

RESEARCH BRIEF • 10 OCTOBER 2026

Allsopp & Allsopp Q3 2026: Average Prices Up 14%, But Read the Mix Before the...

Allsopp & Allsopp reports its average Dubai sales price rose 14% quarter on quarter to AED 5,447,110 in Q3 2026. The report itself says this was not a market wide repricing. Buyers transacting higher up the market drove the ...

MEDIUM

INVESTOR IMPACT

7.6

SIGNIFICANCE SCORE

9 October 2026

EVENT DATE

7/10

SOURCE RELIABILITY

OI

EXECUTIVE SUMMARY

Allsopp & Allsopp Q3 2026: Average Prices Up 14%, But Read the Mix Before the Headline

Allsopp & Allsopp's Q3 2026 report shows an average sales price of AED 5,447,110, up 14% on Q2 and 5% on Q3 2025. Transaction volume rose 4% quarter on quarter and total value rose 19%. The headline is real, but the broker's own analysis says it reflects mix: transactions above AED 10M rose 38% while the sub AED 1M bracket moderated. The report also notes that the wider market's average price eased in the same quarter, and that DLD's own villa and townhouse figures eased against Q2. For a capital preservation investor, this is a useful signal about where demand is concentrated. It is not proof that every Dubai asset is appreciating by 14%.

- Allsopp & Allsopp's average sales price rose 14% quarter on quarter and 5% year on year to AED 5,447,110 in Q3 2026.
- The report states this was not a market wide repricing. Transactions above AED 10M rose 38% quarter on quarter, the strongest of any bracket, and only the sub AED 1M bracket moderated.
- Apartments moved far less than villas. Average apartment price rose 3% to AED 2,589,504, while villa and townhouse average price rose 15% to AED 8,619,368.
- Finance accounted for 67% of purchases against 33% cash, so debt is supporting demand, particularly higher up the market.
- British buyers led nationality data at 26% of transactions, followed by Indian buyers at 13% and Italian buyers at 5%.
- This is one broker's data set. Allsopp & Allsopp says the wider market's average price eased in the same quarter, so treat 14% as a signal about its own mix, not a market wide figure.

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THE EVENT

What happened, and why it matters

WHAT HAPPENED

On 9 October 2026, Allsopp & Allsopp published its Q3 2026 Dubai sales report. Its average sales price rose 14% quarter on quarter and 5% year on year to AED 5,447,110. Transaction volume was up 4% on Q2, and total transaction value rose 19%. Year on year, volume and value levelled out against an exceptionally strong Q3 2025. By price bracket, transactions above AED 10M rose 38% quarter on quarter, the strongest growth of any bracket. The AED 1M to AED 3M segment rose 11%. Only the sub AED 1M bracket moderated against Q2. Villas and townhouses led. Their average price rose 15% quarter on quarter to AED 8,619,368, with volume up 2% and total value up 17%. The top transaction was a villa at Garden Homes, Frond F, Palm Jumeirah for AED 56M, followed by Balqis Residence on Palm Jumeirah for AED 55M and a Wildflower villa in Jumeirah Golf Estates for AED 44M. Jumeirah Golf Estates led villa and townhouse areas at an average of AED 20,447,308, followed by Arabian Ranches and Damac Hills 2. Apartments rose 3% to an average of AED 2,589,504, with volume up 4% and total value up 7%. Dubai Marina remained the top transacting area at AED 2,778,192, followed by Motor City and Dubai Hills Estate. Finance accounted for 67% of purchases against 33% cash. August alone saw cash share dip as low as 23%, so the Q3 blend reflects some give back toward cash later in the quarter. Listings activity moderated 9% quarter on quarter, while viewings held steady.

WHY IT MATTERS

Hesitant overseas buyers often say the market is weakening. This report gives a more nuanced answer than either side usually offers. Allsopp & Allsopp's own transaction data points to a business gaining ground, while the same report says the wider market's average price eased in the quarter and DLD's own villa and townhouse figures eased against Q2. Two things are true at once. Demand at the upper end is strong, and the headline average is flattered by who is buying. The report says this was more buyers transacting higher up the market, not a market wide repricing. So the 14% tells you where capital is concentrating. It does not tell you what a typical apartment or a typical off plan unit is doing. For a capital preservation lens, that distinction is the whole point. A rising average built on a shift in mix is a weaker foundation than a broad based price rise, and you should size your expectations to the segment you actually buy in.

WHO IT AFFECTS

If you hold or are weighing a villa or townhouse in established communities such as Palm Jumeirah, Jumeirah Golf Estates or Arabian Ranches, this is the most relevant segment of the report. Average villa and townhouse prices rose 15% in the quarter in Allsopp & Allsopp's data. If you are weighing an apartment, the data is more modest. Average

apartment price rose 3%, in line with the market rather than ahead of it. If you are buying below AED 1M, this was the only bracket that moderated against Q2, so the headline is least applicable to you. If you are a UK based buyer, note that British buyers led nationality data at 26% of transactions, so you are not an outlier in this market. If you rely on financing, the 67% finance share is worth reading as context for how the wider buyer pool is funding purchases.

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INVESTOR READ

Implications, risks and opportunities

HISTORICAL CONTEXT

The fact sheet gives limited long run history. What the report does say is that the pattern of Allsopp & Allsopp's prices outpacing DLD's figures has held across much of 2026, and that the villa segment has shown similar strength consistently across the year. It also notes that the move toward financed purchases has built across 2026. Year on year, the comparison is against what the report calls an exceptionally strong Q3 2025, which is why volume and value levelled out rather than grew. That context matters: Q3 2026 is strong in price terms, but it is not an unbroken acceleration from a weak base.

IMPLICATIONS

Do not anchor on 14%. It is an average sales price across one broker's transactions, and the report attributes it to mix. A better use of the number is as a confirmation that demand at the top of the market remains active. Check which bracket and product type your own target sits in. The AED 1M to AED 3M bracket rose 11% on volume, apartments rose 3% on price, and villas and townhouses rose 15% on price. Those are very different stories, and your underwriting should reflect your segment, not the blended figure. On the financing side, the 67% finance share means a large part of demand is leveraged. The verified data shows 3 month EIBOR at 4.2% in October 2026 (Central Bank of the UAE). If you plan to use leverage, stress your numbers against that rate and against the possibility that financed demand slows. For off plan, the verified data shows off plan accounted for 65.4% of sales by count in September 2026 (Dubai Land Department). That means a large share of the market is exposed to delivery and developer risk, so escrow protection and developer track record matter as much as headline price growth.

RISKS

The bear case deserves its full weight here. First, this is one broker's data. Allsopp & Allsopp states that the wider market's average price eased in the same quarter, and that DLD's own villa and townhouse figures eased against Q2. Where the broker and the official record diverge, you should not assume the broker is the better guide to your asset. The report itself says its figures are the more current signal, but it also acknowledges the DLD lag, and a lag is not the same as an error. Second, the 14% is a mix effect. With transactions above AED 10M up 38% and the sub AED 1M bracket moderating, a few very large sales can lift an average without any underlying asset repricing. A single AED 56M villa moves a blended average far more than a studio does.

Third, year on year, volume and value levelled out against an exceptionally strong Q3 2025. The 5% year on year price rise is a more sober read than 14%. Fourth, listings moderated 9% and financing is the clear majority of purchases at 67%. If rates or credit conditions tighten, leveraged demand at the top end is the part most exposed. Fifth, the verified September 2026 DLD data shows AED 29.7bn of sales value across 11,431 transactions. That is a strong activity level, but activity is not the same as price appreciation, and you should not treat the two as interchangeable.

OPPORTUNITIES

The report shows genuine depth in the upper segments. Transactions above AED 10M were the fastest growing bracket, and villa and townhouse total value rose 17%. For an investor focused on prime, established communities with limited supply, that supports the view that scarce, high quality assets are holding demand. The AED 1M to AED 3M bracket rose 11%, which suggests mid market demand is also active, not just trophy assets. Broad international demand is a stabiliser. British buyers at 26%, Indian buyers at 13% and Italian buyers at 5% show a buyer base that is not dependent on a single nationality. Viewings held steady while listings moderated 9%. A tighter supply of listings against steady viewing interest is a constructive setup, though it is one quarter of data and should be tracked rather than assumed.

WHAT TO WATCH

Watch how the finance and cash balance moves into Q4. The report flags that August saw cash share dip as low as 23%, and that the Q3 blend reflects some give back toward cash, so the direction is not a straight line. Watch whether DLD's official figures converge with Allsopp & Allsopp's. The gap between the two is the central uncertainty in this report. Watch listings. A 9% moderation with steady viewings is a tightening signal only if it persists. Watch 3 month EIBOR, currently 4.2% (Central Bank of the UAE, October 2026), given that finance accounts for 67% of purchases. Watch whether growth broadens beyond transactions above AED 10M. If the sub AED 1M bracket and apartments stay soft, the average will keep being driven by a narrow set of buyers.

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THE BOTTOM LINE

What this means for Dubai investors

THE MEANING

If you are weighing Dubai, this report supports one narrow conclusion: demand at the upper end of the market is active and the buyer base is international. It does not support the idea that everything is rising 14%. The sensible use of this data is to anchor on your own segment. Villas and townhouses show the strongest price movement in this report, apartments show modest movement at 3%, and the lowest price bracket moderated. Then check the official DLD record for the same period before you commit capital, because the broker and the official data are currently telling different stories. For capital preservation, the questions that matter are not how fast prices rose last quarter. They are whether the asset is protected by escrow if it is off plan, whether the developer has delivered before, whether the rental and exit demand exists in that specific community, and whether your financing survives a higher rate.

“ Here's the thing. A 14% headline is exactly the kind of number that makes people rush, and it's exactly the kind I'd slow you down on. Read the report properly and the broker itself tells you this wasn't a market wide repricing. It was more buyers transacting higher up the market. That's a mix story, right? So what do I take from it? Two things are true at once. Demand for scarce, high quality product is clearly alive, and the official data and the broker data are not saying the same thing about the wider market. I'd rather be straight with you about both than sell you the number. If you're weighing this up, I'd ask you to look at your own segment first. An apartment at 3% and a Palm Jumeirah villa are not the same trade. Then look at your financing, because 67% of buyers are using it and that's a dependency worth stress testing, not

ignoring. Waiting isn't automatically costly and rushing isn't automatically smart. What protects generational wealth is buying the right asset, from a developer with a delivery record, with the escrow protections in place, at a price that still works if growth is flat. If the numbers only work at 14%, they don't work.

BRADLEY JAMES, DUBAI REAL ESTATE INVESTMENT ADVISOR

SOURCES AND VERIFICATION

Allsopp & Allsopp, Q3 2026 Dubai Sales Report: Average Prices Rise 14%, published 9 October 2026,

<https://www.allsoppandallsopp.com/dubai/about-us/news-videos/1953-q3-2026-dubai-sales-report>

Dubai Land Department, September 2026 sales transaction value (AED 29.7bn), sales transactions (11,431) and off plan share of sales by count (65.4%), via Bradley James data warehouse Central Bank of the UAE, 3 month EIBOR (4.2%), October 2026, via Bradley James data warehouse

Begin the conversation.

Every allocation starts with a candid, numbers-first discussion shaped around your mandate, risk profile and timeline.

Bradley James

ASSOCIATE DIRECTOR & SENIOR INVESTMENT ADVISOR

Bradley James is an Associate Director and Senior Investment Advisor based in Dubai, specialising in Dubai real estate, off-plan investment, strategic wealth allocation, portfolio diversification, and relocation and residency planning. He advises private investors and family offices on entering the Dubai market with the same rigour he applies to his own capital.

SPECIALISMS

- Dubai Real Estate
- Off-Plan Investment
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- Portfolio Diversification
- Relocation & Residency Planning



WHATSAPP

+971 50 119 5649

INSTAGRAM

@braddjames

WEB

bradleyjames.website

LOCATION

Dubai, U.A.E.

SOURCES

Allsopp & Allsopp, Q3 2026 Dubai Sales Report: Average Prices Rise 14%, published 9 October 2026,
<https://www.allsoppandallsopp.com/dubai/about-us/news-videos/1953-q3-2026-dubai-sa>



SCAN TO MESSAGE