United Arab Emirates Real Estate Services - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 150 pages | Mordor Intelligence

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Report description:

United Arab Emirates Real Estate Services Market Analysis

The UAE real estate services market size in 2026 is estimated at USD 19.49 billion, growing from 2025 value of USD 18.45 billion with 2031 projections showing USD 25.62 billion, growing at 5.63% CAGR over 2026-2031. This steady trajectory underscores the market's resilience, aided by record foreign direct investment inflows, robust tourism volumes, and a policy push to digitalise land administration. The continued build-out of data-centre, logistics, and branded-residence assets is raising demand for specialised brokerage, valuation, and facilities-management support. At the same time, mandatory green-building rules in Dubai and Abu Dhabi are creating an additional layer of compliance-driven service needs. Technology adoption-from AI-backed valuation engines to tokenisation platforms-further distinguishes service providers that can deliver faster, cheaper, and more transparent transactions, reinforcing competitive intensity across the UAE real estate services market.

United Arab Emirates Real Estate Services Market Trends and Insights

Foreign direct investment-led transaction growth

Record capital inflows remain the single largest catalyst for the UAE real estate services market. The Ministry of Investment confirmed USD 30.7 billion in FDI during 2023, a 35% year-on-year increase, with real estate securing a notable share. Recent rules allowing free-zone companies to operate onshore are widening the corporate buyer pool while Mubadala's USD 1 billion alliance with Fortress Investment Group signals deeper institutional participation. These trends expand the transaction pipeline for brokerage, valuation, and due diligence providers over the medium term.

Tourism-fuelled demand for short-stay assets

Dubai welcomed 9.31 million international visitors in H1 2024, surpassing pre-pandemic levels and creating an acute need for vacation-rental management and hospitality-oriented brokerage services. Abu Dhabi's Tourism Strategy 2030 targets 39 million arrivals, requiring 18,000 additional hotel keys. Branded-residence schemes backed by Wyndham and Kamah Hotels exemplify how developers bundle hospitality and residential inventory, generating recurring fee income for property-management specialists.

Mortgage-rate plateau & costlier project finance

The 12-month EIBOR stood at 5.306% in June 2024 while leading banks priced resident mortgages from 3.94%, squeezing affordability for mid-income buyers. Lenders have raised minimum loan thresholds for non-residents and curtailed tenors, slowing transaction velocity. Service providers are responding by structuring Islamic rent-to-own models and advising on alternative funding vehicles, yet commission revenues tied to conventional sales remain under pressure.

Other drivers and restraints analyzed in the detailed report include:

Mandatory green-building regulations in Dubai & Abu DhabiRapid build-out of hyperscale data-centre campusesPersistent mid-market residential oversupply

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Residential apartments and condominiums accounted for 50.20% of the UAE real estate services market share in 2025, a lead sustained by the steady inflow of expatriate professionals and investors seeking resilient rental income streams. Warehouse and distribution assets, although representing a smaller base, are projected to record the fastest 1% CAGR to 2031 on the back of e-commerce expansion and supply-chain re-routing toward the Gulf. Dubai's prime warehouse rents climbed more than 20% in 2024, while Abu Dhabi witnessed 14% growth, signalling tight occupier markets that support premium advisory fees. Aldar Properties committed USD 270 million to new industrial parks, a move highlighting institutional confidence in the segment's outlook. Developers are increasingly incorporating cold-storage and last-mile nodes, elevating the technical specifications demanded of property-management providers.

Commercial office assets display a split personality. Grade A towers in the DIFC and Abu Dhabi Global Market enjoy 94-96% occupancy, yet secondary stock wrestles with double-digit vacancy. This performance divergence is prompting landlords to commission adaptive-reuse studies and smart-building upgrades, generating additional consulting and project-management mandates. Retail centres are benefiting from the rebound in footfall, but the growth of omni-channel retailing is pushing mall operators to craft experiential formats and entertainment clusters, again expanding the scope of design and leasing services.

The UAE Real Estate Services Market Report is Segmented by Property Type (Residential - Apartments and Condominiums, Villas and Landed Houses; Commercial - Office, Retail, Logistics, Others), Service (Brokerage Services, Property Management Services, Valuation Services, Others), Client Type (Individuals/Households, and More), and Geography (Dubai, Abu Dhabi, and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

CBRE Group Inc. Jones Lang LaSalle Incorporated (JLL) Cushman & Wakefield PLC Colliers International Group Inc. Savills PLC Knight Frank LLP Emaar Properties PJSC Aldar Properties PJSC DAMAC Properties Nakheel PJSC Meraas Holding LLC Dubai Properties (DPG) Wasl Asset Management Group Azizi Developments Arada Development LLC Union Properties PJSC Sobha Realty Danube Properties The First Group MAG Property Development Ellington Properties

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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