Dubai Residential Market Review | June 2026

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

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Commercial Valuations

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Market Highlights

General Market

June 2026 delivered the market's first meaningful recovery signal since the disruption cycle began, with total transaction value rising 16.8 percent to AED 34.0 billion across 14,104 deals a 36.9 percent volume rebound from May's cycle low of 10,301 transactions. The recovery was broad-based in volume terms across all four asset classes, though commercial property registered a counterintuitive 20.7 percent value decline despite a 43.6 percent volume surge, reflecting a decisive shift toward smaller-ticket transactions as larger institutional deal flow remained selective. Year-on-year comparisons remain challenging, with June 2026 recording 40.0 percent below June 2025's AED 56.3 billion in value and 15.9 percent below the year-ago volume of 16,765 transactions.

The month's defining event was Azizi Venice's extraordinary 2,402 off-plan sales the largest single-project monthly absorption recorded in recent cycle history that anchored the segment's recovery and amplified the headline result. Rental market activity surged 31.5 percent to 39,074 new contracts across all segments, providing compelling evidence that Dubai's underlying occupier demand base remains structurally intact despite the challenging sales environment.

Apartments

Apartment transactions rebounded strongly to 11,872 sales worth AED 18.7 billion in June, a 35.0 percent volume increase and 26.4 percent value recovery from May's 8,796 deals and AED 14.8 billion.

Off-plan apartments dominated with 9,264 transactions valued at AED 13.7 billion, while ready stock contributed 2,608 deals worth AED 5.0 billion. Azizi Venice's 2,402 off-plan sales were the primary catalyst, representing approximately 25.9 percent of total apartment off-plan volume and marking the project's emergence as the cycle's dominant off-plan absorption engine. Off-plan pricing stabilised at AED 1,848.8 per square foot from May's AED 1,838 a 0.6 percent recovery indicating developers are tentatively holding firm after last month's 11.9 percent retreat. JVC led both off-plan (384 sales) and secondary (350 transactions) activity, underlining its exceptional dual-market depth.

Villas and Townhouses

Villa transactions recovered to 1,533 deals worth AED 7.9 billion in June, a 46.3 percent volume rebound from May's 1,048 transactions, though value growth was a more modest 3.9 percent from AED 7.6 billion indicating average transaction values compressed as mid-market villa activity accounted for a larger share. A notable structural development was the near-parity between off-plan (777 transactions, AED 4.450 billion) and ready (756 transactions, AED 3.450 billion) channels the most balanced split of the current cycle, suggesting the ready market is absorbing June's handover supply more effectively than anticipated.

Market Highlights

Mortgage buyers remained elevated at 66.5 percent of villa transactions (1,019 versus 514 cash), an improvement from May's extreme 74.3 percent that points to gradual re-engagement by cash buyers at current price levels. Villa leasing surged 49.0 percent to 2,981 contracts, reflecting robust summer family relocation demand.

Commercial

Commercial property produced a paradoxical result in June, with transaction volume rising 43.6 percent to 481 deals while total value contracted 20.7 percent to AED 2.3 billion. This inverse relationship signals a decisive mix shift toward smaller commercial transactions average deal size fell from AED 8.66 million per transaction in May to AED 4.78 million in June as retail units and smaller office spaces dominated activity while large-format institutional acquisitions remained scarce. Commercial rental registrations advanced 9.4 percent to 14,682 contracts, led by a 16.6 percent increase in office leases to 8,627 and a 33.5 percent surge in retail and showroom registrations to 1,900 reflecting steady business normalisation rather than the volatile catch-up spikes characterising prior months.

Land

Land transactions staged the strongest proportional recovery of any asset class in June, rising 78.7 percent in volume to 218 deals and 34.2 percent in value to AED 5.1 billion from May's 122 transactions and AED 3.8 billion. The rebound signals a shift from defensive capital conservation toward selective offensive positioning by developers, who appear to be acquiring strategic parcels ahead of the next launch cycle as geopolitical uncertainty moderates and market confidence returns. Infill sites in established corridors and land positions in emerging communities attracted renewed institutional interest, with the average deal size recovering from May's compressed levels.

Off-Plan

Off-plan sales rebounded to 10,041 residential transactions valued at AED 18.125 billion in June a 35.3 percent volume recovery from May's 7,420 deals and a 15.1 percent value increase. The segment's volume share held steady at 74.9 percent of residential transactions while its value share moderated to 68.1 percent, reflecting compressed average transaction values of AED 1.81 million per deal versus May's AED 2.118 million. Azizi Venice's 2,402 sales were the defining event, accounting for approximately 23.9 percent of total residential off-plan volume. Pricing stabilised at AED 1,848.8 per square foot a 0.6 percent recovery from May's cycle low suggesting developers are cautiously testing whether the pricing floor has been established.

Rental Transactions

Rental Transactions

Dubai's leasing market surged in June, with 39,074 new rental contracts registered a 31.5 percent increase from May's 29,717. Apartment leases led with a 49.7 percent surge to 21,411 contracts, driven by summer relocation activity and normalising business demand. Villa rentals rose 49.0 percent to 2,981 contracts, maintaining the positive momentum established in May. Commercial leasing advanced 9.4 percent to 14,682 contracts, demonstrating steadier but more sustainable growth. The leasing market's exceptional performance across all three segments provides the strongest evidence yet that Dubai's population and business formation dynamics remain robust, with the occupier base actively expanding even as the sales market continues its recovery.

Commercial Leasing Breakdown

Commercial leasing advanced broadly in June, registering 14,728 new contracts across all subcategories. Office leases rose 16.6 percent to 8,627 contracts as corporate expansion and relocation activity continued normalising. Retail and showroom registrations surged 33.5 percent to 1,900 deals as consumer-facing businesses secured space ahead of peak summer trading periods. Industrial leasing advanced 20.3 percent to 290 contracts as logistics operators continued completing near-term capacity requirements. The 'other' category eased 10.1 percent to 3,911 leases the sole subcategory to contract as flexible accommodation demand normalised from elevated prior-month levels. The broad-based advance confirms Dubai's commercial occupier base is progressively reactivating as operational certainty improves across the region.

Sales Transactions

Apartments

The apartment segment delivered the market's primary recovery engine in June with 11,872 transactions totalling AED 18.7 billion. Off-plan dominance continued at 78.0 percent of apartment volume (9,264 deals, AED 13.7 billion), while ready sales contributed 2,608 units worth AED 5.0 billion. Off-plan pricing stabilised at AED 1,848.8 per square foot while ready stock advanced 1.3 percent to AED 1,754.6 per square foot from May's AED 1,732. Azizi Venice dominated the off-plan landscape with 2,402 sales, followed by City of Arabia (458), Dubailand Residence (392), JVC (384), and Al Furjan (308). The secondary market strengthened meaningfully, led by JVC (350 transactions), the new entrant Jebel Ali Village (219), and Business Bay (191). The segment's 26.4 percent value recovery, achieved against a backdrop of still-subdued off-plan pricing, demonstrates the depth of underlying end-user and investor demand when project launches align with market appetite.

Villa & Townhouses

Villa transactions recovered to 1,533 deals worth AED 7.9 billion in June, with the near-equal split between off-plan (777 units, AED 4.450 billion) and ready (756 units, AED 3.450 billion) channels marking the most balanced villa market structure of the current cycle. The financing composition improved modestly from May's extremes, with mortgage buyers at 66.5 percent of transactions (1,019 versus 514 cash) down from May's peak of 74.3 percent suggesting selective re-engagement by cash buyers at current price levels.

Villa leasing surged 49.0 percent to 2,981 contracts, with Damac Hills 2 extending its rental dominance at 314 new leases, followed by Arabian Ranches 3 (159) and Mirdiff (137). The segment's volume recovery is encouraging, though the modest 3.9 percent value gain relative to 46.3 percent volume growth confirms that average transaction prices remain under pressure as mid-market activity drives the rebound.

Commercial Properties

Commercial sales registered 481 transactions in June up 43.6 percent from May generating AED 2.3 billion in value, down 20.7 percent. The average deal size contracted from AED 8.66 million per transaction in May to AED 4.78 million in June, clearly indicating the transaction mix has shifted from large-format institutional acquisitions to smaller retail and office units. DIFC 2.0's appearance in the secondary market top five at 147 transactions likely representing premium per-unit values provides a counterpoint to the overall value decline and suggests that high-quality commercial assets in prime locations retain their appeal for selective buyers. The commercial sector's recovery path to pre-crisis value levels requires institutional transaction volumes to return, which is likely to follow rather than lead the broader market stabilisation.

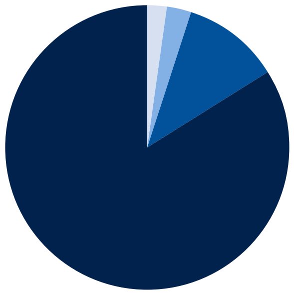
Land Plots

Land transactions staged their strongest recovery of 2026, with 218 deals registering AED 5.1 billion the highest monthly plot value since the disruption cycle began. The 78.7 percent volume increase and 34.2 percent value gain signal developers moving from capital preservation toward selective growth positioning, acquiring strategic sites in preparation for the next launch cycle. With July bringing a very constrained apartment supply pipeline of just 501 units, land demand in established residential corridors may intensify as developers compete for sites in communities demonstrating strong rental and sales absorption. The segment's recovery is the most concrete indication yet of returning developer confidence in Dubai's medium-term residential outlook.

Sales Transactions

Month on Month | May 2026 - June 2026

	May Transactions	May Value (AED)	June Transactions	June Value (AED)	Value Change %
Apartments	8,796	14,800,000,000	11,872	18,700,000,000	26.35%
Villas	1,048	7,600,000,000	1,533	7,900,000,000	3.95%
Commercial	335	2,900,000,000	481	2,300,000,000	-20.69%
Plots	122	3,800,000,000	218	5,100,000,000	34.21%
Total	**10,301**	**29,100,000,000**	**14,104**	**34,000,000,000**	**16.84%**



Apartments	84%
Villas	11%
Commercial	3%
Plots	2%

Transactions Value - Graph

2025 v/s 2026

June 2026 recorded AED 34.0 billion in total transaction value, a 16.8 percent recovery from May's cycle low of AED 29.1 billion but still 40.0 percent below June 2025's AED 56.3 billion.

Year-to-date 2026 cumulative transaction value now stands at AED 289.3 billion across the first six months, compared to AED 328.9 billion in the equivalent 2025 period a 12.0 percent shortfall that reflects concentrated value destruction in Q2 despite 2026's exceptionally strong start through February.

The month-on-month rebound was led by apartments (+26.4%), plots (+34.2%), and villas (+3.9%), partially offset by commercial's 20.7 percent value decline. The partial recovery confirms May's AED 29.1 billion as the apparent trough, though year-on-year gaps remain wide and full recovery is contingent on sustained regional normalisation.

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**	**34,000,000,000**
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 14,104 property transactions in June 2026, up 36.9 percent from May's 10,301 deals but 15.9 percent below June 2025's 16,765 transactions a significant narrowing of the year-on-year volume gap from May's 44.9 percent deficit.

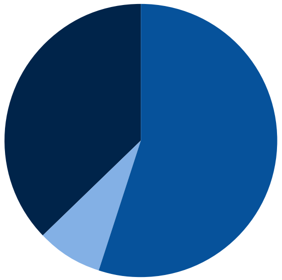
Apartment volumes rose 35.0 percent to 11,872 units, villas recovered 46.3 percent to 1,533 transactions, commercial advanced 43.6 percent to 481 deals, and plots surged 78.7 percent to 218. The across-the-board volume recovery marks the most positive monthly data point of the 2026 disruption cycle, with the year-on-year volume gap narrowing from May's extreme levels across every asset class.

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**	**14,104**
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



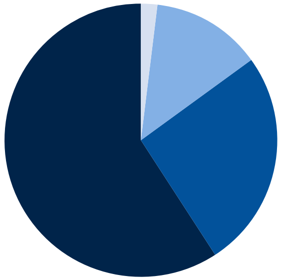
Apartments		55%
Villas		8%
Commercial		37%

	May	June	Volume Change %
Apartments	14,300	21,411	49.73%
Villas	2,001	2,981	48.98%
Commercial	13,416	14,682	9.44%
Total	**29,717**	**39,074**	**31.49%**

Leasing registered 39,074 new contracts in June, a 31.5 percent surge from May's 29,717 registrations. Apartment leases advanced 49.7 percent to 21,411 contracts, driven by summer relocation activity and normalising business demand. Villa rentals rose 49.0 percent to 2,981 contracts, extending the positive momentum established in May.

Commercial leasing advanced 9.4 percent to 14,682 contracts, demonstrating steady rather than spike-driven growth. The exceptional leasing performance across all three segments with apartments and villas both approaching 50 percent monthly increases provides the most compelling evidence of the current cycle that Dubai's underlying occupier demand base has not been structurally impaired by the disruption period.

Commercial Rental Breakdown



Shops/Showroom	13%
Office	59%
Industrial	2%
Others	26%

	May	June	Volume Change %
Shops/Showroom	1,423	1,900	33.52%
Office	7,402	8,627	16.55%
Industrial	241	290	20.33%
Others	4,350	3,911	-10.09%
Total	**13,416**	**14,728**	**9.78%**

Commercial leasing registered 14,728 new contracts in June, advancing across three of four subcategories. Retail and showroom registrations led the growth at 33.5 percent to 1,900 deals, as consumer-facing businesses secured positions ahead of peak summer trading. Industrial leasing advanced 20.3 percent to 290 contracts, and office leases rose 16.6 percent to 8,627 contracts as corporate normalisation continued.

The 'other' category flexible accommodation and multi-use spaces contracted 10.1 percent to 3,911 leases as prior months' elevated accommodation demand normalised. The commercial leasing picture is one of broad-based, sustainable growth rather than the volatile catch-up dynamics that characterised April's spike and May's subsequent reversal.

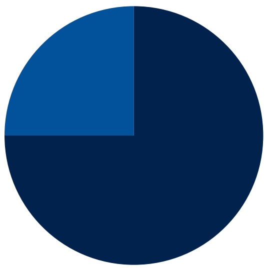
Residential Off Plan v/s Secondary Sales

Sales Volume	Off-Plan	10,041
	Ready	3,364

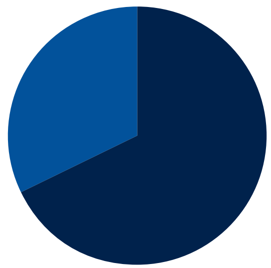
Sales Value (AED)	Off-Plan	18,125,000,000
	Ready	8,475,000,000

Residential Breakdown	Off Plan	Ready
Apartments	9,264	2,608
Villas	777	756

Residential Breakdown	Off Plan	Ready
Apartments	13,700,000,000	5,000,000,000
Villas	4,450,000,000	3,450,000,000



Off-Plan	75%
Ready	25%

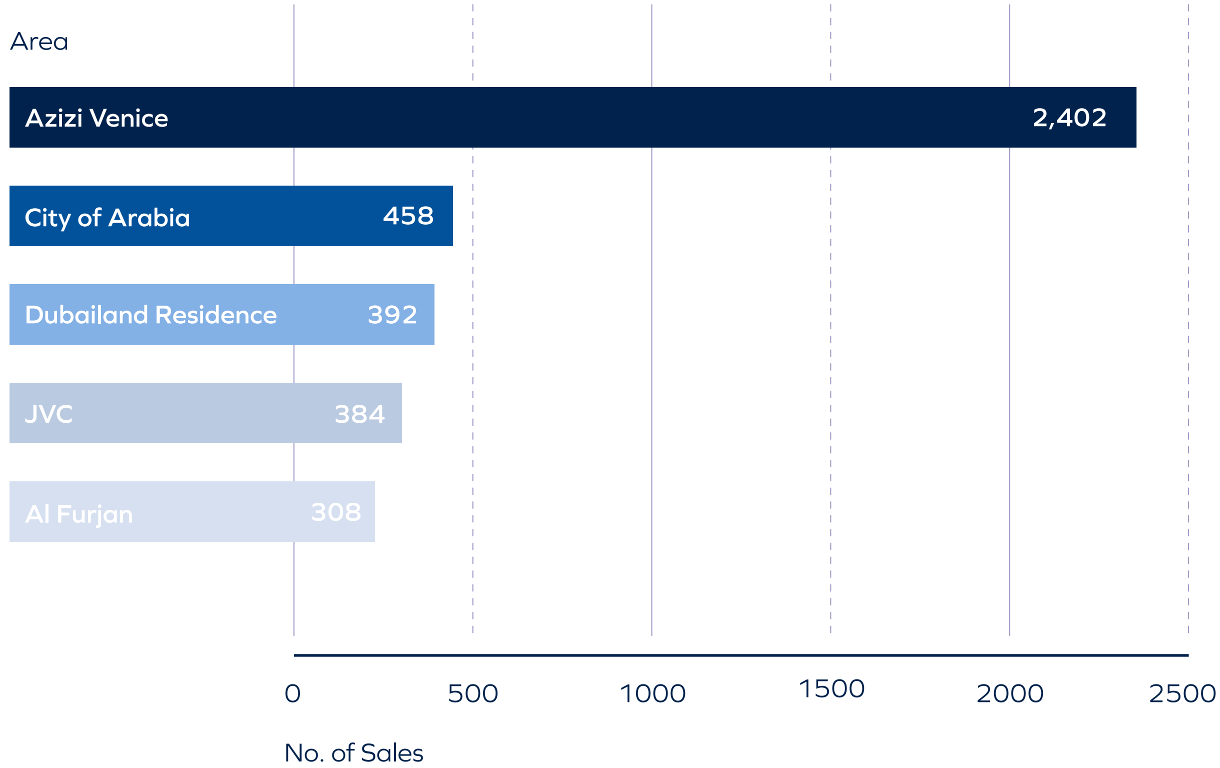


Off-Plan	68%
Ready	32%

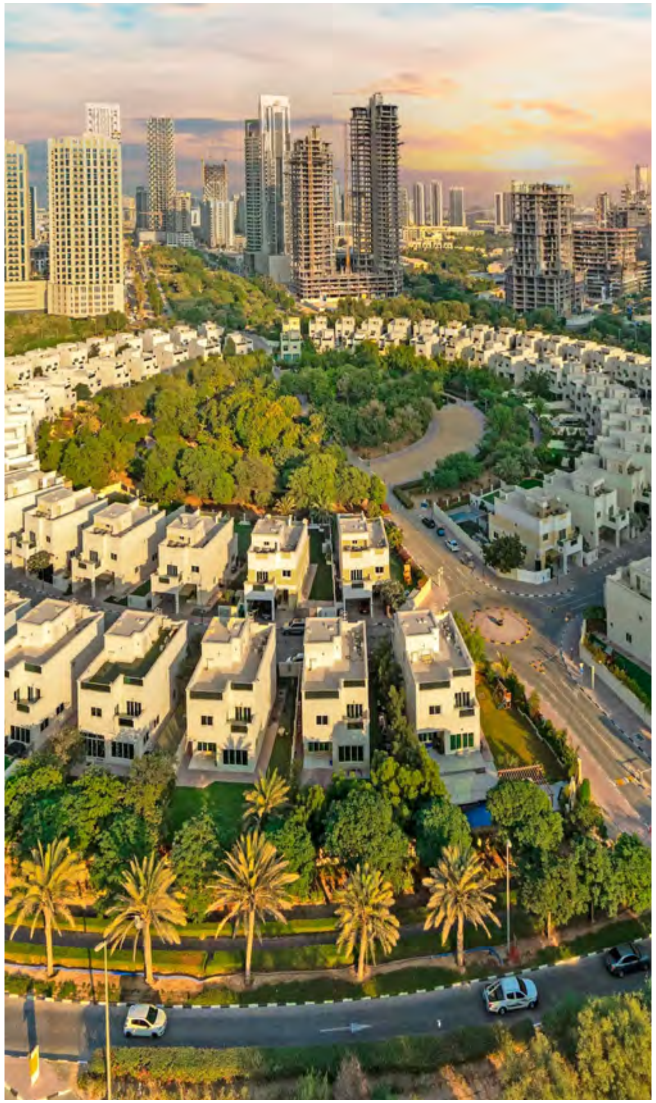
Off-plan sales rebounded to 10,041 residential transactions valued at AED 18.125 billion in June, versus 3,364 ready sales worth AED 8.475 billion. Off-plan volume share held at 74.9 percent while its value share moderated to 68.1 percent of residential totals as average transaction values compressed to AED 1.81 million below May's AED 2.118 million reflecting the dominance of more affordably-priced project launches.

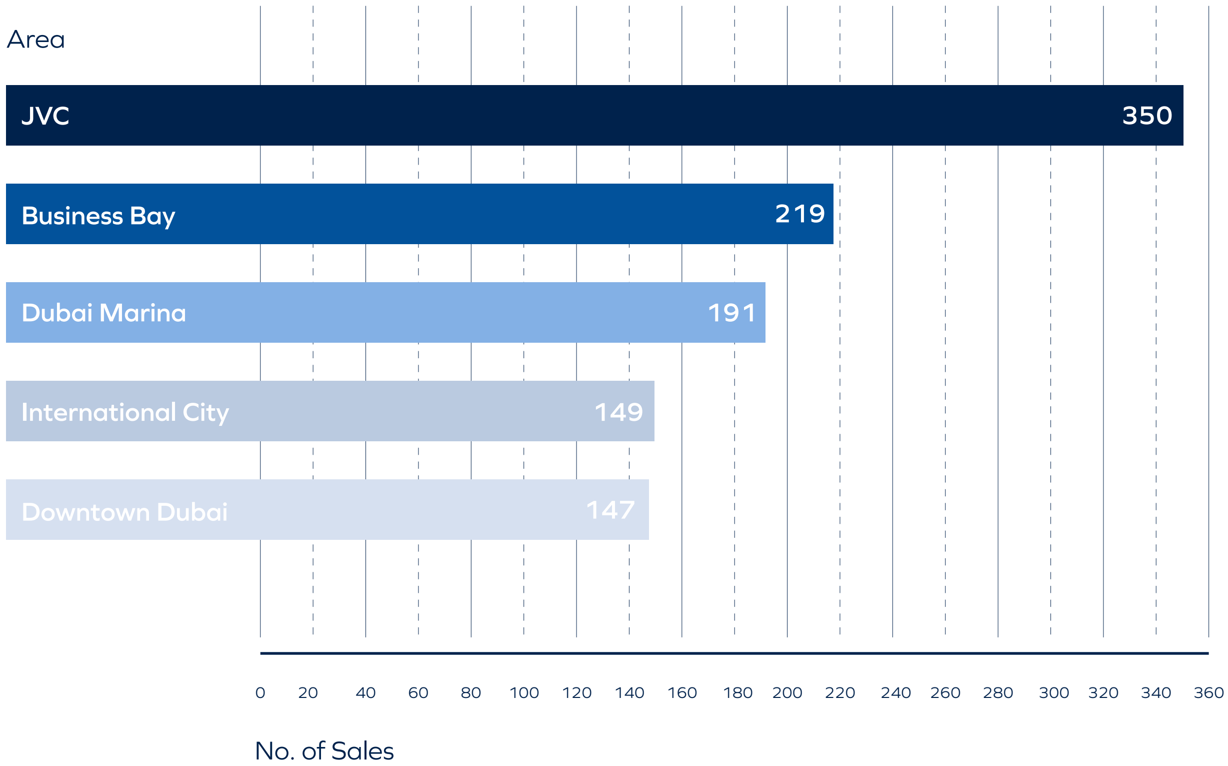
Cash buyers retained market leadership at 74.0 percent of residential transactions (9,915 cash versus 3,490 mortgage), though the mortgage market's 57.7 percent volume recovery from May reaching 3,490 transactions worth AED 7.3 billion represents the banking sector's clearest signal yet of restored confidence in market fundamentals.

Top 5 Performing Areas - Off Plan Sales



Top 5 Performing Areas - Secondary Sales





Residential Breakdown

Apartments led June's residential activity with 11,872 transactions totalling AED 18.7 billion, split between 9,264 off-plan deals (AED 13.7 billion) and 2,608 ready transactions (AED 5.0 billion). Villas registered 1,533 deals worth AED 7.9 billion, comprising 777 off-plan sales (AED 4.450 billion) and 756 ready transactions (AED 3.450 billion).

The villa segment's near-equal off-plan/ready split is notable ready transactions at 49.3 percent of villa volume represent the highest ready market share in the villa segment since before the disruption cycle. Apartments accounted for 88.6 percent of residential volume and off-plan pricing averaged AED 1,848.8 per square foot, while ready stock advanced to AED 1,754.6 per square foot.

Top Performing Areas – June 2026

Off-Plan Sales

June's off-plan market was defined by Azizi Venice's extraordinary 2,402 transactions the highest single-project monthly absorption of the current market cycle and nearly triple the project's own May figure of 977 sales. City of Arabia entered the top tier with 458 transactions, reflecting renewed appetite for established master-plan communities, while Dubailand Residence contributed 392 deals. JVC maintained dual-market strength with 384 off-plan sales, and Al Furjan recorded 308 transactions as mid-market communities sustained their appeal. The top five collectively accounted for 3,944 transactions 39.3 percent of total off-plan residential volume with Azizi Venice alone representing 23.9 percent, underscoring the extraordinary concentration of a single project launch.

Secondary Sales

The ready market registered 3,364 residential transactions in June, led by JVC's 350 secondary deals the area's continued dominance reflecting deep liquidity and strong rental fundamentals. Jebel Ali Village emerged as the month's most notable new entrant at 219 transactions, potentially reflecting the community's proximity to Jebel Ali Port and renewed operational confidence in the logistics corridor. Business Bay followed with 191 deals and Dubai Marina contributed 149 transactions. DIFC 2.0 entered the top five at 147 transactions, representing premium commercial-adjacent residential demand in one of Dubai's most sought-after addresses. The secondary market's improved volume 3,364 versus May's 2,424 transactions and more diverse community representation signals broadening buyer confidence beyond the core affordable hubs.

New Apartment Rentals

Apartment rental registrations surged to 21,411 contracts in June, led by JVC's exceptional 1,694 new leases a 64.6 percent jump from April's 1,008 confirming the community's position as Dubai's premier affordable rental hub. Business Bay followed with 984 contracts, reflecting strong corporate demand for centrally located units, while International City contributed 811 leases.

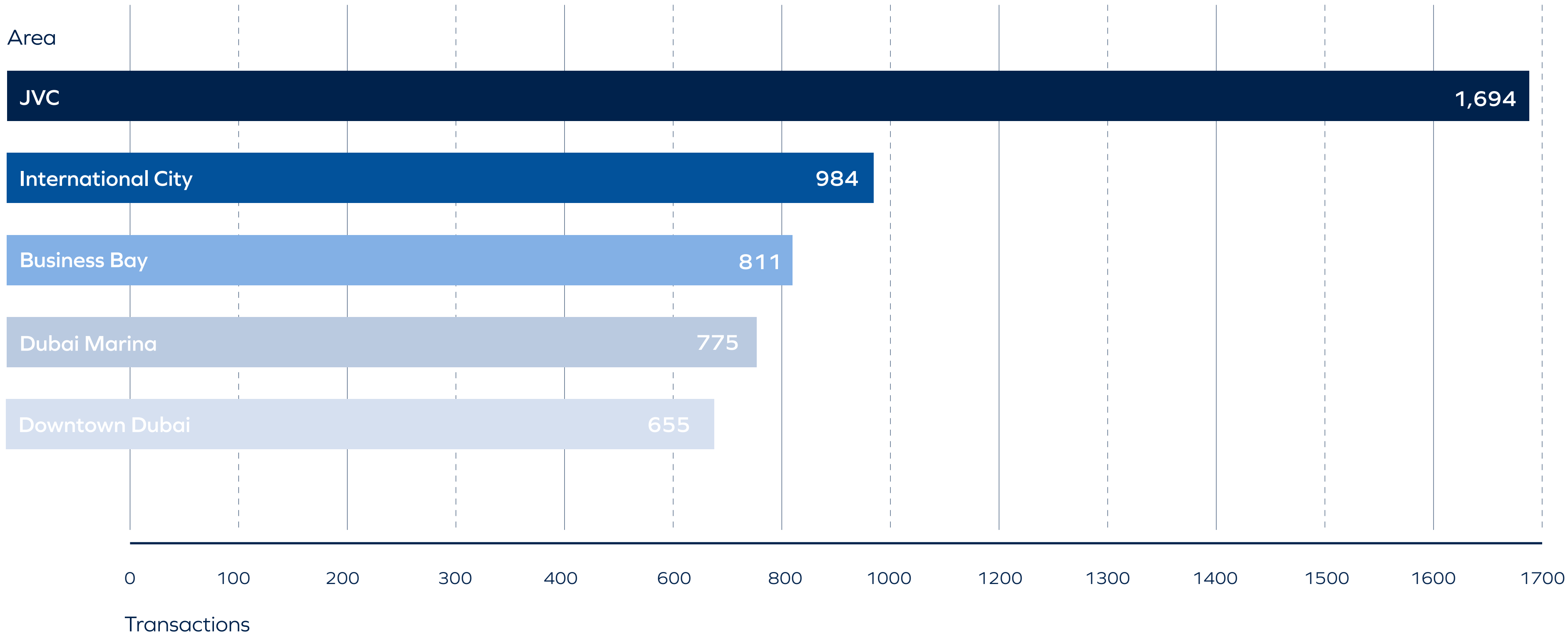
Dubai Marina registered 775 contracts and Town Square rounded out the top five with 655 deals—the latter's entry displacing Downtown Dubai from the top five and reflecting growing demand for affordable master-planned communities further from the city centre. The surge across all top five communities signals that June's leasing rebound was broad-based rather than concentrated in a single corridor.

New Villa Rentals

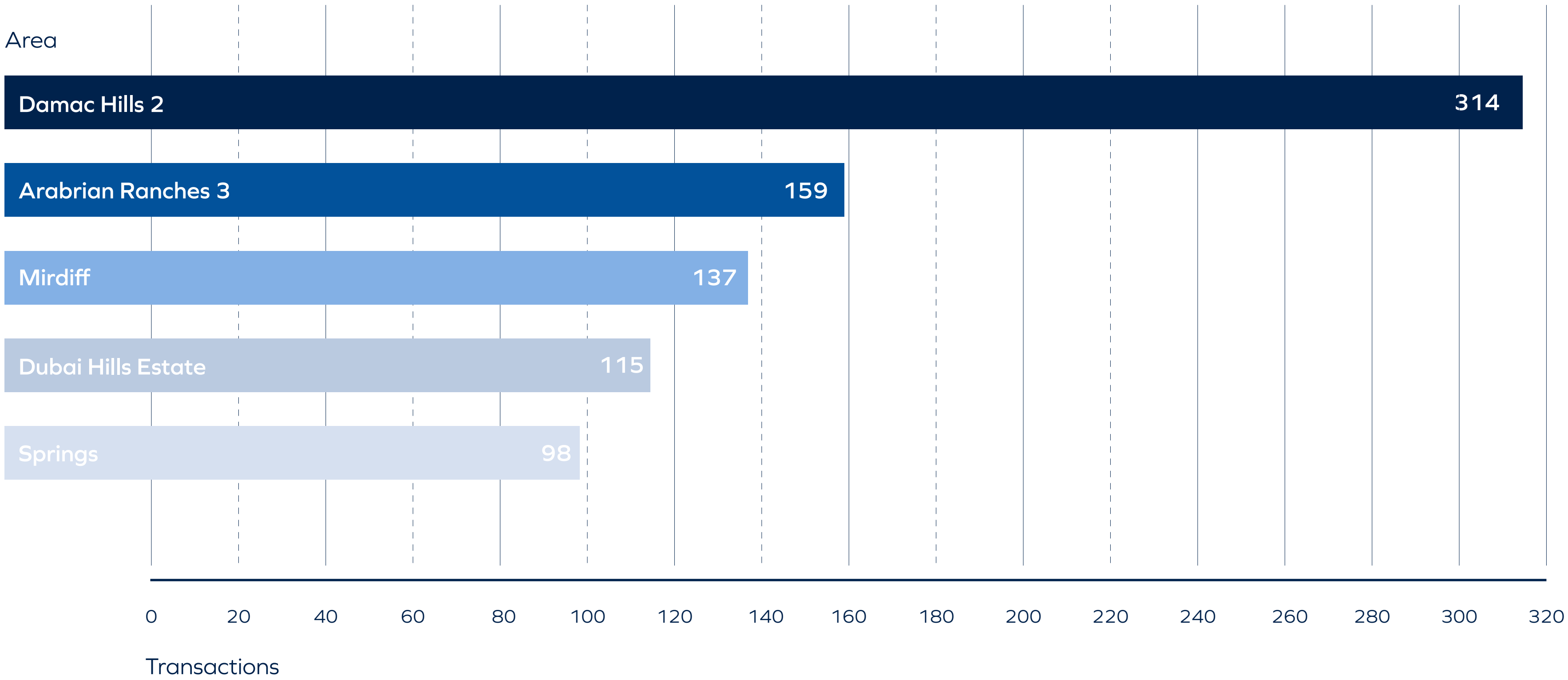
Villa rental registrations surged 49.0 percent to 2,981 contracts in June, with Damac Hills 2 extending its dominant position at 314 new leases a 57.0 percent increase from May's 200. Arabian Ranches 3 followed with 159 contracts, sustaining its top-tier presence from May and confirming growing family demand for newer master-planned communities.

Mirdiff contributed 137 leases as its affordability-and-infrastructure combination retained appeal, while Dubai Hills Estate advanced to 115 contracts. The Springs re-entered the top five with 98 leases, reflecting enduring demand for established integrated communities with proven quality infrastructure. The segment's near-50 percent monthly leasing increase demonstrates that family relocation and corporate housing demand are accelerating into Q3. Ranches 3 and Dubai Hills Estate indicating premium family community demand is broadening in the current environment.

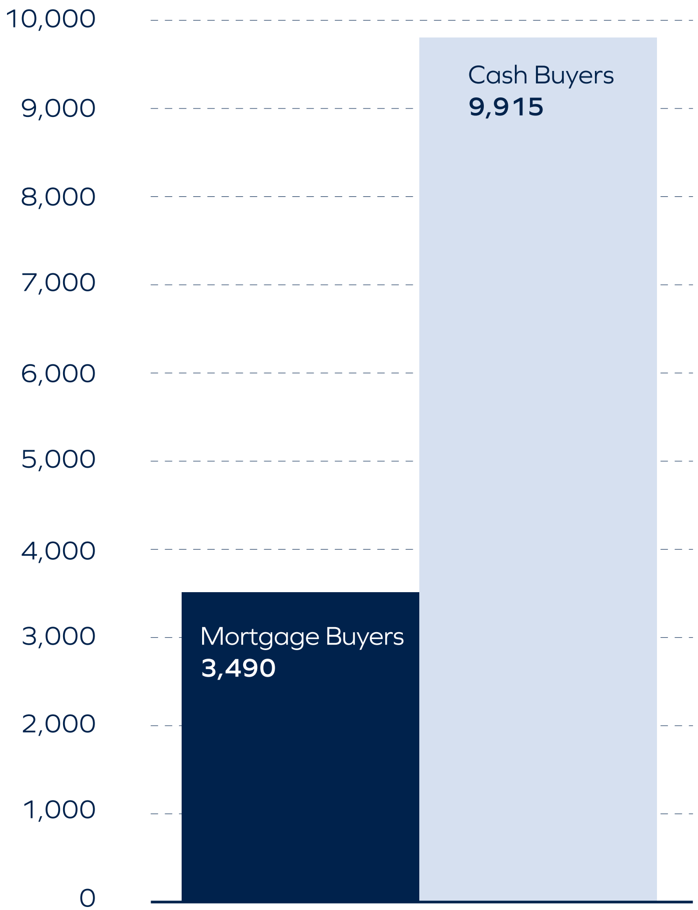
Top 5 Performing Areas - New Apartment Rentals



Top 5 Performing Areas - New Villa Rentals



Residential Mortgage Buyers v/s Cash Buyers



	Mortgage Sales	Cash Sales
Apartments	2,471	9,401
Villas	1,019	514

Mortgage Transaction Value: AED 7,300,000,000

Mortgage Buyers v/s Cash Buyers

Cash transactions retained market leadership in June at 74.0 percent of residential purchases (9,915 cash versus 3,490 mortgage), a slight improvement in mortgage participation from May's 77.5 percent cash share. Mortgage activity surged 57.7 percent from May's 2,214 transactions to 3,490, with total mortgage value rising to AED 7.3 billion the most substantial single-month mortgage recovery of the cycle.

The average loan size reached approximately AED 2.09 million, indicating credit committees are maintaining disciplined underwriting while restoring market access at scale. Apartments recorded 79.2 percent cash preference (9,401 cash versus 2,471 mortgage), while the villa segment continued its gradual normalisation to 66.5 percent mortgage (1,019 versus 514 cash), improving from May's extreme 74.3 percent as selective cash buyers re-engaged with the segment.

Price Trends and New Supply

Dubai's residential pricing staged a modest recovery in June, with off-plan rates edging up 0.6 percent to AED 1,848.8 per square foot from May's cycle low of AED 1,838 the first month-on-month off-plan price increase since the disruption cycle began. Ready property values advanced 1.3 percent to AED 1,754.6 per square foot from May's AED 1,732, marking a second consecutive month of ready price recovery. Year-on-year, off-plan pricing remains 3.5 percent below June 2025's AED 1,914.7, while ready stock is 3.6 percent above June 2025's AED 1,693.7 a modestly improving picture in both absolute and relative terms. The off-plan price stabilisation, following May's 11.9 percent retreat, suggests developers have found a workable floor around AED 1,838–1,849 that is attracting renewed buyer demand without requiring further discounting.

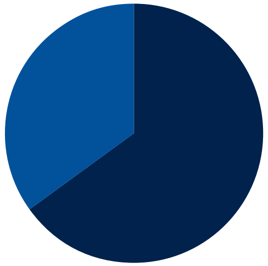
Looking ahead, July brings the tightest monthly apartment supply pipeline of 2026, with only 501 units scheduled for handover a dramatic reduction from June's 2,638 deliveries. Villa handovers of 917 units, however, are relatively elevated.

This asymmetry creates divergent near-term dynamics: apartment ready stock should tighten meaningfully, providing support for price recovery in that segment, while the villa market will need to maintain its improved absorption pace to prevent overhang from the continued handover flow.

The combination of record-low apartment supply and recovering demand fundamentals positions the segment for potential pricing advancement through Q3, subject to broader regional stability.

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**	**1,848.8**	**1,754.6**
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	501
Villa	917

June 2026 delivered the market's first concrete evidence that May represented a genuine cycle trough, with a broad-based volume recovery and the first off-plan price increase since the disruption began. Total transaction value reached AED 34.0 billion across 14,104 deals a 16.8 percent monthly rebound that, while still 40.0 percent below June 2025, establishes a directional shift from the contraction trajectory of Q2. The month's defining event was Azizi Venice's 2,402 off-plan transactions an absorption figure without recent precedent in the Dubai market—that both validated developer confidence and provided a significant portion of the month's volume recovery. Adjusting for this exceptional single-project contribution, the underlying market recovery is real but more measured, with the secondary market (3,364 deals, the strongest since March) and the leasing market providing the most structurally credible signals.

The leasing market's exceptional performance 39,074 new contracts, including a 49.7 percent surge in apartment leases to 21,411 is arguably June's most significant data point. JVC's 1,694 apartment rental contracts and Damac Hills 2's 314 villa leases, both substantial multi-month highs, confirm that Dubai's population and household formation dynamics remain robust. The leasing surge simultaneously validates existing property values for income-seeking investors and signals that the occupier base is expanding in the communities most relevant to mid-market and family residential demand. Mortgage market recovery is the month's other critical signal. With 3,490 mortgage transactions worth AED 7.3 billion a 57.7 percent volume increase from May financial institutions are providing their clearest endorsement of market stabilisation since the crisis began.

The gradual improvement in villa financing composition, from May's extreme 74.3 percent mortgage to June's 66.5 percent, suggests the segment is beginning its re-normalisation as selective cash buyers return to a market where pricing has reset meaningfully from peak levels. The commercial property paradox more transactions, less value warrants attention as a leading indicator. The shift from large institutional deals to smaller retail and office units reflects a market where operational necessities are being met but strategic capital allocation remains cautious.

Expert Insights

DIFC 2.0's emergence in the secondary top five and Jebel Ali Village's 219 secondary transactions suggest that both premium and logistics-adjacent assets are finding buyers selectively, providing early evidence of geographic demand broadening.

For the outlook, July's 501-apartment supply constraint is the market's most favourable near-term technical factor. Against a backdrop of recovering demand, stabilising pricing, and a leasing market that is actively absorbing population growth, the arithmetic of very limited new apartment supply arriving in Q3 is compelling for near-term price stability and potential appreciation. The market's path to closing the year-on-year gap with 2025 remains contingent on regional normalisation continuing and the absence of a further disruption event, but June's data provides the most encouraging foundation for cautious optimism that the cycle has turned.

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