◆ UNITED ARAB EMIRATES ◆ STRATEGIC INTELLIGENCE REPORT

THE NEW FLOOR

Dubai Real Estate H1 2026:
Strategic Domination

AED 286.43 BILLION IN SALES

The Second-Highest H1 in History. The Data You Can't Ignore.

86,005 transactions • 30,000 first-time foreign buyers in one quarter • Yields hitting 10%

This is not a market asking for your attention. **This is a market that already has the world's capital** — and the only question left is whether yours is in it.

JULY 2026 • FOR INTERNATIONAL INVESTORS

◆ EXECUTIVE SUMMARY

The Macro Picture

Let's kill the lazy narrative first. Dubai trailing the absolute peak of 2025 is **not a slowdown**. Speculative markets spike and collapse. Dominant markets reset their baseline and defend it. Dubai just defended **AED 286.43 billion** as its new floor — a number that would have been a fantasy full-year total a decade ago, delivered in **26 weeks**.

KEY METRIC	H1 2026 PERFORMANCE
Total Sales Value	**AED 286.43B ($78B)**
Total Transactions	**86,005**
Units / Buildings / Land Parcels	71,570 / 7,301 / 7,134
Total Incl. Mortgages	**AED 419.94B+**
Q1 — Strongest in History	**AED 252B (+31% YoY)**
Q2 Sales	AED 169.04B
June Alone	**AED 32.66B (+31.3% volume vs May)**

★ THE BOTTOM LINE: The strongest Q1 ever recorded. A June that accelerated 31.3% into the half-year close. A market holding the second-best H1 in history the year after its all-time peak. This is what structurally bulletproof looks like — and sitting on the sidelines while the floor rises is not caution. It's a losing strategy.

◆ CHAPTER 1

The Anatomy of Demand

Off-Plan vs. Ready — Two Engines, One Market Printing Wealth on Both Ends

If you don't understand this split, you're not investing — you're guessing.

The Volume Split

OFF-PLAN 67%

READY 33%

	OFF-PLAN	READY (SECONDARY)
Share of Volume	**67%**	**33%**
Total Value	AED 139.8B	**AED 146.7B**
Deals Closed	58,800	27,200
Avg. Deal Size	**AED 2.38M**	**AED 5.39M** ◆

The Off-Plan Engine — 67% of the Market

58,800 buyers committed **AED 139.8 billion** to properties that don't exist yet. That is not gambling. That is conviction — backed by escrow protection, staged payment plans, and entry tickets averaging just **AED 2.38M**. Off-plan is the accumulation engine: lowest entry, maximum appreciation exposure between launch and handover.

The Ready Market — The Premium Nobody Talks About

Here's the number most reports bury: the ready market moved **MORE total value (AED 146.7B) on less than HALF the deals.** The average secondary transaction closed at **AED 5.39M — 2.3x the off-plan average.**

★ READ THAT AGAIN — THE PREMIUM IS YOUR EXIT STRATEGY

- → **ENTER** off-plan at **AED 2.38M** average
- → **HOLD** through handover
- → **EXIT** into a secondary market clearing **AED 5.39M** average tickets

The spread is quantified. The liquidity is proven — 27,200 ready deals in six months means exits execute in weeks, not years. The cycle isn't a theory. **It's the H1 transaction data.**

◆ CHAPTER 2

The Global Capital Inflow

Domestic Demand Builds Markets. Foreign Capital Validates Them.

Q1 2026 delivered the verdict — and it wasn't subtle.

AED 148.35B	+26%	~30,000
FOREIGN CAPITAL, Q1 ALONE	YEAR-ON-YEAR GROWTH	FIRST-TIME BUYERS

Focus on that last number. **Thirty thousand investors who had NEVER owned Dubai property** committed capital in ninety days. This is not recycled local money. This is new capital, from new participants, arriving at record pace.

Top 5 Investor Nationalities

1 **INDIA** **20.6%** *The anchor. One in five foreign dirhams.*

2 **UNITED KINGDOM** **13.3%** *Established wealth repositioning east.*

3 **EGYPT** **12.6%** *Regional capital demanding hard-currency assets.*

4 **USA** **9.0%** *American smart money going global.*

5 **PAKISTAN** **6.9%** *Deep diaspora conviction.*

◆ THE VERDICT: Five nationalities, three continents, emerging-market and G7 capital side by side — and no single country exceeds 21%. No single economy's downturn can drain this market. This is diversification you cannot engineer. Global smart money is parking in Dubai. The only question is what's parked next to it.

◆ CHAPTER 3

Community Yield Heatmap

Where the Capital Went — and What It Earns

Averages hide alpha. Dubai is not one market — it's a portfolio of zones, each with a distinct weapon.

COMMUNITY	AED/SQFT	GROSS YIELD	PROFILE
◆ Palm Jumeirah	3,750	4–5%	Ultra-luxury benchmark
Downtown Dubai	3,011	5–6%	Premium liquidity king
Dubai Marina	2,600	5.5–7%	Highest expat rental demand
Business Bay	2,547	6.5–7.6%	Income + appreciation combo
Dubai Hills Estate	2,350	5.4–6%	Premium golf-view play
Dubai Creek Harbour	2,050	5–6.5%	Waterfront off-plan value
Dubai Islands	2,000	5–7%	Explosive growth corridor
JVC	1,460	**7–9%**	Highest deal volume in Dubai
International City	775	**9–10%**	Highest gross yields, period

◆ ULTRA-LUXURY: Palm Jumeirah

AED 3,750/SQFT | 4–5% YIELD

You don't buy the Palm for yield. You buy it because they are not making more of it. Finite land, global demand, zero substitutes. Its price sets the ceiling for the entire market — and it keeps rising.

◆ PREMIUM LIQUIDITY: Downtown Dubai & Dubai Marina

AED 3,011 / AED 2,600 PER SQFT | 5–7% YIELDS

The two most tradeable addresses in the emirate. Downtown is the deepest resale market in the premium tier. The Marina commands the **highest expat rental demand in Dubai** — meaning zero vacancy risk and exits measured in weeks. This is your core allocation.

◆ GROWTH CORRIDORS: Dubai Islands & Airport City

AED 2,000/SQFT ENTRY | 5–7% YIELDS

The frontier. Dubai Islands at **AED 2,000/sqft** is absorbing capital at a pace emerging zones aren't supposed to manage, while the Airport City corridor rides Dubai's next infrastructure supercycle. Today's entry prices here are tomorrow's case studies. Move before the case studies get written.

◆ MAXIMUM YIELD: JVC & International City

AED 1,460 / AED 775 PER SQFT | 7–10% YIELDS

The cash-flow weapons. **JVC (7–9%)** pairs the highest deal volume in Dubai with mid-market pricing. **International City (9–10%)** delivers gross yields that embarrass most global REITs — at an entry price of AED 775/sqft. If income is the mission, this is the arsenal.

> ★ **PORTFOLIO LOGIC: Preserve in Palm Jumeirah. Trade in Downtown & Marina. Grow in Dubai Islands. Earn in JVC & International City. One city. Four strategies. Every risk profile armed.**

◆ CHAPTER 4

The H2 Outlook & Strategic Forecast

The First Half Told You Where the Market Is. June Told You Where It's Going.

The June Signal

June closed at **AED 32.66 billion** with volume surging **+31.3% over May**. Summer is supposed to be Dubai's quiet season. Instead, June behaved like a launch window. Markets don't accelerate into their sixth consecutive month by accident — this is momentum compounding into H2.

> ◆ **FULL-YEAR 2026 FORECAST — THE HARD NUMBERS**
>
> - **5–8%** capital appreciation — forecast unchanged, on track
> - **6.3–6.8%** average gross apartment yields
> - **~5%** gross villa yields
> - Combined total return potential: **11–15%** on apartment allocations

Three Conclusions. No Hedging.

1. **The floor has moved — permanently.** The second-best H1 ever, one year after the all-time peak, is a structural re-rating. AED 286B is the new baseline, not the ceiling.
2. **The capital pipeline is already loaded.** AED 148B of foreign money and 30,000 first-time buyers in Q1 alone. H2's demand is visible in Q1's data.
3. **The window is the spread.** AED 2.38M off-plan entries against AED 5.39M ready exits, with 5–8% appreciation compounding underneath. Spreads like this get arbitraged away. They always do.

★ H2 2026 will reward the positioned — not the patient.

◆ THE ULTIMATUM

Position Your Capital Before H2 Peaks. Not After. Before.

You've now read the same data the institutions are acting on. **AED 286 billion in six months. 30,000 new foreign buyers in one quarter. Yields touching 10%. A 31.3% June acceleration into H2.**

The market is not waiting for you to feel ready. Every week of hesitation is entry price you hand to someone else.

Your free portfolio consultation maps your budget, risk profile, and exit horizon against the exact zones and yields in this report. No cost. No obligation. **No excuses left.**

◆ CLAIM YOUR POSITION NOW ◆

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The floor is rising. Get on it — or watch it rise without you.