Dubai Real Estate Brief — H1 2026

The second-best half-year in the emirate's history. What the numbers actually mean for investors. Published July 2026 · BRN 94316

AED 419.9B
TOTAL DLD TRANSACTIONS H1 2026 (112,850 DEALS)

AED 286.4B
SALES VALUE (~86,000 DEALS)

6.58%
AVG GROSS RESIDENTIAL YIELD

THE MARKET IN ONE TABLE

Metric	H1 2026	Signal
Sales value vs H1 2025	-12.3% (vs record AED 326.6B)	Normalization, not correction
Ready (completed) sales	AED 146.7B / 27,200 deals	Largest share — market matured
Off-plan sales	AED 139.8B / 58,800 deals	Still deep, but no longer dominant
Off-plan office sales	AED 13.1B (record; >7 prior years combined)	Commercial is the 2026 story
Mortgages	AED 102B+ / 22,000+ deals	Cash still dominates
New launches announced	AED 275B+ (largest H1 launch cycle ever)	Watch delivery, not launches

CORRIDOR PRICING (DLD TRANSACTIONS, JAN–JUN 2026)

Community	Avg AED/sqft	Buyer demand trend YoY
Palm Jumeirah	4,240	Stable — scarcity-led
Downtown Dubai	3,011	-23.7% — cooling from peak
Dubai Creek Harbour	2,600	Steady
Business Bay	2,547	-27% — supply competition
Dubai Hills Estate	2,432	Stable — family demand
Dubai Marina	2,058	-23.7%
Jumeirah Village Circle	1,510	-26% — heavy new supply

SUPPLY REALITY CHECK

Announced 2026 pipeline: 100,000–130,000 units. Realistic delivery after typical 15–30% slippage: 75,000–105,000 — against population growth absorbing roughly 80,000–100,000 homes a year. No glut — but supply is uneven, and area selection now matters more than market timing.

YIELDS & RENTS

Gross yields average 6.58% (apartments 6.9%, townhouses 5.1%, villas 4.5%). Rents forecast +~6% on average in 2026 — sharpest in supply-constrained prime districts, flattest in high-delivery zones.

THE BOTTOM LINE

The easy-money phase is over; the smart-money phase is not. Ready assets in established communities are leading, commercial is waking up, and buyers hold real negotiating power in high-supply corridors. Deploy with data, not with brochures.

Sources: Dubai Land Department H1 2026 transaction data; W Capital H1 2026; Cavendish Maxwell H1 2026 residential insight; Engel & Völkers / Property Monitor community pricing (Jan–Jun 2026); Property Finder Demand Index Q2 2026. This brief is for information only and is not financial advice. MR Living Capital · mrlivingcapital.com · mrlivingcapital@gmail.com · BRN 94316