EARLYBIRD PROPERTIES

MARKET INSIGHTS
MONTHLY REPORT



DUBAI REAL ESTATE MARKET REPORT

OCTOBER 2026

11,937 sales worth AED 34 billion. Sales rose 5.3% on September. Against October 2025, sales were 39.9% lower. Value rose 14.4% on September. A broker-side reading of Dubai sales data, with our interpretation labelled throughout.

AED 34B
SALES VALUE OCTOBER 2026

11,937
SALES TRANSACTIONS

64%
SOLD BELOW AED 2 MILLION (31% + 33%)

-39.9%
SALES VS OCTOBER 2025

PERIOD	PUBLISHED	DATA	PREPARED BY
October 2026	November 2026	Dubai Land Department data, pulled 10 November 2026	Early Bird Properties

Illustrative.

THE MONTH IN ONE PAGE

What you need to know

SALES (NUMBER)

▲ +5.3%
vs September

▼ -39.9%
vs October 2025

SALES VALUE

▲ +14.4%
vs September

▼ -42.6%
vs October 2025

Sales rose on September. 11,937 sales, up 5.3% on September. Against October 2025, sales are down 39.9%.

Primary led. Primary-market sales were 64% of deals and 56% of value. Resale was 36% of deals and 44% of value.

Apartments took 43% of the money. Villas took 27% and plots 17%. Those are shares of value, not of deals.

Value rose faster than the number of sales. AED 34B, up 14.4% on September, against 5.3% for sales. Against October 2025, value is down 42.6%.

Sixty-four percent of sales were under AED 2 million. 31% were below AED 1 million and 33% were between AED 1 million and AED 2 million.

Five areas led by number of sales. Al Barsha South Fourth, Dubai South, Al Rowaiyah First, Wadi Al Safa 3 and Wadi Al Safa 5. Order only.

HOW TO READ THE NUMBERS IN THIS REPORT

SALES BASIS, USED FOR EVERY SALES FIGURE.
Including DLD direct sale transactions and DIFC sale transactions. Excludes mortgage registrations and gift transfers.

MORTGAGE FIGURES, PAGE 4 ONLY.
Registered mortgages come from a different source and a different count. They are not part of the sales figures and are not compared with them.

VOLUME VS VALUE.
Volume is how many properties sold. Value is what they were worth. A price band or property type can be a large share of one and a small share of the other.

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Where we interpret the figures, the block is labelled as opinion so you can separate the record from our read of it.

The month in numbers

October's totals with September and October 2025 alongside. All sales figures exclude mortgage registrations and gift transfers.

MEASURE · SALES BASIS	OCTOBER 2026	VS SEPTEMBER	VS OCT 2025
Sales transactions	11,937	+5.3%	-39.9%
Sales value	AED 34B	+14.4%	-42.6%

Value rose faster than the number of sales on the month, and fell slightly more than the number of sales on the year.

Primary led on deals and on value

Share of sales (volume)



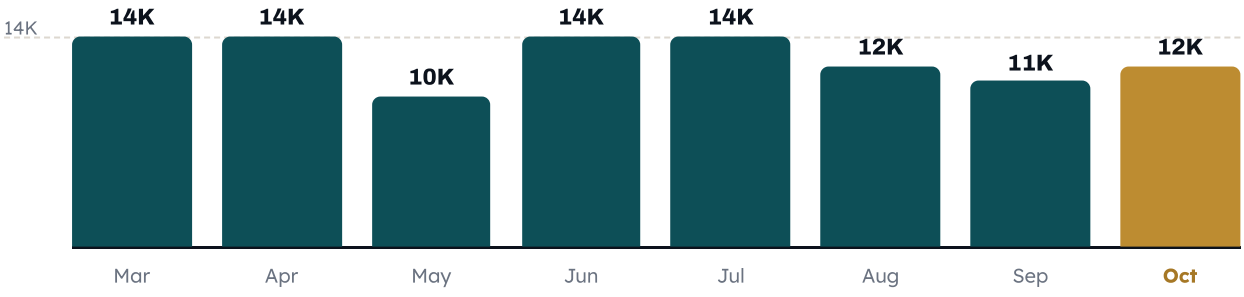
Share of sales (value)



Primary's share of value (56%) was lower than its share of deals (64%). Resale's was higher: 44% of value from 36% of deals. "Primary" and "resale" are the source's own categories. We do not read primary as off-plan.

Monthly sales have settled between 10K and 14K this year

March to October 2026; labels are rounded by the source to the nearest thousand



Source: Dubai Land Department data, October 2026, pulled 10 November 2026. Monthly values are rounded to the nearest thousand; October is 11,937 exactly.

WHAT THIS MEANS · OUR READ, LABELLED AS OPINION

The record holds two true facts. October sales were 5.3% above September. Against October 2025, they were 39.9% lower. The monthly line shows 14K in July, then 12K, 11K and 12K. One month's rise follows a lower September, and we treat a single month as one data point.

Source for every figure on this page: a property portal's analysis of Dubai Land Department data, reported by Khaleej Times. October 2026.

02 · REGISTERED MORTGAGES

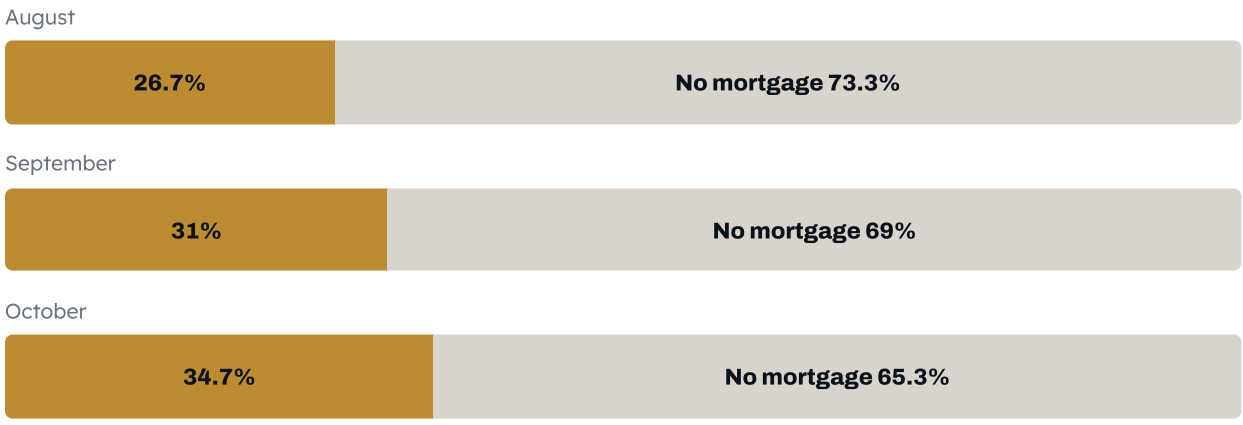
Registered mortgages rose for a third month

3,811
Registered mortgages (number)
▲ up 5.2%, as reported

Dh7.32 billion
Combined value of registered mortgages
▼ down 24.7%, as reported

The source describes October as the third consecutive monthly rise in registered mortgages. It does not print the comparison month beside the 5.2% or the 24.7%, so we do not name one.

Share of apartment sales that involved a mortgage



No mortgage is 100% minus the reported share (derived).

85.8%
Apartments' share of all mortgages

1,037
Villa sales, highest in four months

52.1%
of villa sales involved a mortgage, down from 79.2% in September

What moved: the number of registered mortgages and the value moved in opposite directions in October.

DO NOT COMPARE WITH THE SALES FIGURES

Mortgage registrations are a separate count from the 11,937 sales on the other pages. They come from a different source and measure a different thing, so we show no ratio between the two.

64% of sales were below AED 2m

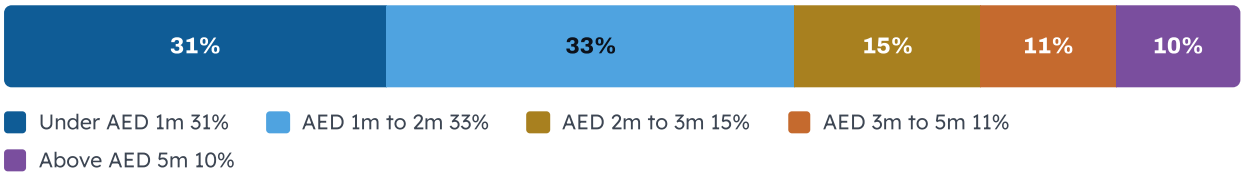
64%

of October sales were below AED 2 million
(31% + 33%, our arithmetic)

These are shares of volume, meaning how many sold.

31% of October sales were under AED 1 million

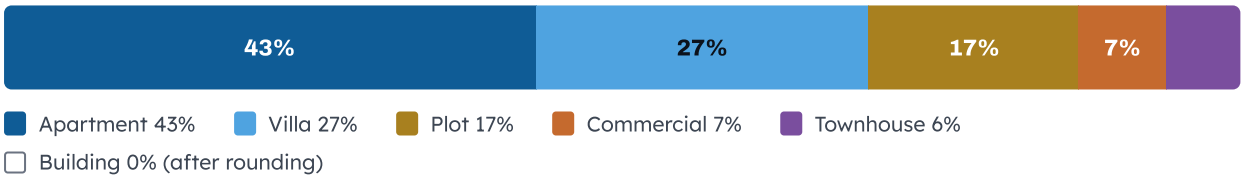
Share of sales volume by price band · October 2026 · Sales basis



Source: Dubai Land Department data, October 2026. Bands sum to 100%.

Apartments took 43% of the money

Share of sales value by category · October 2026 · Sales basis



Shares are rounded. Building is 0% after rounding.

VOLUME IS NOT VALUE

A price band can be a big share of the deals and a small share of the money. In October, apartments were 43% of value while the two bands under AED 2 million were 64% of deals.

WHAT THIS MEANS · OUR READ, LABELLED AS OPINION

Most deals sit below AED 2 million. Price bands above that share the remaining deals. That describes where activity sits. It is not a recommendation.



04 · WHERE THE DEALS HAPPENED

Five areas led by number of sales

Illustrative.

The five most active areas by number of sales in October.

1	Al Barsha South Fourth
2	Dubai South
3	Al Rowaiyah First
4	Wadi Al Safa 3
5	Wadi Al Safa 5

This is a ranking only. The source shows these areas as bars, and we quote the order without counts.

Source: Dubai Land Department data, October 2026.

How this report was made

Source and basis. All sales figures come from Dubai Land Department data, for the full month of October 2026, pulled on 10 November 2026. They cover DLD direct sale transactions and DIFC sale transactions. They exclude mortgage registrations and gift transfers.

Full source reference box: Dubai Land Department data. October 2026, full month, retrieved 10 November 2026. Sales basis: DLD direct sale transactions and DIFC sale transactions; excludes mortgage registrations and gift transfers.

Mortgage figures. Page 4 uses a property portal's analysis of Dubai Land Department data, reported by Khaleej Times. It is a different count from the sales figures and is not mixed with them.

Figures published elsewhere on a total basis include mortgages and gifts. They are larger by definition and are not comparable with the sales figures here.

Month on month. September and October are both full months on the same basis, so the 5.3% and 14.4% changes compare like with like.

Precision and rounding. Price-band shares and value shares are as compiled and sum to 100%. The monthly line is rounded by the source to the nearest thousand. October is 11,937 exactly.

Area results are a ranking only. We do not quote counts for individual areas.

What we derived. 64% under AED 2 million is 31% plus 33%. We also compare value growth with sales growth on the month and on the year. Both are straight comparisons of published figures.

What is not in this report. We do not publish average price-per-square-foot figures. Every building carries its own price per square foot, and a market-wide average is a misleading number rather than a fact about any particular property. Ask us for the figure on a specific building instead.

WHAT WE ARE WATCHING IN NOVEMBER

Whether October's rise holds: sales against 11,937, sales value against AED 34B, the share of sales under AED 2 million against 64%, the primary share of deals against 64%, and registered mortgages against 3,811. We will report these measures next month. The list makes no forecast.

WANT THE PICTURE FOR YOUR AREA OR BUDGET?

Tell us the area and price band you are weighing up and our team will send you what actually sold there: the registered transactions behind these totals, for your segment rather than the market average.

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+971 56 161 5675

Important notice. Market commentary and general information. It is not financial, investment, tax, or legal advice, and not an offer or solicitation. Property values can fall as well as rise. Figures are compiled from the sources named for the period stated; market conditions change. Blocks labelled as opinion are our own.

Early Bird Real Estate LLC · DLD ORN 37167 · Dubai, United Arab Emirates · earlybirdsproperties.com