

AUGUST 2026



DUBAI

MARKET REPORT



INTRODUCTION

The 2026 regional conflict did not bring Dubai's property market to a halt. In August, DLD registered 12,145 sales worth AED 28.87bn across all property types.

Off-plan remained the larger segment at 67.7% of sales. Apartment & villa transfers totalled 10,588; their median registered price was AED 1.14m, and the filtered median was AED 1,698 per square foot.

Activity extended beyond sales: DLD logged 3,491 mortgage-related records with registered value of AED 15.08bn. Ejari recorded 78,818 rental contract starts, including 24,251 new one-property apartment and villa starts.

AUGUST 2026 / DLD SALES MIX

8,225 OFF-PLAN SALES

3,920 READY SALES

AUGUST AT A GLANCE

12,145

August Registered Sales



AED 28.87B

August Sales Value



67.7%

August Off-Plan Share



AED 1.14M

August Median Home Transfer



1,698

August Median Home AED / Sq ft



Despite regional disruption, Dubai registered 12,145 property sales in August, worth AED 28.87 billion.

ONE INVESTMENTS

Dubai Market Report
August 2026





GROWTH & MARKET HIGHLIGHTS

01

Full year to date (January–August 2026): Dubai recorded **112,091 property sales** worth **AED 350.51bn**.

02

Sales rose 12.8% year on year in January–February, then **fell 26.6%** in March–August.

03

Ready sales fell 45.7% year on year in March–August; **off-plan sales fell 14.2%**. The **55,312 off-plan sales** amid uncertainty suggest confidence in Dubai's long-term market.

04

Villa sales were broadly steady at 8,736 in January–August, against 8,837 a year earlier (-1.1%). **Apartment sales** totalled 87,733, versus 102,610 (-14.5%).

05

Property sales rose from **10,441 in May** to **13,929 in July**, then eased to **12,145 in August**. August remained **16.3% above May's low**.

06

For January–August, the **filtered median home price was AED 1,723/sq ft**, up **3.9% year on year**. This reflects the mix of homes sold, not like-for-like price growth.

07

New rental agreements for individual apartments & villas totalled **146,718** in January–August, up **0.4%** year on year. Each agreement covered one home.

08

Tourism regained momentum amid regional uncertainty: Dubai welcomed about **869,000 international overnight visitors in August**, the most since February. **Hotel occupancy reached 66%**, up from **36% in March**.





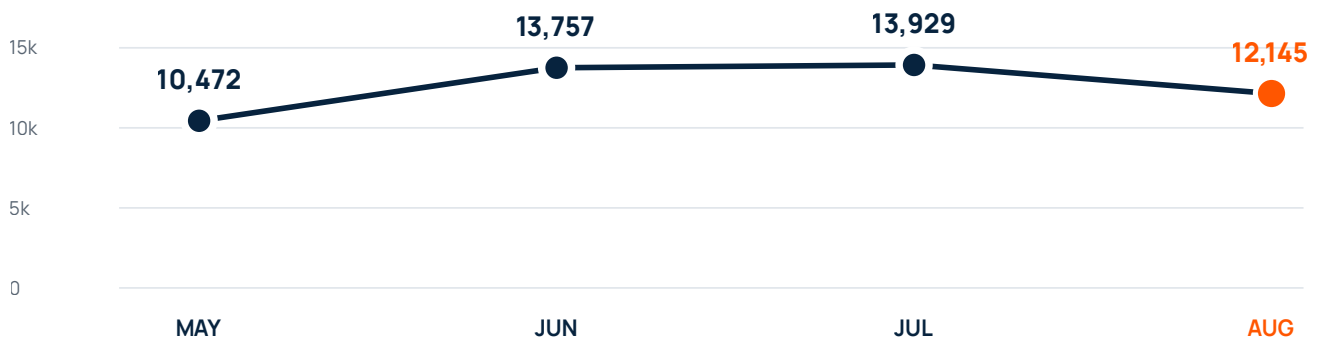
REGIONAL CONTEXT & RECOVERY

The regional escalation reached the UAE on 28 February. The IMF says it weighed on UAE tourism, transport, trade and real estate. Dubai sales were +12.8% year-on-year in January-February, then -26.6% in March-August.

Sources: WAM, 28 Feb 2026 · IMF, 17 Jul 2026 · Dubai Land Department

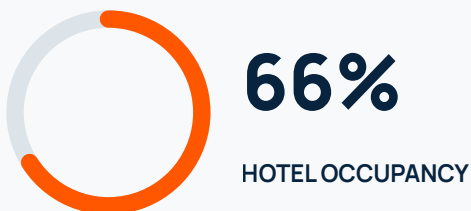
MONTHLY PROPERTY SALES

Dubai, all property types | May–August 2026



Source: Dubai Land Department

AUGUST 2026 VISITOR ECONOMY



Source: Dubai Department of Economy and Tourism, 13 Sep 2026

APPROX. INTERNATIONAL OVERNIGHT VISITORS

869,000

Visitor numbers rose by double digits from July.

Dubai approved AED 2.5bn in economic incentives by May. The IMF credits wider policy buffers and swift support with containing the shock. Travel and hospitality activity recovered, while August property sales remained 16.3% above May's low.

Sources: Dubai Government, 21 May 2026 · IMF, 17 Jul 2026 · Dubai Land Department





MORTGAGE & LOAN MARKET



From January-August 2026, DLD logged 26,500 mortgage-related records, versus 27,904 a year earlier (-5.0%). Their registered value rose from AED 119.37bn to AED 134.41bn (+12.6%).

Standard 'Mortgage Registration' was the largest procedure in August: 2,712 records, or 77.7% of mortgage-related records. Their median registered amount was AED 1.40m.

DLD also recorded 375 delayed mortgage entries and 23 portfolio mortgage entries across registration & modification procedures.

Standard mortgage registrations were 2,712 in August versus 2,964 in July (-8.5%). Their median registered amount was AED 1.40m, versus AED 1.41m in July.

In August, DLD logged 3,491 mortgage-related records, versus 4,036 in July (-13.5%). Registered value was AED 15.08bn, versus AED 17.14bn in July (-12.0%). Large records can influence monthly totals.

These counts include delayed, portfolio and modification activity. The Dubai Land Department records do not identify purchase-money loans, refinancing or loan-to-value ratios, so those figures are not estimated here.





REGISTERED HOME PRICE SNAPSHOT

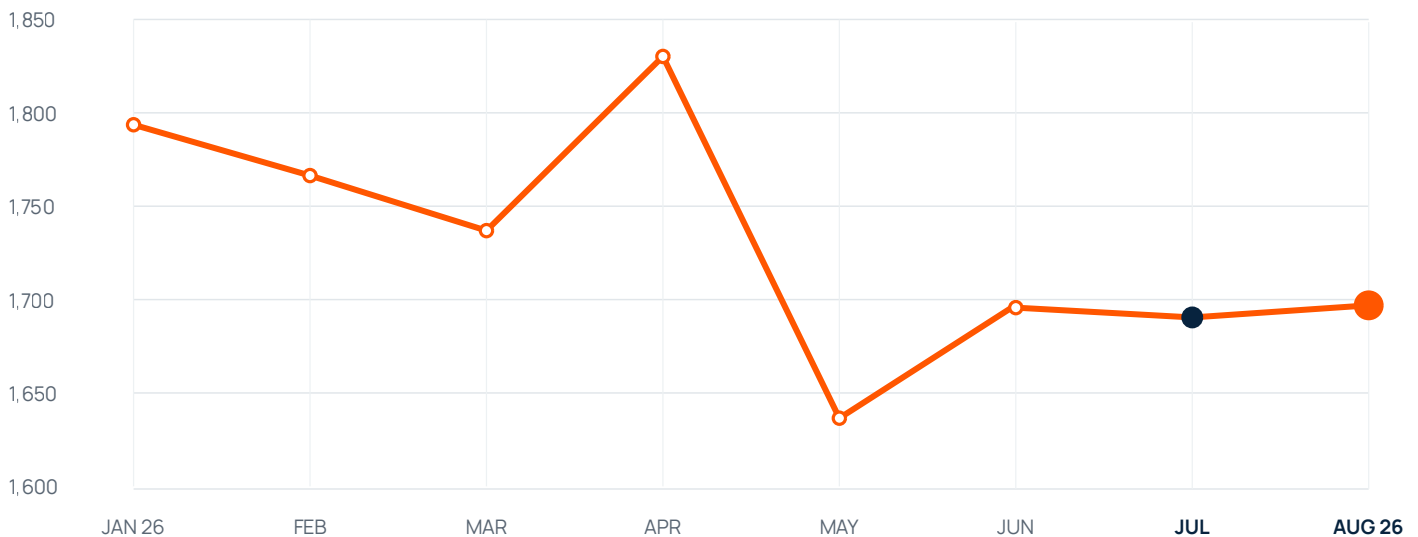
MEDIAN REGISTERED SALE PRICE / SQ FT

Qualifying apartment and villa sales, January-August 2026

AUGUST 2026

AED 1,698

10,445 qualifying home sales



The plotted series shows monthly transaction medians, not repeat sales of the same homes.



+0.4%

VS JUL 2026 MEDIAN



AED 1,692

JUL 2026 MEDIAN / SQ FT



AED 1,705

APARTMENT / SQ FT



AED 1,575

VILLA / SQ FT

Source: Dubai Land Department

Note: Median sample: apartment/villa sales of AED 100k-100m, area 20-2,000 sqm and implied AED 200-10,000/sq ft. Changes reflect the mix sold, not like-for-like growth.



HOME PRICE MONTHLY OVERVIEW

Apartment and villa sales / July versus August 2026

MEASURE	JUL 2026	AUG 2026	MOM CHANGE
Home Sales	12,240	10,588	-13.5%
Median Transfer	AED 1.05m	AED 1.14m	+7.7%
Median AED/sqft	1,692	1,698	+0.4%
Apartment Median	AED 1.00m	AED 1.07m	+6.6%
Villa Median	AED 3.05m	AED 3.50m	+14.6%
Off-plan Home Median	AED 1.01m	AED 1.09m	+7.3%
Ready Home Median	AED 1.18m	AED 1.26m	+6.8%

METHOD NOTE

Medians describe recorded sales, not the same properties over time. Month-on-month changes use unrounded figures. The AED/sqft calculation uses the filtered sample shown on the previous page. Source: Dubai Land Department.



APARTMENT & VILLA MARKET

From January-August, villa sales were broadly steady at 8,736 (-1.1% year-on-year), while apartment sales were 87,733 (-14.5%). The cards below show August's monthly endpoint. Median prices reflect the mix sold.

APARTMENTS

9,891

AUGUST 2026 SALES

Jul 2026: 11,495 | -14.0% MoM

REGISTERED SALES VALUE

AED 15.47bn

-11.7% versus July 2026

9,750 qualifying AED/sq ft sales

VILLAS

697

AUGUST 2026 SALES

Jul 2026: 745 | -6.4% MoM

REGISTERED SALES VALUE

AED 2.69bn

+2.3% versus July 2026

695 qualifying AED/sq ft sales

FILTERED MEDIAN REGISTERED PRICE / SQ FT

APARTMENT

AED 1,705

+0.2% MoM

VILLA

AED 1,575

+4.2% MoM

Source: Dubai Land Department

Note: The home figures cover apartments and villas. Filtered price medians are affected by the mix sold and are not like-for-like price changes.



TRANSACTION STATUS

DLD off-plan vs ready registration

Each full-width bar shows that month's off-plan and ready sales mix.

JULY 2026

13,929

TOTAL PROPERTY SALES

9,624

OFF-PLAN

4,305

READY

69.1% OFF-PLAN

30.9% READY

AUGUST 2026

12,145

TOTAL PROPERTY SALES

8,225

OFF-PLAN

3,920

READY

67.7% OFF-PLAN

32.3% READY

Source: Dubai Land Department

DLD's classification is used as supplied. It is a registration status, not a construction audit.





OFF-PLAN & READY LOCATION LENS

OFF-PLAN HOMES

7,770

AUGUST 2026 HOME SALES

Madinat Al Mataar	1,901
Jul 2026: 2,308 -17.6% MoM	24.5%
Wadi Al Safa 4	928
Jul 2026: 647 +43.4% MoM	11.9%
Jabal Ali Industrial Second	652
Jul 2026: 816 -20.1% MoM	8.4%
Al Barsha South Fourth	359
Jul 2026: 389 -7.7% MoM	4.6%
Wadi Al Safa 5	359
Jul 2026: 421 -14.7% MoM	4.6%

READY HOMES

2,818

AUGUST 2026 HOME SALES

Al Barsha South Fourth	383
Jul 2026: 506 -24.3% MoM	13.6%
Marsa Dubai	243
Jul 2026: 262 -7.3% MoM	8.6%
Business Bay	188
Jul 2026: 189 -0.5% MoM	6.7%
Al Merkadh	165
Jul 2026: 168 -1.8% MoM	5.9%
Jabal Ali First	131
Jul 2026: 138 -5.1% MoM	4.6%

WHERE ACTIVITY CONCENTRATED

44.8% Off-plan

28.9% Ready

Top three areas' share within each home-sale segment.

AED 30M+ APARTMENT / VILLA

21 vs 21 in Jul 2026

18 off-plan; 3 ready. Small classified sample, not all luxury sales.

Source: Dubai Land Department

Note: The areas use DLD names and count apartment and villa sales only. Off-plan and ready follow DLD categories; untyped sales are excluded.



WHERE HOMES SOLD

Top DLD areas by August 2026 apartment and villa registrations

AREA	JUL 26	AUG 26	MOM	OFF-PLAN
Madinat Al Matar	2,383	1,951	-18.1%	97%
Wadi Al Safa 4	650	945	+45.4%	98%
Al Barsha South Fourth	895	742	-17.1%	48%
Jabal Ali Industrial Second	827	660	-20.2%	99%
Wadi Al Safa 5	507	434	-14.4%	83%
Wadi Al Safa 3	395	401	+1.5%	82%
Jabal Ali First	444	378	-14.9%	65%
Business Bay	309	308	-0.3%	39%

Madinat Al Matar recorded 1,951 home sales, 97.4% off-plan. Changes from July can reflect project-registration mix and timing. DLD area names are used as supplied. Counts do not measure price growth or returns.

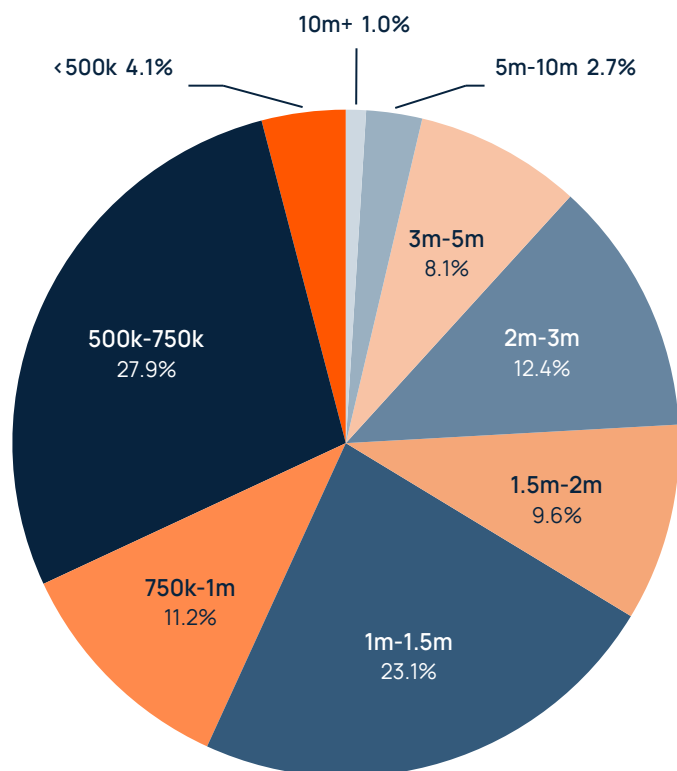
Source: Dubai Land Department



PRICE TIERS MONTHLY COMPARISON

Apartment and villa sales / DLD registered transaction values

AUG 2026 PRICE MIX



UNDER AED 1M

43.2%

of August apartment and villa sales
July share: 47.2%

SHARE OF HOME SALES

BAND	JUL 26	AUG 26	PP
< 500k	5.0%	4.1%	-0.9
500k-750k	29.4%	27.9%	-1.6
750k-1m	12.8%	11.2%	-1.6
1m-1.5m	21.4%	23.1%	+1.7
1.5m-2m	10.0%	9.6%	-0.4
2m-3m	11.0%	12.4%	+1.3
3m-5m	7.3%	8.1%	+0.7
5m-10m	2.1%	2.7%	+0.7
10m+	1.0%	1.0%	+0.0

PP = percentage-point change.

Source: Dubai Land Department

Note: Price bands use registered apartment and villa sale values.





RENTAL MARKET

In August 2026, 78,818 rental agreements began, versus 78,765 in July (+0.1%). New agreements for individual apartments and villas rose from 21,479 to 24,251 (+12.9%); renewals eased from 28,172 to 27,600 (-2.0%). Counts use contract start dates.

AUGUST 2026 RENTAL SNAPSHOT

78,818

ALL CONTRACT STARTS

24,251

NEW HOME CONTRACTS

AED 67k

NEW APARTMENT MEDIAN / YR

JULY TO AUGUST 2026 | MONTH-ON-MONTH

MEASURE	JUL 2026	AUG 2026	CHANGE
All contract starts	78,765	78,818	+0.07%
New home contracts	21,479	24,251	+12.91%
Renewed home contracts	28,172	27,600	-2.03%
New apartment median/yr	AED 65k	AED 67k	+3.08%
Renewed apartment median/yr	AED 60k	AED 61k	+1.67%
New villa median/yr	AED 180k	AED 180k	0.00%
Renewed villa median/yr	AED 173k	AED 178k	+2.89%

Source: Dubai Land Department

Note: Distinct Ejari contract IDs by start date; New/Renew home rows cover individual apartment or villa leases. Medians reflect this month's mix, not like-for-like rent growth.



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info@oneinvestments.com



+971 (0) 4 568 1856

One Global Real Estate | 1602 Ubora Office Tower, Marasi Drive, Business Bay, Dubai