HAPPY ENDPOINT · MARKET DATA NOTE

Dubai Real Estate Market Data: October 2026

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Sales edged up from September but stayed about 40% below a year earlier, while rental activity kept growing. Dubai recorded 11,730 property sales worth AED 33.4 billion in October 2026, 39.7% fewer than in October 2025 and 5.3% more than in September. Registered rental contracts reached 108,563, up 10.3% year on year. Apartment prices per square foot eased 3.2% over the year, while villa and townhouse prices rose 3.0%.

One bulk registration stands out: 536 mixed-use land plots in Al Ruwayyah, worth AED 2.6 billion, were registered on two days in October. Without them, sales were 11,194, level with September.

All figures are computed from individual registered transactions in the Happy Endpoint Dubai dataset (1.36 million sales since 1997 and 8.82 million rental contracts since 2010). Mortgages and gifts are not included.

Key figures

	October 2026	October 2025	Change
Sales transactions	11,730	19,444	-39.7%
Sales value	AED 33.4bn	AED 58.1bn	-42.5%
Off-plan share of sales	60.1%	70.4%	-10.3 pts
Median apartment price per sq ft	AED 1,660	AED 1,715	-3.2%
Median villa/townhouse price per sq ft	AED 1,684	AED 1,635	+3.0%
Rental contracts registered	108,563	98,445	+10.3%
New leases as share of contracts	52.0%	45.0%	+7.0 pts

Sales

- **Volume:** 11,730 sales, up from 11,137 in September and down from 19,444 in October 2025. Total value was AED 33.4 billion against AED 58.1 billion a year earlier.
- **Bulk land registration:** 536 of the month's sales were mixed-use land plots in Al Ruwayyah, all ready (not off-plan) and registered on 2 and 22 October. They add AED 2.6 billion to the month's value.
- **Off-plan:** 60.1% of sales were off-plan (63.0% without the Al Ruwayyah plots), down from 70.4% a year earlier and 67.8% in September.
- **Apartments:** 8,633 sales at a median price of AED 1.15 million and AED 1,660 per sq ft.
- **Villas and townhouses:** 1,649 sales at a median price of AED 4.04 million and AED 1,684 per sq ft.

Most active areas for sales, October 2026

Area	Sales	Median price (AED)	Off-plan share
Jumeirah Village Circle (JVC)	841	996,960	52%
Dubai South	795	745,000	87%
Al Ruwayyah (bulk land registration)	536	2,448,062	0%
Downtown Jebel Ali	482	1,154,280	99%
Business Bay	452	2,000,000	29%
Dubai Land Residence Complex (DLRC)	399	804,685	88%
DAMAC Lagoons	385	1,247,040	74%
Majan	334	1,050,000	83%
Motor City	302	1,100,000	87%
Arjan	256	985,000	58%

Rentals

- **Volume:** 108,563 rental contracts, 0.8% fewer than in September and 10.3% more than in October 2025. Of these, 64,318 were residential and 44,245 commercial.
- **New leases vs renewals:** new leases made up 52.0% of contracts, up from 45.0% a year earlier.
- **Rents:** median annual apartment rents were flat for studios and rose 3% to 4% for larger units.

Median annual apartment rent by size

Unit	Contracts	Median rent, Oct 2026 (AED)	Oct 2025 (AED)	Change
Studio	12,275	40,000	40,000	0.0%
1 bedroom	23,577	60,000	58,000	+3.4%
2 bedrooms	17,391	80,000	77,000	+3.9%
3 bedrooms	3,662	122,914	118,000	+4.2%

Most active areas for residential leasing, October 2026

Area	Contracts	Median annual rent (AED)	New leases
Deira	5,766	45,000	46%
Bur Dubai	3,483	68,000	29%
Jumeirah Village Circle (JVC)	3,396	62,705	64%
Business Bay	2,488	90,000	65%
International City	2,429	38,650	38%
Al Nahda (Dubai)	2,401	54,857	27%
Al Qusais	2,170	48,000	21%
Dubai Silicon Oasis (DSO)	1,782	55,000	33%
Dubai Marina	1,747	105,000	60%
Discovery Gardens	1,600	48,000	35%

Method

- **Source:** individual registered sales and rental contracts, compiled by Happy Endpoint from publicly available Dubai property transaction records, with data through 2 November 2026.
- **Late registrations:** a few records arrive after the month ends. Between 24 October and 2 November, September's counts rose by 10 sales (0.1%) and 231 rental contracts (0.2%), so September is shown here as 11,137 sales and 109,387 contracts. October's daily counts run at normal levels to the last working day of the month.
- **Prices:** medians, not averages, so that a small number of very large deals does not distort them. Price per sq ft is the median of each transaction's price per square metre, converted at 10.7639 sq ft per square metre.
- **Rents:** annual rent is the monthly rent (contract value divided by contract length) multiplied by 12. Contracts covering several units are counted once per unit, so commercial contract counts can be higher than per-contract totals.
- **Areas:** areas are the broad districts Dubai uses for registration, such as Business Bay or Dubai Marina.
- **Not included:** mortgages, gifts and other non-sale registrations.

Happy Endpoint is an independent data provider and is not affiliated with the Dubai Land Department.

The data behind this note

- **Free:** monthly medians and deal counts for the 50 most active areas, November 2025 to October 2026, on Hugging Face: Free Dubai Real Estate Monthly Market Dataset (CC BY 4.0).
- **Free datasets:** 500 sales and 500 rental contracts with every field: Free Dubai Property Sales Dataset and Free Dubai Rental Contracts Dataset.
- **Full dataset:** the Dubai Real Estate Transactions dataset: every registered sale since 1997 and rental contract since 2010, one row per transaction, with property type, size, bedrooms, off-plan or ready

status, area, building and coordinates. Available as a one-time file or an annual subscription with monthly or quarterly updates, in CSV or SQLite, for all of Dubai or any area, period or property type.

Contact: hello@happyendpoint.com

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