HAPPY ENDPOINT · MARKET DATA NOTE

Dubai Real Estate Market Data: September 2026

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Sales volume fell sharply from a year earlier while rental activity grew. Dubai recorded 11,127 property sales worth AED 28.9 billion in September 2026, 44.7% fewer than in September 2025 and 5.2% fewer than in August. Registered rental contracts rose to 109,156, up 20.8% year on year. Apartment prices per square foot eased 3.5% over the year, while villa and townhouse prices rose 3.4%.

All figures are computed from individual registered transactions in the Happy Endpoint Dubai dataset (1.35 million sales since 1997 and 8.79 million rental contracts since 2010). Mortgages and gifts are not included.

Key figures

	September 2026	September 2025	Change
Sales transactions	11,127	20,139	-44.7%
Sales value	AED 28.9bn	AED 54.1bn	-46.6%
Off-plan share of sales	67.8%	75.1%	-7.3 pts
Median apartment price per sq ft	AED 1,668	AED 1,728	-3.5%
Median villa/townhouse price per sq ft	AED 1,599	AED 1,547	+3.4%
Rental contracts registered	109,156	90,359	+20.8%
New leases as share of contracts	50.3%	44.9%	+5.4 pts

Sales

- **Volume:** 11,127 sales, down from 11,742 in August and 20,139 in September 2025. Total value was AED 28.9 billion against AED 54.1 billion a year earlier.
- **Off-plan:** 67.8% of sales were off-plan, down from 75.1% a year earlier. The fall in volume was steeper in off-plan than in ready property.
- **Apartments:** 8,736 sales at a median price of AED 1.17 million and AED 1,668 per sq ft.
- **Villas and townhouses:** 1,413 sales at a median price of AED 3.85 million and AED 1,599 per sq ft.

Most active areas for sales, September 2026

Area	Sales	Median price (AED)	Off-plan share
Jumeirah Village Circle (JVC)	797	968,000	54%
Dubai South	776	779,377	92%
Downtown Jebel Ali	621	888,860	98%
Majan	550	675,000	92%
Business Bay	424	2,000,000	36%
Motor City	402	1,050,000	92%
Dubai Creek Harbour	389	2,327,888	78%
DAMAC Lagoons	329	1,332,480	69%
Dubai Land Residence Complex (DLRC)	312	761,430	79%
Dubai Investments Park (DIP)	307	820,000	93%

Rentals

- **Volume:** 109,156 rental contracts, up 13.8% on August and 20.8% on September 2025. Of these, 66,793 were residential and 42,363 commercial.
- **New leases vs renewals:** new leases made up 50.3% of contracts, up from 44.9% a year earlier.
- **Rents:** median annual apartment rents were flat for studios and rose 3% to 5% for larger units.

Median annual apartment rent by size

Unit	Contracts	Median rent, Sep 2026 (AED)	Sep 2025 (AED)	Change
Studio	12,464	40,000	40,000	0.0%
1 bedroom	24,356	60,000	58,361	+2.8%
2 bedrooms	17,616	80,000	77,700	+3.0%
3 bedrooms	3,788	126,000	120,000	+5.0%

Most active areas for residential leasing, September 2026

Area	Contracts	Median annual rent (AED)	New leases
Deira	5,138	45,780	40%
Jumeirah Village Circle (JVC)	3,866	65,000	66%
Bur Dubai	3,254	63,689	28%
Business Bay	2,601	87,000	71%
Al Nahda (Dubai)	2,466	55,000	27%
International City	2,380	38,000	34%
Al Qusais	2,051	48,500	20%
Dubai Marina	1,930	105,000	62%
Al Barsha	1,866	77,841	45%
Arjan	1,814	58,505	56%

Method

- **Source:** individual registered sales and rental contracts, compiled by Happy Endpoint from publicly available Dubai property transaction records, with data through 24 October 2026. Our September sales count (11,127) is within 2% of the total in the Dubai Land Department's own September file (11,338).
- **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, October 2025 to September 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.

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