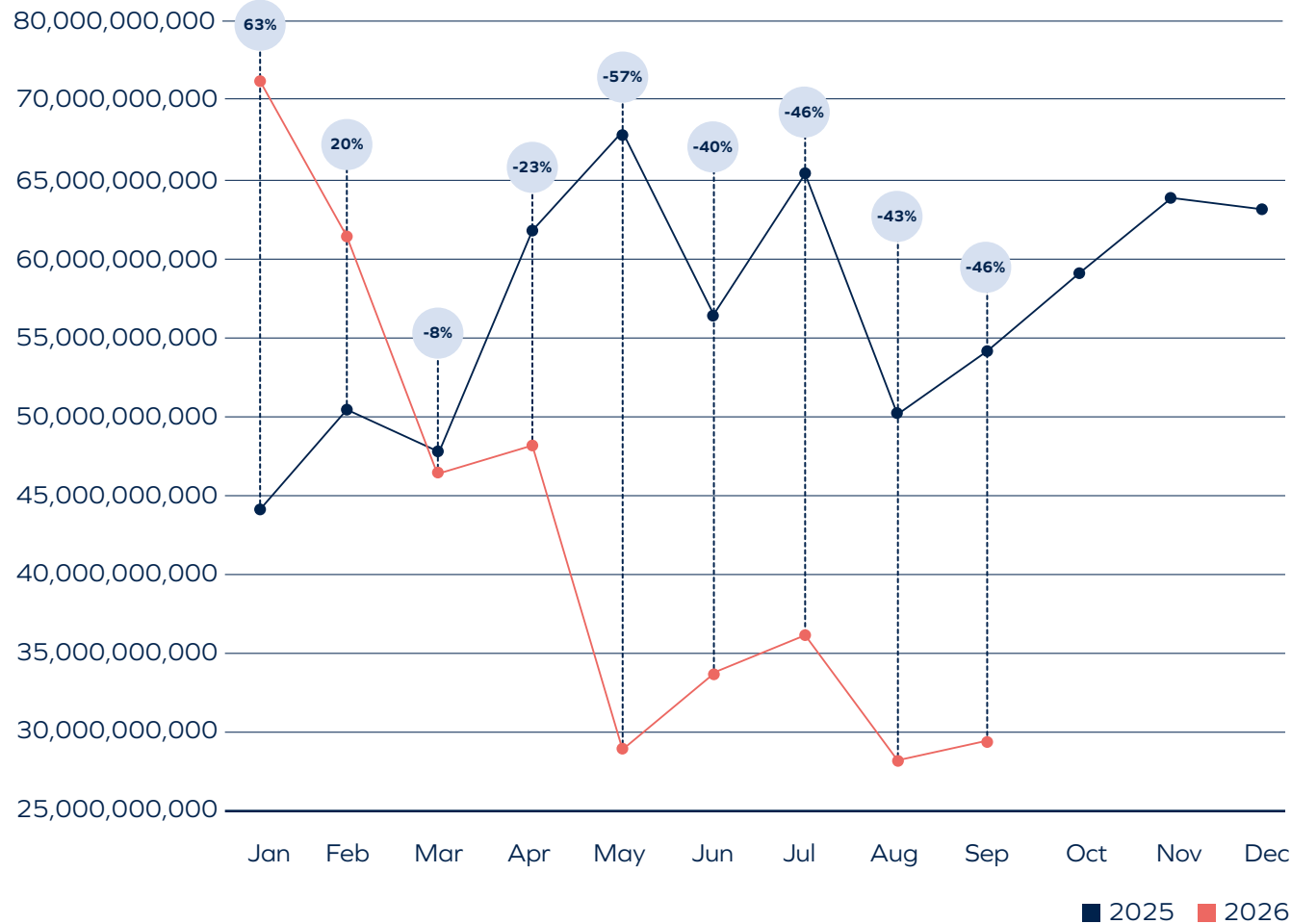


Transactions Value - Graph

2025 v/s 2026



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September 2026 recorded AED 29.8B in total transaction value, a 3.5% increase from August's AED 28.8B but 45.5% below September 2025's AED 54.7B. The modest monthly improvement was driven by the plots segment's AED 1.7B value recovery, with residential and commercial values broadly unchanged. Year-to-date 2026 cumulative value stands at AED 383.3B trailing 2025's equivalent AED 499.5B by 23.3%, a shortfall that reflects the concentrated disruption of Q2 against 2025's strong comparative baseline.

The value range of AED 28.8–35.4B across May through September signals a market that has stabilised but not yet found a catalyst for meaningful upside acceleration.

Transactions Value

2025 v/s 2026



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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	
November	64,800,000,000	November	
December	63,400,000,000	December	

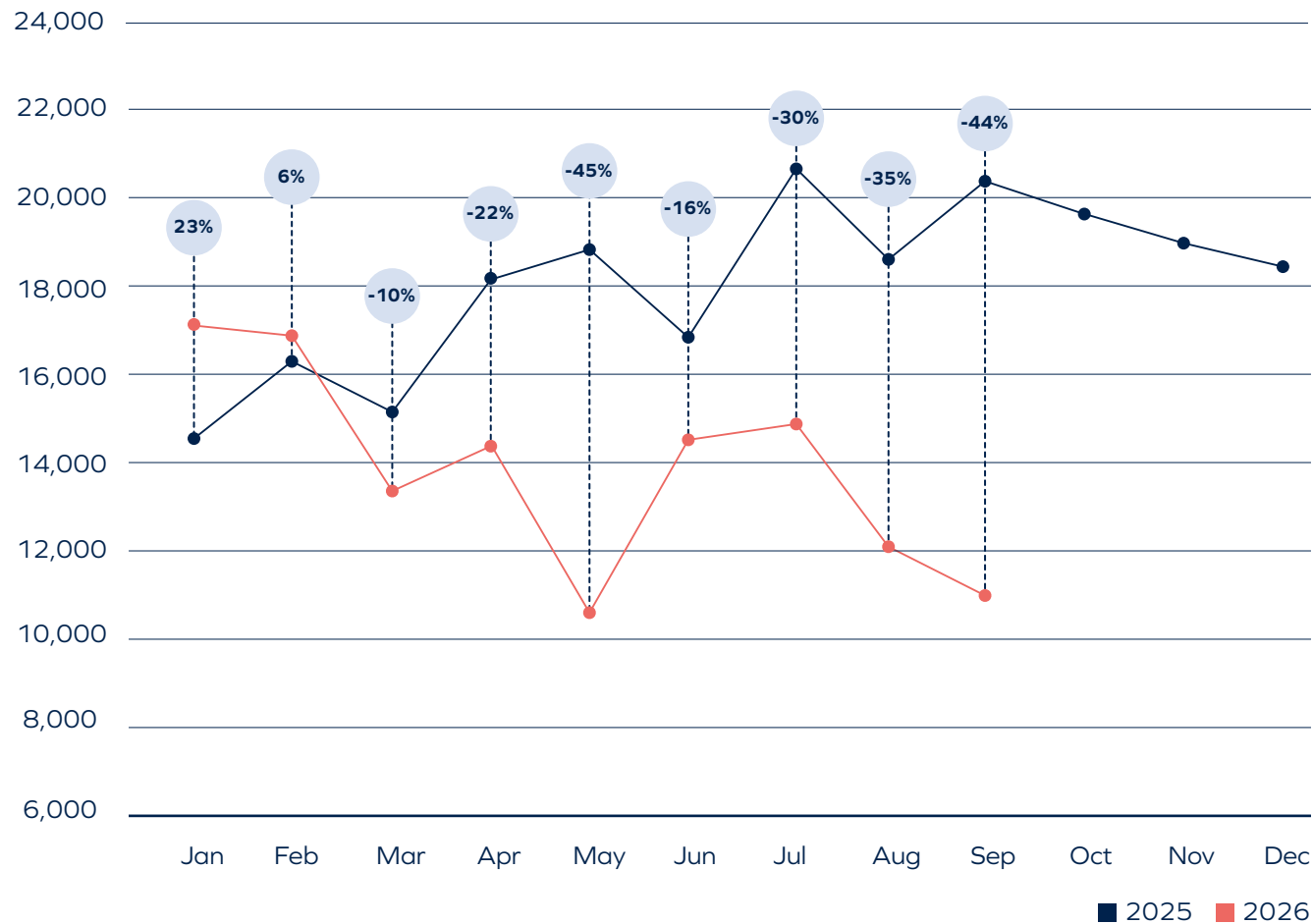


Transactions Volume - Graph

2025 v/s 2026



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Dubai registered 11,341 property transactions in September 2026, down at 6.1% from August's 12,082 deals and 44.3% below September 2025's 20,360 transactions one of the widest year-on-year volume gaps of the cycle, reflecting September 2025's exceptionally strong baseline of 20,360 transactions.

Year-to-date 2026 transaction volume stands at 124,339 against 2025's equivalent 158,184 a 21.4% shortfall concentrated in the Q2 disruption period. The market's monthly volume has now oscillated in an 11,000-14,300 range for five consecutive months, suggesting a structural stabilisation of activity at a level approximately 25-30% below the prior year's run rate.

Transactions Volume

2025 v/s 2026

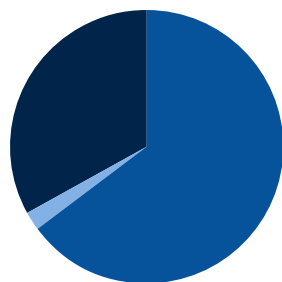


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2025	Volume	2026	Volume
January	14,247	January	17,477
February	16,106	February	17,120
March	15,150	March	13,565
April	18,044	April	14,086
May	18,697	May	10,301
June	16,765	June	14,104
July	20,322	July	14,263
August	18,493	August	12,082
September	20,360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



New Rental Transactions



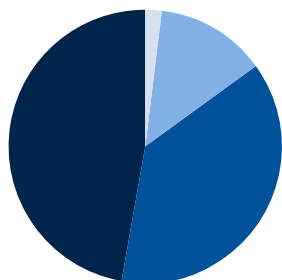
■ Apartments	61%
■ Villas	8%
■ Commercial	31%

	Aug	Sep	Volume Change %
Apartments	24,685	28,969	17.35%
Villas	3,151	3,590	13.93%
Commercial	13,867	14,578	5.13%
Total	41,703	47,137	13.03%

Leasing surged to 47,137 new contracts in September a 13.0% jump from August's 41,703 and the highest monthly total of the disruption cycle by a significant margin. Apartment leases reached 28,969 contracts, a 17.4% increase and a level approaching pre-disruption monthly volumes, as Dubai's corporate workforce and family population fully returned from summer.

Villa rentals advanced 13.9% to 3,590 contracts, and commercial leasing rose 5.1% to 14,578. The September leasing surge is the cycle's most compelling demand validation: across every segment and subcategory, occupier demand is not only recovering but expanding, demonstrating that Dubai's fundamental appeal as a business and residential hub is intact and actively generating real population and corporate growth.

Commercial Rental Breakdown



Shops/Showroom	13%
Office	47%
Industrial	2%
Others	38%

	Aug	Sep	Volume Change %
Shops/Showroom	1,634	1,853	13.40%
Office	6,179	6,803	10.10%
Industrial	288	321	11.46%
Others	5,783	5,592	-3.30%
Total	13,884	14,569	4.93%

Commercial leasing registered 14,569 new contracts in September, recovering broadly after August's seasonal softness. Office leases rebounded 10.1% to 6,803 contracts the first meaningful positive office leasing data point after contractions in July (-23.9%) and August (-5.9%) suggesting the corporate occupier base may be finding a new equilibrium following its post-catch-up normalisation.

Retail and showroom registrations advanced 13.4% to 1,853 deals as Q4 retail positioning began, and industrial leasing rose 11.5% to 321 contracts. The 'others' category eased 3.3% to 5,592 leases but remains structurally elevated, representing 38.4% of commercial leasing and confirming that flexible workspace adoption is a lasting feature of Dubai's commercial occupier landscape rather than a transitional disruption response.

Residential Off Plan v/s Secondary Sales



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Sales Volume	Off-Plan	7,328
	Ready	3,308

Sales Value (AED)	Off-Plan	14,400,000,000
	Ready	9,600,000,000

Residential Breakdown	Off Plan	Ready
Apartments	6,544	2,589
Villas	784	719

Residential Breakdown	Off Plan	Ready
Apartments	10,300,000,000	4,700,000,000
Villas	4,100,000,000	4,900,000,000



Off-plan sales registered 7,328 residential transactions valued at AED 14.4B vs 3,308 ready sales worth = AED 9.6B. Off-plan volume share eased to 68.9% its lowest of the cycle while value share fell to 60.0% as the ready market commanded an increasing premium, particularly in the villa segment where ready product generated AED 4.9B against off-plan's AED 4.1B.

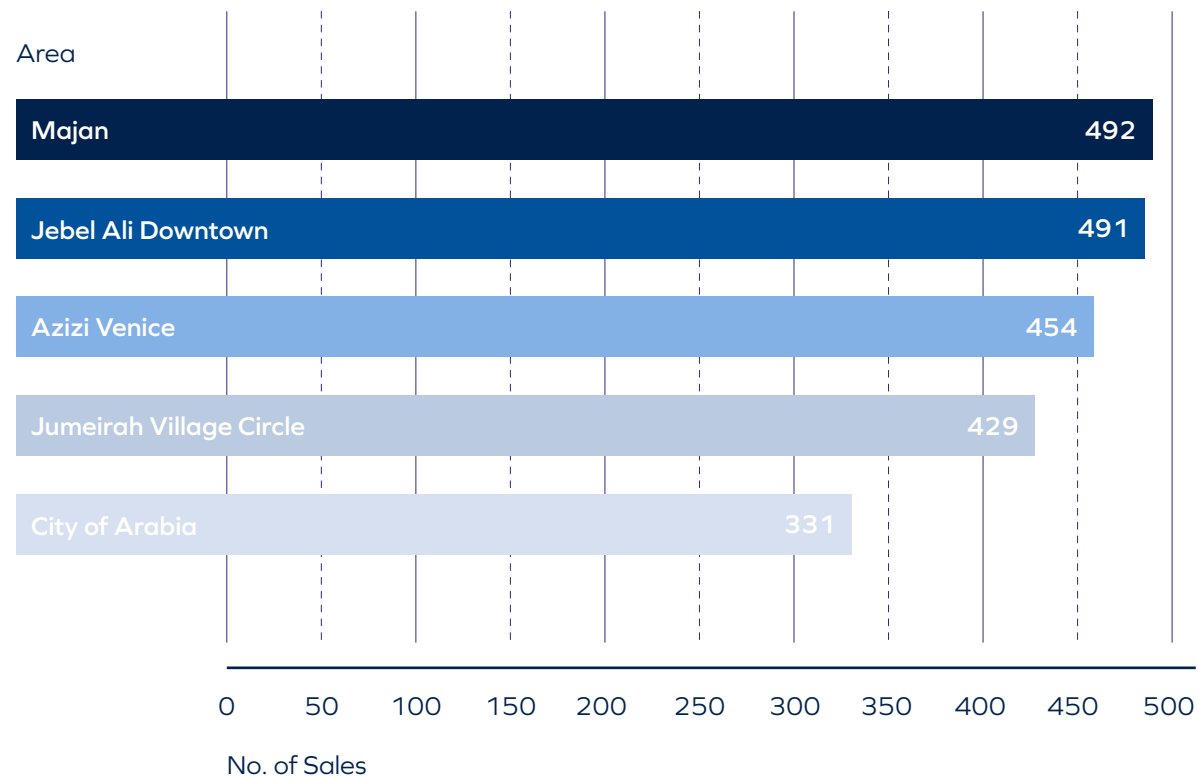


Average off-plan transaction values held near August's level at AED 1.968M per deal. Cash buyers declined to 63.% of residential transactions (6,730 cash versus 3,863 mortgage) as the mortgage market's share advanced to 36.5% the highest mortgage penetration of the current cycle with mortgage value reaching AED 9.5B (sourced from Reidin data, verified by DXB Interact) and average loan size at approximately AED 2.46M.

Top 5 Performing Areas - Off Plan Sales



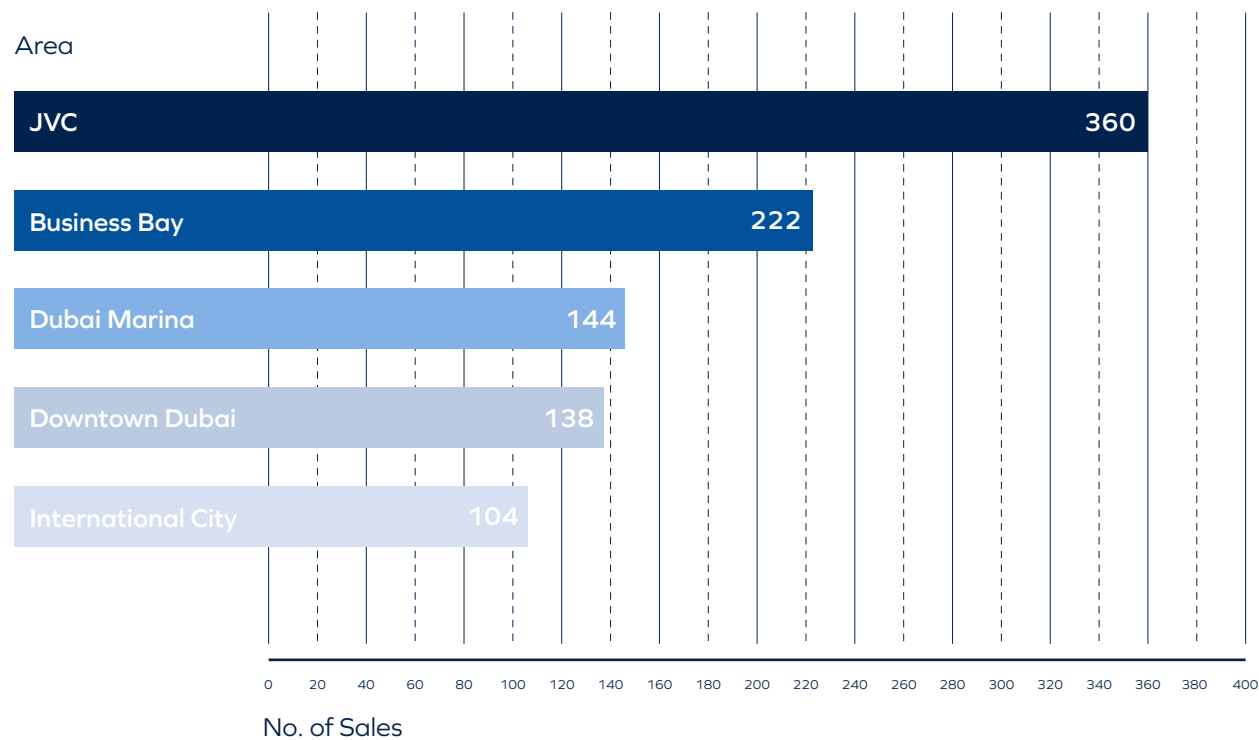
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Top 5 Performing Areas - Secondary Sales



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Residential Breakdown



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Apartments led September's residential activity with 9,133 transactions totalling AED 15.1B, split between 6,544 off-plan deals at AED 10.3B and 2,589 ready transactions at AED 4.7B.

Villas registered 1,460 transactions worth AED 8.8B, comprising 784 off-plan sales at AED 4.1B and 719 ready transactions at AED 4.9B). The villa segment's value inversion ready exceeding off-plan for the first time in the cycle reflects both the immediate occupancy premium in established communities and the relatively lower pricing of new off-plan launches in emerging corridors.

Apartments accounted for 86.2% of residential volume, while villas generated 36.8% of residential value a disproportionate value contribution reflecting persistently elevated average villa transaction sizes.

Note: a minor 43-unit discrepancy between the villa total in the sales transactions table at 1,460 and the sum of the residential breakdown at 1,503 is noted, and both figures are presented as received.



Top Performing Areas – September 2026



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Off-Plan Sales

September's off-plan market registered a significant structural shift as a more geographically distributed leadership emerged, moving away from the single-project dominance of previous months. Majan claimed the top spot with 492 transactions, closely followed by Jebel Ali Downtown at 491 transactions marking its fourth consecutive month in the top five and cementing its status as an established demand center. Meanwhile, Azizi Venice eased to third place with 454 sales, returning to normalized absorption levels after an August peak of 1,481 sales that had previously distorted headline data. JVC followed with 429 off-plan transactions (alongside 360 secondary sales), and City of Arabia rounded out the top five at 331. Together, the top five accounted for 2,197 transactions, representing 30% of total off-plan volume and signaling healthier market breadth.

Secondary Sales

The ready market registered 3,308 residential transactions in September, remaining stable and confirming a secondary market floor above 3,000 monthly deals. JVC maintained decisive leadership at 360 transactions, cementing its status as Dubai's most liquid secondary community across rental and resale channels.

Business Bay followed with 222 deals, while Dubai Marina and Downtown Dubai contributed 144 and 138 transactions respectively. Driven by affordability, International City re-entered the top five with 104 deals, displacing Dubai Hills Estate and highlighting the steady demand sustaining the market's budget segment.

New Apartment Rentals

Apartment rental registrations hit a new cycle high of 28,969 contracts in September, providing clear evidence of Dubai's deep residential demand. JVC extended its market leadership to 2,562 new leases a 17.2% surge from August as the community absorbed the bulk of mid-market tenant demand.

Business Bay delivered an exceptional 1,889 contracts, marking a 49% increase driven by corporate demand returning after the summer. Dubai Marina contributed 1,238 leases, Downtown Dubai surpassed the 1,000-lease threshold at 1,055 contracts, and Arjan held strong at 877 leases. This uniform growth across all top communities confirms a genuine, market-wide demand surge rather than isolated area trends.

New Villa Rentals

Villa rental registrations advanced 13.9% to a new cycle high of 3,590 contracts in September, driven by school-year family relocations and accelerating household formation. Damac Hills 2 retained its market leadership with 332 new leases, while Damac Lagoons climbed to second place with a record 194 contracts, cementing its status as a premier villa rental destination.

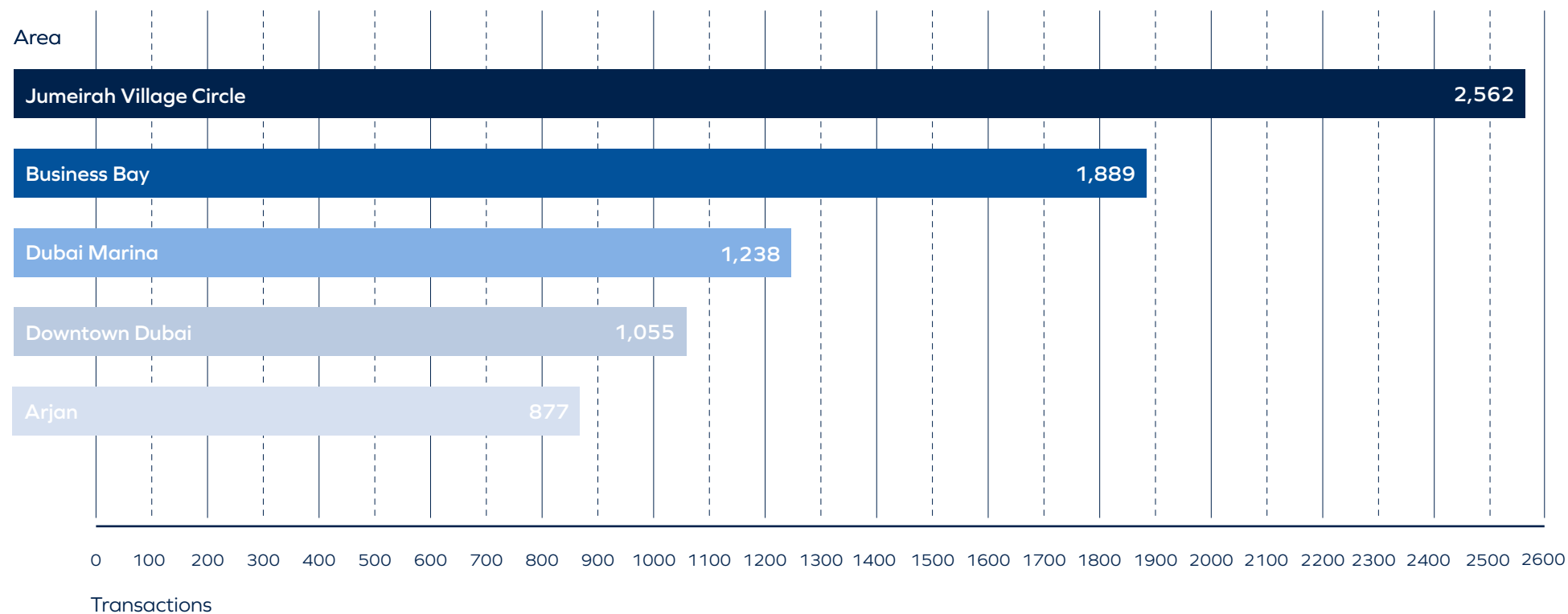
Rounding out the top five, Arabian Ranches 3 contributed 192 leases, followed by Mirdif at 163, and Dubai Hills Estate at 149. With October's incoming supply adding just 479 villa units against nearly 3,600 monthly leases, the resulting 7.5:1 demand-supply ratio remains one of the tightest of this cycle, providing strong structural support for both rental rates and property values.



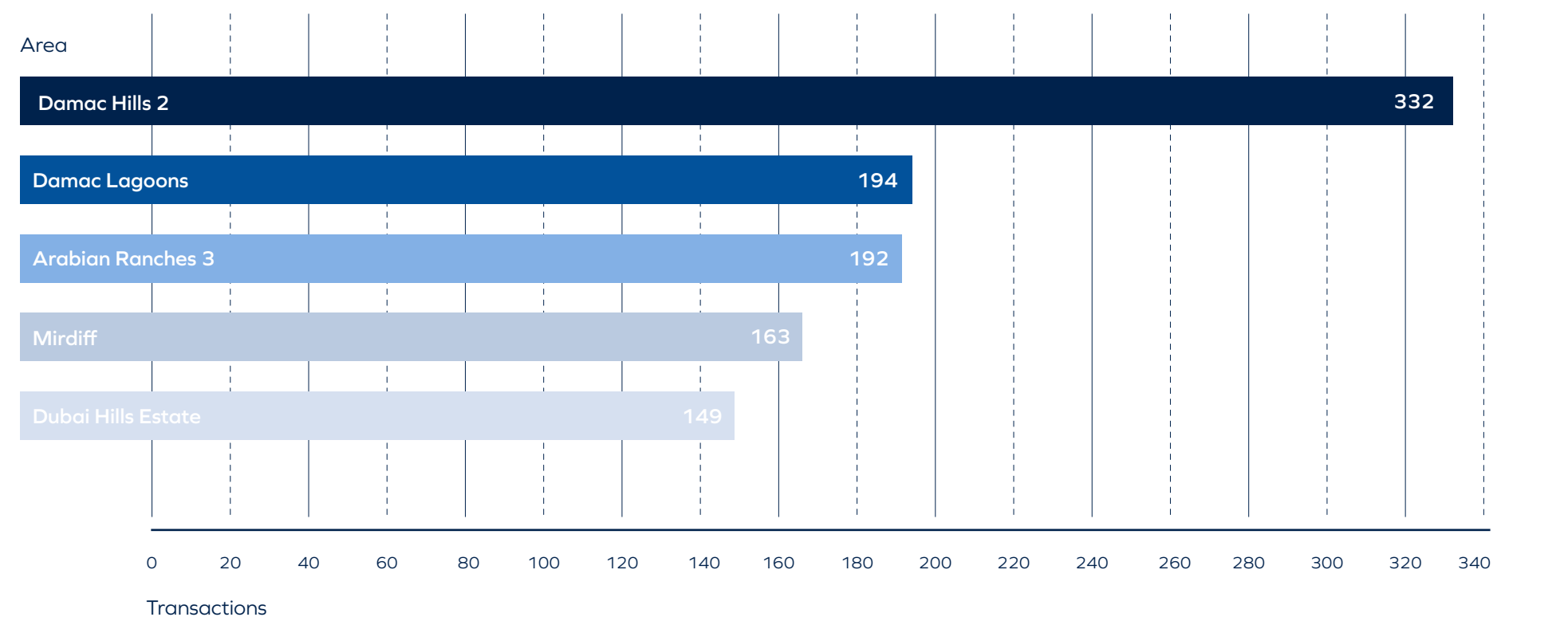
Top 5 Performing Areas - New Apartment Rentals



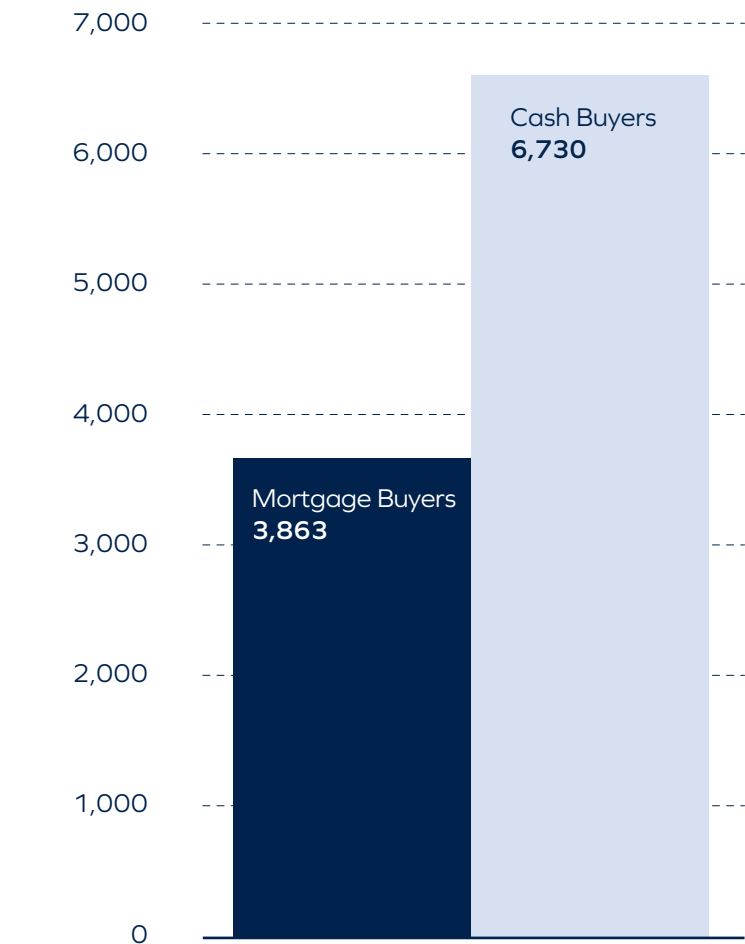
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Top 5 Performing Areas - New Villa Rentals



Residential Mortgage Buyers v/s Cash Buyers



	Mortgage Sales	Cash Sales
Apartments	2,419	6,714
Villas	1,444	16

Mortgage Transaction Value: AED 9,500,000,000



Mortgage Buyers v/s Cash Buyers



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The September mortgage data, sourced from Reidin and verified by DXB Interact, reveals a market in which financing activity reached new cycle highs across every metric. Total mortgage transactions rose to 3,863 worth AED 9.5B the highest mortgage value of the current cycle with average loan size advancing to approximately AED 2.46M from August's AED 2.11M. The cash-buyer share declined to 63.5% of residential purchases (6,730 versus 3,863 mortgage), with mortgage market share reaching 36.5% its highest level of the cycle.

The villa segment's financing data is the most striking element: 1,444 mortgage transactions versus just 16 cash villa sales constitutes a 98.9% mortgage rate effectively the complete withdrawal of cash villa investors from the market. Apartments maintained a more balanced 26.5% mortgage share (2,419 mortgage versus 6,714 cash). The sustained mortgage market recovery to AED 9.5B confirms that banking sector confidence in residential fundamentals is now firmly established across all market conditions, including the seasonal softness of the summer period.



Price Trends and New Supply



Dubai's residential market showed a split performance in September. Off-plan rates eased 0.9% to AED 1,824.7 per sq.ft., falling below the summer stabilization floor to hit a new post-disruption low. Conversely, ready property values edged up 0.2% to AED 1,685.6 per sq.ft., confirming steady secondary market support as new launches price competitively to drive absorption. Year-on-year, off-plan pricing is down 9.2% compared to September 2025 (AED 2,009), while ready stock is up 4.5% (AED 1,613.8), marking five consecutive months of secondary market outperformance. Looking ahead, the incoming October supply pipeline will step up to 1,337 apartments and 479 villas. Although apartment volumes are elevated compared to recent months, the leasing market's record surge to 28,969 monthly apartment contracts provides a robust demand cushion, allowing the market to absorb new secondary inventory without significant pricing disruptions.

The villa supply of 479 units, while higher than recent months, remains well below the 3,590 monthly villa leases being registered a demand-supply ratio that should continue to underpin villa rental rates and provide pricing support through Q4.

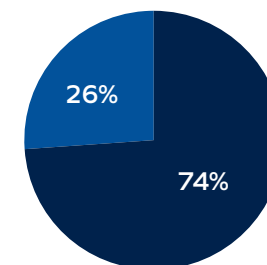


Sales Price Trend (AED per sq.ft.)



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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		
November	2,064.5	1,669.0	November		
December	2,015.1	1,706.2	December		



October Residential Supply

■ Apartments	1,337
■ Villa	479

New Launches October 2026



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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
DAMAC	Chelsea Residences	Maritime City	1-3 BR Apts	AED 2.17M	60/40	Q4 2029
DAMAC	Golf Gate 2	DAMAC Hills	1-3 BR Apts	AED 1.2M	60/40	Q1 2027
Nakheel	Palm Central	Palm Jebel Ali	2-4 BR Apts	AED 2.7M	TBC	Q3 2030
Sobha	Hartland II	Mohammed Bin Rashid City	Studios-3 BR	AED 1.28M	60/40	Q4 2027-2029
Ellington	Everly Place	Meydan Horizon, MBR City	1-3 BR Apts	AED 2.0M	TBC	TBC
Binghatti	Etherea	JVC	Studios-2 BR	AED 765K	70/30	Q4 2027
Wasl	Boulevard Living 1 & 2	Jebel Ali	1-3 BR Apts	TBC	TBC	Q4 2029

New Launches October 2026



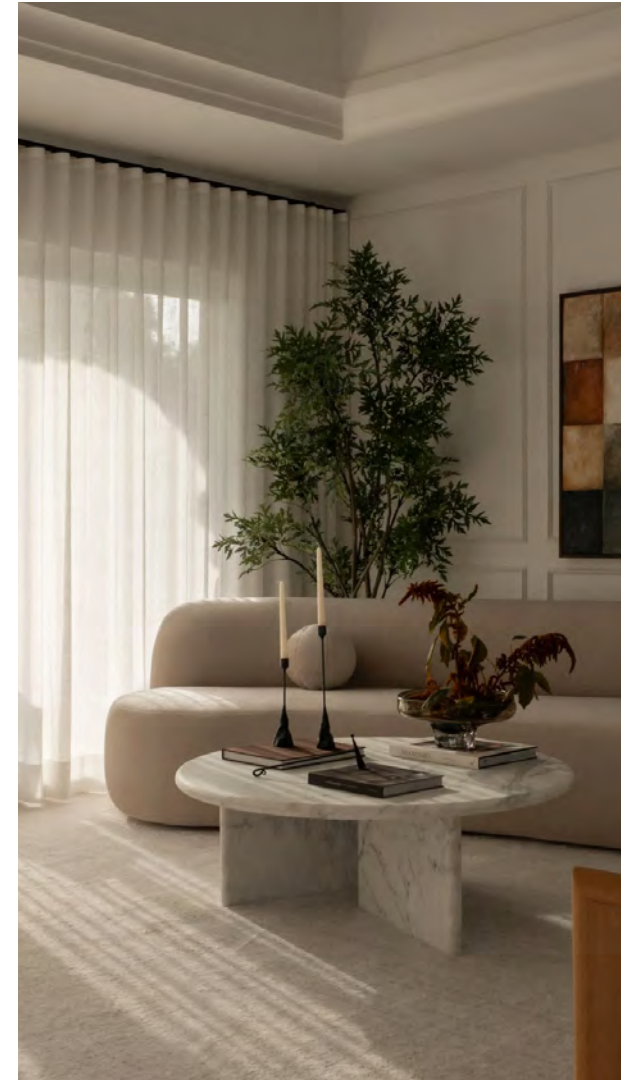
October's launch landscape reflects a market finding its footing after the corrections of Q2 and Q3, with developers deploying product across a wide pricing spectrum rather than concentrating at any single tier. Emaar continues to dominate in both breadth and ambition, running five concurrent launches that span ultra-luxury waterfront living at Dubai Harbour through to competitively priced apartment product at Expo City, with the Grand Polo Club villa community at DIP2 signalling renewed developer confidence in the mid-to-upper villa segment. Its 80/20 payment structure remains the standard across most Emaar product, offering buyers maximum leverage with limited upfront commitment a deliberate strategy to sustain absorption velocity as mortgage rates remain a headwind for the broader market.

DAMAC's two active launches tell a bifurcated story. Chelsea Residences at Maritime City targets the mid-market buyer with a competitive entry point and a clean 60/40 structure, while Golf Gate 2 at DAMAC Hills continues to mop up demand from the established golf community corridor where resale yields remain among the strongest in the suburban belt.

Sobha's Hartland II remains one of the market's most consistent absorbers, drawing a steady pipeline of end-users and South Asian investor capital attracted to MBR City's infrastructure and connectivity fundamentals.

At the accessible end, Binghatti Etherea in JVC stands out with a sub AED 800K entry point and a 70/30 payment structure that front-loads developer cashflow a trend among mid-tier developers managing construction financing in a tighter credit environment. Nakheel's Palm Central at Palm Jebel Ali continues the broader waterfront thesis, with pricing that reflects the premium attached to the Palm brand even as buyer selectivity has increased post-correction.

The overall tone of October's launches is deliberate rather than aggressive. Developers are not flooding the market with inventory; instead, phased releases and selective project activations are the dominant strategy, designed to maintain pricing floors while gauging real-time demand signals. With May's supply collapse having already tightened the ready stock pipeline, new launches carry increasing strategic weight both as market-makers and as indicators of developer confidence in Dubai's medium-term demand trajectory.





September 2026 delivered a market of sharp internal contrasts: while headline value edged up 3.5% to AED 29.8B, volume fell 6.1% and the year-on-year gap of 45.5% on value and 44.3 % on volume remained among the cycle's widest. These headline metrics, however, obscure a data set containing some of the most structurally significant readings of the entire disruption period most notably in leasing, mortgage activity, and the off-plan market's geographic rebalancing.

Leasing market's 47,137 new contracts a 13.0% surge to a new cycle high is the month's defining signal. When JVC records 2,562 apartment leases and Business Bay 1,889 in a single month, the message is unambiguous: Dubai's residential occupier demand is not merely recovering, it is expanding at scale.

The back-to-business seasonal effect amplifies September's leasing numbers, but the underlying trend cycle highs in June, July, August, and now September confirms this is structural population and business growth rather than cyclical noise. Villa leasing at 3,590 contracts, also a cycle high, has completed five consecutive months of growth and is similarly compelling. The mortgage data warrants particularly close examination.

With AED 9.5B in mortgage value the cycle's highest and an average loan size of AED 2.46M, the banking sector is not only participating but deepening its engagement with the market. The 98.9% villa mortgage rate (1,444 transactions versus just 16 cash, sourced from Reidin and verified by DXB Interact) is extraordinary in what it reveals about the current buyer composition: virtually all active villa buyers are end-users with financing requirements.

When cash-rich discretionary investors return as regional normalisation eventually delivers the addition of this buyer cohort to a market currently sustained by mortgage demand alone will materially amplify both volume and value. The villa segment's sustained value growth through four consecutive months of near-exclusive mortgage buyer participation is, in this context, a strong indicator of intrinsic demand quality.

The off-plan market's geographic rebalancing is the cycle's most positive structural development to date. Azizi Venice's moderation to 454 transactions from 1,481 in August and 2,402 at its June peak removes the single-project distortion that has inflated off-plan headline figures since June and reveals a market with genuine breadth: Majan (492), Jebel Ali Downtown (491), JVC (429), and City of Arabia (331) jointly provide a diversified leadership that is more reflective of underlying community-level demand. Jebel Ali Downtown's presence in the top five for four consecutive months 591 transactions in July, 713 in August, 491 in September is the cycle's most consistent off-plan demand signal, confirming the corridor's structural recovery rather than a launch-event spike.

The off-plan pricing break to AED 1,824.7 per sq.ft. below the AED 1,838 level that held from May through August is the month's primary caution flag. While the move is modest (0.9%) and may reflect September's launch mix rather than broad-based pricing erosion, it signals that the floor is still being tested.

The ready market's 0.2% uptick to AED 1,685.6 per sq.ft. against this backdrop is constructive, confirming secondary market pricing resilience even as new-launch pricing adjusts.

For Q4, the key variables are the pace of regional normalisation which will determine when cash investors re-engage and whether the October supply step-up of 1,337 apartments and 479 villas can be absorbed without disrupting the secondary market stabilisation that has been the most durable feature of the second half of 2026.





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