

# BALI PROPERTY MARKET REPORT

## 2026 EDITION

Data-driven insights from 511 active developer listings across 15 areas and 80 developers in the Bali property market.

511

Active listings analysed

80+

Active developers tracked

15+

Bali areas covered

\$290K

Median entry price (USD)

10.6%

Median conservative ROI

**AYLA PROPERTY**

Independent Bali property brokerage | aylaproperty.com

Ayla Property is a Bali-based property brokerage helping foreign investors access the Bali villa and leasehold market. This report draws on proprietary data from direct developer relationships across the island. It is the first publicly available dataset of its kind.

- 01 Market Overview
- 02 Area Analysis: Price by Location
- 03 ROI by Area
- 04 Bali ROI Map
- 05 Property Types
- 06 Pipeline and Delivery Timeline
- 07 Key Market Findings
- 08 Methodology and About Ayla Property

## 01 MARKET OVERVIEW

This report analyses 511 active property listings from 80 developers across Bali as of May 2026. Data was collected through direct developer relationships by Ayla Property and represents the most comprehensive independent dataset of the Bali new-build and off-plan market currently available.

<b>511</b>	<b>80</b>	<b>15+</b>	<b>\$290K</b>
Properties analysed	Active developers	Bali areas covered	Median listing price
<b>71%</b>	<b>10.6%</b>	<b>16.4%</b>	<b>79%</b>
Off-plan (pre-completion)	Median conservative ROI	Median optimistic ROI	Accept crypto payment

### Price Distribution

Price Range (USD)	Listings	Share
Under \$100,000	13	2.6%
\$100,000 to \$200,000	132	26.6%
\$200,000 to \$300,000	117	23.5%
\$300,000 to \$400,000	94	18.9%
\$400,000 to \$500,000	41	8.2%
\$500,000 to \$750,000	37	7.4%
\$750,000 to \$1,000,000	31	6.2%
\$1,000,000 and above	32	6.4%

94% of developers offer a managed rental programme. 94% charge exactly 5% agent commission — a uniform rate that removes any financial incentive for agents to recommend better over worse product.

## 02 AREA ANALYSIS: PRICE BY LOCATION

12 major Bali investment areas compared by median price, mean price, and price per land m<sup>2</sup>. The chart below orders areas by median listing price.

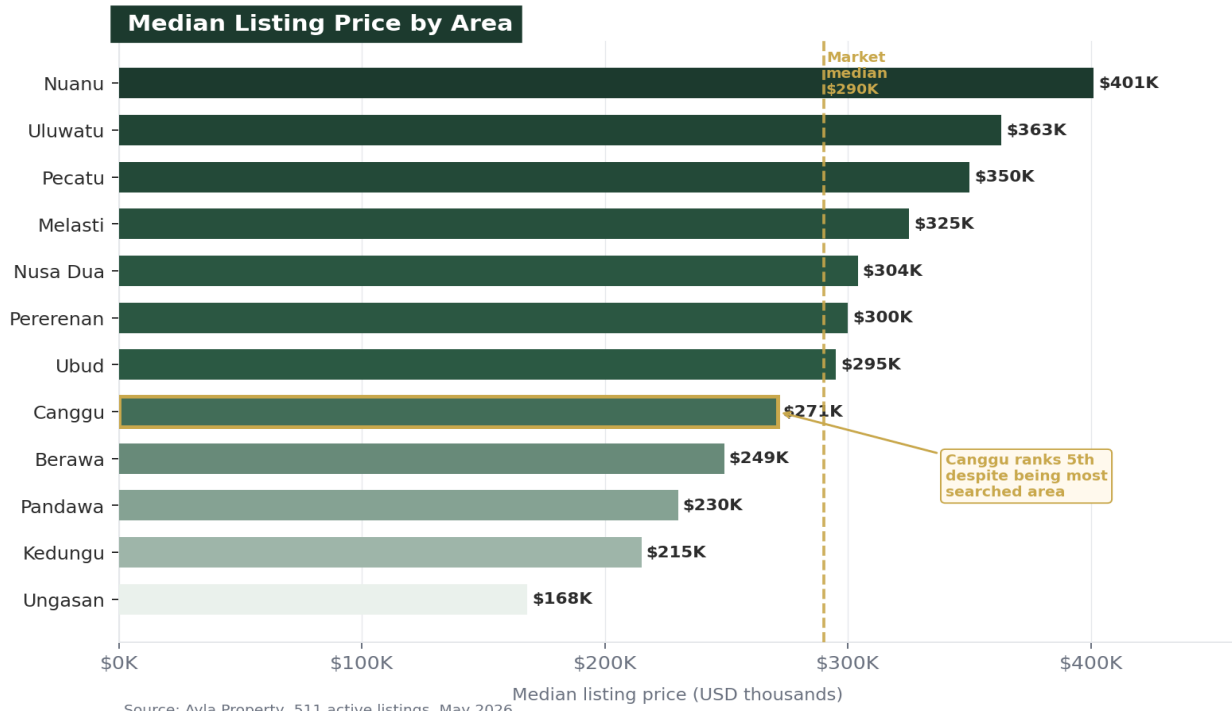


Fig. 1 Median listing price by area (USD). Bars shaded light to dark = lower to higher price. Dashed gold line = market median \$290K. Canggu annotation highlights the gap between search popularity and actual price ranking.

### Full Area Price Table

Area	Listings	Median	Mean	Min	Max	\$/m <sup>2</sup>
Nuanu	44	\$401K	\$491K	\$105K	\$1,455K	\$3,598
Uluwatu	49	\$363K	\$364K	\$100K	\$1,620K	\$3,902
Pecatu	24	\$350K	\$802K	\$75K	\$2,000K	\$2,064
Melasti	30	\$325K	\$411K	\$107K	\$2,500K	\$3,000
Nusa Dua	19	\$304K	\$308K	\$168K	\$413K	\$3,667
Pererenan	40	\$300K	\$552K	\$100K	\$2,925K	\$2,370
Ubud	25	\$295K	\$332K	\$102K	\$780K	\$2,033
Canggu	42	\$271K	\$326K	\$109K	\$1,000K	\$2,454
Berawa	15	\$249K	\$299K	\$130K	\$720K	\$2,903
Pandawa	46	\$230K	\$351K	\$85K	\$2,400K	\$2,753
Kedungu	17	\$215K	\$247K	\$75K	\$540K	\$1,912
Ungasan	37	\$168K	\$207K	\$89K	\$510K	\$3,036

Pererenan mean (\$552K) is heavily skewed by OXO Development's The Bank complex (\$817K to \$2.9M). Excluding OXO, Pererenan is a mid-market area. Kedungu has the lowest price per m<sup>2</sup> on the island at \$1,912 — the closest current equivalent to early-stage Canggu.

## 03 ROI BY AREA

490 of 511 listings carry developer-stated ROI projections. Conservative figures assume lower occupancy; optimistic figures assume peak-season occupancy. Both are gross yields before management fees (typically 20 to 30% of gross revenue).

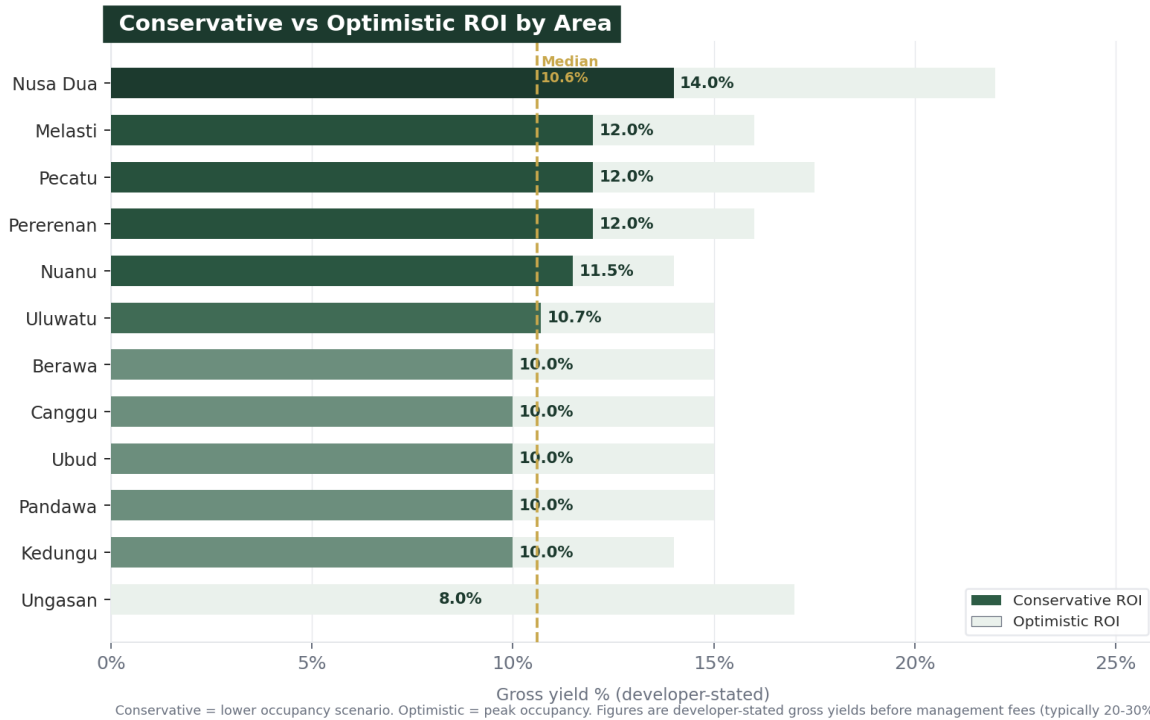


Fig. 2 Conservative ROI (dark bars) vs optimistic ROI (light bars) by area. Gold dashed line = market conservative median 10.6%. Nusa Dua optimistic figure capped at 22% excluding the single Breig, developer outlier of 50%.

The highest conservative yields (12%) cluster in Melasti, Pecatu, and Pererenan — not in Canggu or Uluwatu, which sit exactly at the market median of 10.6%. Investors paying the name premium for those areas receive no yield compensation. On a risk-adjusted basis, ready stock offers essentially the same yield as off-plan (10.5% vs 10.4%), meaning construction risk is unpriced in the market.

## 04 BALI ROI MAP

The map below shows conservative ROI for each tracked area across Bali. Bubble colour moves from amber (lower ROI) through light green to dark green (higher ROI). This is the first publicly available geographic ROI map of the Bali new-build market.

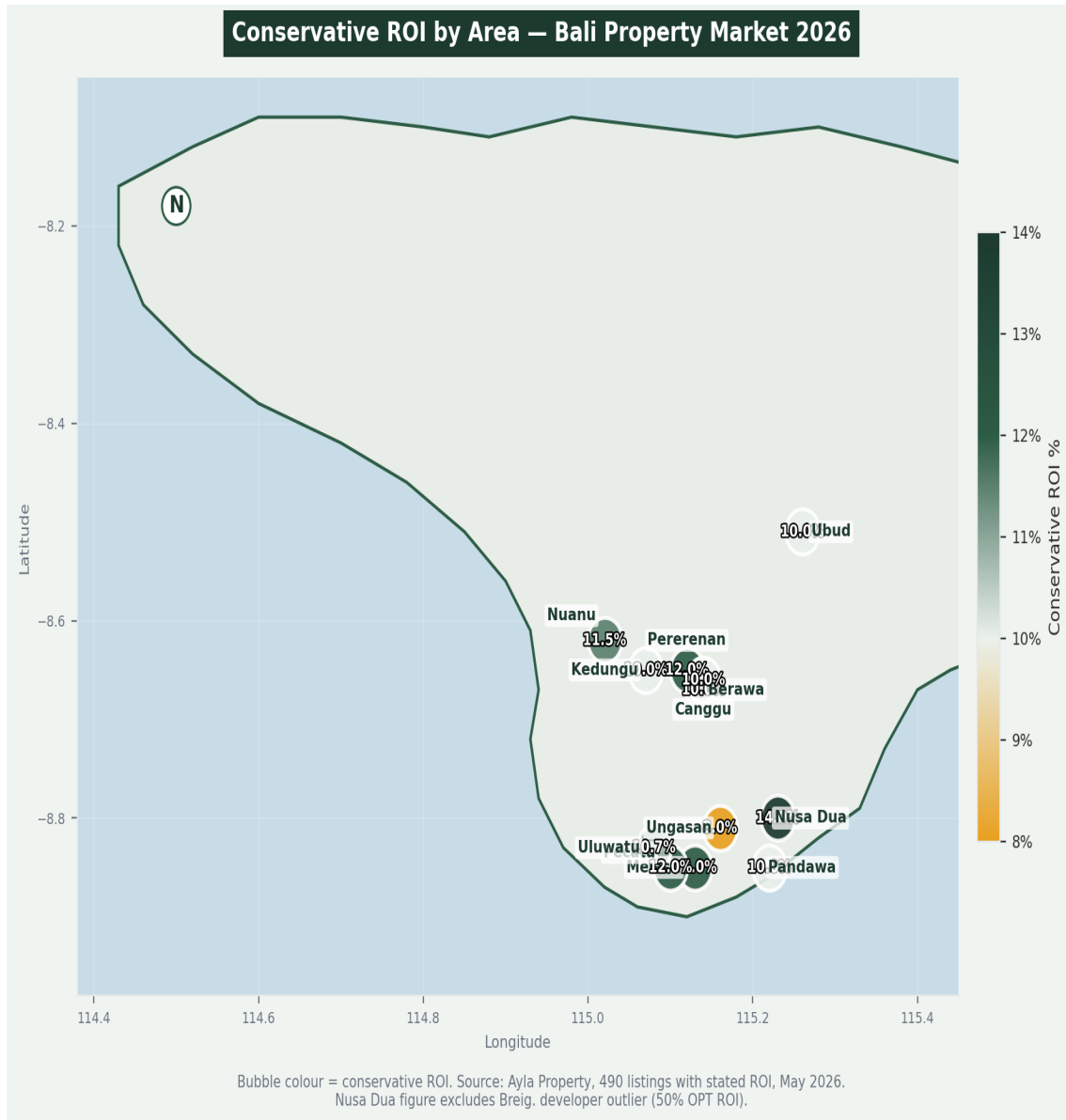


Fig. 3 Conservative ROI by area, Bali 2026. Areas with no listed colour have insufficient data. Bubble size is uniform. Source: Ayla Property, 490 listings with stated ROI, May 2026.

The geographic pattern is clear: the Bukit Peninsula (Melasti, Pecatu, Pandawa, Nusa Dua) and Pererenan in the northwest deliver the strongest conservative yields. Ungasan, despite its Bukit Peninsula location, sits below the market median — reflecting lower developer confidence in that specific micromarket. Ubud and the inland areas cluster at exactly 10%.

## 05 PROPERTY TYPES

Type	Listings	Share	Median Price	Mean Price
Villa	278	54.4%	\$332,500	\$443,265
Apartment	140	27.4%	\$187,443	\$321,823
Townhouse	27	5.3%	\$230,000	\$274,889
Hotel Investment	22	4.3%	\$285,517	\$283,687
House	6	1.2%	\$284,000	\$375,276
Other / Unknown	38	7.4%	N/A	N/A

### Bedroom Configuration

Bedrooms	Listings	Share	Median Price	Price per Bedroom
1 bedroom	167	36.5%	\$171,755	\$171,755
2 bedrooms	147	32.1%	\$300,000	\$150,000
3 bedrooms	96	21.0%	\$387,500	\$129,167
4 bedrooms	34	7.4%	\$829,530	\$207,383
5 bedrooms	7	1.5%	\$920,000	\$184,000
Studio	17	3.7%	Under \$150K	N/A

Three-bedroom villas offer the lowest price per bedroom ratio at \$129,167, suggesting the strongest per-room value for investors targeting group or family rental demand. One and two bedroom configurations dominate supply at 68.6% combined.

### Area Type Specialisation

<b>Nuanu:</b>	Zero apartments. Built entirely on villa, townhouse, and hotel-investment product. The only major planned-city development in the dataset.
<b>Pererenan:</b>	Apartment-dominated: 24 apartments vs 9 villas — the only major area where apartments outnumber villas.
<b>Uluwatu:</b>	32.5% hotel and hotel-investment product — highest of any area. Attracts a different investor profile.
<b>Canggu:</b>	Most balanced mix on the island: 40% villa, 38% apartment, 12% townhouse. Widest entry-point range.
<b>Nusa Dua:</b>	100% villa listings. Highest ROI claims in the dataset alongside the strongest land values.

## 06 PIPELINE AND DELIVERY TIMELINE

Of 511 listings, 459 carry a stated completion date or status. 2026 is the single largest delivery year: 145 projects completing, with another 94 in 2027.

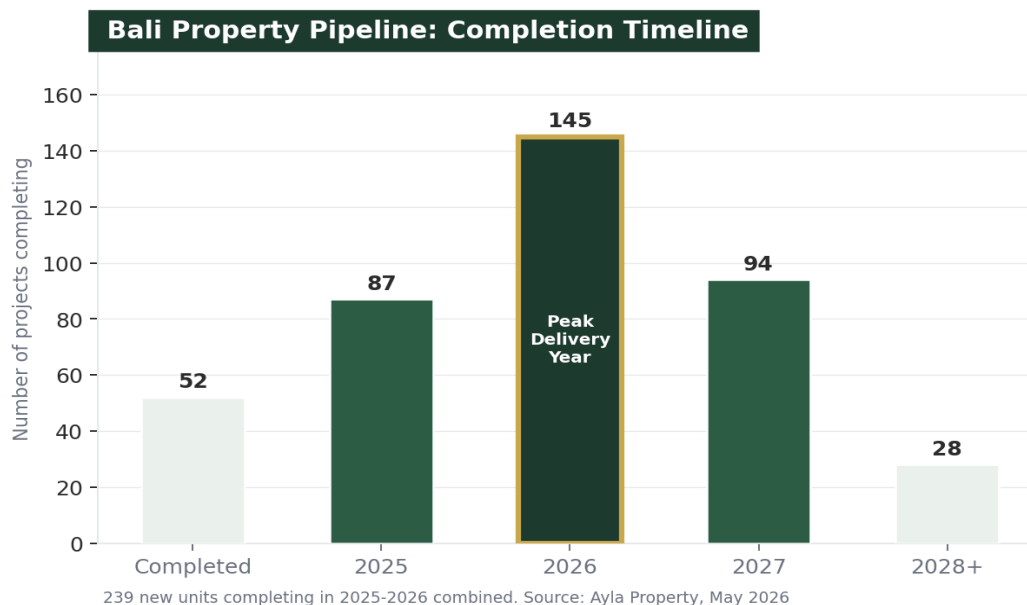


Fig. 4 Project completions by year. 2026 highlighted as peak delivery year. 239 units completing in 2025 and 2026 combined. Source: Ayla Property, May 2026.

Completion Period	Listings	% of Dated Pipeline	Implication
Already completed	52	11.3%	Immediately occupiable, no construction risk
Completing 2025	87	19.0%	Entering rental market now
Completing 2026	145	31.6%	Largest cohort — peak delivery year
Completing 2027	94	20.5%	Second supply wave
Completing 2028+	28	6.1%	Longer-horizon projects

The top 6 developers (LOYO Development, Nuanu Property Group, Mirah Development, Breig., OXO Development, HQC Bali) account for 199 of 511 listings — 39% of the market concentrated in 7.5% of developers.

## 07 KEY MARKET FINDINGS

### 1. Canggu commands no yield premium

Despite being Bali's most searched investment location, Canggu's conservative ROI median (10.0%) is exactly at the market median. Melasti, Pecatu, and Pererenan all deliver 12% vs Canggu's 10%. Investors paying the Canggu name premium receive no yield compensation for it.

### 2. 79% of Bali developers accept cryptocurrency

This makes Bali one of the world's most crypto-friendly property markets by volume. No comparable market-wide figure exists for any other Asian real estate market. The figure reflects the digital nomad buyer demographic and practical challenges of international wire transfers into Indonesia.

### 3. Ready stock offers no yield discount vs off-plan

Conservative ROI median for ready stock is 10.5% vs 10.4% for off-plan. The market does not price construction risk into off-plan yields. All else being equal, ready stock delivers better risk-adjusted value.

### 4. The freehold anomaly

82 listings (16%) offer freehold or a freehold option, despite freehold ownership being legally restricted for foreign nationals in Indonesia. Buyers should always verify title structure with an independent Indonesian notary (PPAT) before committing.

### 5. The commission market is fully commoditised

94% of developers pay exactly 5% agent commission — a uniform rate across the entire market. Agents have no financial incentive to recommend one developer over another based on commission. Buyers working with an independent buyer-side broker receive materially different advice.

## 08 METHODOLOGY AND ABOUT AYLA PROPERTY

### Data Collection

The dataset was built through direct developer outreach by Ayla Property between January 2025 and May 2026. 83.7% of first-contact dates fall within a two-month window in mid-2025, reflecting a structured outreach sprint. The database is maintained and updated on an ongoing basis.

### Limitations

Covers new-build and off-plan product only — no secondary resale market or private listings. ROI figures are developer-stated projections and have not been independently verified. Managed rental returns vary with occupancy, platform fees, management costs (20 to 30% of gross revenue), and maintenance.

Ayla Property is an independent Bali property brokerage founded by Zaq Qureshi. We help foreign buyers and investors access the Bali villa and leasehold market with independent, buyer-side representation.

Unlike developer-aligned agents, Ayla Property works exclusively for the buyer. We source across the full developer landscape and provide independent due diligence support and trusted PPAT notary connections.

**Website**

[aylaproperty.com](https://aylaproperty.com)

**Email**

[zaq@lengmedia.com](mailto:zaq@lengmedia.com)

*DISCLAIMER: For informational purposes only. Does not constitute financial or investment advice. All property investment carries risk including loss of capital. Past yields do not guarantee future performance. Seek independent financial and legal advice before investing.*

© 2026 Ayla Property. Free to share and cite with attribution: 'Source: Ayla Property Bali Market Report 2026, [aylaproperty.com](https://aylaproperty.com)'