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SUMMARY OCTOBER 2026

DUBAI REAL ESTATE MARKET





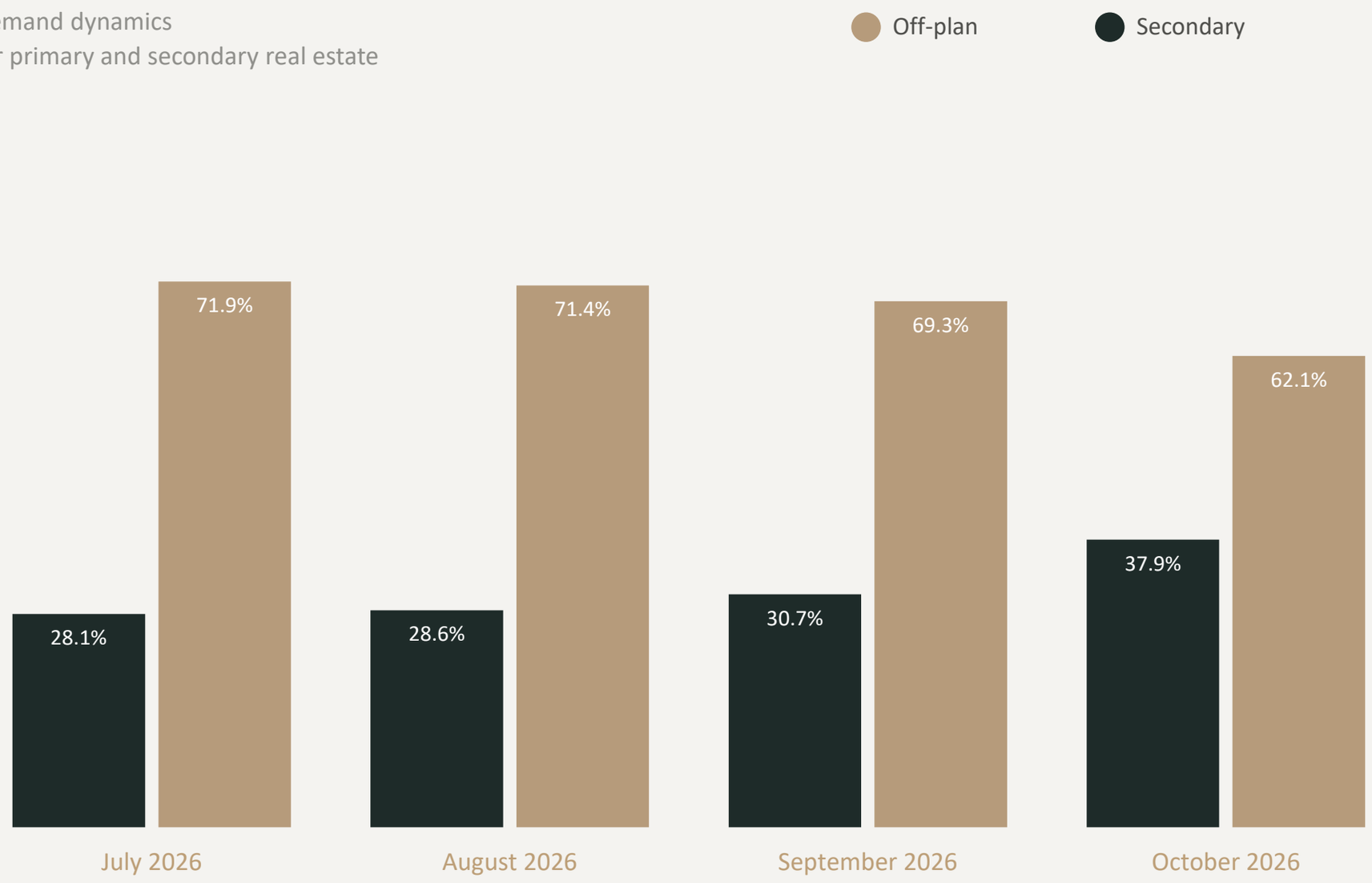
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REAL ESTATE DEMAND OVERVIEW

In October 2026, the off-plan market kept its lead with 62.1% of all transactions, though its share declined for a fourth month in a row. The secondary market jumped to 37.9% of deals — its highest share in recent months — as buyers keep rotating toward ready homes.

Demand dynamics
for primary and secondary real estate



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THE MARKET IN NUMBERS

6,317

total number of off-plan transactions in October 2026

3,851

total number of transactions on secondary real estate market

1,51M AED

average price of an off-plan apartment

6,17M AED

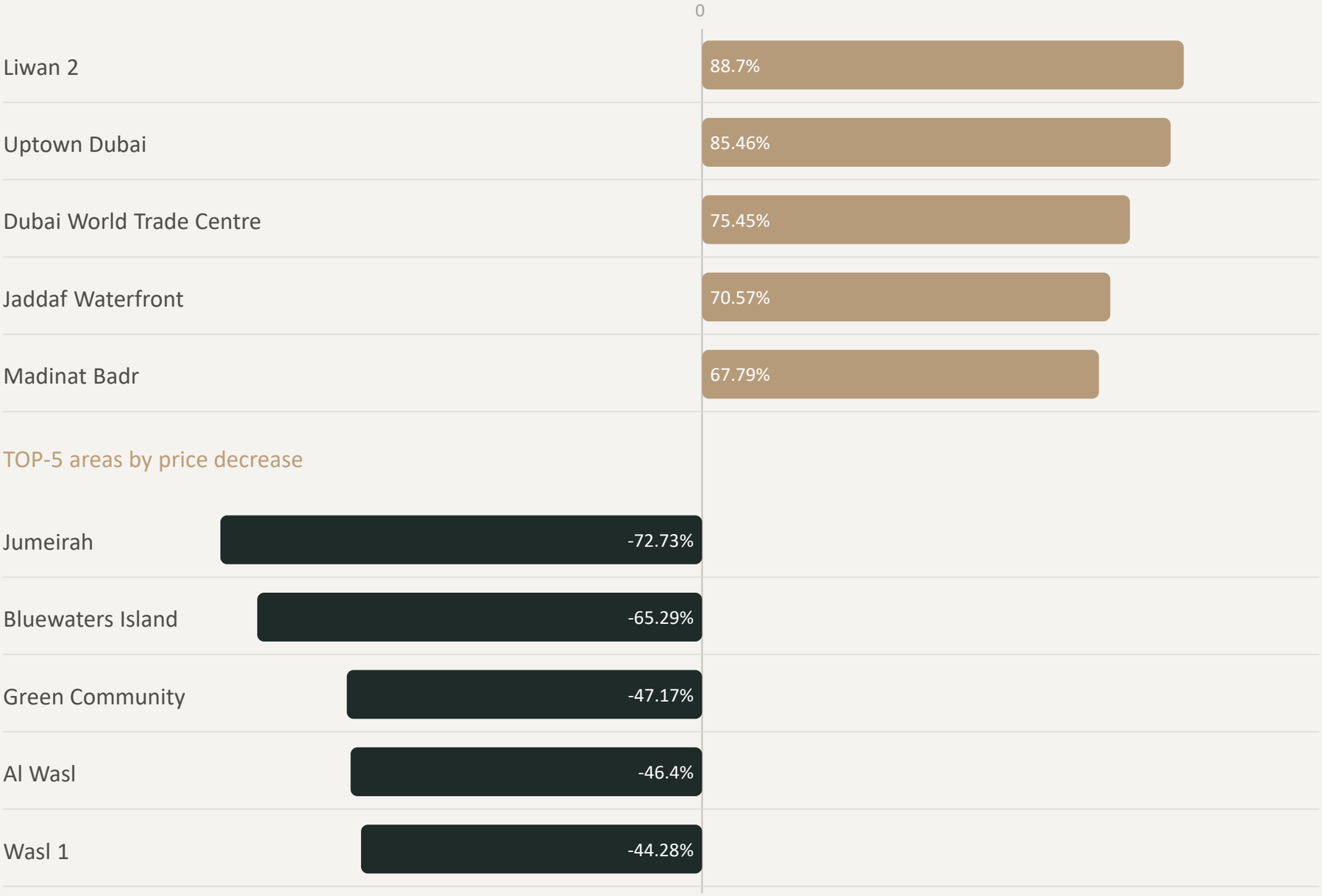
average price of an off-plan villa or townhouse

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APARTMENT PRICES ROSE BY 88.7% IN LIWAN 2

TOP-5 areas by price growth

% change in the value of apartments, October vs September 2026



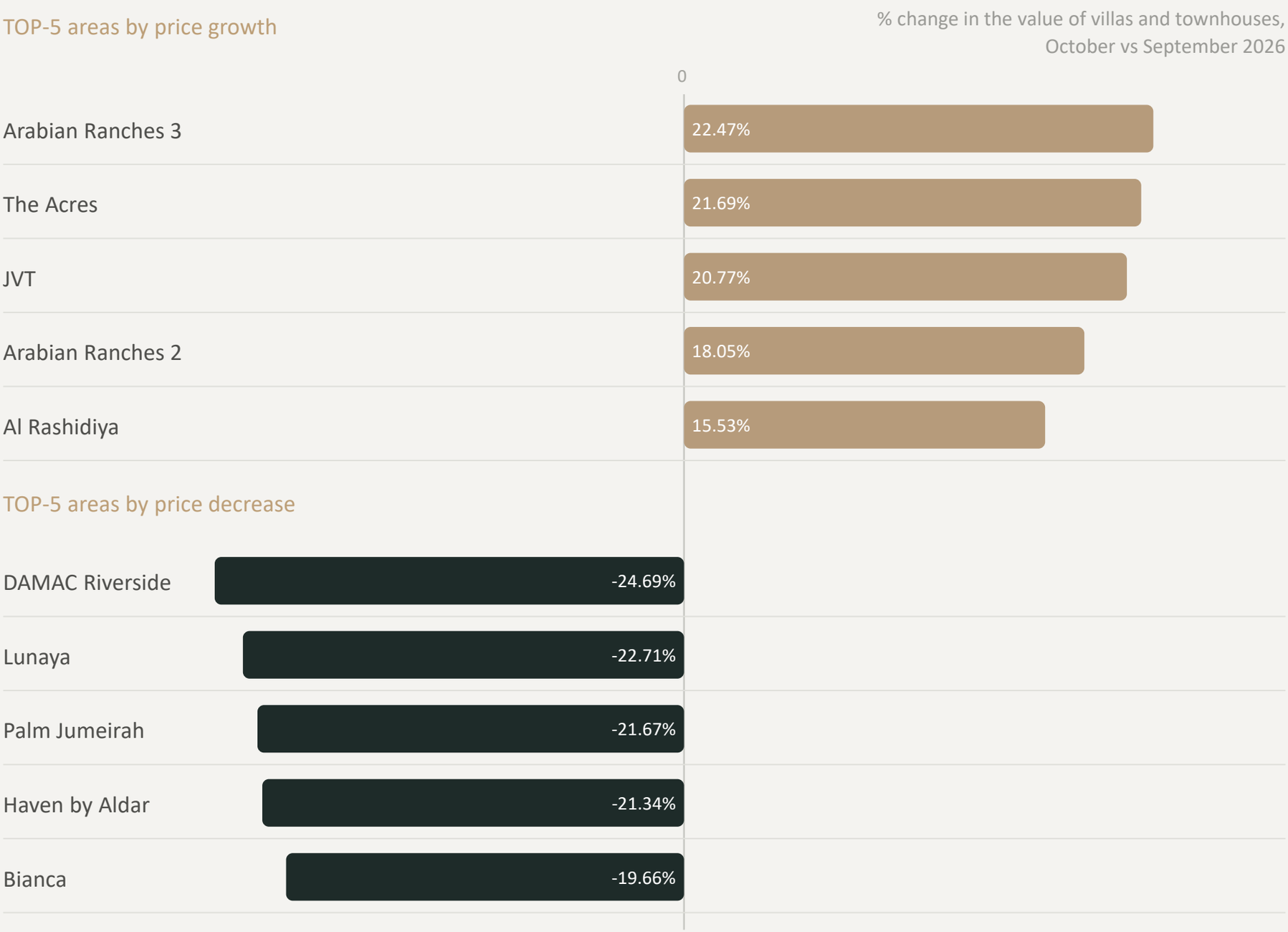
TOP-5 areas by price decrease

Several districts show sharp swings (over ±30%) driven by a small number of transactions. Al Jaddaf declines for a fourth month running (-12.23%).

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VILLA AND TOWNHOUSE PRICES INCREASED BY 22.47% IN ARABIAN RANCHES 3



The review covers districts with changes within ±25%; in areas with few transactions the swings are far wider. JVT grows for a third month running, while Motor City's decline accelerated to -25.16%.



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OFF-PLAN

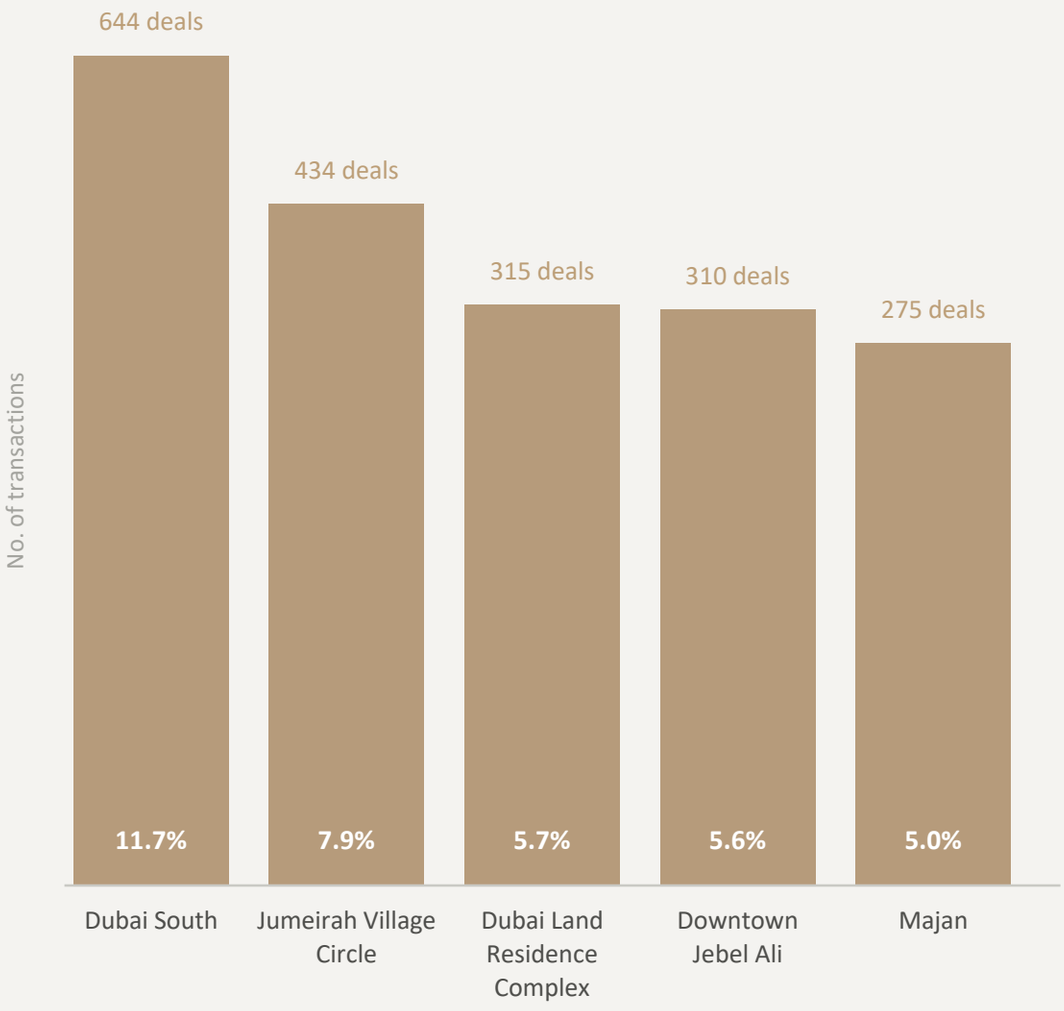
THE DUBAI OFF-PLAN REAL ESTATE MARKET REVIEW





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DUBAI SOUTH LED THE MARKET IN OCTOBER, ACCOUNTING FOR 11.7% OF ALL TRANSACTIONS



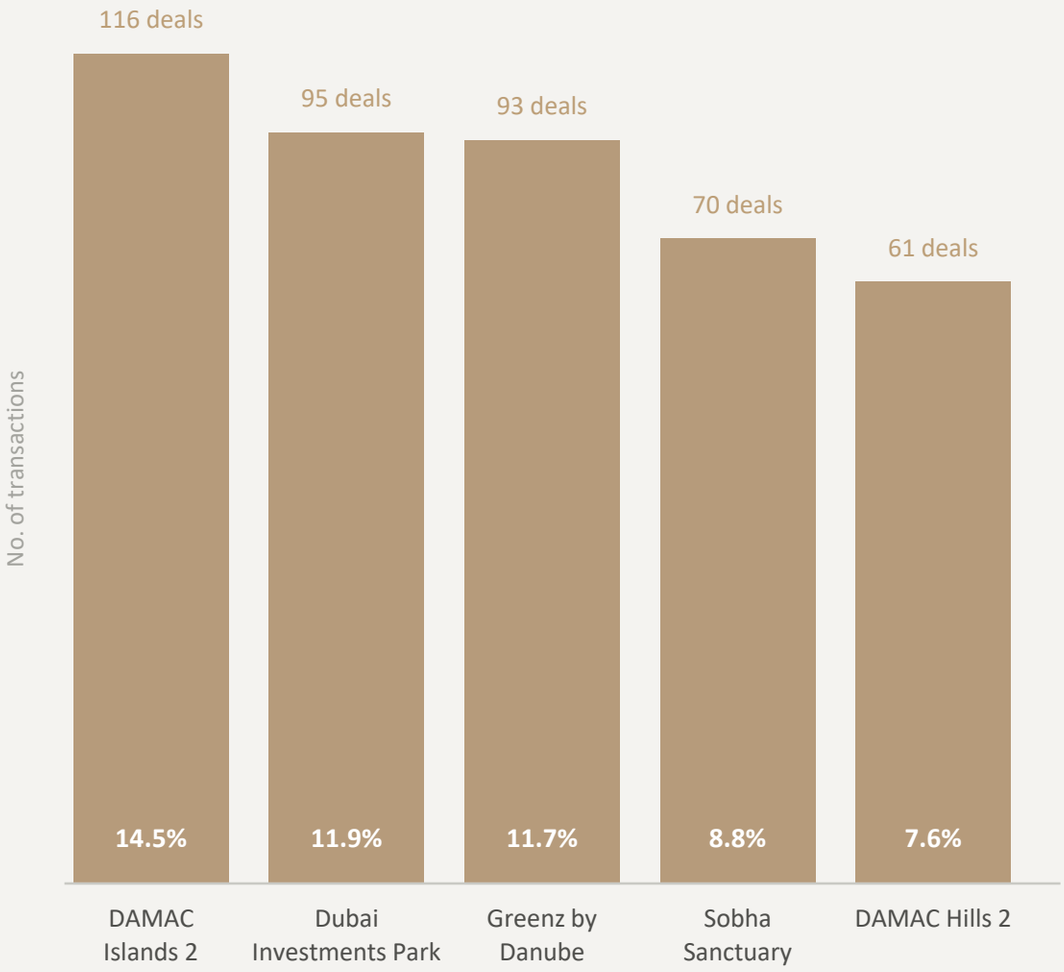
5,524

Total number of off-plan apartment transactions in October 2026

TOP-5 districts where most of the deals took place

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DAMAC ISLANDS 2 — THE MOST POPULAR COMMUNITY FOR HOME PURCHASES IN OCTOBER



798

Total number of off-plan villa and townhouse transactions in October 2026

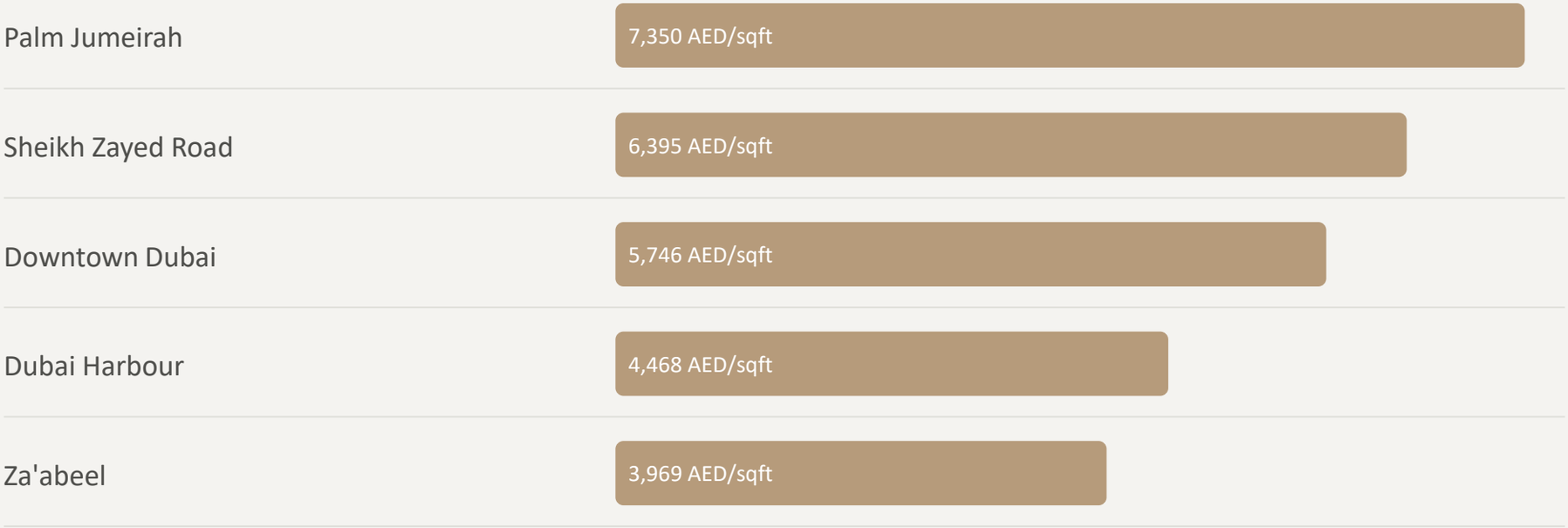
TOP-5 districts where most of the deals took place

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PALM JUMEIRAH — THE HIGHEST PRICE PER SQUARE FOOT FOR APARTMENTS

Palm Jumeirah took the top spot for price per square foot among apartments, driven by exclusive beachfront projects such as Passo by Beyond. Sheikh Zayed Road and Downtown Dubai follow behind.

TOP-5 districts by the cost of the square foot



A square foot is a unit of area measurement in the Imperial system, commonly used in the UAE real estate market. One square foot equals 0.093 square meters.

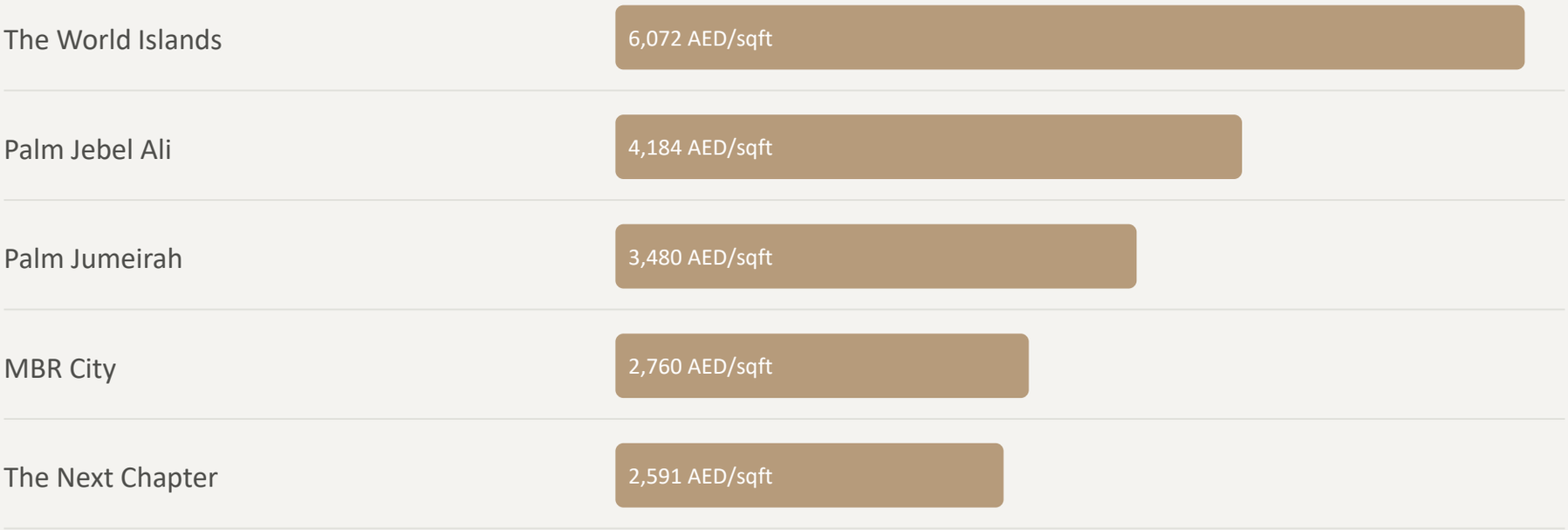
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THE WORLD ISLANDS LEADS IN PRICE PER SQUARE FOOT AMONG VILLAS AND TOWNHOUSES

In October, the highest price per square foot was recorded on The World Islands, where a handful of exclusive island residences set the benchmark. Palm Jebel Ali and Palm Jumeirah follow, keeping waterfront communities at the top of the segment.

TOP-5 districts by the cost of the square foot

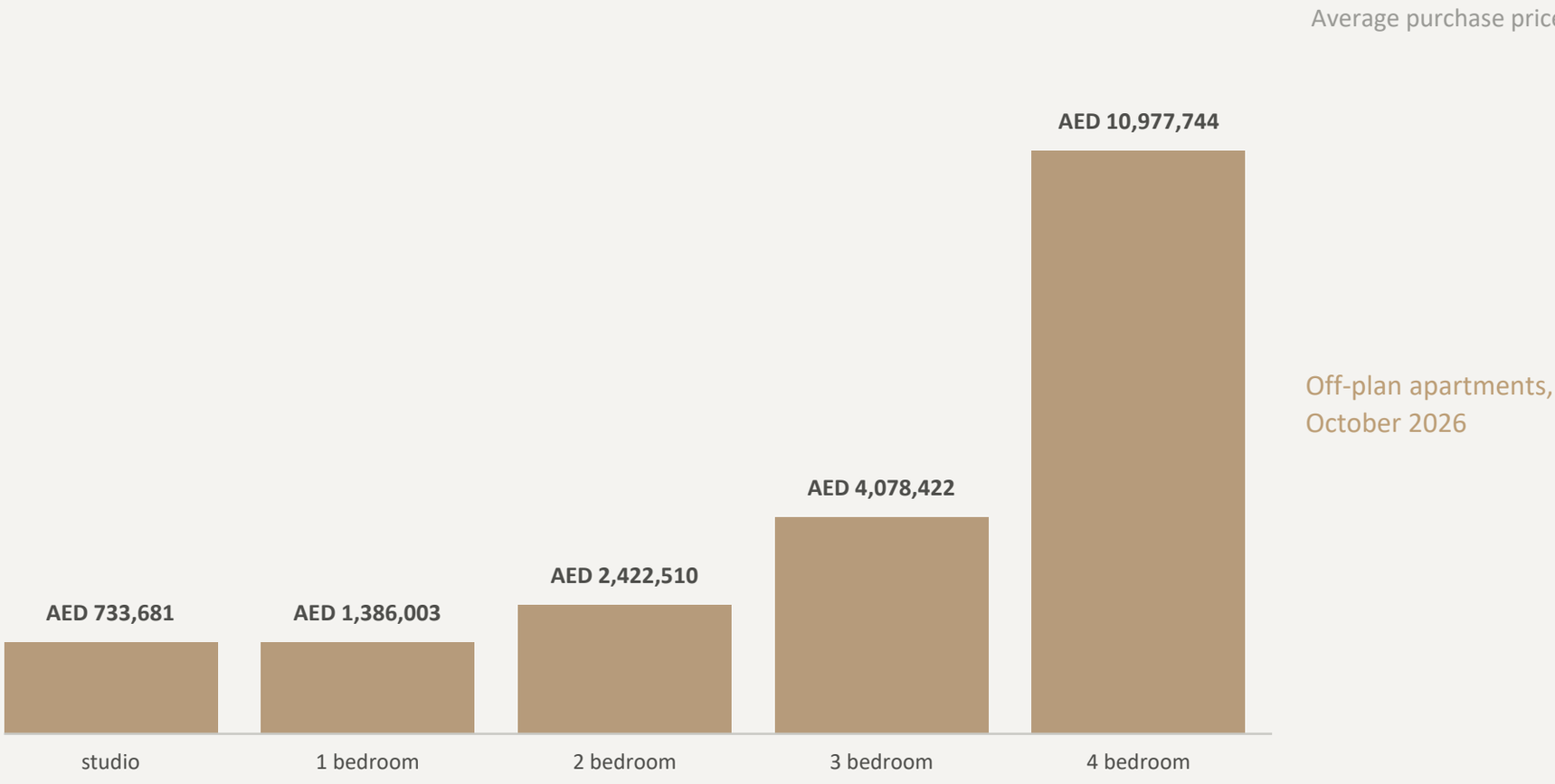


A square foot is a unit of area measurement in the Imperial system, commonly used in the UAE real estate market. One square foot equals 0.093 square meters.

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AVERAGE APARTMENT PRICE BY NUMBER OF BEDROOMS

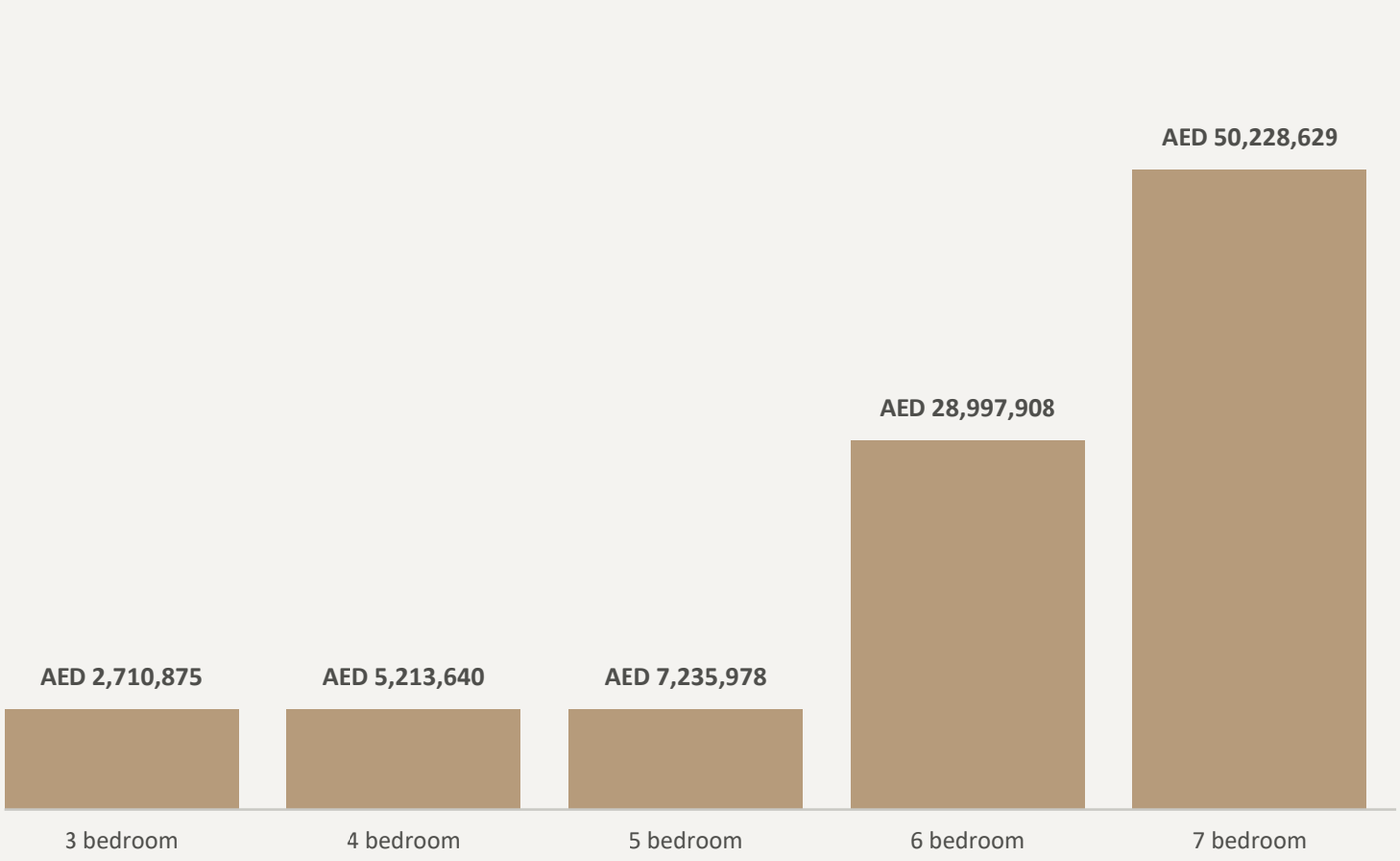
The average off-plan apartment cost about AED 1.51 million in October. The most popular formats — studios and one-bedroom units — averaged AED 733,681 and AED 1,386,003 respectively, while prices rise sharply from the three-bedroom format upward.



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AVERAGE VILLA AND TOWNHOUSE PRICE BY NUMBER OF BEDROOMS

The average off-plan villa or townhouse cost about AED 6.17 million. The most in-demand four-bedroom homes averaged AED 5,213,640 and five-bedroom homes AED 7,235,978, while in the premium segment six- and seven-bedroom villas reached AED 29.0 and 50.2 million.

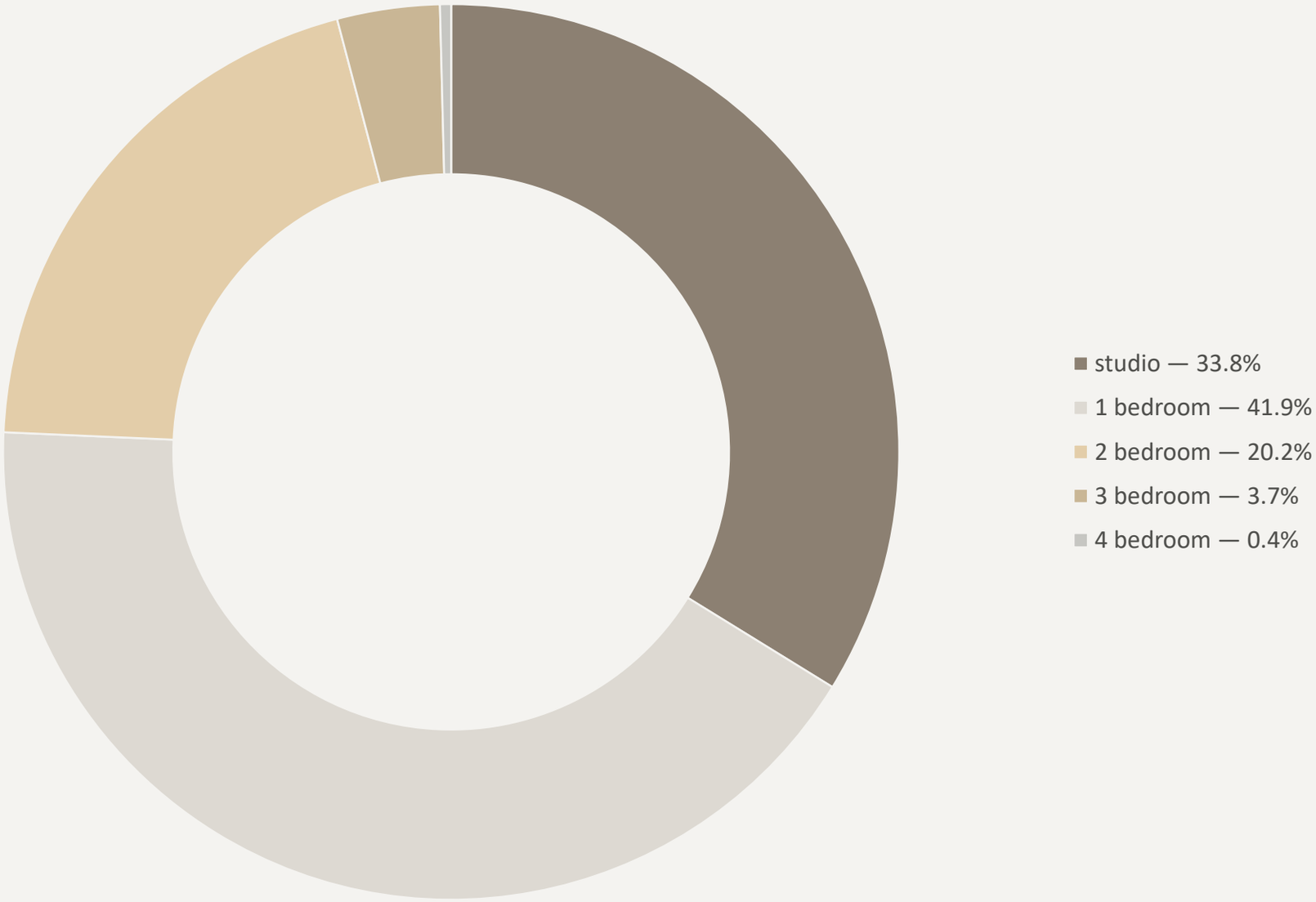


Off-plan villas and townhouses, October 2026

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1-BEDROOM APARTMENTS HOLD THE LEAD

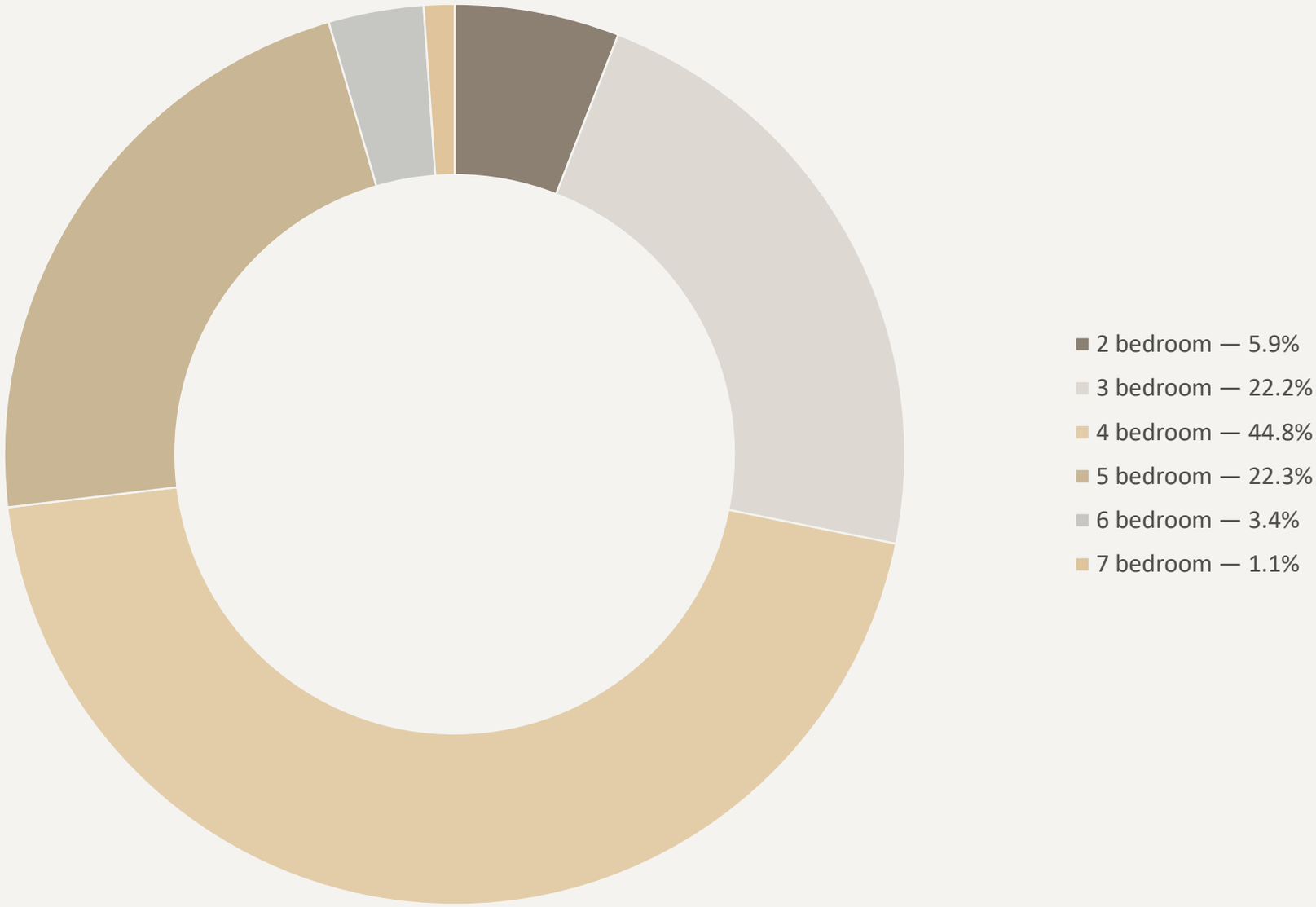
One-bedroom apartments kept first place with 41.9% of purchases, with studios steady at 33.8%. The share of two-bedroom units edged up to 20.2% — the structure of demand is stable month over month.



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44.8% OPTED FOR 4-BEDROOM HOMES

Four-bedroom homes remain the most popular choice (44.8%), with five- and three-bedroom formats close behind at 22.3% and 22.2% — the shift toward three-bedroom units continues for a second month.





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OFF-PLAN

CONCLUSIONS





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WHICH DISTRICT HAD THE MOST APARTMENTS PURCHASED?

Dubai South keeps the lead: 644 transactions in October — fewer than in September (757), but its market share edged up from 11.0% to 11.7%. JVC climbed to second place, and Dubai Land Residence Complex returned to the top-5 straight into third.

644

the number of transactions in the area

1,529 AED

average price per square foot

11.7%

of all off-plan apartment deals in Dubai

The most in-demand project of the month was the Azizi Venice development.

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WHICH DISTRICT HAD THE MOST VILLAS AND TOWNHOUSES PURCHASED?

DAMAC Islands 2 took the lead with 116 transactions — 14.5% of the market — doubling its September volume. Dubai Investments Park slipped to second place, while Greenz by Danube climbed to third: demand keeps rotating between large-scale accessible communities.

116

the number of transactions in the area

1,325 AED

average price per square foot

14.5%

of all off-plan villa and townhouse deals in Dubai

The most in-demand project of the month was Antigua.

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KEY TRENDS

The cooling accelerates again

Off-plan volumes declined for a fourth month in a row — 6,317 transactions against 7,161 in September — and the pace picked up to -11.8% from -9.5%. The contraction came from apartments (5,524 deals), while the villa and townhouse segment actually grew to 798 deals.

Price swings widen sharply

With fewer deals per district, monthly price changes reached ±70–89% in some apartment locations. Al Jaddaf declines for a fourth month running (-12.23%), Motor City's drop accelerated to -25.16%, while Jaddaf Waterfront, Al Barsha and JVT keep growing for a third month.

Demand rotates between communities

Dubai South keeps the apartment lead with its share up to 11.7%, and Dubai Land Residence Complex returned to the top-5. In villas, DAMAC Islands 2 became the new leader with volumes doubled. Formats are stable: 1-bedroom units lead in apartments (41.9%), 4-bedroom homes in villas (44.8%).

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OFF-PLAN IN NUMBERS

1 bedroom

The most common format of purchased apartments

1,51M AED

Average price of a purchased apartment

4

The most common number of bedrooms in homes

6,17M AED

Average price of a purchased villa or townhouse

DUBAI SOUTH, JUMEIRAH VILLAGE CIRCLE, DUBAI LAND
RESIDENCE COMPLEX, DAMAC ISLANDS 2, DUBAI INVESTMENTS PARK

The most popular areas for buying off-plan properties



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SECONDARY

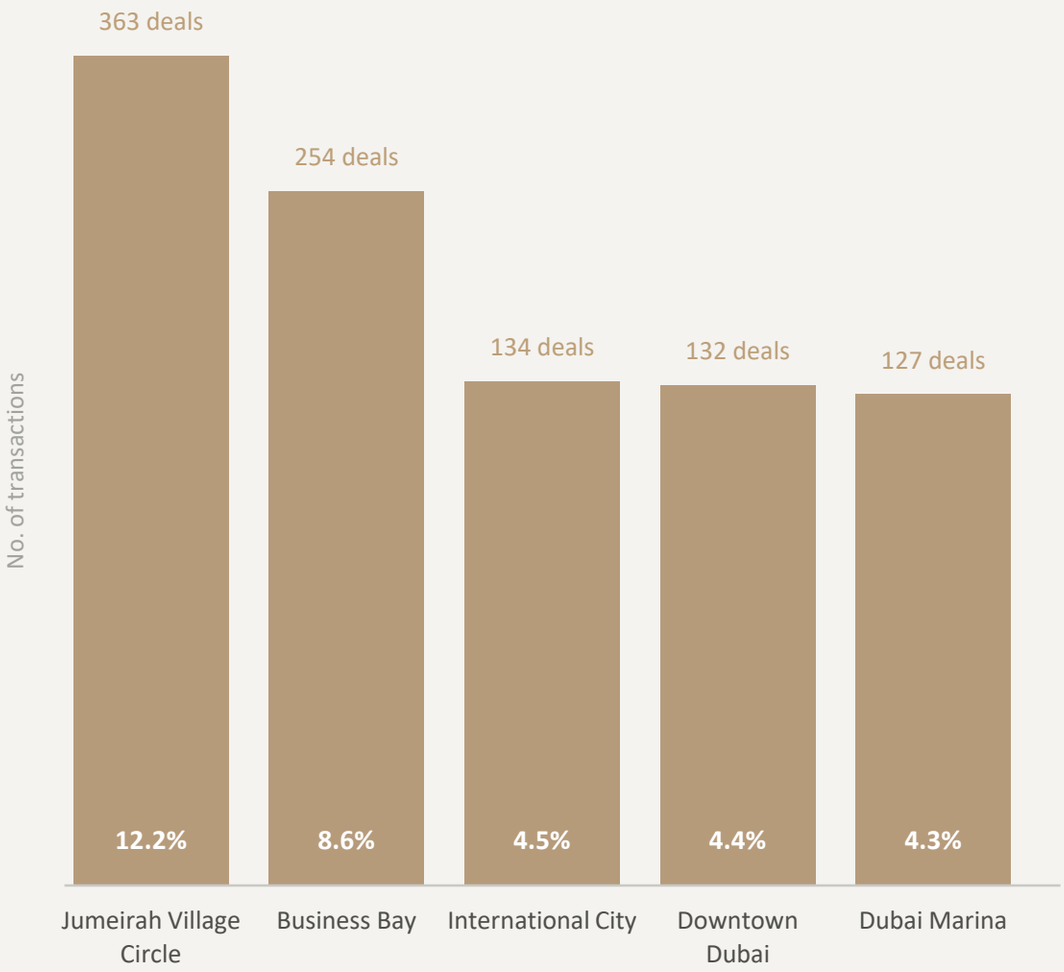
THE DUBAI SECONDARY REAL ESTATE MARKET REVIEW





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12.2% OF INVESTORS PURCHASED READY APARTMENTS IN JVC



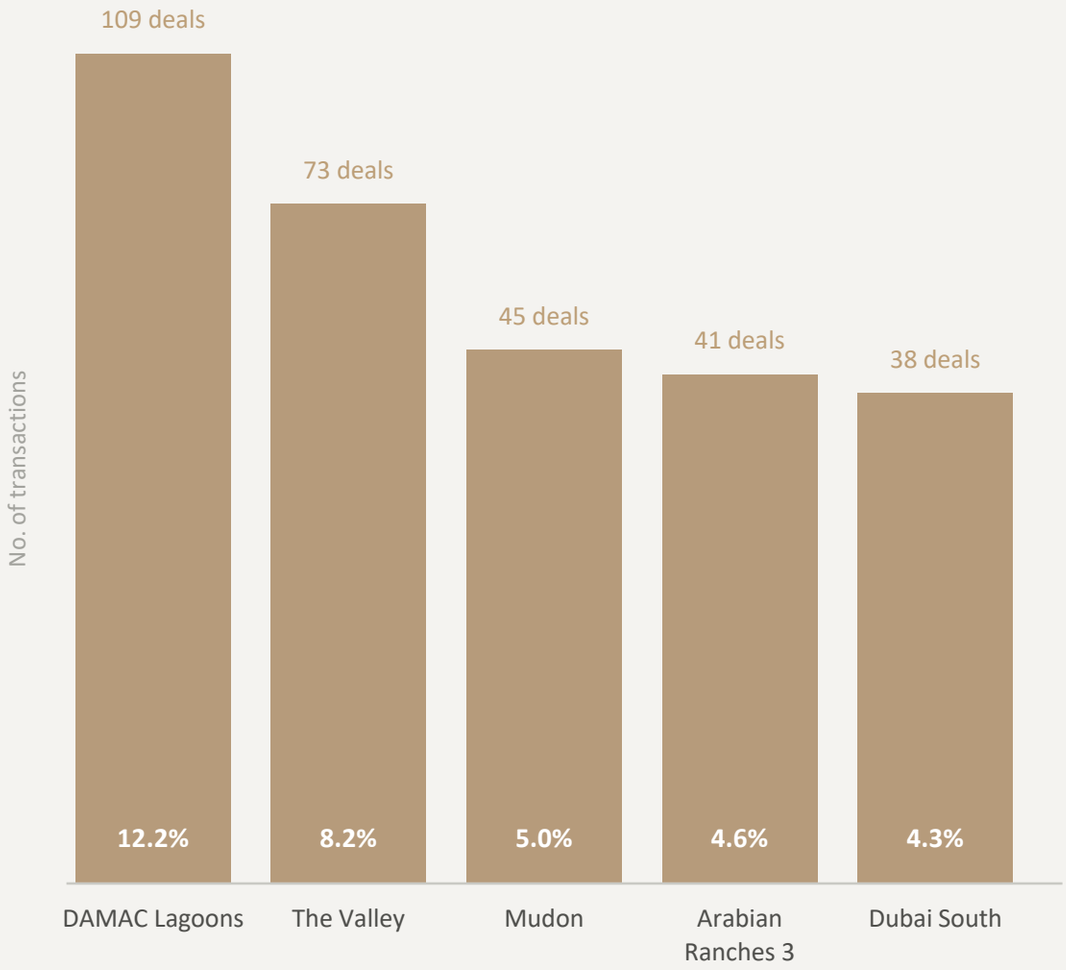
2,968

Total number of secondary apartment transactions in October 2026

TOP-5 districts where most of the deals took place

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DAMAC LAGOONS — A POPULAR CHOICE FOR PURCHASING A VILLA OR TOWNHOUSE IN OCTOBER



893

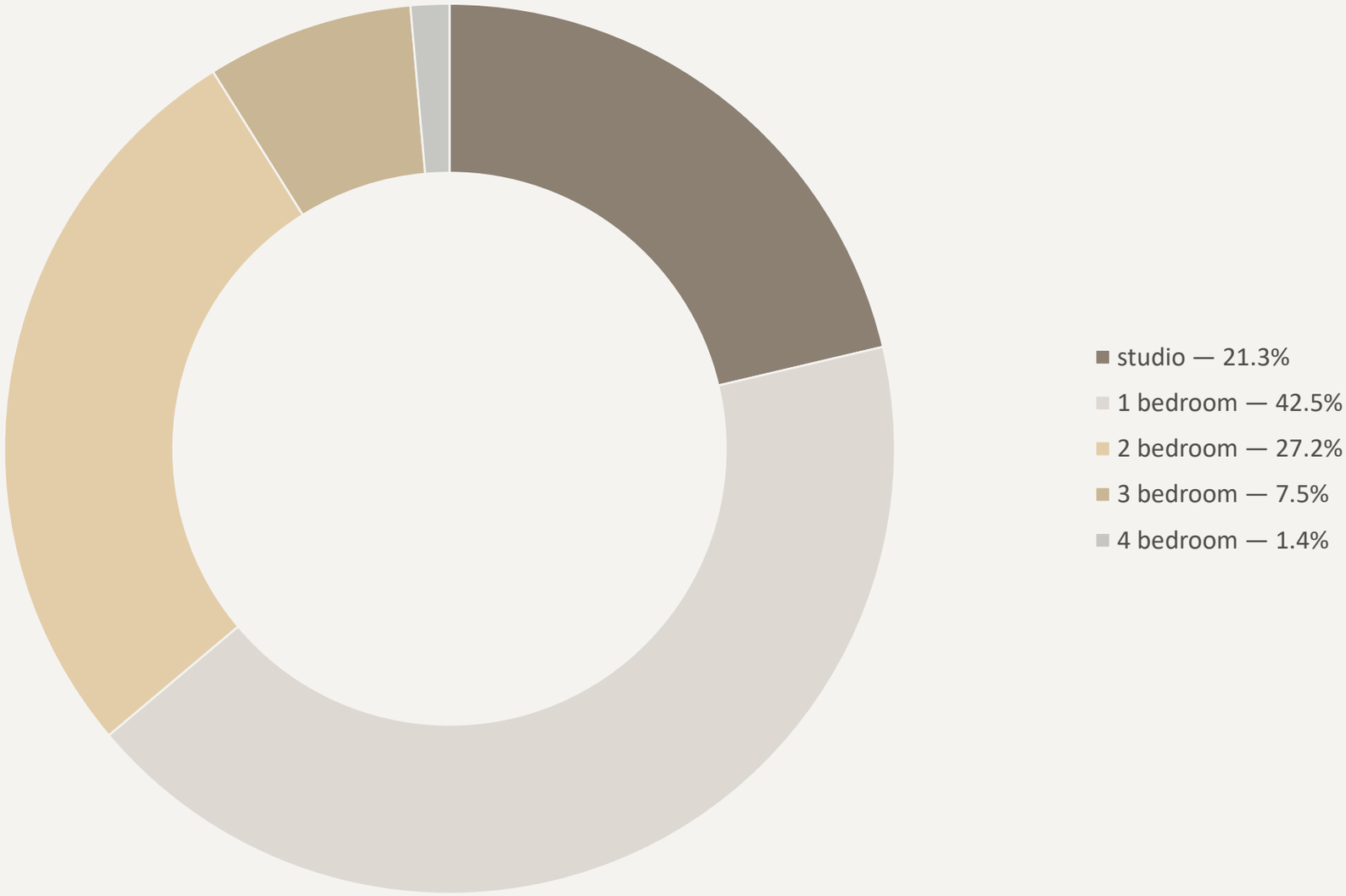
Total number of secondary villa and townhouse transactions in October 2026

TOP-5 districts where most of the deals took place

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STABLE DEMAND FOR 1-BEDROOM APARTMENTS

One-bedroom apartments strengthened their lead on the secondary market — 42.5% of October purchases. Two-bedroom units held at 27.2%, while the share of studios eased to 21.3%.

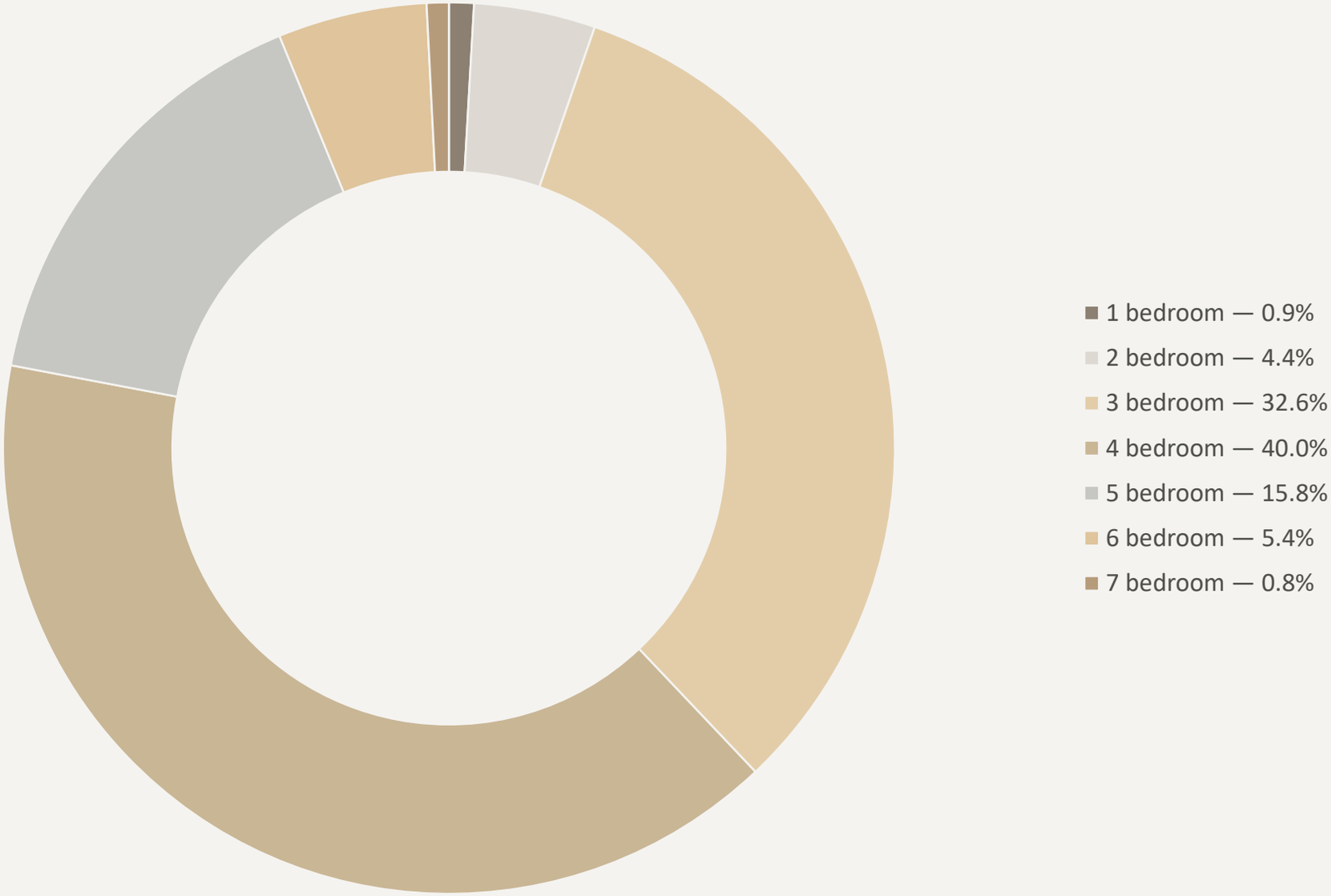


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3- AND 4-BEDROOM RESIDENCES — THE CLIENT'S MUST HAVE

Four-bedroom homes kept first place in October (40.0%), the share of three-bedroom units eased to 32.6%, and five-bedroom homes grew to 15.8% — the shift toward larger formats on the secondary market continues.

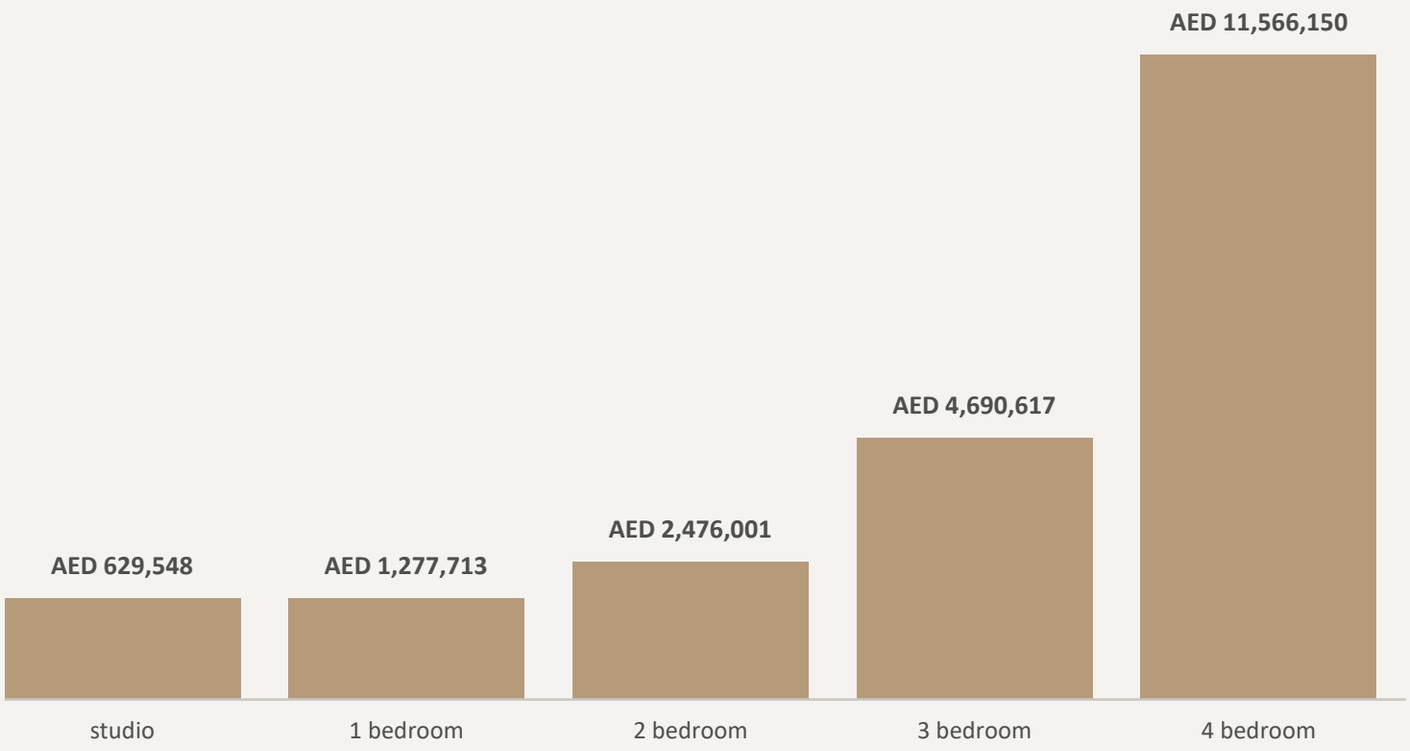


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AVERAGE READY APARTMENT PRICE BY NUMBER OF BEDROOMS

The average secondary-market apartment cost about AED 1.89 million — above the off-plan average of AED 1.51 million. Studios averaged AED 629,548 and one-bedroom units AED 1,277,713, with prices rising steeply from the three-bedroom format upward.

Average purchase price, AED

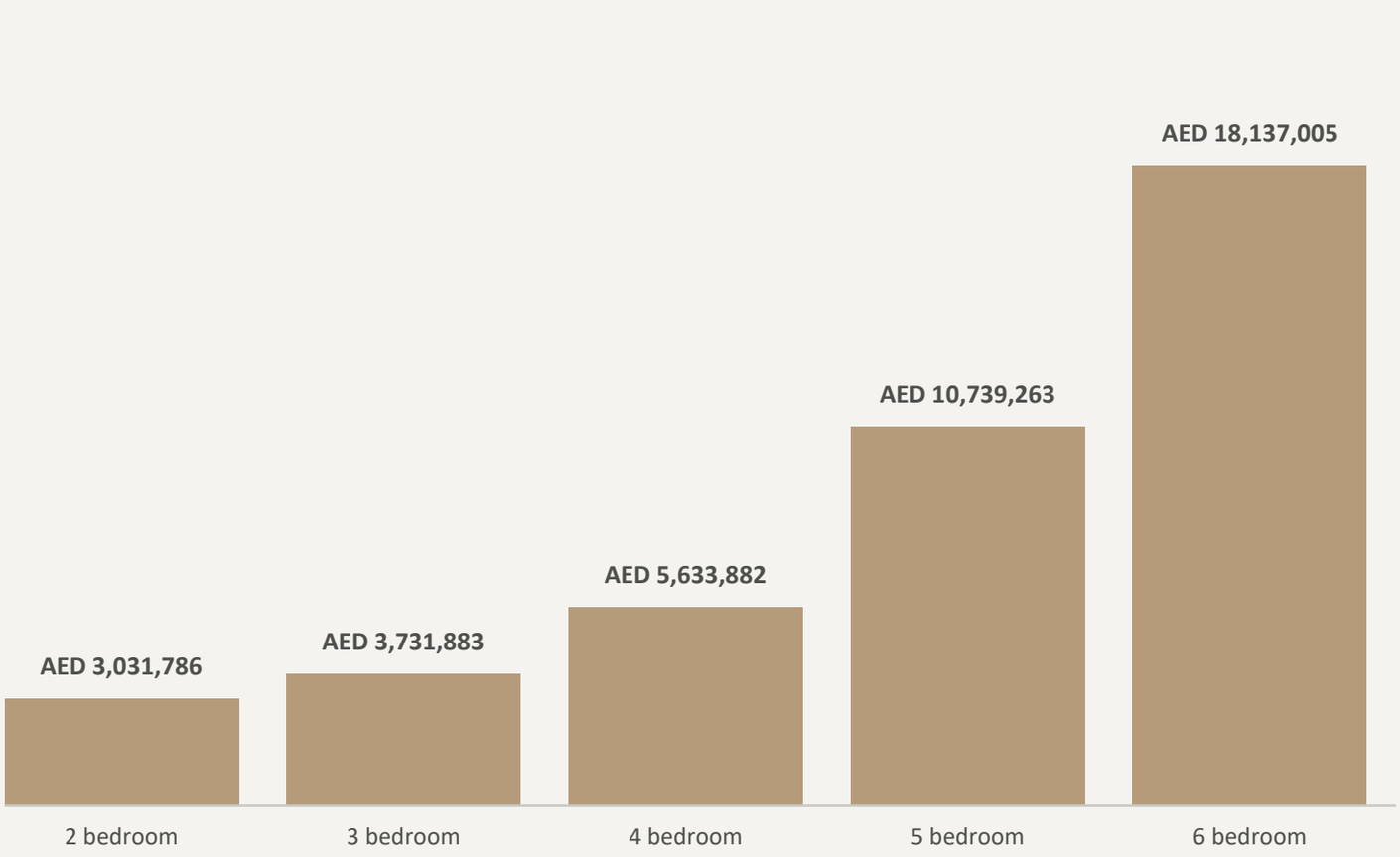


Secondary apartments, October 2026

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AVERAGE READY HOME PRICE BY NUMBER OF BEDROOMS

The average secondary-market villa or townhouse cost about AED 6.55 million (AED 6.17 million on the off-plan market). The most in-demand four-bedroom homes averaged AED 5,633,882, while six-bedroom villas reached AED 18.1 million.



Secondary villas and townhouses, October 2026



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RENTAL

THE DUBAI RENTAL REAL ESTATE MARKET REVIEW

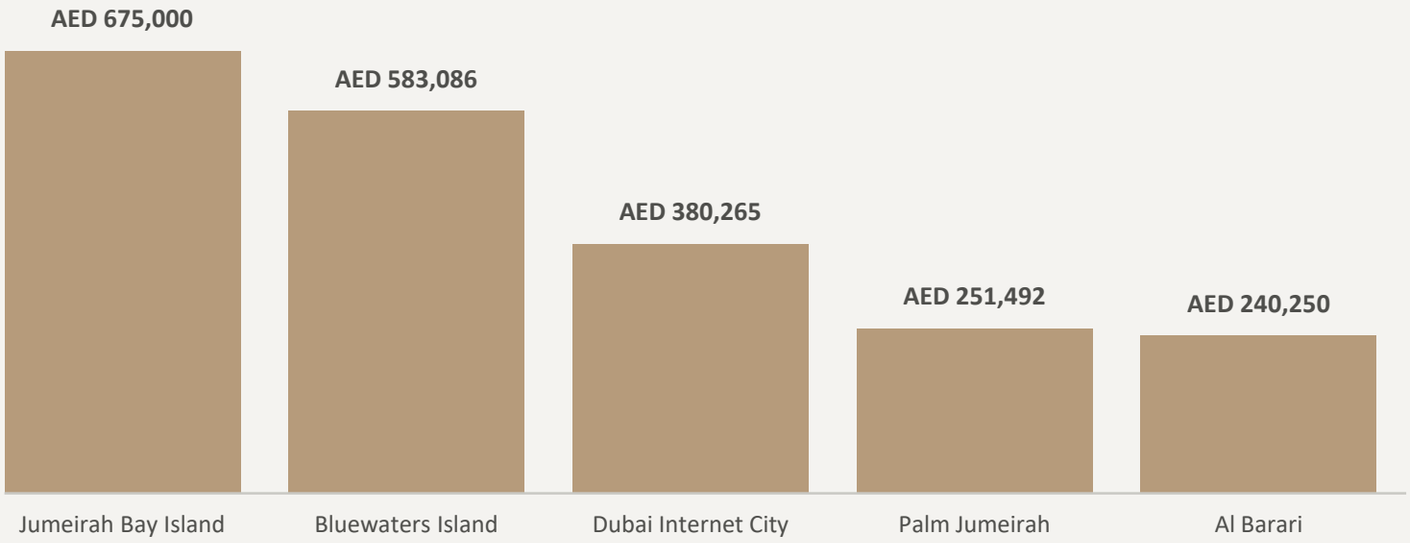




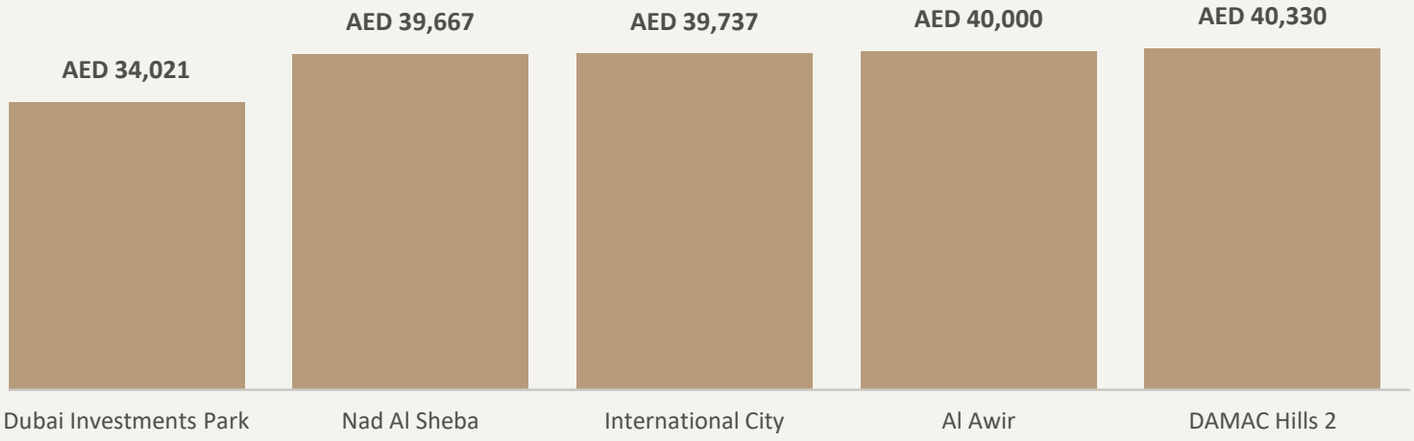
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THE MOST EXPENSIVE AND BUDGET-FRIENDLY NEIGHBORHOODS FOR RENTING AN APARTMENT

Average annual rental cost, AED per year



Top-5 most expensive rental neighborhoods

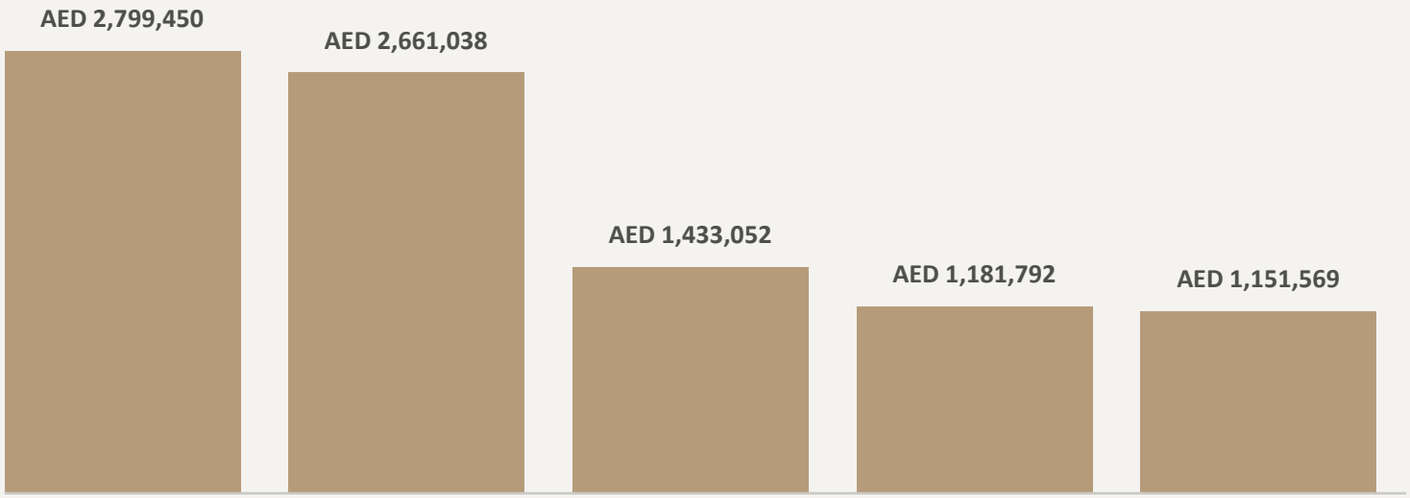


Top-5 most affordable rental neighborhoods

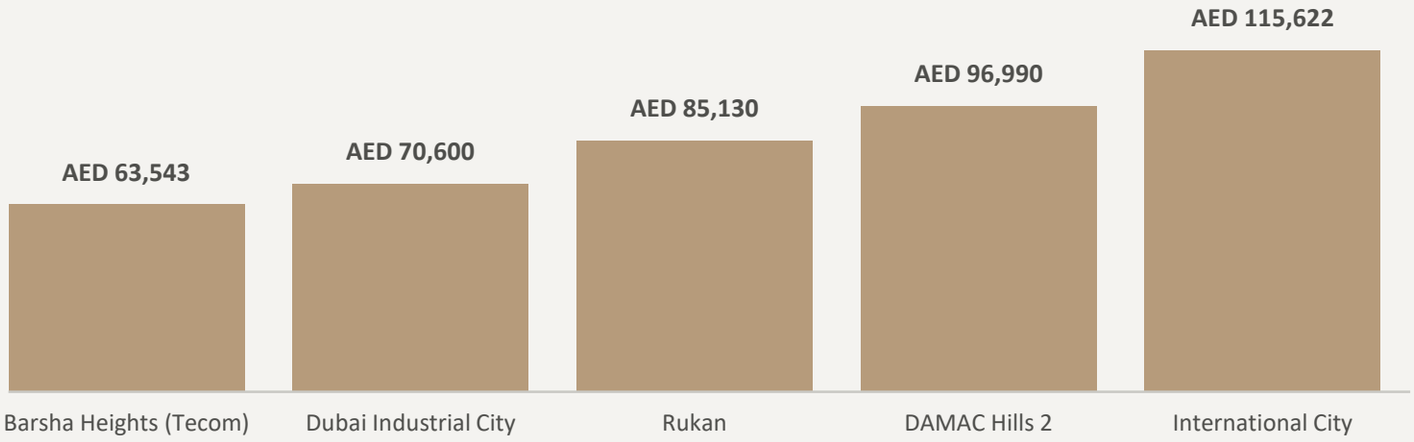
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THE MOST EXPENSIVE AND BUDGET-FRIENDLY NEIGHBORHOODS FOR RENTING A HOME

Average annual rental cost, AED per year



Top-5 most expensive rental neighborhoods



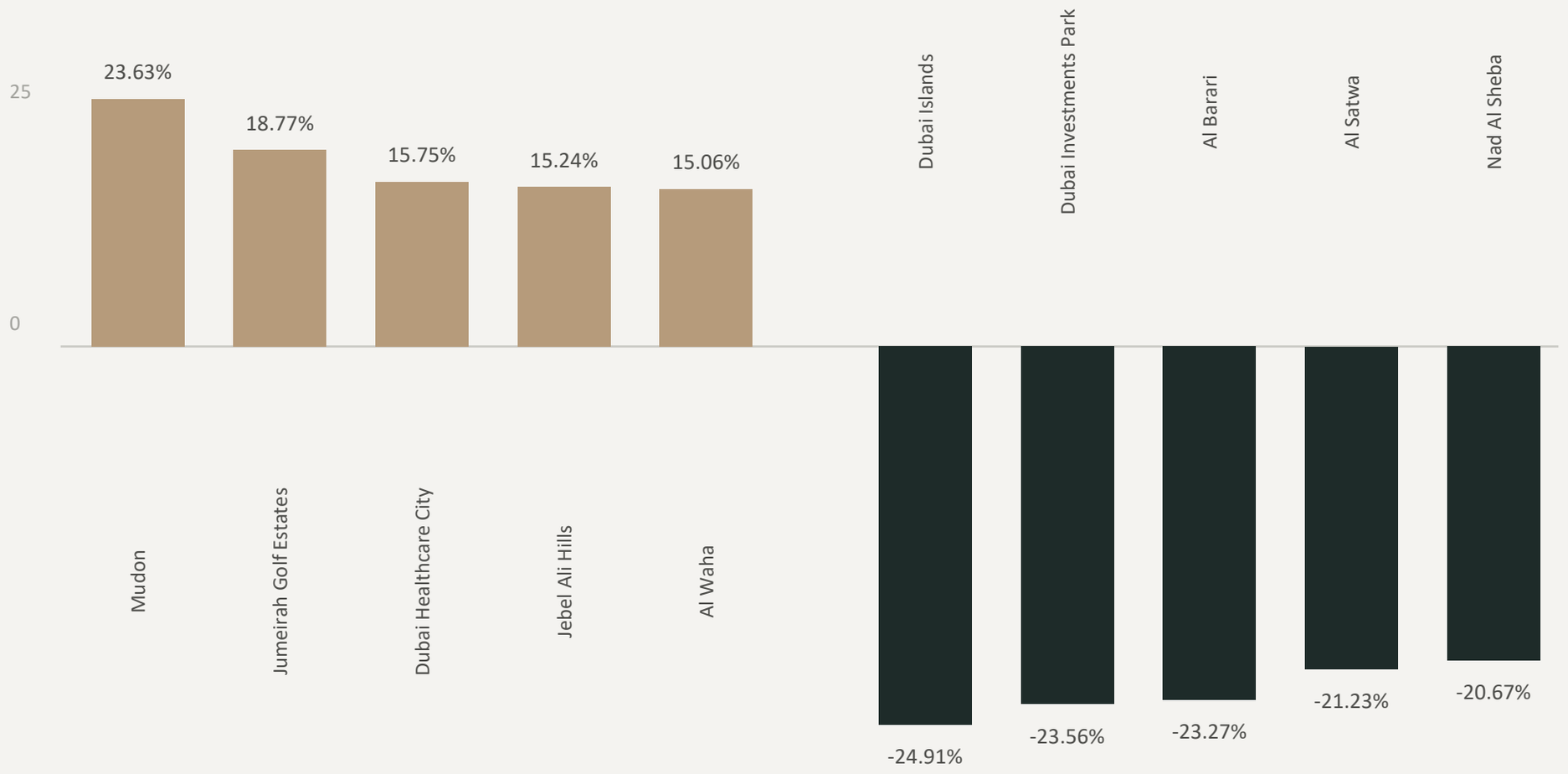
Top-5 most affordable rental neighborhoods

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DUBAI ISLANDS — APARTMENT RENTS FELL BY 24.91%

TOP-5 areas by rental value growth

TOP-5 areas with the biggest decrease in rental prices



The review covers districts with rental changes within ±25%; in areas with few transactions the swings are far wider.

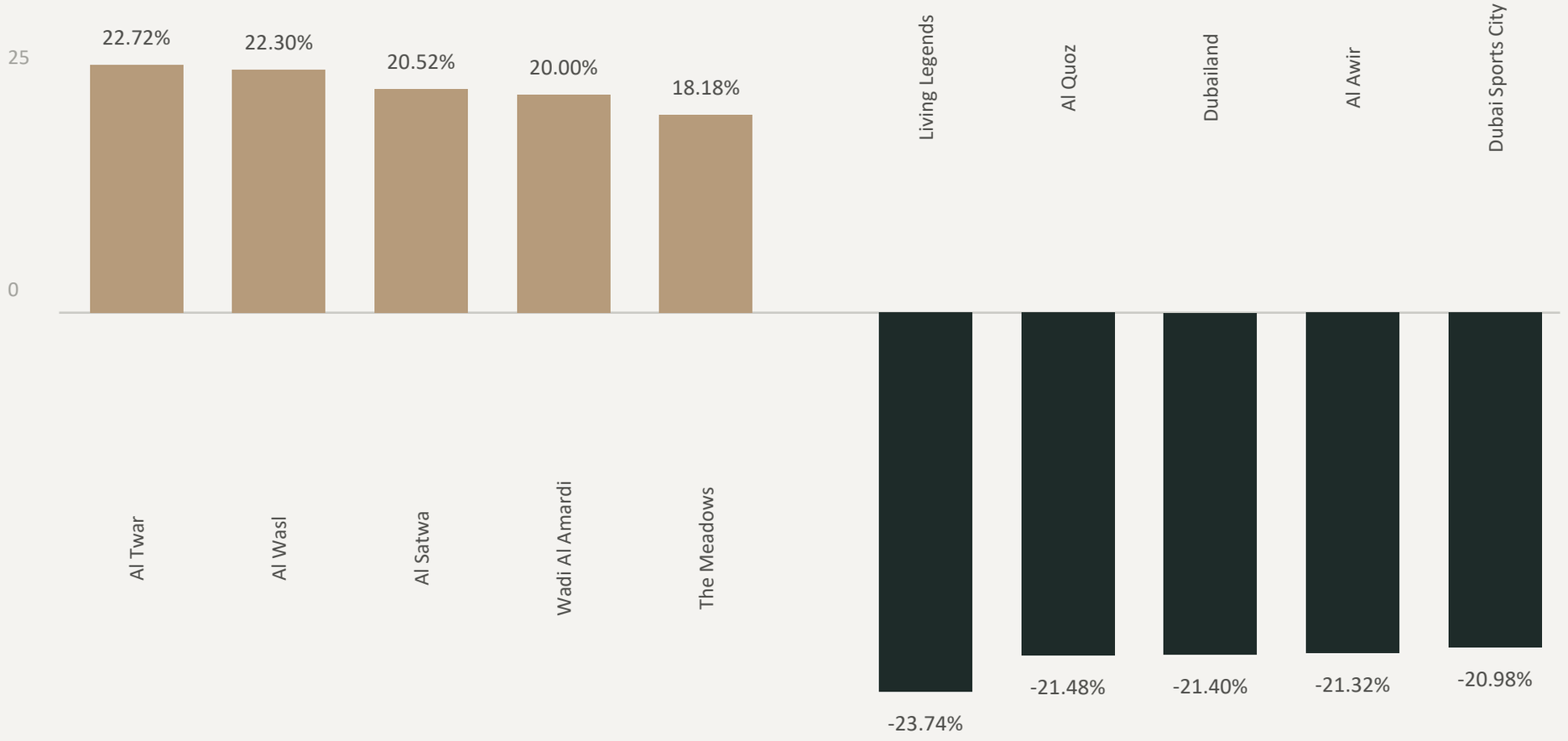
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LIVING LEGENDS — VILLA RENTS FELL BY 23.74%

TOP-5 areas by rental value growth

TOP-5 areas with the biggest decrease in rental prices

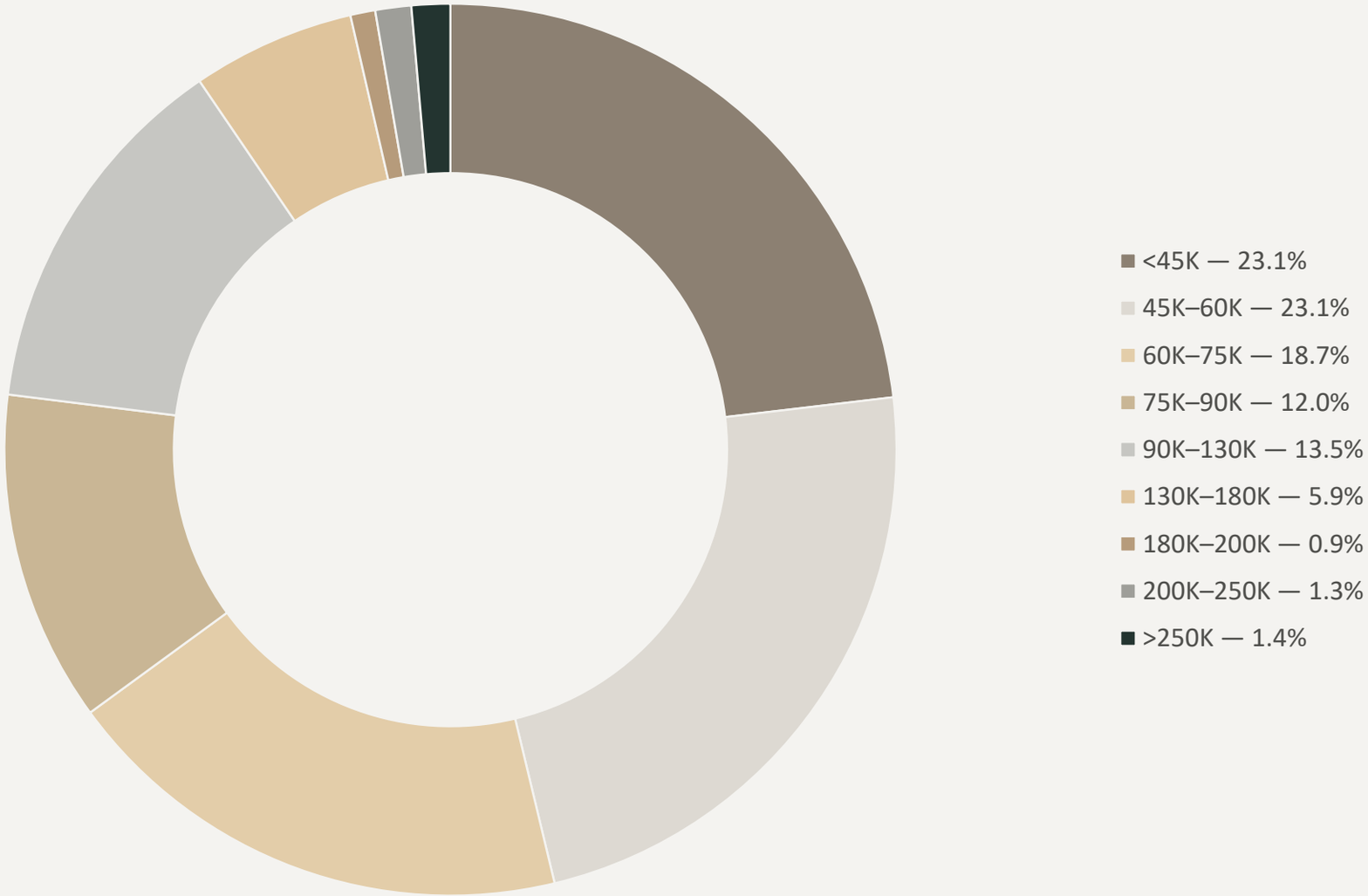


The review covers districts with rental changes within ±25%; in areas with few transactions the swings are far wider.

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46.2% OF TENANTS OPT FOR APARTMENTS PRICED UP TO AED 60,000 PER YEAR

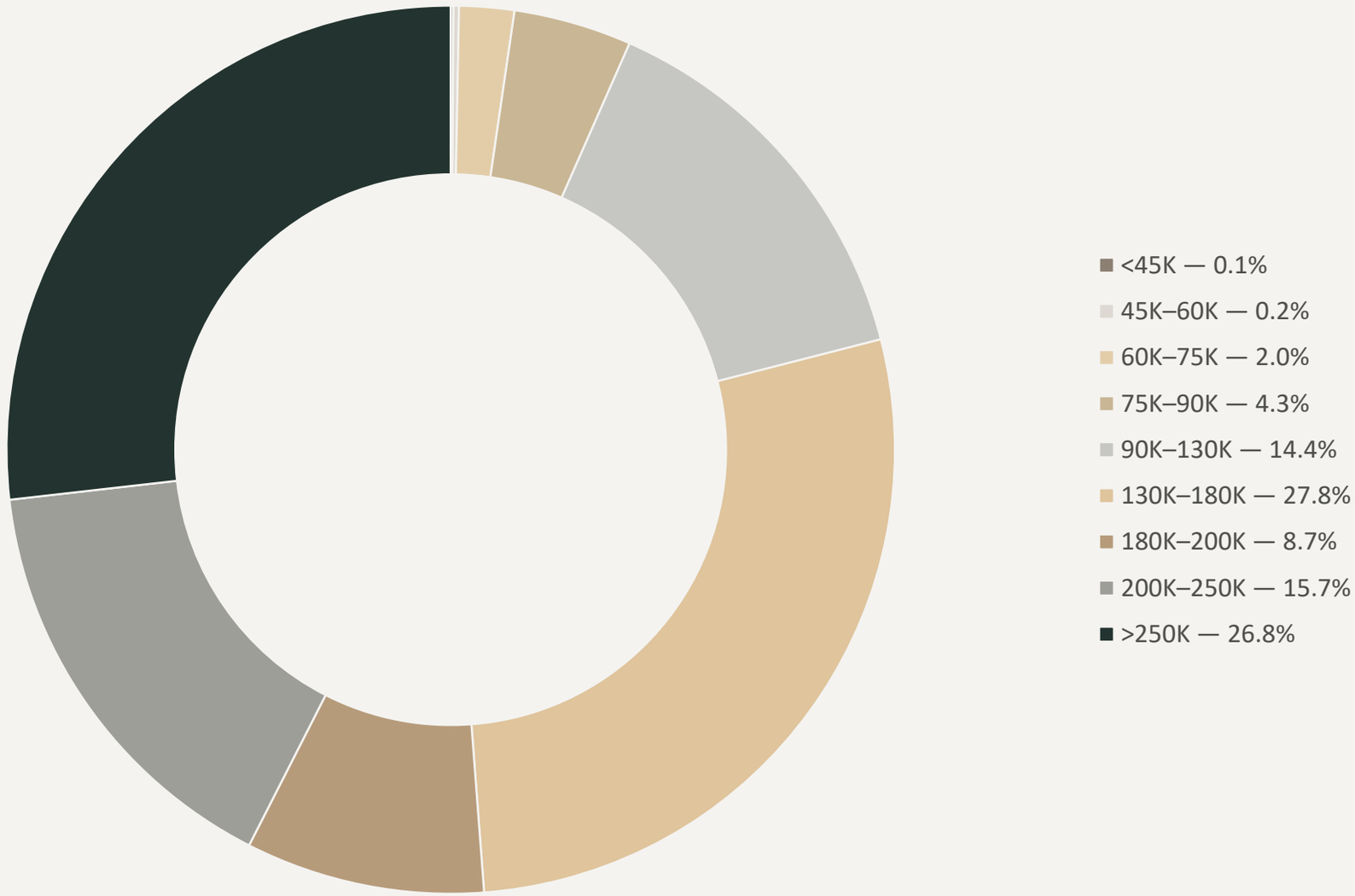
Demand is concentrated in the budget segment: 23.1% of tenants chose apartments priced below AED 45,000 per year and another 23.1% the AED 45,000–60,000 range. The AED 60,000–75,000 bracket follows with 18.7%, while only 3.6% of tenants rented apartments above AED 180,000.



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AED 130–180K PER YEAR — THE MOST POPULAR RENTAL BUDGET FOR VILLAS AND TOWNHOUSES

27.8% of tenants chose villas and townhouses with annual rents of AED 130,000–180,000, and another 26.8% opted for homes above AED 250,000 — demand for spacious homes offering a high level of comfort remains strong.





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CONCLUSIONS





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WHICH AREAS SAW THE HIGHEST NUMBER OF READY APARTMENT PURCHASES?

Jumeirah Village Circle continues to lead the market by number of transactions; in October the most popular project in the area was Dune Residency. Business Bay strengthened its second place, while International City climbed to third — budget-friendly areas keep gaining ground.

363

the number of transactions in the area

1,173 AED

average price per square foot

12.2%

of all secondary apartment deals in Dubai

Compared with September, deals in the district rose from 339 to 363, though JVC's share eased as the whole market grew by 22%.

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WHICH AREA SAW THE HIGHEST NUMBER OF READY HOME PURCHASES?

DAMAC Lagoons kept its lead for a fifth month running: 109 transactions, or 12.2% of the market, with most buyers choosing homes in the Costa Brava cluster. The Valley jumped from fifth to second place — its deal count more than doubled (29 → 73).

109

the number of transactions in the area

1,192 AED

average price per square foot

12.2%

of all secondary villa and townhouse deals in Dubai

Mudon and Arabian Ranches 3 follow, while Dubai South entered the top-5, displacing DAMAC Hills 2.

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KEY TRENDS

Growth accelerates

The secondary market grew for a second month in a row, and the pace picked up sharply: apartment deals rose from 2,432 to 2,968 (+22.0%) and villa and townhouse deals from 722 to 893 (+23.7%). The segment's share of the overall market jumped to 37.9%.

New names among the leaders

JVC and DAMAC Lagoons keep their leadership, but the rankings are shifting: International City climbed to third place in apartments, The Valley jumped to second in villas with deals more than doubled, and Dubai South entered the villa top-5 for the first time.

Prices diverge, formats grow larger

Price per square foot rose in Downtown Dubai (+5.5%) and Business Bay (+7.6%) but declined for a second month in Dubai Marina and JVC. In villas, the shift toward larger formats continues: 4-bedroom homes lead at 40.0% and the share of 5-bedroom units grew to 15.8%.

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SECONDARY IN NUMBERS

1–2

The most common number of bedrooms in purchased apartments

1,89M AED

Average price of a purchased apartment

3–4

The most common number of bedrooms in homes

6,55M AED

Average price of a purchased villa or townhouse

JVC, BUSINESS BAY, INTERNATIONAL CITY, DOWNTOWN DUBAI, DAMAC LAGOONS

The most popular areas for buying secondary properties

Dubai
+971 (4) 581-4553

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Abu Dhabi
+971 (4) 581-2364



WE HELP PEOPLE TO BUY PROPERTY

Whitewill experts know all the best real estate projects in Dubai. We'll show you the widest selection of properties matching your request, negotiate the best possible discount, and be the first to congratulate you on your new home. We work with passion — and with no commission.

EMAAR TOP 10 · SOBHA TOP 10 · ELLINGTON TOP 10 · MERAAS TOP 20 · SELECT GROUP TOP 10 · OMNIYAT TOP 10 · DAMAC TOP 10 · NAKHEEL TOP 10