

Hamptons
INTERNATIONAL

MAY
2026

Dubai Residential Market Review

A monthly review of Dubai residential market's performance and key real estate trends

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- Accounting
- Mergers and Acquisitions
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Residential Valuations



Commercial Valuations



Retail Valuations



Hospitality Valuations



Specialised Property Valuations



Corporate Valuations

Asset Class	May Transactions	May Value (AED)	Value Change %
Apartments	8,796	14,800,000,000	-39.34%
Villas	1,048	7,600,000,000	-45.32%
Commercial	335	2,900,000,000	-27.50%
Plots	122	3,800,000,000	-39.68%
Total	10,301	29,100,000,000	-40.12%

General Market

May 2026 delivered the most pronounced market contraction of the current disruption cycle, with total transaction value declining to AED 29.1 billion across 10,301 deals. This represents a 40.1 percent month-on-month value decline and a 26.9 percent volume contraction from April's partial stabilisation, erasing the recovery gains registered in the prior month. Year-on-year comparisons deteriorated dramatically, with May 2026 recording 56.5 percent below May 2025's AED 66.9 billion and 44.9 percent below the year-ago volume of 18,697 transactions, the widest annual divergence recorded since the disruption cycle commenced. The decline was broad-based across all asset classes, with villas suffering the steepest value compression at 45.3 percent and apartments contracting 39.3 percent in value.

The deterioration reflects the persistence of elevated risk premiums and continued logistical constraints that prevented April's recovery momentum from consolidating, as full Strait of Hormuz normalisation remained incomplete and buyer confidence retreated further. The month confirms that the geopolitical disruption is proving more sustained than April's early stabilisation signals had suggested.

Apartments

Apartment transactions fell sharply to 8,796 sales worth AED 14.8 billion in May, a 23.3 percent volume decline and 39.3 percent value contraction from April's 11,465 deals and AED 24.4 billion. Off-plan apartments dominated with 6,788 transactions valued at AED 11.265 billion, while ready stock contributed 2,008 deals worth AED 3.544 billion.

Off-plan pricing softened notably to AED 1,838 per square foot from April's AED 2,085, an 11.9 percent monthly retreat, reflecting developer adjustments to weaker absorption conditions. The segment maintained its position as the market's highest-volume contributor despite the contraction, with Azizi Venice (977 sales), Majan (788), and Dubailand Residence (538) leading off-plan performance. The magnitude of the monthly decline marks a significant reversal of April's stabilisation, suggesting the segment's earlier resilience was partially demand-timing driven.

Villas and Townhouses

The villa segment experienced its sharpest monthly contraction of the cycle in May, with transactions falling to 1,048 deals worth AED 7.6 billion, a 43.4 percent volume decline and 45.3 percent value drop from April's 1,851 deals and AED 13.9 billion. Off-plan villa sales totalled 632 transactions worth AED 4.490 billion, while ready units registered 416 deals valued at AED 3.101 billion. The segment's collapse reflects the near-complete withdrawal of discretionary international luxury buyers, who have extended their wait-and-see positioning as regional risks persist beyond initial recovery timelines. A significant composition shift emerged in financing, with mortgage buyers now representing 74.3 percent of villa transactions, up sharply from April's 57.5 percent, indicating that cash-rich investors have largely stepped back from

from the segment, leaving end-users with financing requirements as the primary transaction driver. Established family community leasing remained resilient, with Damac Hills 2 leading villa rentals at 200 contracts.

Commercial

Commercial property sales contracted to 335 transactions worth AED 2.9 billion in May, a 40.5 percent volume decline and 27.5 percent value drop from April's recovered levels. The reversal partially unwinds the prior month's V-shaped recovery, confirming that April's surge reflected catch-up demand rather than a new structural demand baseline. Commercial rental registrations declined 28.6 percent to 13,416 contracts, with office leases contracting 36.9 percent to 7,402, reversing a substantial portion of April's 79.8 percent surge. The retreat signals that while businesses-maintained core space commitments through the crisis period, discretionary expansion plans are being deferred pending clearer visibility on regional normalisation timelines. The sector's retreat is broad-based but disproportionately concentrated in office space, with industrial leasing's more modest 11.7 percent decline suggesting logistics operators are maintaining operational capacity commitments.

Land

Land transactions contracted further in May to 122 deals worth AED 3.8 billion, a 41.1 percent volume decline and 39.7 percent value drop from April's 207 transactions and AED 6.3 billion. The pullback confirms that April's tentative land recovery was fragile, with developers reverting to capital conservation positioning as market visibility remained limited. Plot acquisition activity is now at its lowest monthly level since the disruption cycle began, reflecting a broad sector preference for completing existing project obligations over committing to new development cycles. With June bringing a substantially increased residential supply injection of 2,638 apartments and 953 villas, land demand is likely to remain subdued as the market manages an elevated incoming handover volume.

Off-Plan

Off-plan sales retained structural dominance in May despite significant volume compression, capturing 7,420 residential transactions valued at AED 15.745 billion—representing 75.4 percent of residential volume and 70.3 percent of residential value. The segment's value share moderated from April's 80.3 percent as pricing softened, with average off-plan rates falling to AED 1,838 per square foot from AED 2,085 and average transaction values contracting to AED 2.118 million. Ready sales contributed 2,424 transactions worth AED 6.655 billion. Despite the monthly contraction, off-plan's structural dominance reflects continued buyer preference for payment plan flexibility, particularly as immediate capital preservation concerns intensify in the extended disruption environment.



Rental Transactions

Dubai's leasing market retreated in May, with 29,717 new rental contracts registered—a 19.6 percent decline from April's 36,977 registrations. Apartment leases fell 12.2 percent to 14,300 contracts, reversing part of April's rebound, and commercial leasing contracted 28.6 percent to 13,416 contracts as the post-crisis catch-up wave normalised. The sole positive was villa rentals, which bucked the trend by rising 5.6 percent to 2,001 contracts—marking the first monthly increase in the segment and indicating sustained family relocation activity and continued corporate housing demand in established residential communities.

Commercial Leasing Breakdown

Commercial leasing registered 13,416 new contracts in May, down 28.6 percent from April's elevated post-crisis levels. Office leases bore the heaviest contraction at 36.9 percent to 7,402 contracts, unwinding a significant portion of April's extraordinary surge. Retail and showroom registrations declined 19.5 percent to 1,423 deals, while industrial leases eased 11.7 percent to 241 contracts.



The 'other' category contracted 13.5 percent to 4,350 leases. The broad-based retreat confirms May's commercial activity normalised from April's catch-up spike, settling to a more sustainable demand baseline while underlying occupier commitments remain structurally intact.

Apartments

The apartment segment maintained relative market leadership in May despite broad-based contraction, registering 8,796 transactions totalling AED 14.8 billion. Off-plan dominance continued at 77.2 percent of apartment volume

(6,788 deals, AED 11.265 billion), while ready sales contributed 2,008 units worth AED 3.544 billion. Pricing softened, with off-plan rates declining to AED 1,838 per square foot and ready stock easing to AED 1,732 per square foot. Azizi Venice emerged as the standout off-plan performer at 977 sales, followed by Majan (788) and Dubailand Residence (538). Secondary market activity concentrated in JVC (236), Business Bay (144), and Dubai Marina (142). The pricing retreat from April's highs suggests developers are adjusting launch strategies to maintain absorption velocity as market conditions tighten.

Villa & Townhouses

Villa transactions declined steeply to 1,048 deals worth AED 7.6 billion in May, extending the segment's correction to multi-month lows. Off-plan villa sales reached 632 units valued at AED 4.490 billion while ready transactions registered 416 deals worth AED 3.101 billion. The financing composition shift is particularly notable: 779 of 1,048 villa transactions (74.3 percent) were mortgage-financed, compared to 57.5 percent in April, indicating cash-rich villa investors have substantially stepped back from the market. Damac Hills 2 retained leasing dominance with 200 villa rental contracts, followed by Arabian Ranches 3 (107) and Mirdiff (94), confirming that community occupancy levels remain healthier than transaction volumes suggest.

Commercial Properties

Commercial sales moderated to 335 transactions worth AED 2.9 billion in May, stepping back from April's exceptional rebound. The partial reversal reflects normalisation from post-crisis catch-up demand, with the AED 2.9 billion monthly total remaining above crisis-period lows. Leasing activity also pulled back, with commercial registrations declining to 13,416 contracts.

While the month-on-month contraction is evident, the commercial sector's underlying demand base, particularly in core office corridors of Business Bay and DIFC, retains occupancy levels consistent with longer-term operational fundamentals.

Land Plots

Land transactions fell to 122 deals registering AED 3.8 billion in value, extending the segment's retreat as developer confidence in new plot acquisitions retreated alongside the broader market.

The 39.7 percent value decline confirms that stakeholders are prioritising existing project completion over new ground-breaking activity. With June's supply additions of 2,638 apartments and 953 villas scheduled for handover, land demand is expected to remain subdued as market attention shifts to managing an elevated incoming residential handover cycle.



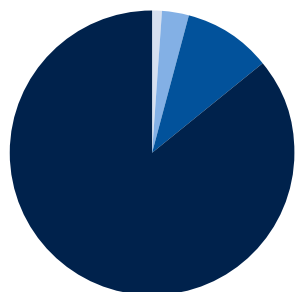
Sales Transactions

Month on Month | Apr 2026 - May 2026



DUBAI RESIDENTIAL MARKET REVIEW
MAY 2026

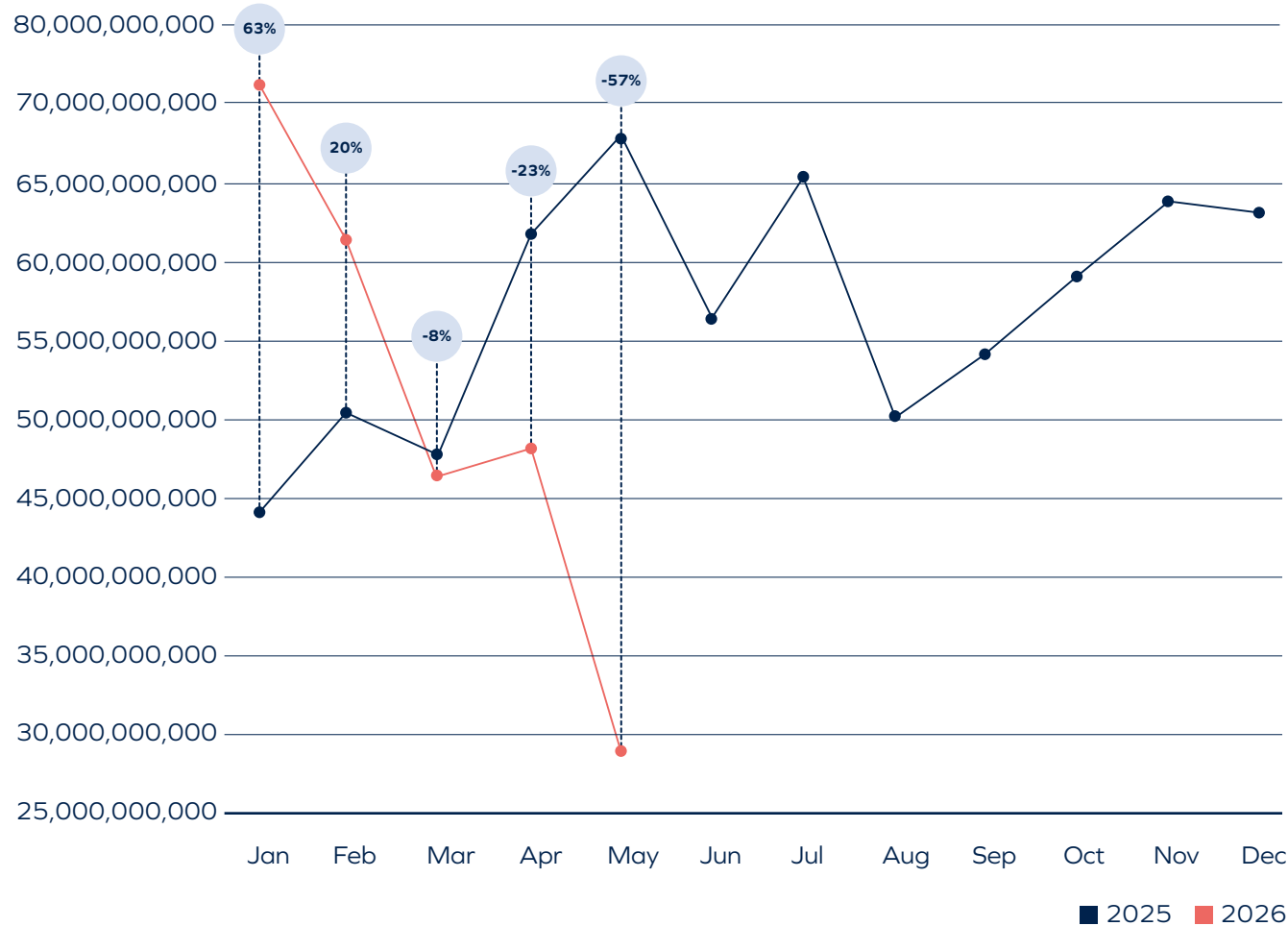
	Apr Transactions	Apr Value (AED)	May Transactions	May Value (AED)	Value Change %
Apartments	11,465	24,400,000,000	8,796	14,800,000,000	-39.34%
Villas	1,851	13,900,000,000	1,048	7,600,000,000	-45.32%
Commercial	563	4,000,000,000	335	2,900,000,000	-27.50%
Plots	207	6,300,000,000	122	3,800,000,000	-39.68%
Total	14,086	48,600,000,000	10,301	29,100,000,000	-40.12%



■ Apartments	86%
■ Villas	10%
■ Commercial	3%
■ Plots	1%

Transactions Value - Graph

2025 v/s 2026



May 2026 recorded AED 29.1 billion in total transaction value, a 40.1 percent decline from April's AED 48.6 billion and 56.5 percent below May 2025's AED 66.9 billion, the deepest year-on-year value contraction of 2026. The result reverses April's partial recovery and establishes a new cycle low.

All four asset classes contracted month-on-month: villas declined 45.3 percent to AED 7.6 billion, apartments fell 39.3 percent to AED 14.8 billion, plots retreated 39.7 percent to AED 3.8 billion, and commercial eased 27.5 percent to AED 2.9 billion.

Year-to-date 2026 cumulative transaction value stands at AED 255.3 billion across the first five months, compared to AED 272.6 billion in the equivalent 2025 period—a 6.3 percent shortfall that, despite 2026's exceptionally strong start through February, reflects the concentrated value destruction of the Q2 disruption cycle.

Transactions Value

2025 v/s 2026

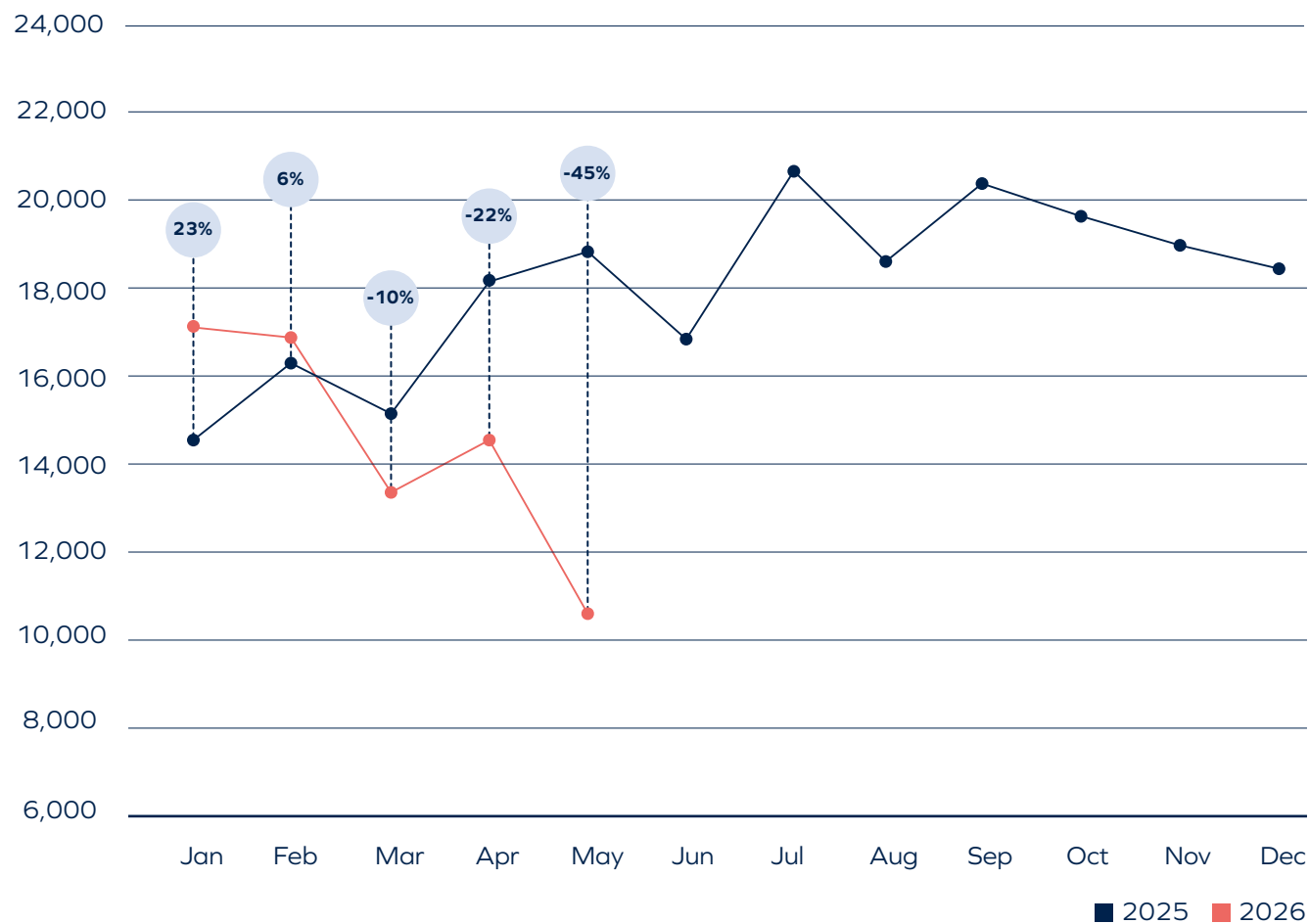


2025	Value	2026	Value
January	44,600,000,000	January	72,500,000,000
February	51,000,000,000	February	61,400,000,000
March	47,300,000,000	March	43,700,000,000
April	62,800,000,000	April	48,600,000,000
May	66,900,000,000	May	29,100,000,000
June	56,300,000,000	June	
July	65,100,000,000	July	
August	50,800,000,000	August	
September	54,700,000,000	September	
October	59,100,000,000	October	
November	64,800,000,000	November	
December	63,400,000,000	December	



Transactions Volume - Graph

2025 v/s 2026



Dubai registered 10,301 property transactions in May 2026, down 26.9 percent from April's 14,086 deals and 44.9 percent below May 2025's 18,697 transactions, the largest year-on-year volume gap recorded in 2026.

Apartment volumes fell 23.3 percent to 8,796 units, villas declined 43.4 percent to 1,048 transactions, commercial contracted 40.5 percent to 335 deals, and plots fell 41.1 percent to 122. The across-the-board volume compression represents the market's weakest monthly performance of 2026 in both absolute and year-on-year terms, confirming that May marked a renewed deterioration rather than a continuation of April's stabilisation.

Transactions Volume

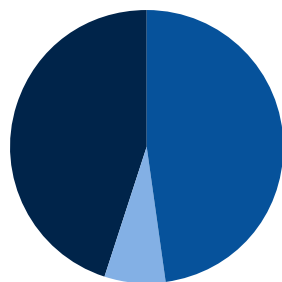
2025 v/s 2026



2025	Volume	2026	Volume
January	14,247	January	17,477
February	16,106	February	17,120
March	15,150	March	13,565
April	18,044	April	14,086
May	18,697	May	10,301
June	16,765	June	
July	20,322	July	
August	18,493	August	
September	20,360	September	
October	19,852	October	
November	19,024	November	
December	18,680	December	



New Rental Transactions



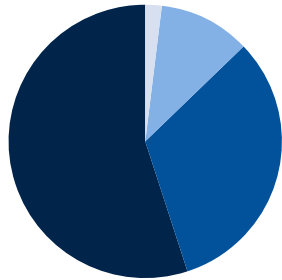
■ Apartments	48%
■ Villas	7%
■ Commercial	45%

	Apr	May	Volume Change %
Apartments	16,288	14,300	-12.21%
Villas	1,895	2,001	5.59%
Commercial	18,794	13,416	-28.62%
Total	36,977	29,717	-19.63%

Leasing registered 29,717 new contracts in May, a 19.6 percent contraction from April's 36,977 registrations. Apartment leases declined 12.2 percent to 14,300 contracts as post-crisis catch-up demand normalised. Commercial leasing fell 28.6 percent to 13,416 contracts, retreating from April's exceptional surge.

Villa rentals provided the sole positive data point, rising 5.6 percent to 2,001 contracts, indicating sustained family relocation and household formation within established residential communities. The aggregate decline confirms April's leasing strength was partially deferred demand release, with May settling toward a more normalised baseline.

Commercial Rental Breakdown



Shops/Showroom	11%
Office	55%
Industrial	2%
Others	32%

	Apr	May	Volume Change %
Shops/Showroom	1,767	1,423	-19.47%
Office	11,728	7,402	-36.89%
Industrial	273	241	-11.72%
Others	5,026	4,350	-13.45%
Total	18,794	13,416	-28.62%

Commercial leasing recorded 13,416 new contracts in May, down 28.6 percent from April's 18,794. Office leases led the contraction at 36.9 percent to 7,402 contracts, while retail and showroom registrations declined 19.5 percent to 1,423 deals. Industrial leasing eased 11.7 percent to 241 contracts, and the 'other' category contracted 13.5 percent to 4,350 leases.

The May pullback reflects normalisation from April's extraordinary post-crisis catch-up wave, with underlying office demand remaining intact while non-essential space expansion is deferred. Industrial's relative stability, the smallest percentage contraction across subcategories, suggests logistics operators continue to secure operational capacity despite the broader commercial market cooling.

Residential Off Plan v/s Secondary Sales

Sales Volume	Off-Plan	7,420
	Ready	2,424

Sales Value (AED)	Off-Plan	15,755,000,000
	Ready	6,645,000,000

Residential Breakdown	Off Plan	Ready
Apartments	6,788	2,008
Villas	632	416

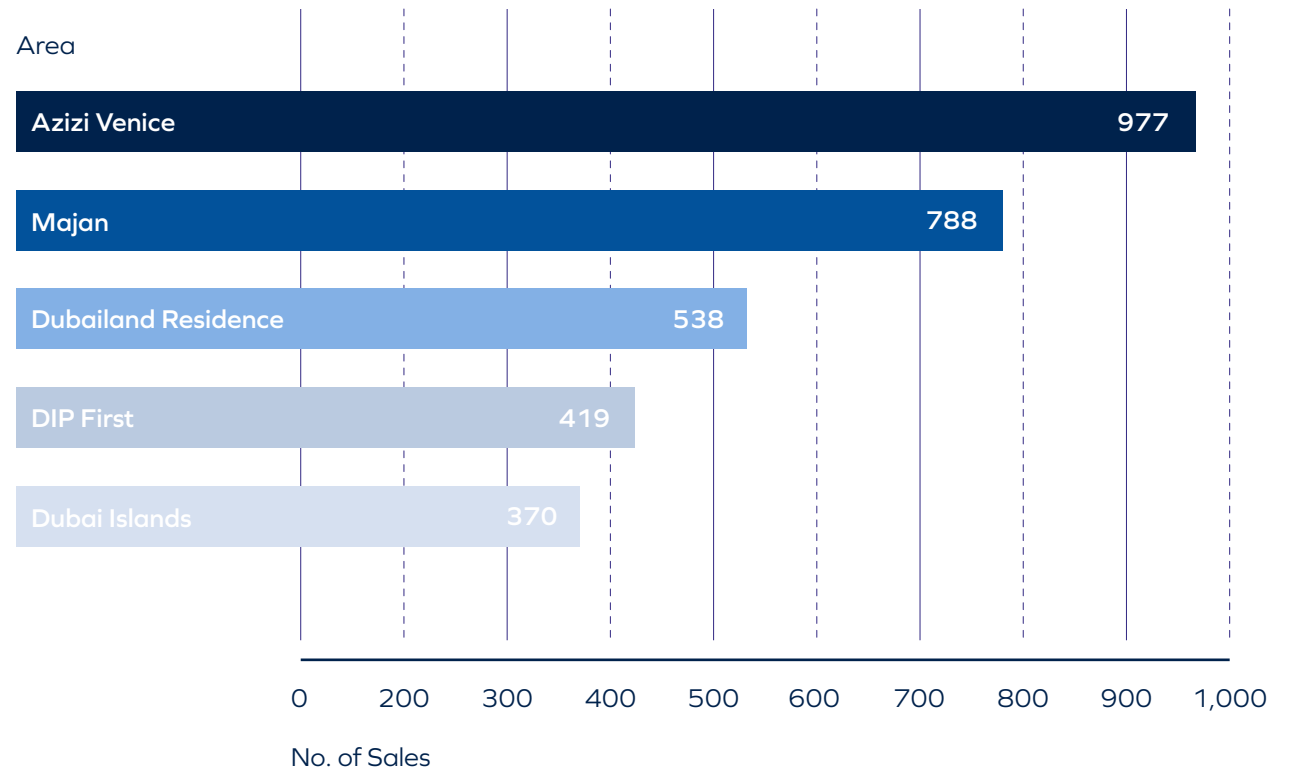
Residential Breakdown	Off Plan	Ready
Apartments	11,265,000,000	3,544,000,000
Villas	4,490,000,000	3,101,000,000



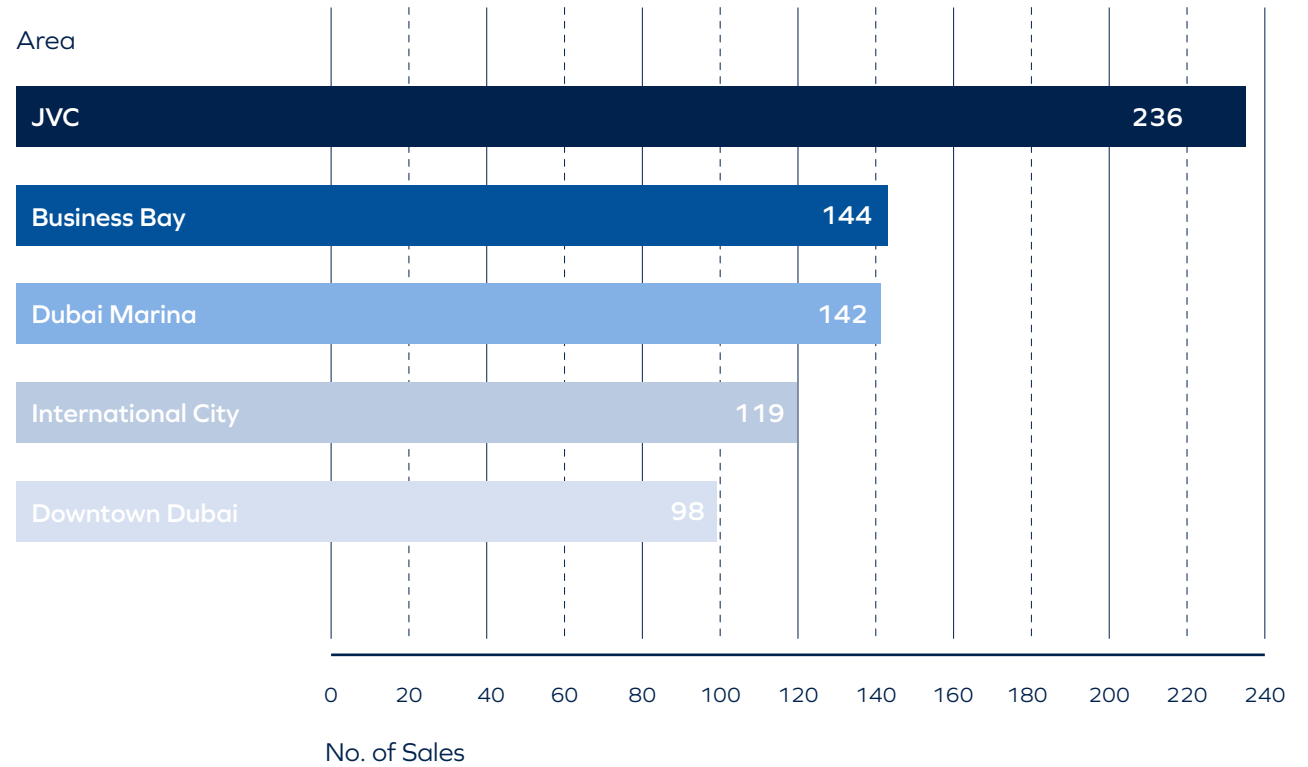
Off-plan sales maintained structural dominance in May, capturing 7,420 residential transactions valued at AED 15.745 billion versus 2,424 ready sales worth AED 6.655 billion. Off-plan volume share remained at 75.4 percent while its value share moderated to 70.3 percent of residential totals as average pricing retreated to AED 1,838 per square foot and average transaction values fell to AED 2.118 million.

Cash buyers maintained a commanding dominance at 77.5 percent of residential transactions (7,630 cash versus 2,214 mortgage), an increase from April's 73.2 percent. The financing dynamics shifted notably by asset class, with villa buyers inverting toward 74.3 percent mortgage financing while apartments retained 83.7 percent cash preference, indicating distinctly different buyer compositions between the two main residential segments.

Top 5 Performing Areas - Off Plan Sales



Top 5 Performing Areas - Secondary Sales



Residential Breakdown



Apartments led May's residential activity with 8,796 transactions totalling AED 14.809 billion, split between 6,788 off-plan deals (AED 11.265 billion) and 2,008 ready transactions (AED 3.544 billion). Villas registered 1,048 deals worth AED 7.591 billion, comprising 632 off-plan sales (AED 4.490 billion) and 416 ready transactions (AED 3.101 billion).

Apartments accounted for 89.4 percent of residential volume, with the value mix reflecting villas' significantly higher average transaction values. Off-plan pricing averaged AED 1,838 per square foot, down from April's AED 2,085, while ready stock softened to AED 1,732 per square foot from AED 1,786.8.



Top Performing Areas – May 2026



Off-Plan Sales

May's off-plan market was led by Azizi Venice with 977 transactions, a project-specific surge that marked the highest individual area performance of the current market cycle. Majan followed with 788 sales, reflecting continued interest in emerging master-plan communities, while Dubailand Residence contributed 538 transactions. DIP First recorded 419 deals and Dubai Islands, which topped April's rankings at 731 sales, normalised to fifth position with 370 transactions as phased launch activity stabilised. The top five collectively accounted for 3,092 transactions, 41.7 percent of total off-plan volume, indicating that project-driven launches in specific communities are providing disproportionate support to overall segment volumes in the current challenging market environment.

Secondary Sales

The ready market registered 2,424 residential transactions in May, with JVC maintaining leadership at 236 transactions. Business Bay followed with 144 deals and Dubai Marina contributed 142 transactions. International City recorded 119 sales and Downtown Dubai rounded out the top five with 98 transactions.

Compared to April's top five, Business Bay and Dubai Marina have consolidated their relative positions, while the return of International City reflects the sustained demand for affordable, high-liquidity communities. The secondary market's continued compression, with 2,424 versus April's 2,965 transactions, reflects persistent pricing resistance as sellers maintain expectations that have yet to fully align with buyers' revised appetite in the current environment.

New Apartment Rentals

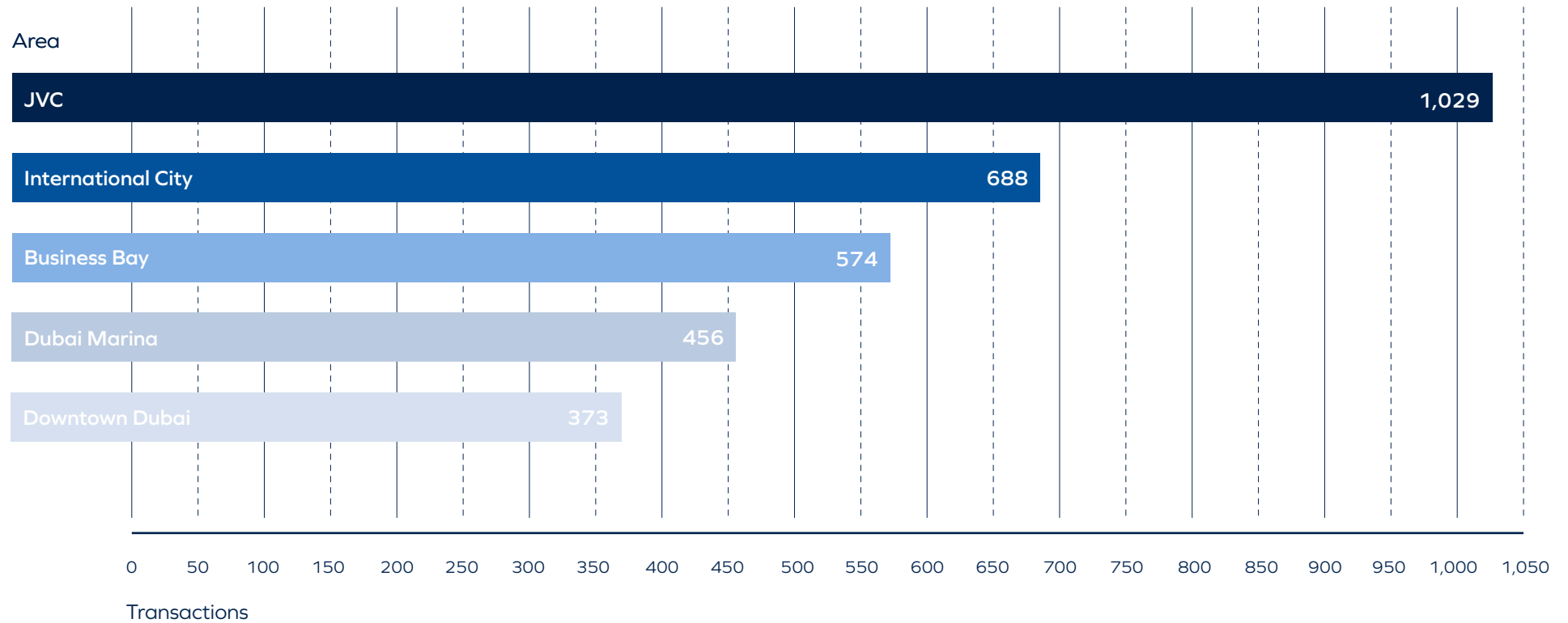
Apartment rental registrations totalled 14,300 contracts in May, with JVC maintaining market leadership at 1,029 new leases, broadly stable versus April's 1,008 contracts, through community maturity, affordability, and infrastructure depth. International City followed with 688 contracts, while Business Bay registered 574 leases. Dubai Marina contributed 456 contracts and Downtown Dubai rounded out the top five with 373 deals. The leasing top five remains largely unchanged from April, confirming that structural demand drivers such as affordability, connectivity, and community quality continue to sustain these corridors through broader market uncertainty without significant compositional shifts.

New Villa Rentals

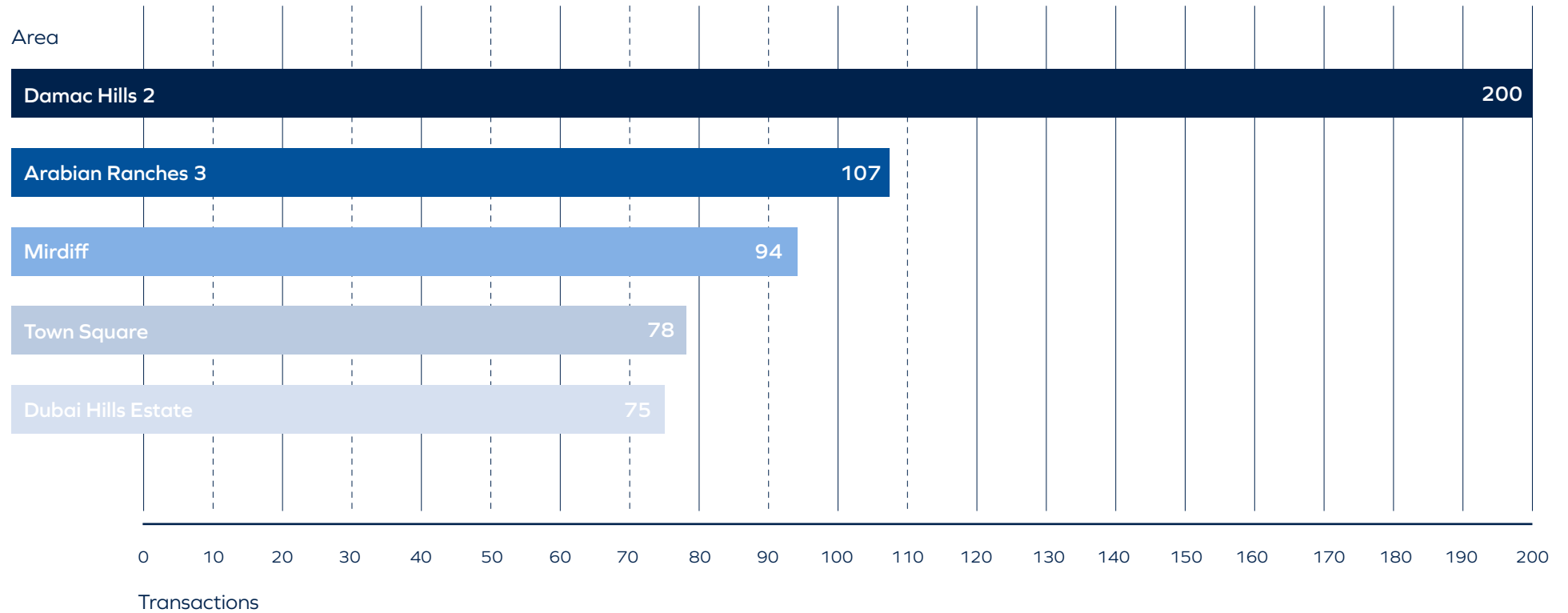
Villa rental registrations rose 5.6 percent to 2,001 contracts in May, bucking the broader leasing market contraction. Damac Hills 2 led at 200 new leases while Arabian Ranches 3 entered the top tier with 107 contracts, reflecting growing family demand for newer master-planned communities. Mirdiff followed with 94 leases, Town Square registered 78 deals, and Dubai Hills Estate contributed 75 contracts. The segment's month-on-month growth confirms sustained family housing demand and household formation activity in established communities, with the presence of Arabian Ranches 3 and Dubai Hills Estate indicating premium family community demand is broadening in the current environment.



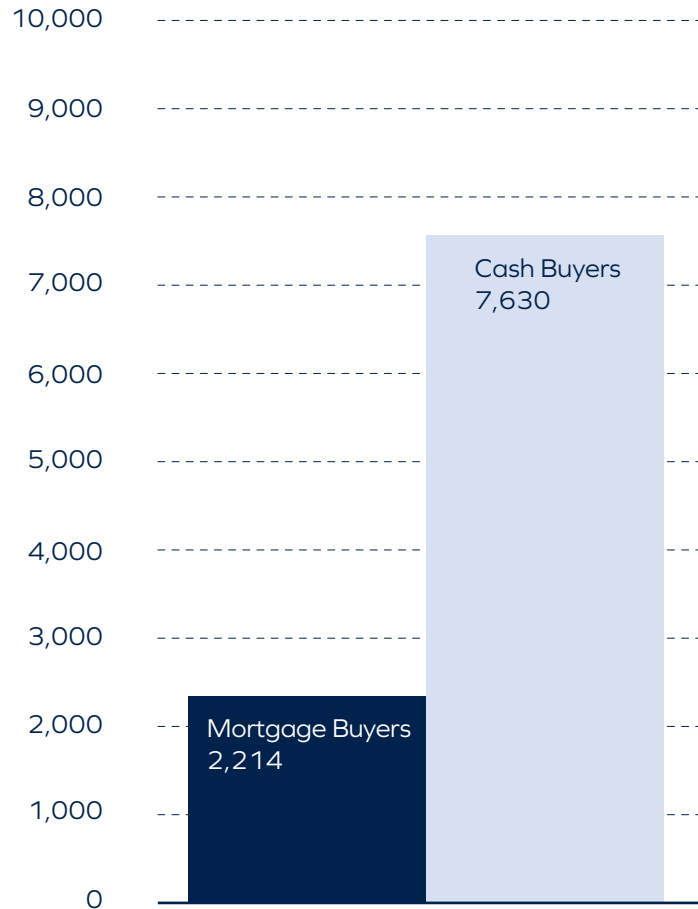
Top 5 Performing Areas - New Apartment Rentals



Top 5 Performing Areas - New Villa Rentals



Residential Mortgage Buyers v/s Cash Buyers



	Mortgage Sales	Cash Sales
Apartments	1,435	7,361
Villas	779	269

Mortgage Transaction Value: AED 4,900,000,000



Mortgage Buyers v/s Cash Buyers



Cash transactions maintained market supremacy in May, accounting for 77.5 percent of residential purchases (7,630 cash versus 2,214 mortgage), an increase from April's 73.2 percent cash share as investor activity retreated. Total mortgage activity declined to 2,214 transactions worth AED 4.9 billion, with the average loan size at approximately AED 2.21 million.

The asset-class financing dynamics diverged sharply: apartments recorded 83.7 percent cash preference (7,361 cash versus 1,435 mortgage), while the villa segment inverted to 74.3 percent mortgage-financed (779 mortgage versus 269 cash), up dramatically from April's 57.5 percent. The villa financing shift, the most notable structural change of May's data, indicates that cash-rich villa investors have largely exited the market, with end-user mortgage buyers remaining as the primary transaction driver in the segment.



Price Trends and New Supply



Dubai's residential pricing retreated meaningfully in May, with off-plan rates averaging AED 1,838 per square foot, an 11.9 percent monthly decline from April's AED 2,085 and the steepest single-month premium retreat of the current cycle. Ready property values softened to AED 1,732 per square foot, down 3.1 percent from April's AED 1,786.8. Year-on-year, off-plan pricing sits 3.9 percent below May 2025's AED 1,912.1 while ready stock remains 4.5 percent above May 2025's AED 1,656.8, reflecting divergent trajectories between the two segments. The off-plan price retreat marks a significant reversal of the sustained premium growth recorded through Q1 2026, signalling developers are recalibrating pricing strategies to restore absorption velocity in a challenging market environment.

Looking ahead, June will see a substantially increased supply injection of 2,638 apartments and 953 villas scheduled for handover, the most significant monthly delivery of 2026 to date. This elevated supply arrives against a backdrop of compressed transaction velocity, softening prices, and a market seeking directional clarity.

The combination of heightened handover volumes and continued market uncertainty creates near-term pressure on ready stock pricing, particularly in communities with concentrated delivery schedules.

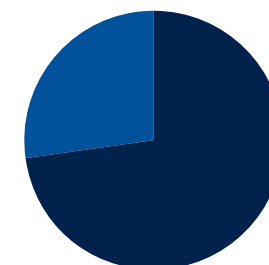
For the off-plan segment, the pricing reset to AED 1,838 per square foot may attract renewed buyer interest if regional risk premiums begin declining, though sustained recovery will require broader geopolitical stabilisation to materialise.



Sales Price Trend (AED per sq.ft.)



2025	Off-plan	Ready	2026	Off-plan	Ready
January	1,694.3	1,609.1	January	2,021.5	1,695.7
February	1,782.2	1,600.7	February	2,030.8	1,647.9
March	1,938.0	1,651.4	March	2,032.6	1,648.6
April	1,903.0	1,674.8	April	2,085.0	1,786.8
May	1,912.1	1,656.8	May	1,838.0	1,732.0
June	1,914.7	1,693.7	June		
July	2,010.9	1,611.5	July		
August	2,024.1	1,698.3	August		
September	2,009.0	1,613.8	September		
October	2,001.5	1,659.7	October		
November	2,064.5	1,669.0	November		
December	2,015.1	1,706.2	December		



June Residential Supply

■ Apartments	2,638
■ Villa	953

May 2026 delivered the sharpest market contraction of the current disruption cycle, with total transaction value falling to AED 29.1 billion across 10,301 deals, the weakest monthly performance of 2026 and a 56.5 percent year-on-year decline from May 2025's AED 66.9 billion.

The result marks a decisive reversal of April's tentative stabilisation, confirming that the recovery signals observed last month were premature and that the underlying geopolitical disruption continues to weigh materially on transactional activity. The magnitude of the monthly contraction, with value declining 40.1 percent and volume falling 26.9 percent from April, indicates the market has entered a second contraction phase rather than a sustained recovery trajectory. The persistence of Strait of Hormuz navigation constraints and continued Jebel Ali operational complexity appear to have prevented the normalisation anticipated through May. With full logistics restoration still incomplete, business and investor confidence retreated, and deferred transaction decisions in the villa and commercial sectors extended from near-term to mid-term timing horizons.

The commercial sector's 40.5 percent volume contraction and the simultaneous unwinding of April's office leasing surge, down 36.9 percent to 7,402 contracts, confirm that corporate expansion plans are being placed on extended hold pending clearer regional visibility.

Within the broad decline, several structural observations merit attention for market participants. Villa transaction composition shifted the most dramatically, with mortgage buyers representing 74.3 percent of all villa

deals versus April's 57.5 percent, indicating that cash-rich discretionary buyers have effectively exited the segment while end-users with financing requirements continue transacting at reduced velocity.

Off-plan pricing fell 11.9 percent to AED 1,838 per square foot, signalling that developers are prioritising absorption over margin preservation and recalibrating to the current demand reality. The contrast with ready stock's more modest 3.1 percent softening reflects the structural supply constraints in established communities.



The sole positive signal emerged from villa rentals, rising 5.6 percent to 2,001 contracts, alongside JVC's sustained apartment rental leadership at 1,029 contracts, confirming that population growth and household formation trends remain fundamentally intact even as sales velocity compresses significantly. These leasing metrics continue to validate Dubai's underlying occupier demand base, which has not been structurally impaired by the crisis period.

For investors and market participants, May 2026 presents a market in which the fundamental demand base, evidenced by rental stability across both segments, remains intact but where transactional recovery requires geopolitical resolution rather than incremental operational improvement. The combination of June's incoming supply surge (2,638 apartments and 953 villas), softened off-plan pricing, and compressed transaction volumes creates a near-term environment that rewards patience and selective capital allocation. The market's recovery trajectory will be determined primarily by the pace and completeness of regional normalisation, with internal demand fundamentals providing a resilient floor rather than a recovery catalyst in the months immediately ahead.





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