

H1 2026 • PRIVATE INVESTOR BRIEFING

Dubai's property market has proven resilient

Following a period of acute geopolitical tension, transaction volumes rebounded sharply — and remain among the highest in the emirate's history.

Sources: Cavendish Maxwell • DXB Interact • Dubai Land Department • Zawya • Reuters

JULY 2026



EXECUTIVE SUMMARY

Record activity, despite geopolitical headwinds

The first half of 2026 closed with **79,200 residential sales** worth **AED 221 billion** — among the strongest six-month stretches on record.

June alone accounted for AED 25 billion as buyers returned to the market in force.

SIX MONTHS TO 30 JUNE 2026

79,200

H1 RESIDENTIAL SALES

Among the highest half-year totals in Dubai’s history

AED 221B

TOTAL TRANSACTION VALUE

Combined H1 2026 sales value across all segments

12,315

JUNE RESIDENTIAL SALES

A decisive rebound from the May slowdown

AED 25B

JUNE SALES VALUE

Up 12.9% on the previous month

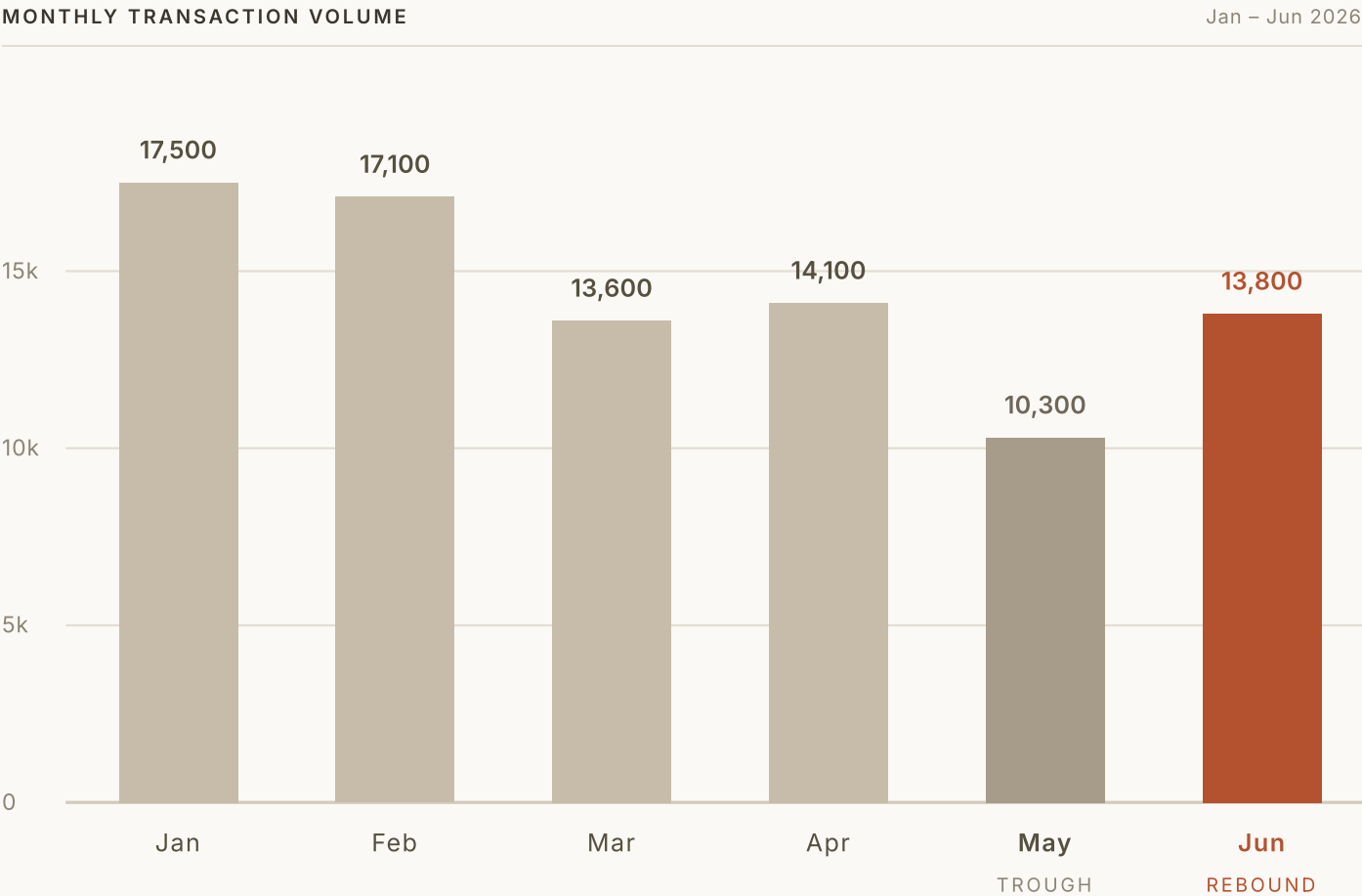
What happened during the conflict

Volumes opened the year at record highs in January and February, then softened steadily through the spring as regional tensions escalated.

THE TROUGH

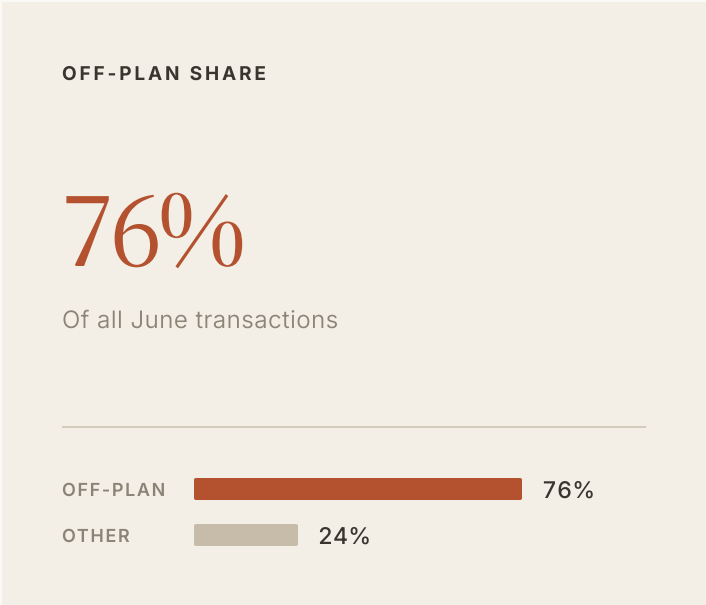
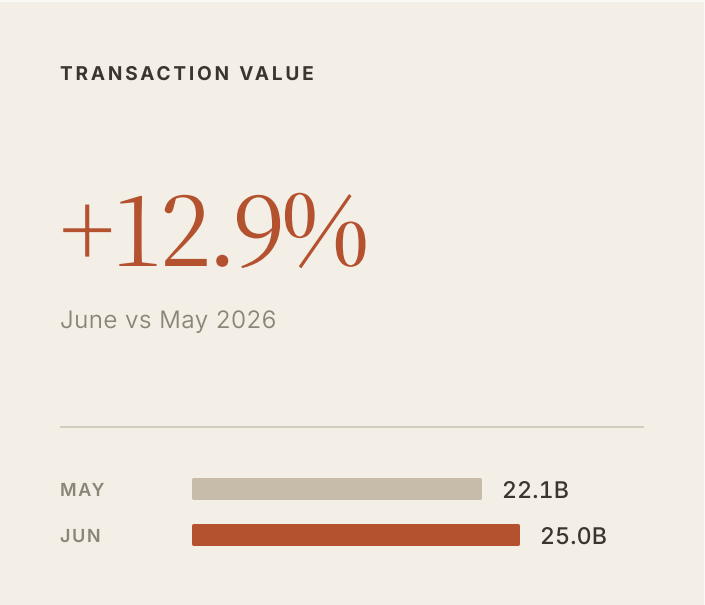
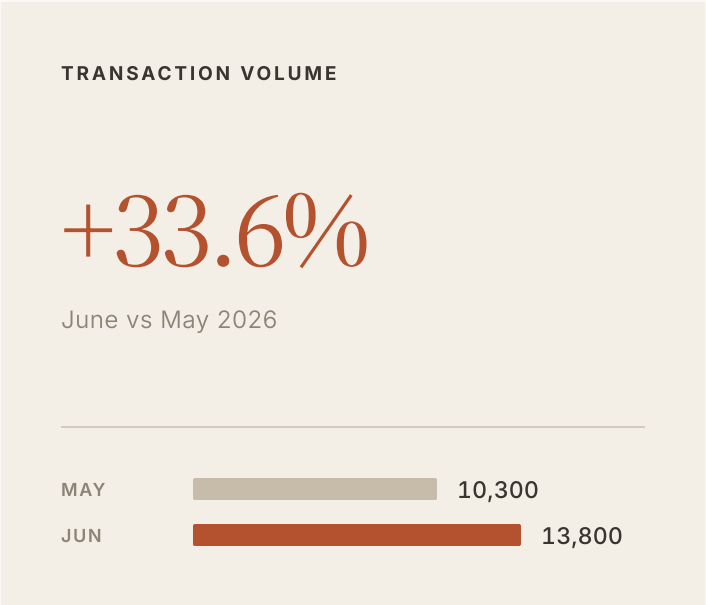
May recorded roughly **10,300** transactions — the lowest monthly volume of the uncertainty period, and 41% below the January peak.

Figures cover all registered property transaction types.
Residential-only totals are shown on page 2.



June 2026 — confidence returned

Within a single month, volumes climbed back to their March–April levels. Volume led the recovery; value followed more gradually, and off-plan retained its dominant share of activity.



WEEKLY ACTIVITY

Buyers kept transacting through the uncertainty

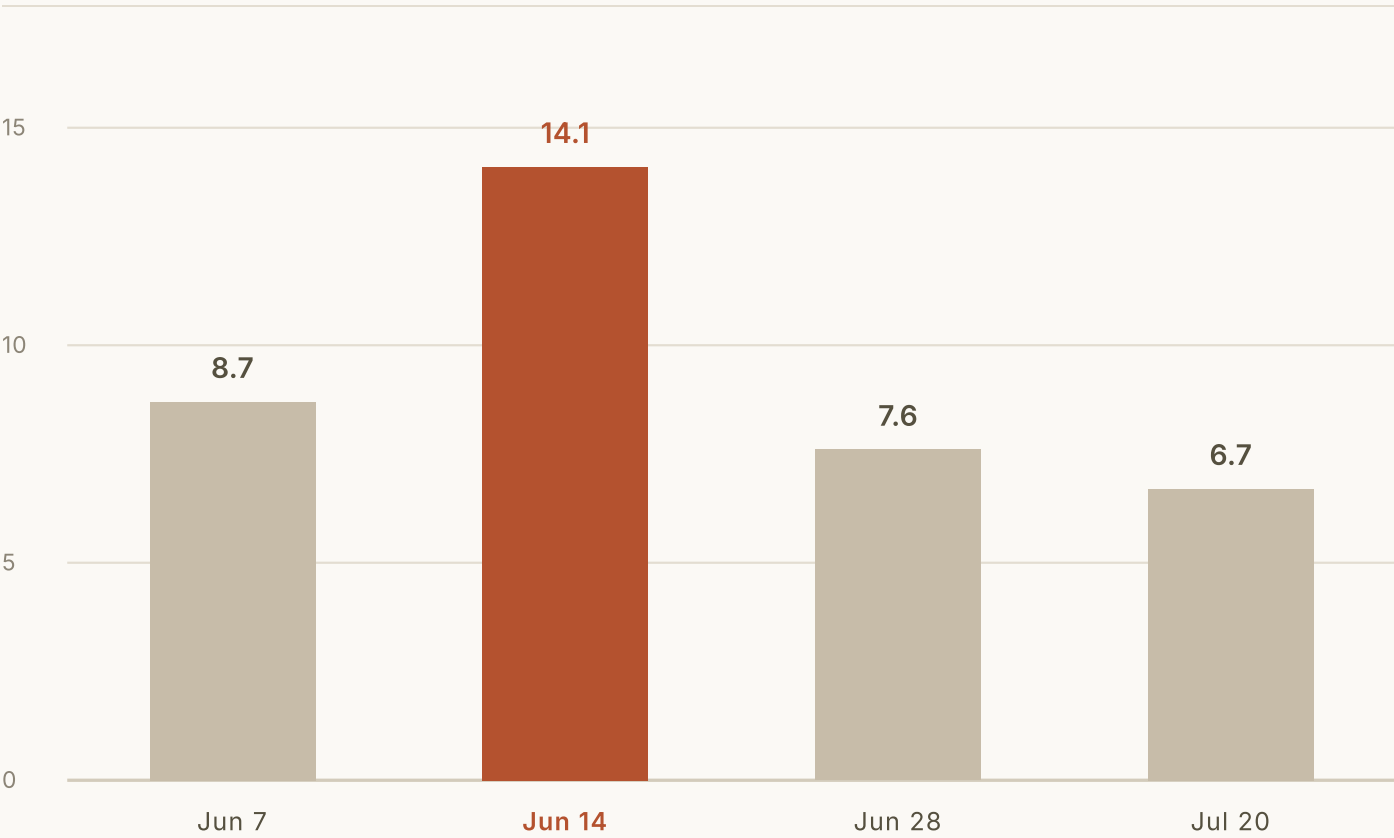
Billions of dirhams continued to change hands every single week. At no point did weekly transaction value collapse, even as geopolitical headlines peaked.

WEEKLY FLOOR

The quietest week of the period still cleared **AED 6.7 billion** — roughly AED 950 million a day.

WEEKLY TRANSACTION VALUE

AED billion · week ending



Why capital keeps flowing into Dubai

01 Developer commitment

Emaar announced a **US\$55 billion** master development designed to house **150,000 residents** — capital committed years ahead of delivery.

02 Healthy financing

Mortgage activity exceeded **AED 100 billion** in H1 2026, indicating lender confidence alongside cash-buyer demand.

03 International demand

Sustained inflows from the **UK, Germany, India, China and the wider GCC**, spreading exposure across multiple source markets.



CONCLUSION

The market has normalised — not collapsed

THE EVIDENCE

- June volumes recovered **+33.6%** against May
- Off-plan sustained a **~76%** share of transactions
- Developers continued launching **billion-dollar** communities
- Mortgage activity remained above **AED 100B** for the half

THE OUTLOOK

The events of 2026 tested investor confidence in a way few prior years have. The data answers the question plainly: buyers returned as soon as uncertainty eased, and they returned in volume.

For long-term investors, the present market offers **better negotiating conditions** than the run-up of early 2026, while the underlying demand picture remains intact.

PRIVATE INVESTOR BRIEFING · JULY 2026