

DUBAI SOUTH

The district Dubai is building an airport around. What AED 17.5 billion of registered turnover, 2,531 clean sales and 2,814 tenancy contracts say about buying here in 2026.

AED 17.5bn

TURNOVER, JANUARY-
AUGUST

7.35%

MEDIAN PAIRED GROSS
YIELD

+28%

MEDIAN RESALE GAIN,
374 EXITS

94%

OF ALL SALES ARE OFF-
PLAN

WHAT IS INSIDE

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HOW TO READ THIS

The transaction analysis is our own, computed from registered Dubai Land Department data. Where published sources disagree – and on this district they disagree by a factor of two and a half – every figure is printed rather than averaged into a number nobody published.

PART ONE

THE COMMUNITY

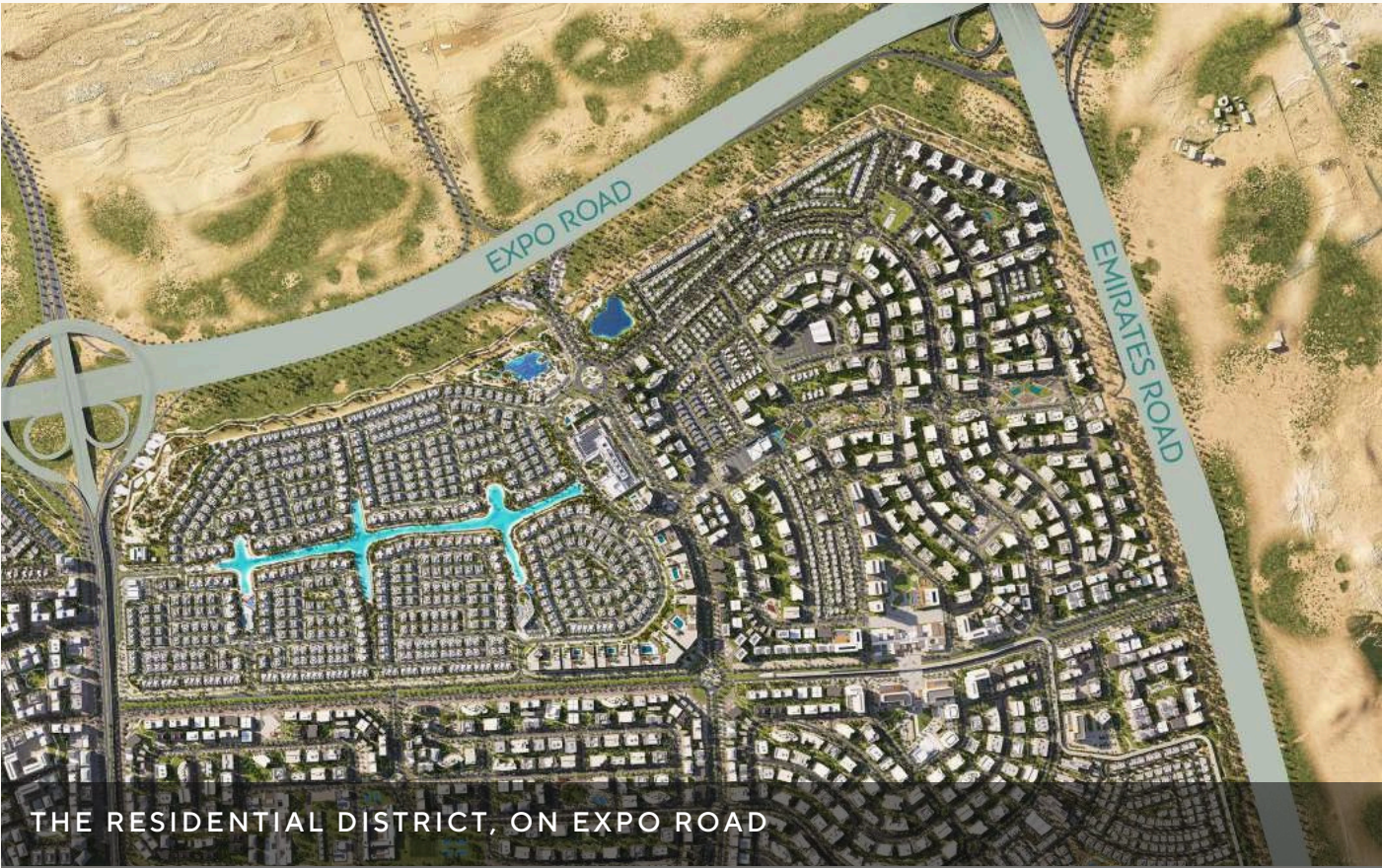
A district planned for a million people, with roughly twenty-five thousand living in it. What stands in Dubai South today — and what is still a render.

AT A GLANCE

The district, and who runs it

A government master plan the size of Bahrain’s capital island, built around the airport that is meant to replace Dubai International.

145	Eight	4,200	Freehold
SQUARE KM	DISTRICTS	BUSINESSES	TENURE
Residential	Planned for ~250,000; where every figure in this guide sits		
Aviation	Al Maktoum International and its MRO and aerospace supply chain		
Logistics	Free-zone warehousing, bonded corridor to Jebel Ali Port		
Business Park	Offices and licensing; 4,200+ operational businesses		
Commercial	Retail and mixed use, largely unbuilt		
Humanitarian	International Humanitarian City, UN and NGO logistics		
Golf	Emaar South and its 18-hole championship course		
Exhibition	Expo City Dubai, 430 hectares		



THE RESIDENTIAL DISTRICT, ON EXPO ROAD

WHO YOU ARE ACTUALLY BUYING FROM

Dubai South is a government entity under **Dubai Aviation City Corporation**, chaired by Sheikh Ahmed bin Saeed Al Maktoum. Its development arm, Dubai South Properties, is both the master developer and a competing seller of units. Group CEO Nabil Al Kindi reported 653 new companies and a 65 per cent rise in licences for 2025.

THE POPULATION NUMBER

Dubai South is routinely marketed as a city of **one million**. That figure is the executive chairman’s 2024 target for people living and working in it – not a population forecast. The last published resident count is **25,000, from 2022**. No current figure exists in any public source. Two different metrics, four years apart, and neither is a demand model.

THE THESIS

One airport, and everything resting on it

128bn	2032	260m	120k
AED COMMITTED	PHASE ONE	ULTIMATE PASSENGERS	PEAK WORKFORCE
End 2027	Second runway opens		Griffiths, 11 Sep 2026
2027	flydubai moves first — 5–6 aircraft		Dubai Airports
Dec 2031	Automated people mover, 50 km, 9 stations		MHI, 20 Aug 2026
2032	Phase 1 complete — 150m passengers		Dubai Airports
2032	DXB reaches maximum capacity		The National
Undated	Full build — 260m passengers, 5 runways		—

WHAT QUIETLY CHANGED IN THE STORY

The 2024 announcement was reported everywhere as **DXB relocating within ten years**. The official framing in 2026 is a staged, airline-by-airline migration beginning with five or six flydubai aircraft in 2027 and running past 2032. **No date has ever been published on which Al Maktoum replaces Dubai International.**

SIX YEARS, IN BUYER TERMS

Phase 1 lands in **2032**. A buyer completing on a 2028 handover holds for four years before the airport does anything for the rent roll, and pays service charges throughout. The infrastructure is real and funded. The timing is the risk.

LOCATION

Where it sits, and how you leave it

Forty kilometres south-west of Downtown, off Expo Road and Emirates Road. Published drive times do not agree with each other.

DESTINATION	DEVELOPER	OFF-PEAK	DISTANCE
Al Maktoum International (DWC)	10 min	—	5–10 min
Expo City Dubai	10 min	—	10 min
Dubai Marina	15 min	25–40 min	30 km
Palm Jebel Ali	20 min	—	—
Downtown · Dubai Mall	—	35–50 min	40 km
DIFC · Business Bay	—	35–45 min	—
Dubai International (DXB)	—	35–45 min	—

THREE THINGS WRONG WITH THE BROCHURE COLUMN

One. It promises a “Brown Line metro station” in ten minutes. Dubai Metro has a Red Line and a Green Line. There is no Brown Line. **Two.** It promises an Etihad Rail station in ten minutes. Dubai’s only station is Al Yalays at Jumeirah Golf Estates, roughly **thirty minutes away by road**. **Three.** No brochure prints the peak figure. Downtown at rush hour is **60 to 90 minutes** — and that is the number your tenant commutes.



The railway that is not coming

SCHEME	OPENS	WHAT IT ACTUALLY DOES FOR DUBAI SOUTH
Dubai Metro Blue Line	9 September 2029	Does not serve Dubai South. Route is eastern — Mirdif, International City, Academic City, Creek Harbour.
Route 2020 extension to DWC	No date	No contract, no budget, no construction date has ever been published.
Airport Express, DXB–DWC	No date	55 km, five stations. Six consultancies bid in June 2026. RTA has confirmed no timeframe.
Etihad Rail passenger	30 September 2026	Dubai’s station is Al Yalayis, Jumeirah Golf Estates — about 30 minutes away by road.
Dubai Loop	~2027 pilot	DIFC to Dubai Mall, then Business Bay. Entirely central Dubai.

WHAT DOES EXIST

The Red Line’s **Route 2020** branch terminates at **Expo 2020 station**, inside Expo City. It is a genuine metro connection to the district — but it serves the exhibition site, not the residential clusters, and it is a drive from every community priced in this guide.

WHAT IS BEING BUILT INSTEAD

The **Latifa bint Hamdan Corridor**, AED 2 billion, awarded 12 July 2026 and due end-2028: 12 km linking Sheikh Zayed Road to E311 and Emirates Road, cutting that run from 33 minutes to 15. A road scheme, not a Dubai South scheme — but the one funded project that shortens this commute.

READ THE SECOND COLUMN TWICE

Four of the five have no opening date, no route through Dubai South, or both. The Blue Line is the one that is funded and dated — and its map does not come within twenty-five kilometres of here. Where a developer cites “metro expansion” as a Dubai South catalyst, it is citing a line that goes the other way.

Five rail schemes are cited in Dubai South marketing. Today, exactly one line reaches the district — and it stops at Expo City.



Zero metro stations inside the Residential District, in 2026 and for the rest of this decade

THE MASTER PLAN

What is built, and what is a render

COMMUNITY	DEVELOPER	STATUS	DEVELOPER
The Pulse	Dubai South Properties	Complete	Phase 1 delivered Feb 2020, ~14 months late
The Pulse Beachfront	Dubai South Properties	90% built	788 units, sold out at launch; 800 delivered 2025
MAG 5 Boulevard	MAG	Complete	1,118 apartments, 13 blocks, October 2019
Celestia	DAMAC	Complete	967 studios and apartments
Emaar South	Emaar	Part delivered	~22,700 homes planned; golf course operational
Expo City Dubai	Expo City Authority	Operating	430 ha; residential still being launched
South Bay	Dubai South Properties	Under construction	5 clusters, 1,200+ units, 3 km crystal lagoon
Azizi Venice	Azizi	39% built	AED 12bn; 305 villas, 90+ blocks, 575 keys; est. 2027
Windsor House	Ellington	Started Q4 2025	~830 units, four 11-storey towers; est. Q3 2028
Hayat	Dubai South Properties	Started 2026	~2,500 townhouses over ~10m ft²; est. Q2 2028
The Villages · ParkLane	—	Cancelled	The Villages was 254 townhouses and 426 apartments

THE DELIVERY RECORD, SUCH AS IT IS

Dubai South Properties delivered 800 units in 2025 and schedules 1,300 for 2026. Its first phase at The Pulse landed fourteen months late, and Cavendish Maxwell measures a Dubai-wide 42.3 per cent materialisation rate. Discount every date on this page accordingly.

Four communities are finished. Two were cancelled. Everything else on the marketing map is a construction site.



SOUTH BAY – THE 3 KM CRYSTAL LAGOON, RENDER



HAYAT MASTER PLAN, PHASE 1



SOUTH BAY TOWNHOUSES – RENDER

AMENITIES

Schools, hospitals and the mall that isn't

SCHOOLS – KHDA RATING AND ANNUAL FEES, AED

SCHOOL	CURRICULUM	WHERE	KHDA	KHDA
GEMS Founders Dubai South	British	Inside the district	Not yet inspected	30,940–40,460
Greenfield International	British & IB	Dubai Investments Park, 8.3 km	Very Good	~59,000
South View School	British	Remraam	Good	46,510–66,519
Fairgreen International	IB	The Sustainable City	Good	54,004–92,302
Jebel Ali School	British	Akoya / Mudon	Very Good	49,630–82,190

HEALTHCARE

There is no general hospital inside Dubai South. In-district provision is the Saudi German Clinic and the DWC airport medical centre. The nearest 24-hour emergency departments are Aster Cedars in Jebel Ali and NMC Royal in Dubai Investments Park – both outside the district.

RETAIL – OPEN TODAY

The Pulse community retail, about 30,000 ft². The Outlet Village, on the Jebel Ali side. Emaar South’s golf course. Expo City’s plazas and parks. That is the list.

One school inside the district. No hospital. No mall. For a place targeting a million people, that is the gap that matters.



COMMUNITY LIFE, DEVELOPER IMAGERY

THREE MALLS, NONE OF THEM OPEN

South Bay Mall – 200,000 ft², announced November 2025, construction “expected to begin soon”, no opening date. Dubai South Mall – an Emaar and DWTC joint venture whose handover target was 2022; still listed as incomplete. Majid Al Futtaim – AED 62bn and 22 million ft² announced 19 May 2026, no timeline published.

THE GAP, STATED PLAINLY

One	Zero	Zero	10 km
SCHOOL IN DISTRICT	HOSPITALS IN DISTRICT	MALLS OPEN	TO THE NEAREST NURSERY

WHAT THIS DOES TO THE TENANT POOL

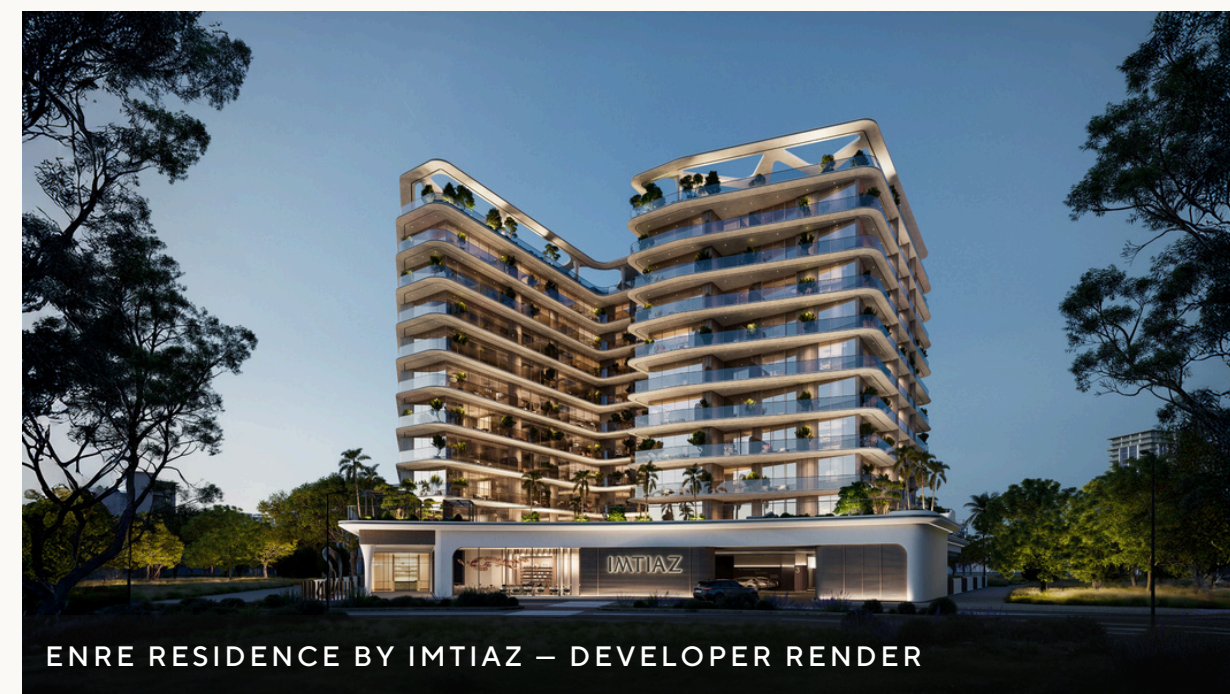
Amenity thinness caps who will rent here: airport, logistics and free-zone staff who prize the commute and the price, rather than families choosing a school catchment. That is a real, durable tenant base – it is simply a narrower one, and it sets a ceiling on rent growth that the yield figures on page 17 do not show.

SUPPLY

Who is building here

Every developer-primary sale registered in the Residential District between 2 January and 31 August 2026, ranked by volume.

DEVELOPER	PRINCIPAL PROJECT	SALES	AED/FT ²	MEDIAN PRICE
Ellington Properties	Windsor House x4	753	1,508	1,557,828
Avenew Development	Avenew 888 Loom, Modo	254	1,429	1,039,000
Dubai South Properties	South Square, ParkLane	199	1,473	1,802,504
Intiaz Developments	Enre Residence	112	1,556	1,355,688
Kappa Acca	Kappa Acca 1-6	82	1,053	660,020
Marquis Developers	Marquis Horizon	66	1,580	1,265,000
Al Mizan International	The LAX, The Harmony 2	66	921	1,120,000
Takmeel Real Estate	Divine Elements	48	1,496	968,792
Al Helal Al Zahaby	Oasis Residences	43	1,214	885,036
Bold Living	The Collective	42	1,314	1,157,000
Zoya Developments	Miorah	39	1,419	1,027,522
Vakson Group	Timber Terrace	33	1,254	1,119,000
Credo Investments	Majestique Residence 2	28	1,285	1,137,000
Mirfa IBC	Stories by Mirfa	25	1,309	659,000
Transcend Developments	Anchorage Residences	25	1,100	825,000



ONE DEVELOPER, FOUR BUILDINGS, THIRTY-FIVE PER CENT

Ellington's **753 sales** are **35 per cent** of every primary transaction in the district over eight months — and as far as public records show they are all Windsor House, one project of roughly 830 units in four towers that broke ground in Q4 2025 and is due Q3 2028. Roughly nine in ten units sold before the second slab.

Ellington's own research blog, 22 June 2026, lists Dubai South among the "growth corridors" with "more cranes and higher oversupply risk". When the district's largest seller says that in public, print it.

THE PRICE SPREAD BETWEEN SELLERS

Primary pricing runs from **AED 921/ft²** at Al Mizan to **AED 1,580** at Marquis — a **72 per cent spread** inside one district, in the same eight months, largely for the same product. Location within the district explains some of it. Brand explains the rest.

BEFORE YOU SIGN

The due-diligence page

- ◆ Pull the **Mollak** service-charge statement for the exact building, not the district band. The published spread here is AED 11.66 to 26.09 per square foot — a factor of 2.2.
- ◆ Check the **escrow account number** and RERA project registration before any payment. Off-plan money goes to escrow, never to a developer account.
- ◆ Read the **handover date in the SPA**, not the brochure. Dubai's materialisation rate is 42.3 per cent; The Pulse phase 1 ran fourteen months late.
- ◆ Verify **floor area on the Oqood or title deed**. Brochure areas include balconies inconsistently, and psf is the number you are actually buying.
- ◆ Understand the **40 per cent rule** before you plan an exit: most developers here will not issue a resale NOC until 30–40 per cent of contract value is paid. On a 5/55/20/20 plan that is deep into construction.
- ◆ Budget the **round trip**: 4 per cent DLD transfer, AED 5,250 trustee, AED 1,000–5,000 developer NOC, and about 2 per cent agency. Eight to twelve per cent in and out.
- ◆ Ask for the **flight-path and noise assessment**. Five parallel runways are being built inside this district and no public noise-contour study exists.

THE ROUND TRIP, COSTED

DLD transfer, on purchase	4.0%	Developer NOC, on exit	1,000–5,000
Trustee office	AED 5,250	Round trip, in and out	8–12%
Agency, each side	2.0%	On the median AED 1.22m unit	~100–145k

Roughly four months of median gross rent on a two-bedroom, before the property has moved at all.



PUBLISHED SERVICE CHARGES, AED PER FT² PER YEAR

Desire South Residences	11.66
Celestia	14.19 + 0.56 reserve
MAG 505	15.11
Anchorage Residence	15.38
Azizi Gardens	26.09

WHAT NOBODY PUBLISHES

There is **no public Mollak figure** for The Pulse, MAG 5 Boulevard, South Bay or Emaar South — four of the largest communities in the district. The portal is not scrapeable and the owners' associations do not publish. If an agent quotes you a service charge for these from memory, ask for the statement.

PART TWO

THE INVESTMENT CASE

AED 17.5 billion changed hands here in eight months. Ninety-four per cent of it was off-plan, at a 54 per cent premium to what finished stock trades for.

MARKET SNAPSHOT

September 2026

Dubai has turned negative for the first time since 2021. Dubai South is one of the few districts still growing volume.

-3.1%

DUBAI PRICES, YEAR ON YEAR
ValuStrat, August 2026

-2.6%

DUBAI RENTS, YEAR ON YEAR
CBRE, Q2 2026

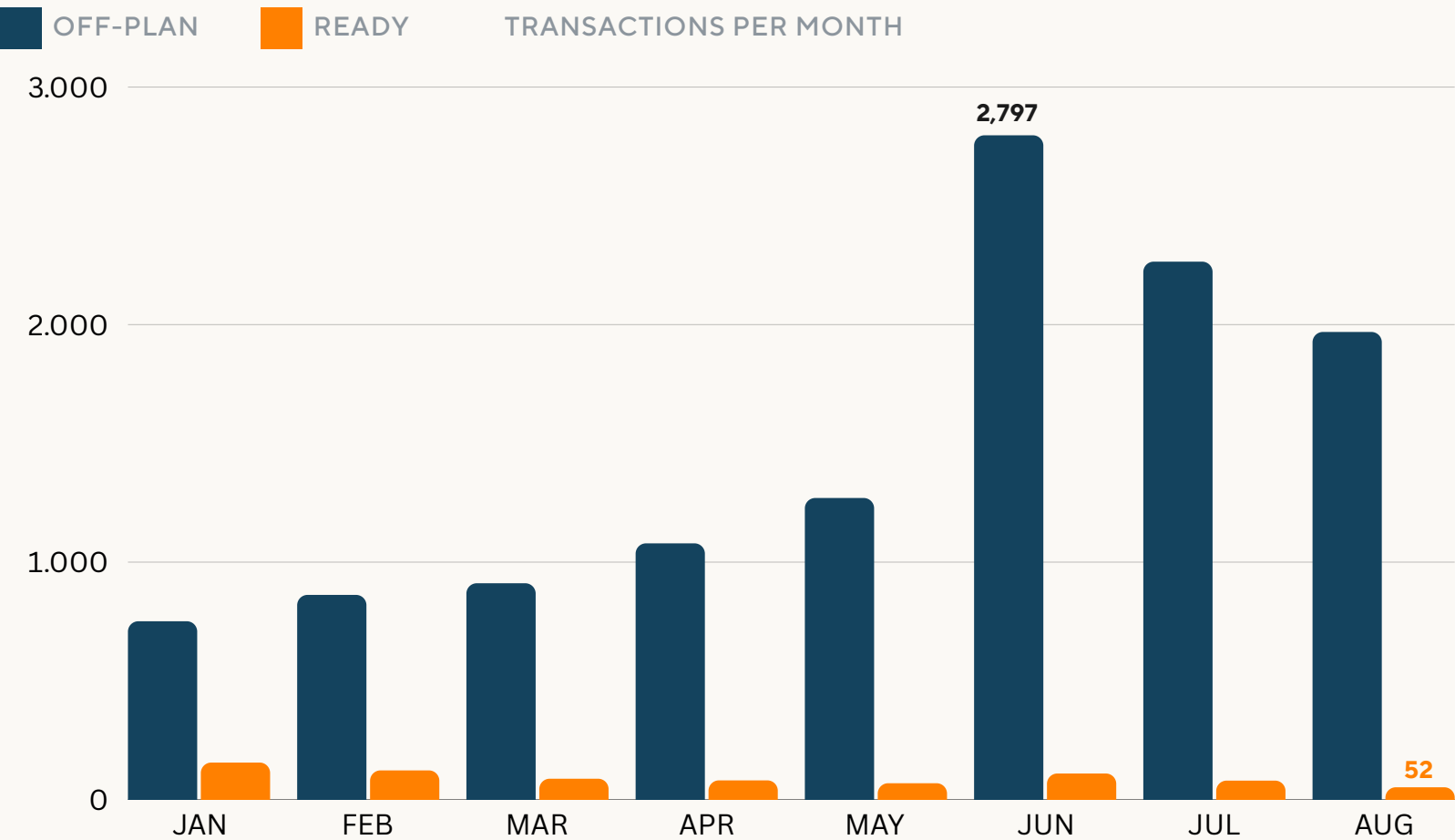
-40.4%

DUBAI OFF-PLAN REGISTRATIONS
ValuStrat, August 2026

+75.5%

DUBAI SOUTH TRANSACTIONS
Property Finder, trailing year

REGISTERED SALES, DUBAI SOUTH – OFF-PLAN AGAINST READY, 2026



WHAT WAS FORECAST FOR 2026, IN DECEMBER 2025

HOUSE	FORECAST	HOUSE
Betterhomes	Dubai prices +12%	Wrong
Cushman & Wakefield Core	Prices +5–8%, rents stable	Wrong
Cavendish Maxwell	Moderate rises to mid-2026	Half right
Fitch Ratings	“A moderate correction”	Right

The ratings agency warning of correction was the outlier at the time. Treat 2027 forecasts from the same houses accordingly.

THREE INDICES, ONE MARKET

CBRE · July 2026	+1.9% YoY
REIDIN · April 2026	+6.1% YoY
ValuStrat · September 2026	-3.1% YoY
Dubai average, all stock	AED 1,513/ft²

RUNNING AGAINST THE CITY

Dubai-wide, off-plan registrations fell **40 per cent year on year** in August and ready sales fell **21 per cent**. Here, off-plan volume is **2.6 times** its January level while ready sales fell from 156 a month to **52**. Dubai South is not tracking the correction; it is absorbing the developer pipeline that the rest of the city has stopped absorbing. Which is the bull case and the bear case in one sentence.

PRICES

What 2,531 registered sales say

Every sale registered in the Dubai South Residential District, 2 January to 31 August 2026. Not asking prices, not a portal average.

SEGMENT	SALES	AED/FT ²	MEDIAN PRICE
All residential, clean	2,531	1,413	1,220,204
Developer primary	2,157	1,444	1,220,204
Resale, secondary	374	1,160	1,226,350
Off-plan	1,950	1,462	1,276,800
Ready	581	1,131	800,000
Studio	300	1,409	568,635
1 bedroom	1,033	1,446	1,104,000
2 bedroom	895	1,388	1,605,000
3 bedroom	161	1,433	2,209,828
Villas & townhouses	142	1,264	4,165,000

THE NUMBER THAT SETTLES THE ARGUMENT

Four published figures circulate for Dubai South's price per square foot: **AED 800, 950–1,600, 1,479** and **2,000**. They cannot be reconciled — they mix asking with transacted, off-plan with ready and district with sub-community. The registered median across 2,531 sales is **AED 1,413**.

PRIMARY SALES BY PROJECT — AND THE RANGE INSIDE EACH ONE

PROJECT	DEVELOPER	SALES	AED/FT ²	RANGE
Windsor House 2 A	Ellington	198	1,537	1,333–1,791
Windsor House 2 B	Ellington	187	1,546	1,422–1,776
Windsor House 1	Ellington	187	1,456	1,350–1,684
Windsor House 2	Ellington	181	1,462	1,323–1,749
Avenew 888 Loom	Avenew	218	1,429	925–1,787
South Square 1	Dubai South	144	1,524	982–2,205
Enre Residence	Imtiaz	112	1,556	1,274–2,332
Marquis Horizon	Marquis	66	1,580	1,327–1,856
Kappa Acca 6	Kappa Acca	58	1,059	775–1,273
Divine Elements	Takmeel	48	1,496	1,274–1,903
The Collective	Bold Living	42	1,314	1,095–1,886
The LAX	Al Mizan	36	867	835–1,467

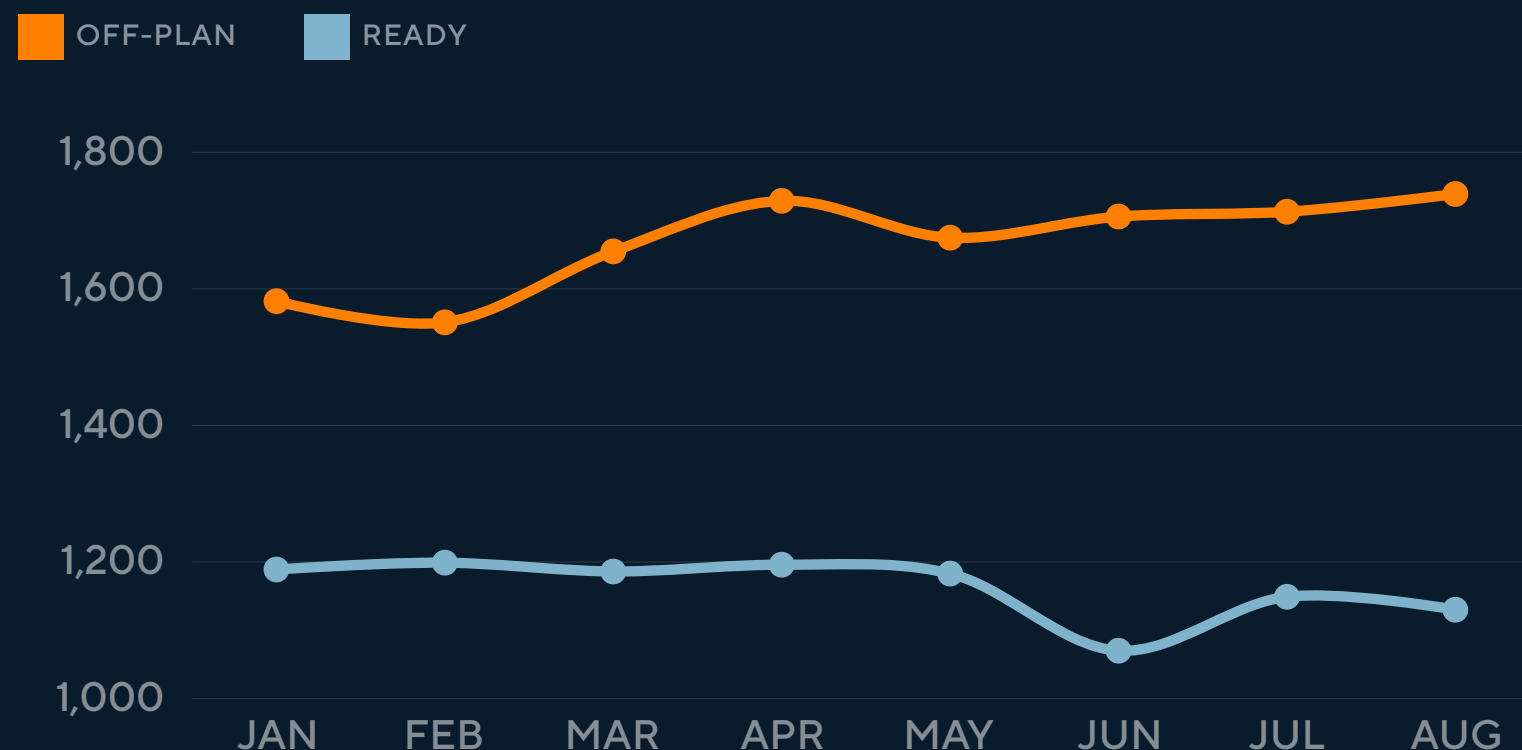


FOUR-BEDROOM TOWNHOUSES, SOUTH BAY — RENDER

THE KEY PAGE

Off-plan against ready

REGISTERED SALES, DUBAI SOUTH – OFF-PLAN AGAINST READY, 2026



1,739 Off-plan, August

1,130 Ready, August

WHAT IT COSTS TO CLOSE THAT GAP

Off-plan opened the year **33 per cent** above ready stock and ended August **54 per cent** above it – off-plan up 9.9 per cent, ready down 5.0 per cent. A buyer at Windsor House's **AED 1,508/ft²** needs roughly **33 per cent of growth in Dubai South's ready market** simply to reach today's parity at exit, before 8 to 12 per cent of round-trip cost – and that market fell from AED 1,194 in January to 1,099 in August.

READY RESALE, BY BUILDING

BUILDING	SALES	AED/FT ²
The Pulse Beachfront 2	11	1,357
Majestique Residence 2	17	1,327
The Pulse Beachfront 3	38	1,319
The Pulse Beachfront 1	26	1,318
RR Residence	75	1,200
Cresswell Residences	15	1,118
Kappa Acca 1	31	1,117
Celestia A	31	1,116
Anchorage Residences	25	1,100
Kappa Acca 6	58	1,059
Tenora	13	897
The LAX	37	867

DEVELOPER PRIMARY, SAME DISTRICT

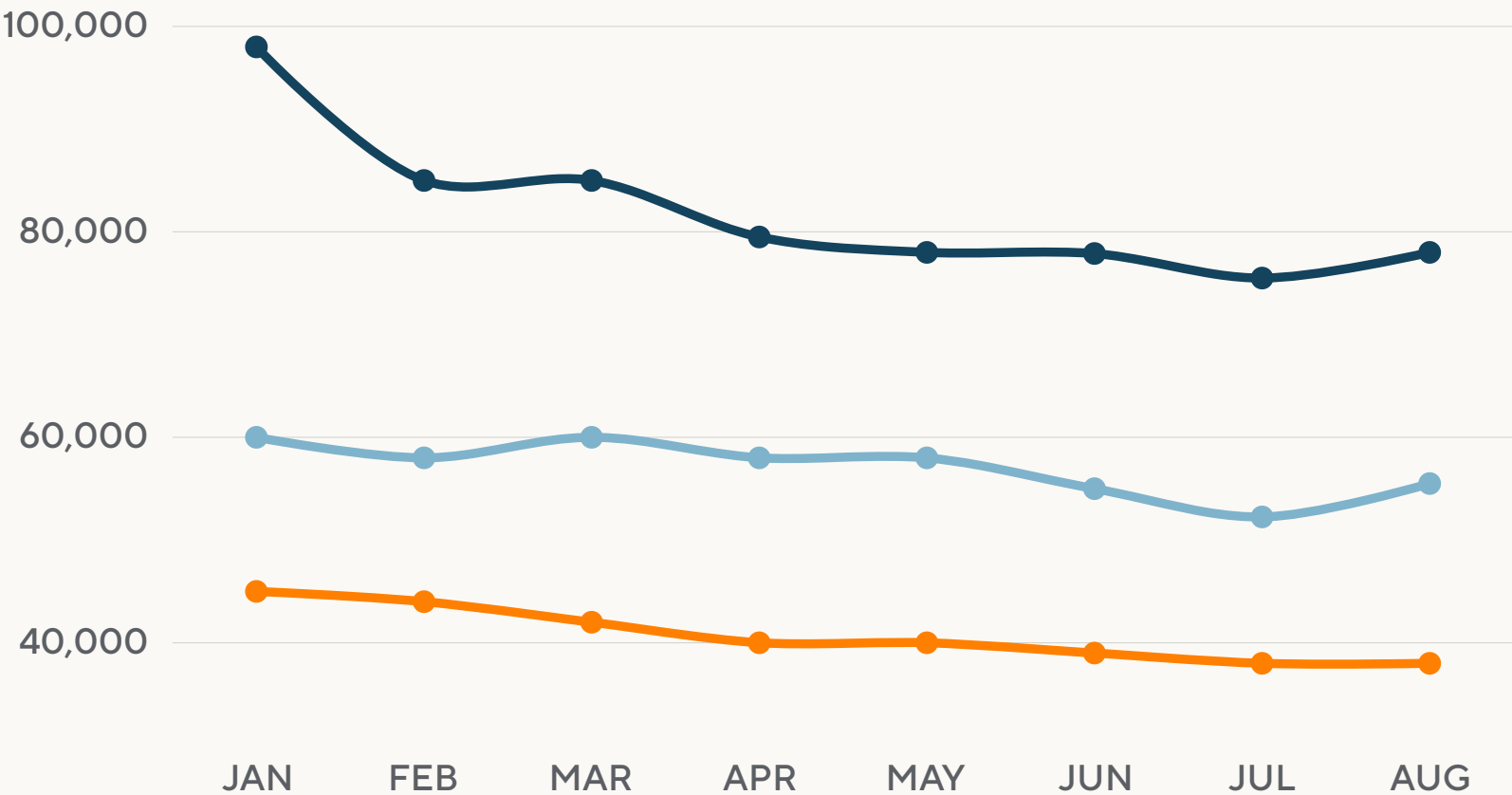
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Windsor House 1	187	1,456
Avenew 888 Loom	218	1,429
Miorah	39	1,419
The Collective	42	1,314
Timber Terrace	33	1,254

RENTS

The rent chart nobody prints

REGISTERED SALES, DUBAI SOUTH – OFF-PLAN AGAINST READY, 2026

2 BED 1 BED STUDIO



EIGHT MONTHS, ONE DIRECTION

Between January and August, median new-let rents fell **15.6 per cent** on studios, **7.5 per cent** on one-beds and **20.4 per cent** on two-beds. Across the district, apartment rent per square foot peaked at **AED 93.4** in **February** and stands at **84.3** – down 9.8 per cent from the peak and 2.2 per cent year on year. Every yield on the next page is calculated on rents that are still falling.

2,814 tenancy contracts registered in eight months. New lets are still above renewals – and falling faster.

NEW LETS AGAINST RENEWALS

TYPE	NEW		RENEWED		AED/FT ²
	NO.	MEDIAN	NO.	MEDIAN	
Studio	458	41,000	387	38,500	96.4
1 bedroom	500	57,500	456	50,000	77.4
2 bedroom	368	80,000	279	75,000	67.2
3 bedroom	83	136,500	116	150,000	62.3
4 bedroom	117	190,000	21	190,000	59.2

WHERE THE TENANTS ARE

The Pulse accounts for **829** contracts, the MAG blocks for **650** and Celestia A and B for **496** – **70 per cent** of every tenancy in the district between three communities, all of them finished before 2021. The rental market is in the delivered stock, not in the towers being sold today.

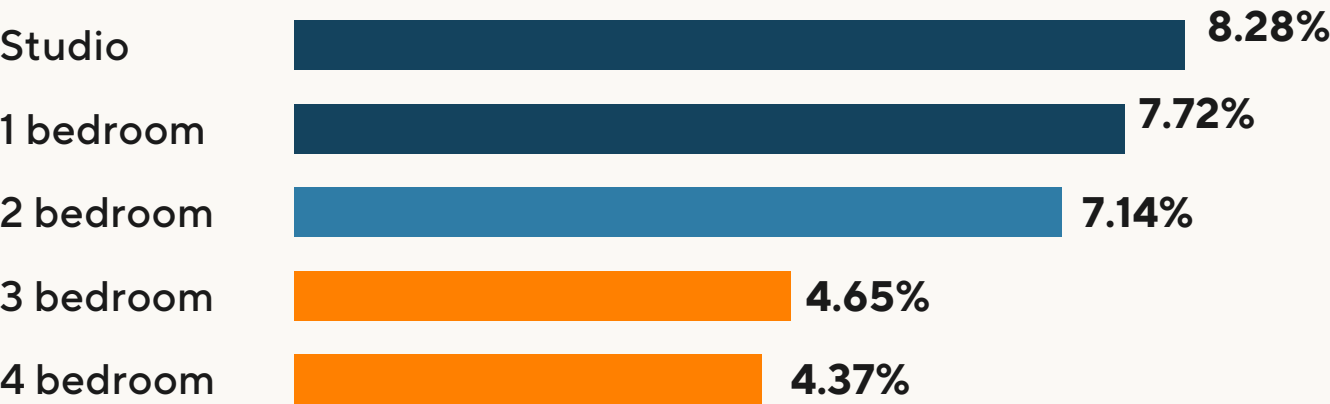


YIELD

Yields, and what you keep



GROSS YIELD BY UNIT TYPE



WHY THE YIELD IS HIGH

Dubai South does not yield 7.35 per cent because rents are strong. It yields 7.35 per cent because **ready prices are low** – AED 1,131 per square foot against a Dubai average of 1,513. On apartments as a whole the premium over the city is only **two-tenths of a point**; the real edge is in studios and one-beds. Villas here pay **4.6 per cent** against 5.0 across Dubai – a discount, not a premium.

DUBAI SOUTH AGAINST THE CITY

	DUBAI SOUTH	DUBAI	GAP
Apartment gross yield	7.4%	7.2%	+0.2 pts
Villa gross yield	4.6%	5.0%	-0.4 pts
Ready price per ft²	AED 1,131	AED 1,513	-25%

PAIRED GROSS YIELDS, BY BUILDING AND UNIT TYPE

PROJECT	SALES	GROSS YIELD
AB South Residence	Studio	15.16%
Tenora	Studio	9.64%
Kappa Acca 6	Studio	8.62%
Pulse Boulevard C3	1 bed	8.57%
MAG 555	Studio	8.45%
Kappa Acca 1	Studio	8.42%
Kappa Acca 6	1 bed	7.80%
RR Residence	1 bed	7.71%
Celestia A	Studio	7.55%
RR Residence	2 bed	7.15%
Majestique Residence 1	2 bed	6.73%
Cresswell Residences	2 bed	6.20%
The Pulse Villas	3 bed	4.98%
Pulse Beachfront 1	3 bed	4.76%
Pulse Beachfront 3	4 bed	4.38%
Pulse Beachfront 2	5 bed	4.18%

THE ROUND TRIP, COSTED

Take the **7.35 per cent** gross. Deduct service charge at AED 11.66 to 26.09 per square foot – roughly **1.0 to 1.5 points** of value. Deduct one month of void a year, Ejari, agency re-let at five per cent and management at five to eight. Realistic net is **5.0 to 6.0 per cent** on a studio or one-bed, and **3.0 to 4.0** on a villa. That is still ahead of most of Dubai. It is not the number in the brochure.

THE TRADE, IN ONE LINE

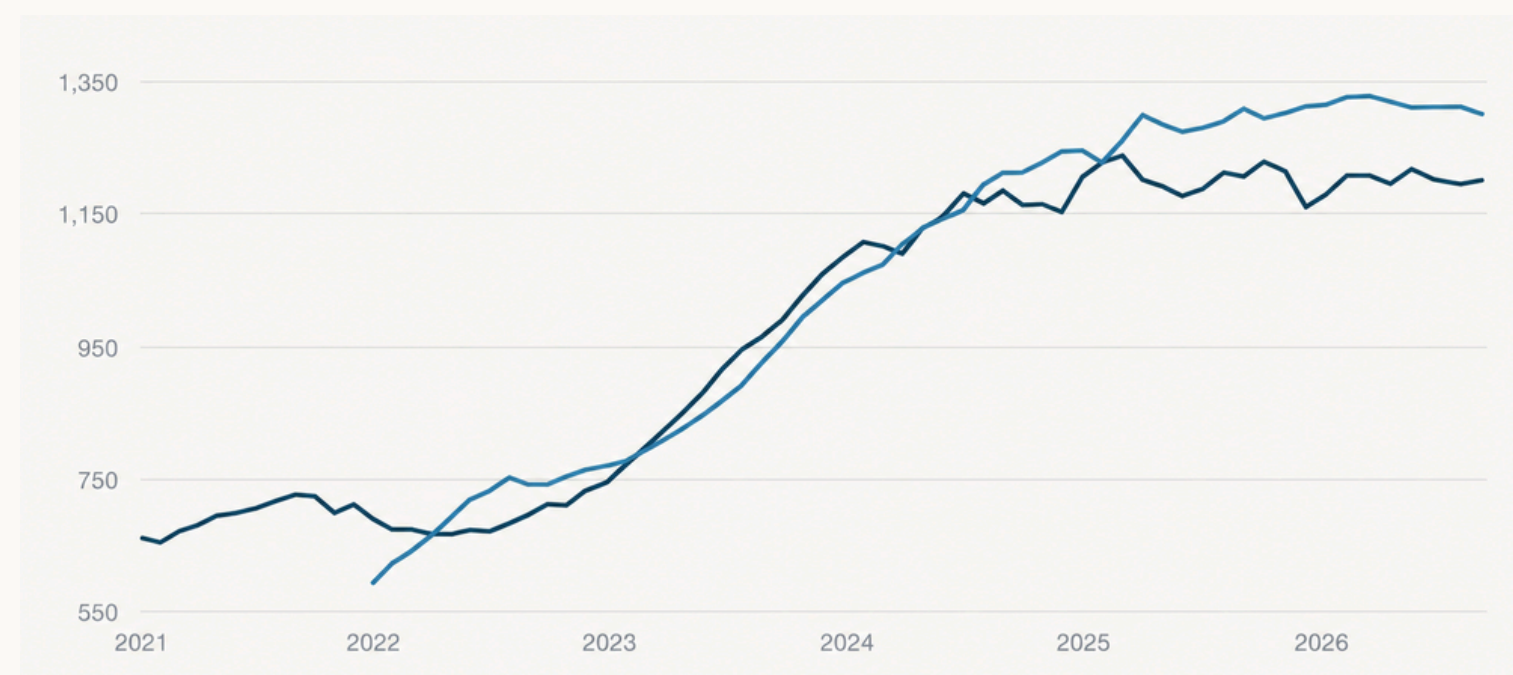
A ready studio at the district median – **AED 495,000** against a **41,000** new let – is among the highest-yielding mainstream apartment trades in Dubai. A four-bedroom villa at **4.35 million** against a **190,000** let is not. Here, the small unit is the income asset and the large one is the growth bet.

THE RECORD

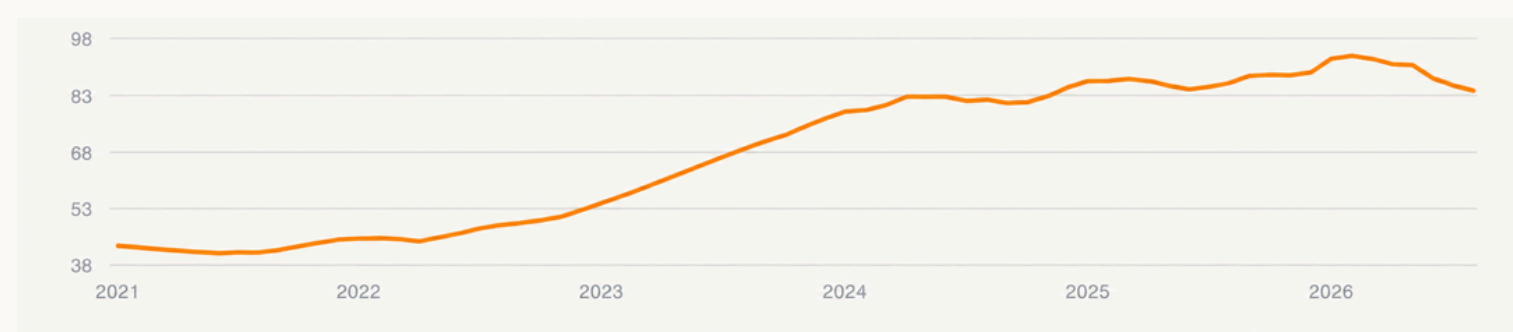
What resellers actually made

FIVE AND A HALF YEARS OF PRICES — AED PER SQUARE FOOT

APARTMENTS VILLAS



FIVE AND A HALF YEARS OF PRICES — AED PER SQUARE FOOT



+69%

APARTMENT PSF
2021 to 2026

+72%

VILLA PSF
2022 to 2026

+89%

APARTMENT RENT PSF
2021 to 2026

-9.8%

RENTS OFF PEAK
Feb to Aug 2026

Three hundred and seventy-four owners sold here in 2026 with a recorded previous purchase price. Four in five made money.

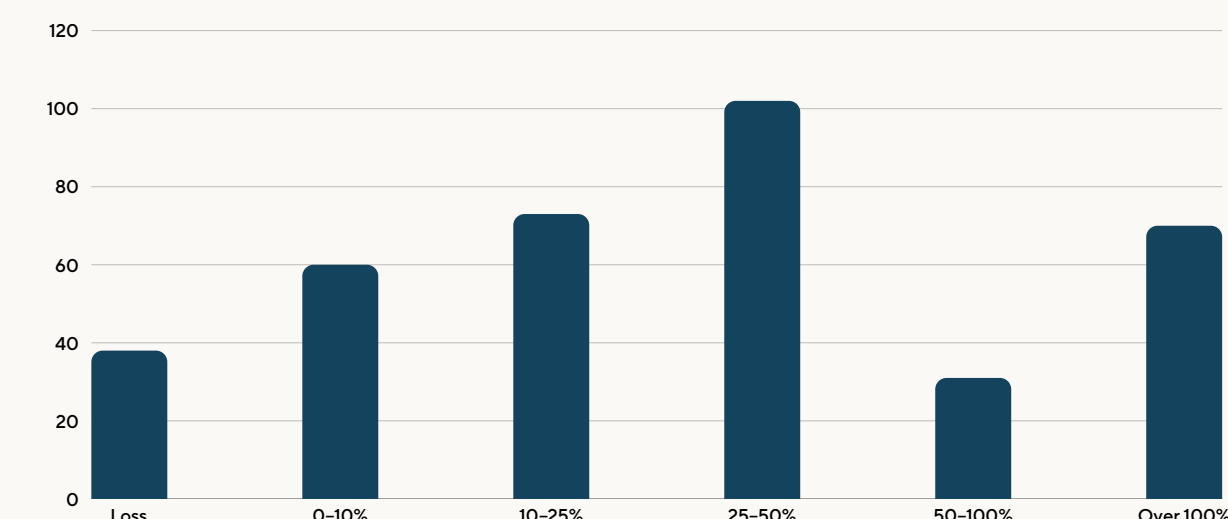
+28%

MEDIAN GAIN
374 resales

82%

SOLD AT A PROFIT
10% at a loss

DISTRIBUTION OF THE 374 EXITS



READ THE TAIL, NOT THE MEDIAN

A fifth of resellers — **70 of 374** — more than doubled their money, and the best exit was **plus 440 per cent**. Those are 2020 and 2021 entries selling into 2026. The **38** who lost went down as far as **minus 55 per cent**. All figures are gross, before eight to twelve per cent of round-trip cost.

WHAT THE MEDIAN DOES NOT PROMISE

Plus 28 per cent is the reward for having bought before the 2022-2023 re-rating, when apartments here traded at AED 730 per square foot. Today they register at **1,413**. The same trade from today's entry needs a different engine, and that engine is the airport.

AVAILABILITY

What is on the market

PROJECT	DEVELOPER	FROM, AED	HANDOVER
Aristo	OKSA	626,000	Q3 2028
Coventry 49	GFS Developments	652,300	Q2 2028
Divine Elements	Takmeel	653,300	Q2 2028
Sikanta Residences	Sikanta	717,200	Q2 2027
Avenew 888 – Loom	AVENEW	1,000,000	Q2 2028
Timber Terrace	Vakson First	1,100,000	Q3 2027
Majestique Residence 2	Credo Investments	1,200,000	Delivered
Nanma Lotus	Nanma Properties	1,200,000	Q1 2028
Marquis Horizon	Marquis Developers	1,300,000	Q2 2028
Livia Residences	Barco Developers	1,600,000	Q4 2027
Enre Residence	Imtiaz Developments	1,800,000	Q1 2028
Cresswell Views	Merath / Arady	2,600,000	Q4 2026
South Bay Phase 1–3	Dubai South	4,500,000	Resale
HAYAT Phase 7	Dubai South	4,800,000	Q2 2029
HAYAT Phase 1	Dubai South	6,200,000	Q1 2029



THIS WEEK'S LAUNCH, IN NUMBERS

HAYAT Phase 7 launches **16 September 2026** on an EOI of AED 100,000. Four-bed middle townhouse from **AED 4.8m / 3,801 ft²**; four-bed end from 5.1m / 4,123; five-bed end from 5.8m / 4,950; five-bed semi-detached villa from **6.25m / 4,953**. That is **AED 1,150 to 1,410 per square foot** – at or below the district's registered off-plan median, for a 2029 handover.

TEN TIMES, IN ONE DISTRICT

Entry pricing runs from **AED 626,000** at Aristo to **AED 6.25 million** at Hayat. Both are Dubai South, both are freehold, both are off-plan. The district name tells you almost nothing about the asset – and Phases 1 and 2 of Hayat sold out within hours in July 2025 for over AED 1 billion, which tells you what the launch queue looks like when the pricing is right.

TALK TO US

Dubai South pays the best apartment yields of any major Dubai district and carries the most concentrated risk. Both are true, and they are the same fact.

SIX RISKS, IN ORDER

- ◆ **Off-plan concentration.** 94 per cent of sales here are off-plan, against 73–76 per cent Dubai-wide, in a month when Dubai off-plan registrations fell 40 per cent year on year.
- ◆ **Supply.** Cavendish Maxwell names Dubai South in the top five contributors to 2026 deliveries. Its largest seller calls the district a growth corridor with higher oversupply risk.
- ◆ **One asset.** The entire thesis is Al Maktoum, whose phase one lands in 2032 and whose full build has no published date.
- ◆ **Transit.** Zero metro stations, and the only funded line opening this decade goes the other way.
- ◆ **Amenity.** One school, no hospital, no mall — a narrower tenant pool than the population target implies.
- ◆ **Noise.** Five parallel runways inside the district, and no published flight-path or noise-contour study.

TALK TO US

We hold the full transaction file behind this guide — every registered sale and tenancy in Dubai South for 2026, by building and by unit type. If you are weighing a specific tower or a specific launch, we will run it against the register before you sign.

Enquiries



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