



**Al Ameen
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THE **\$952 Billion** MIGRATION

**Global Cross-Border Real Estate
Capital Flows: A Comprehensive
Analysis of Overseas Investment
in 2025**





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About the Author

Mr. Al Majali is a Harvard-trained strategist, renowned for his foresight in digital transformation, particularly in asset tokenization, blockchain adoption, and AI integration within real estate. His leadership has driven significant revenue growth and market penetration, evidenced by:

Award for The Highest Number of Transaction
Dubai Land Department

2017

Real Estate Excellence Award
Dubai Land Department

2018

Emaar Top 10 Performance

**2015 –
2020**



AL AMEEN AL MAJALI is a highly respected real estate executive with over 15 years of distinguished experience leading high-value transactions, scaling multi-market operations, and pioneering innovation across the GCC. A Certified International Specialist and Member of the National Association of Realtors, his expertise directly informs the strategic insights presented in this report on the Saudi Arabian real estate market.



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Executive Summary

The global real estate market of 2025 isn't just recovering—it's being fundamentally rewritten. A seismic shift is underway as institutional investors, constrained by debt, are being outmaneuvered by a new force: agile, cash-rich private capital.

Driven by geopolitical instability and the critical need for wealth preservation, this is not a cyclical trend but a structural schism. This report analyzes the resulting \$952 billion migration of private wealth from high-net-worth individuals and family offices who are reshaping the landscape.

The Cash Advantage in Action:

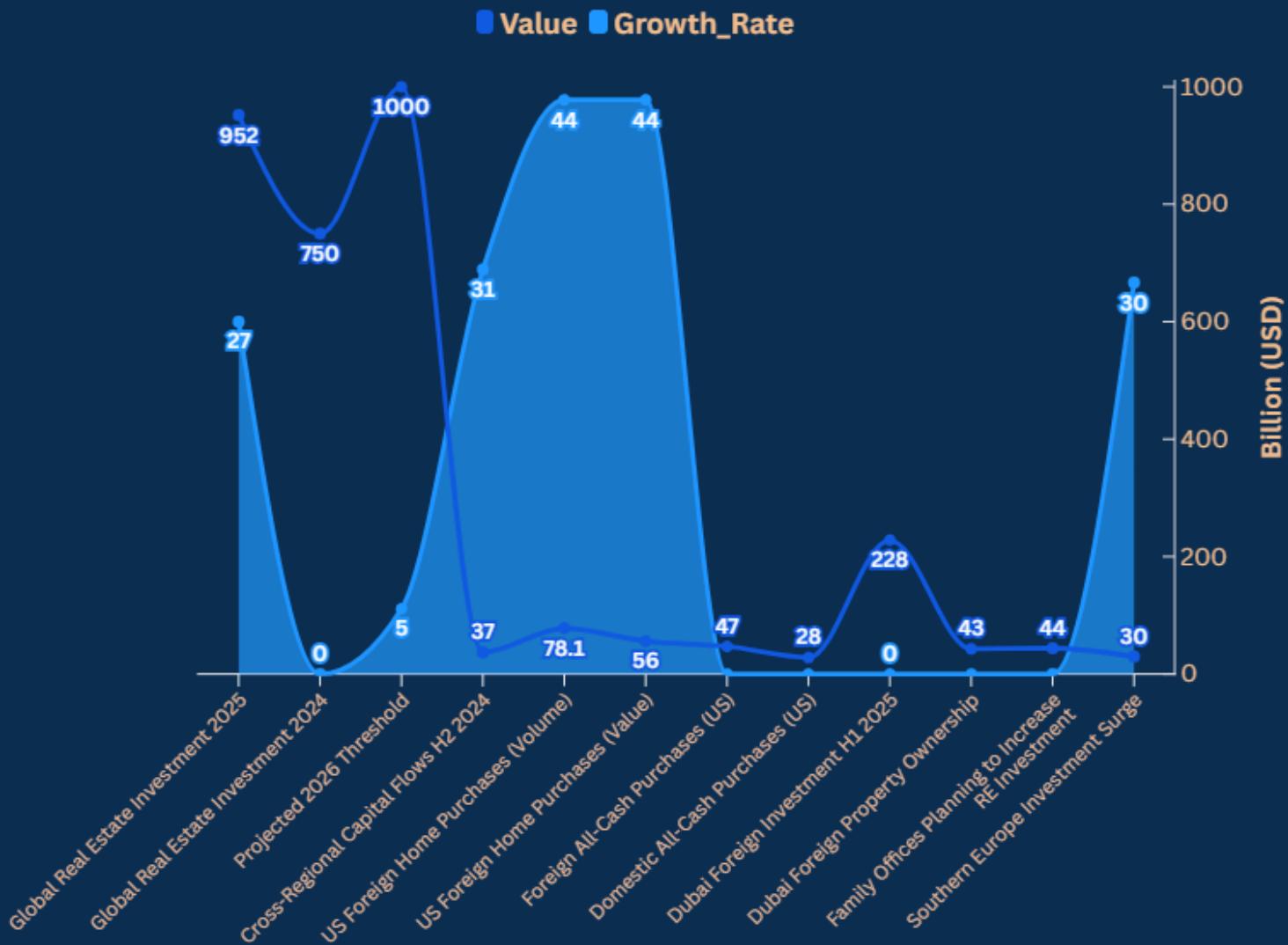
- **United States:** A 44% surge in foreign home purchases (\$56 billion), with a striking 47% of transactions made in all-cash—nearly double the domestic rate.
- **Dubai:** A premier safe-haven where foreign nationals now own a staggering 43% of all residential property, attracting over AED 228 billion in H1 2025.
- **Europe:** American buyers capitalizing on the weak pound in the UK, while family offices fuel a 30%+ investment surge into prime assets across Southern and Eastern Europe.



Key Statistics at a Glance:

- \$952 Billion: Projected global real estate investment turnover for 2025 (+27% YoY)
- 44%: Family offices globally planning to increase real estate investments
- 47%: Foreign buyers in the U.S. paying all-cash vs. 28% of domestic buyers
- 43%: Dubai properties now owned by foreign nationals
- 78,100: Foreign home purchases in the U.S. (+44% increase).

Dashboard visualizes the magnitude of this recovery and sets the foundation for our comprehensive analysis:





THE NEW GLOBAL LANDSCAPE:

Where Private Capital is Redefining Cross-Border Flows

The Inflection Point: Beyond the "New Normal" to a Private-Driven Recovery

The timeline below illustrates the remarkable trajectory from market uncertainty to private capital dominance

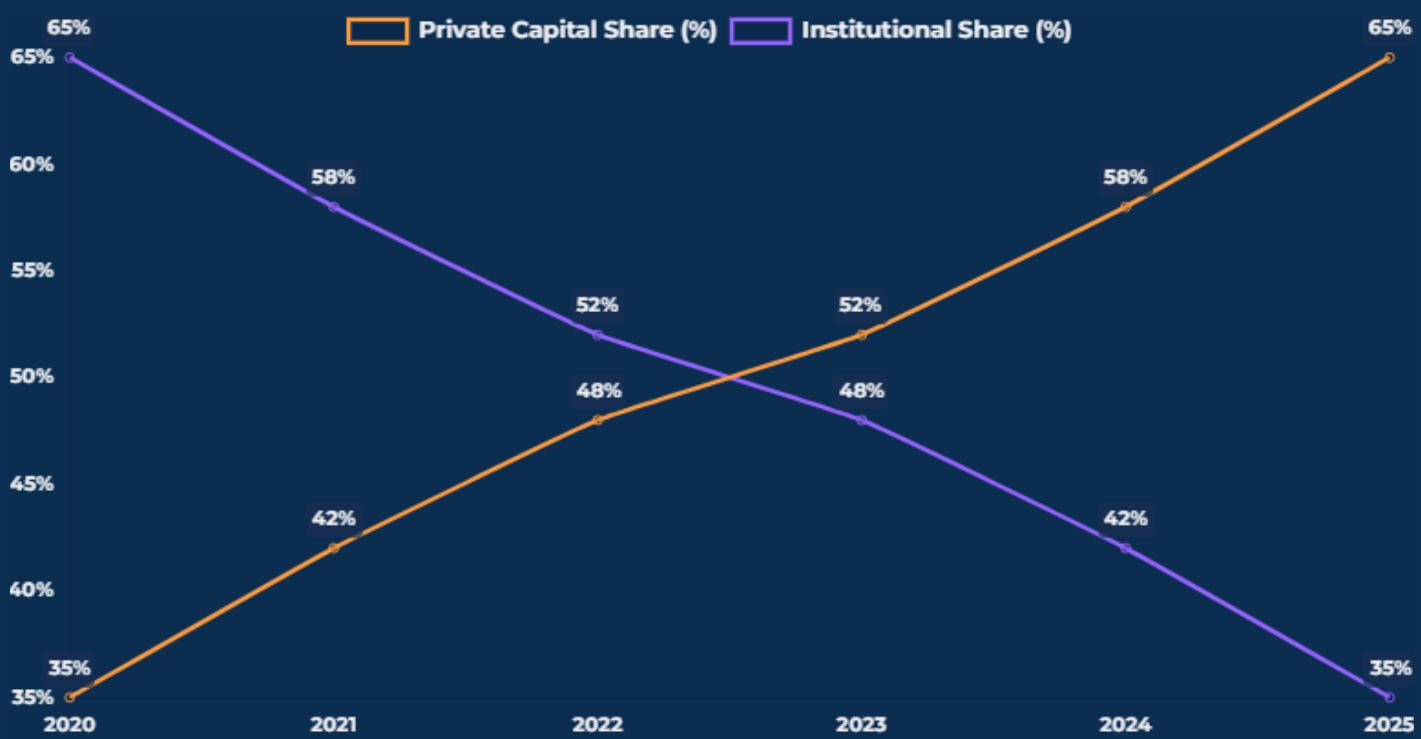




In 2025, the global real estate landscape is being fundamentally redefined. A \$952 billion migration of private capital is displacing institutional funds, a trend driven by agile, debt-free investors like family offices and high-net-worth individuals.

This shift, which is setting the stage for a \$1 trillion market in 2026, highlights a new map of cross-border capital flows crucial for investors to understand.

The chart below documents this fundamental power shift in capital composition.

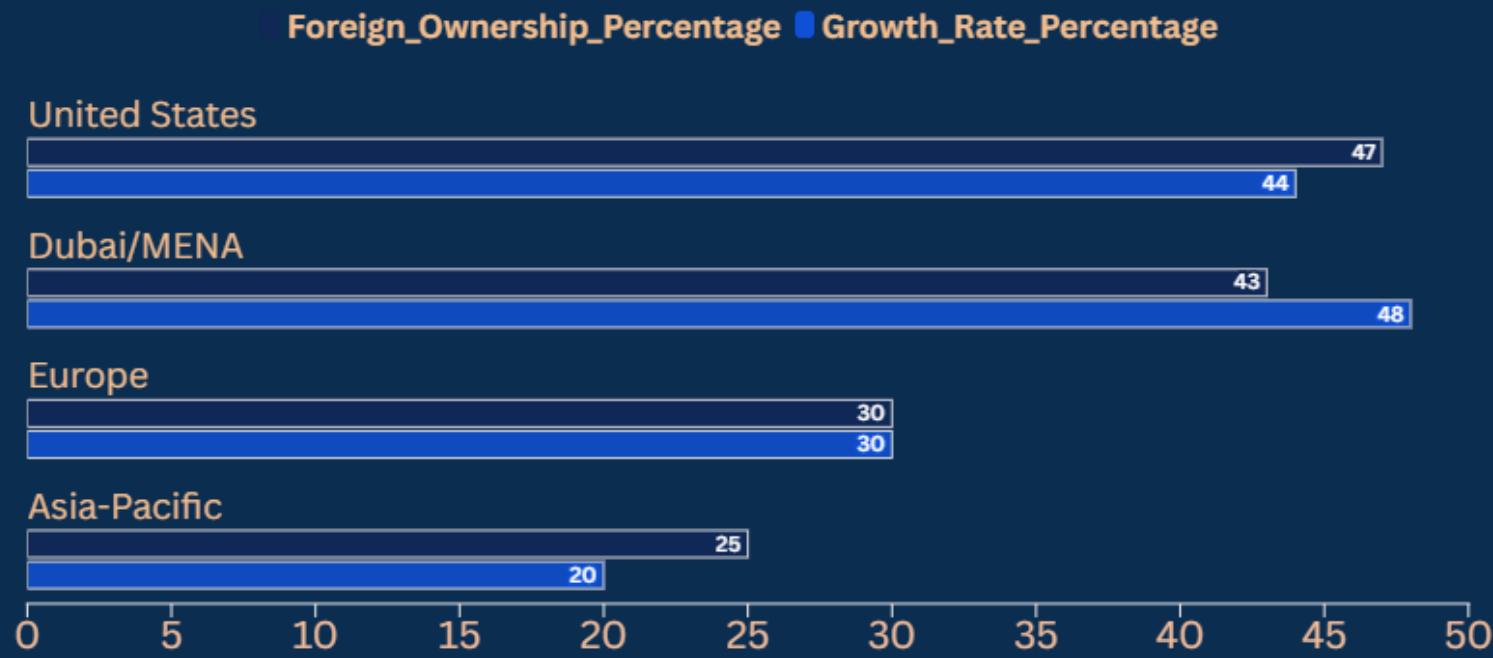




THE \$952 BILLION MIGRATION MAPPED:

Regional Hotspots and the Private Capital Playbook

The \$952 billion private capital migration is transforming diverse regional real estate markets. While traditional hubs stabilize cautiously, agile private wealth is actively creating new investment hotspots and redefining existing ones.





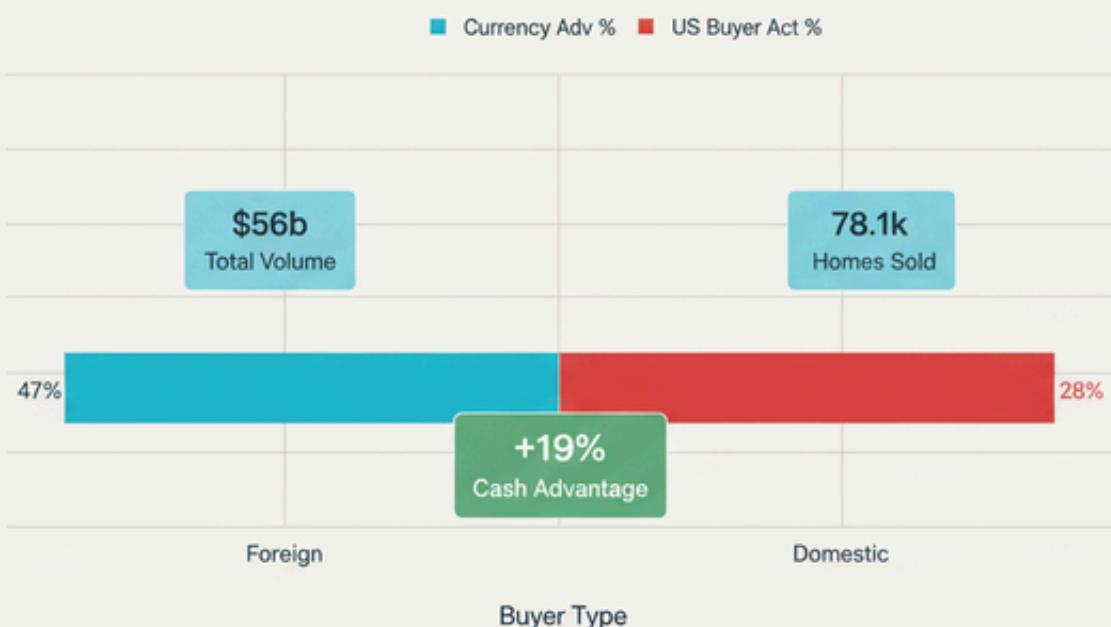
The United States

Remains a preeminent safe-haven, but its appeal in 2025 is increasingly defined by the influx of private foreign buyers. The data is stark: foreign buyers purchased 78,100 homes worth \$56 billion, a remarkable 44% increase. Crucially, 47% of these transactions were all-cash, nearly double the rate of domestic buyers (28%).

This cash advantage allows international private buyers to bypass debt constraints and act decisively, capturing prime residential assets.

The cash advantage creating this competitive dynamic is visualized below:

Cash Purchase Advantage





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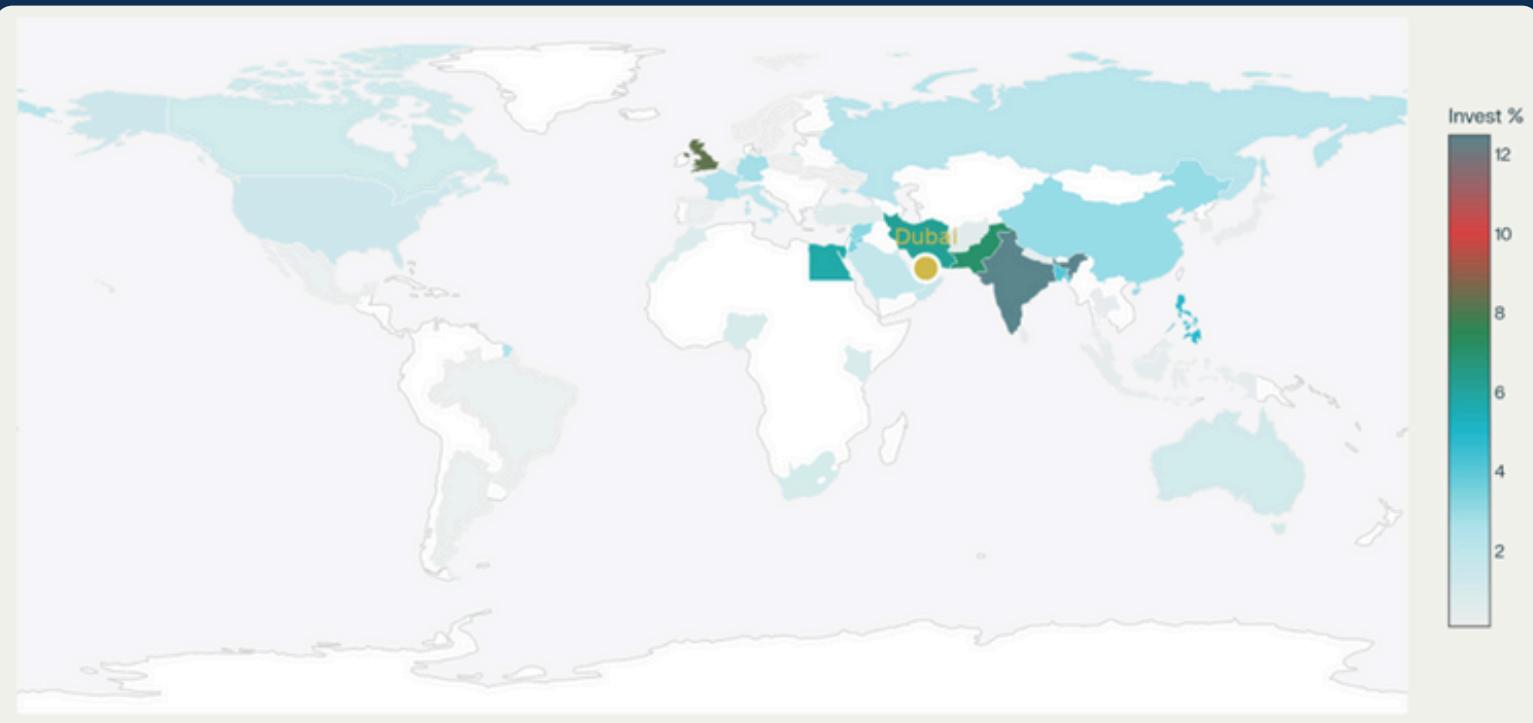


Dubai

Stands as the ultimate showcase of this private wealth migration. Here, foreign nationals now own a staggering 43% of all residential property by value, transforming the emirate into a personal safe-haven vault for investors from over 217 nationalities.

In H1 2025, Dubai drew over AED 228 billion from foreign investors, showcasing its appeal to private capital. MENA Sovereign Wealth Funds are increasingly exporting capital, seeking global opportunities.

Dubai's unprecedented global investor reach is mapped in the following visualization:



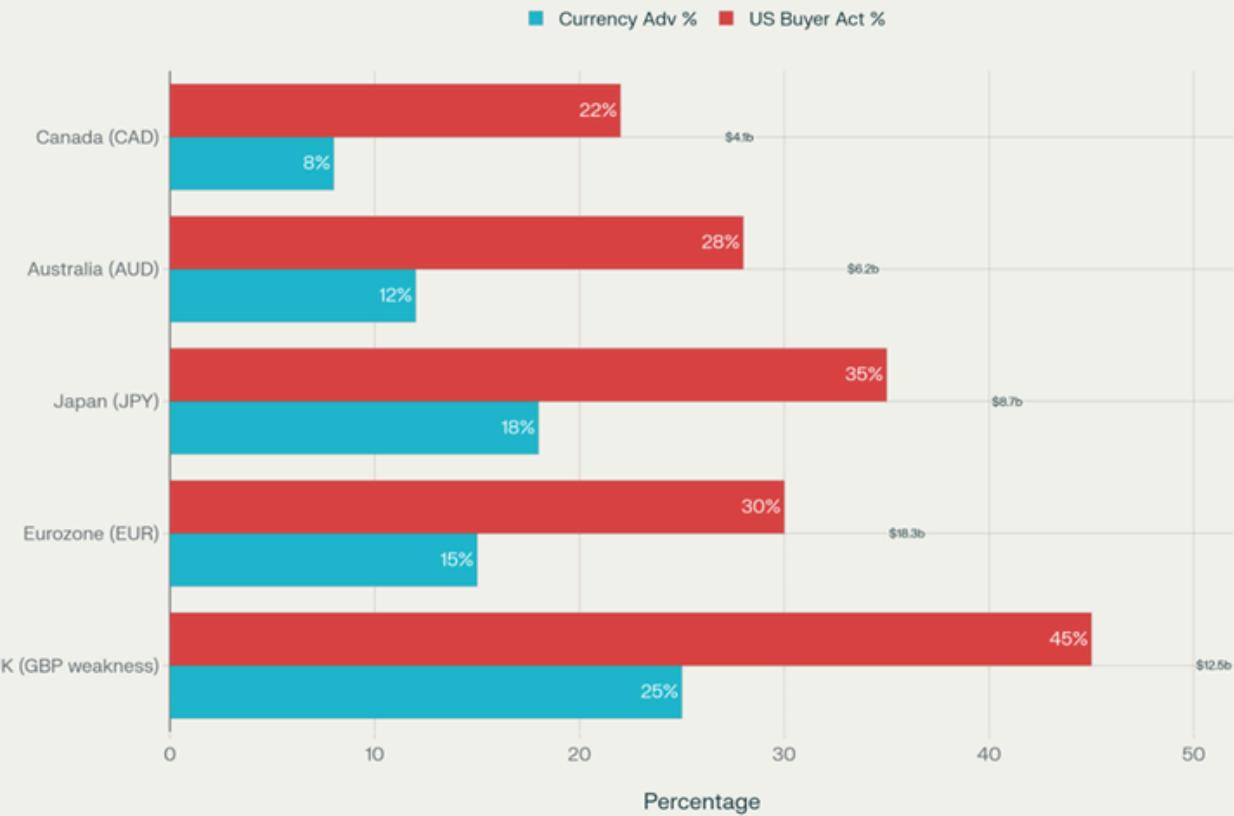


Europe



The largest regional destination for cross-border investment, presents a more fragmented but equally compelling picture of private capital influence. While established markets like the UK and Germany show signs of stabilization, the real momentum is building in Southern and Eastern Europe, where family offices are driving a 30%+ surge in investments, quietly accumulating prime assets. Concurrently, American private buyers are actively flooding into the UK, strategically capitalizing on the weak pound to acquire assets.

Currency Advantage Opportunities



Dubai's unprecedented global investor reach is mapped in the following visualization:



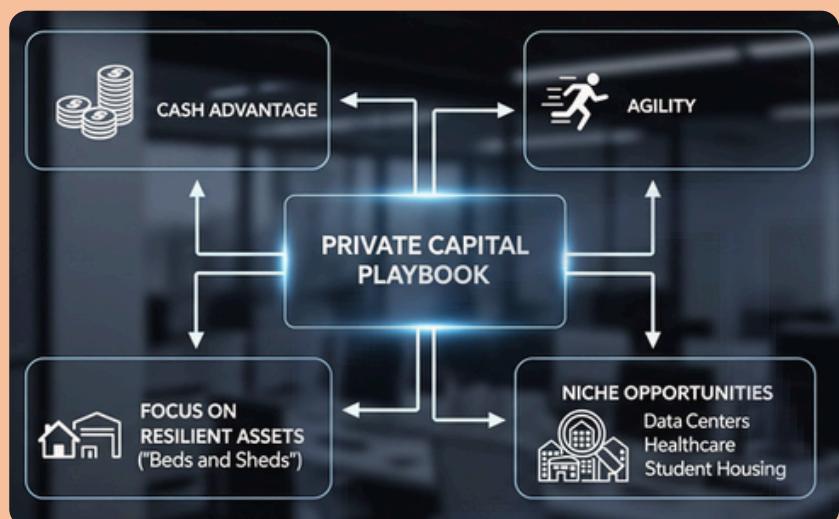
THE PRIVATE CAPITAL PLAYBOOK:

Winning Strategies and Resilient Asset Classes in the \$952 Billion Migration

Beyond mapping the regional hotspots of the \$952 Billion Migration, the critical question for investors is: how is private capital capturing opportunity in this new landscape? While institutional players often adhere to established frameworks, high-net-worth individuals and family offices are deploying a playbook characterized by agility, cash advantage, and a focus on **resilient asset** classes.

The 'cash advantage' is more than just a statistic; it's a strategic tool.

In a high-interest-rate environment, private buyers can bypass costly financing, close deals faster, and often secure more favorable terms. This inherent agility allows them to pivot quickly to emerging opportunities, enter niche markets, and capitalize on temporary market dislocations that larger, more bureaucratic institutions might miss.





Resilient Returns:

Why "Beds and Sheds" Remain Prime Targets

Dubai's unprecedented global investor reach is mapped in the following visualization:

Combined Separate

■ Expected_Return ■ Risk_Level ■ Private_Capital_Interest
■ Liquidity_Score

Expected_Return



Risk_Level



Private_Capital_Interest



Liquidity_Score





In the pursuit of resilient returns, private capital is heavily favoring the 'beds and sheds' sectors – residential (living) and logistics. The residential sector has proven its resilience, attracting capital due to its stable, inflation-hedged income streams, particularly in urban centers and growing suburban areas. The logistics sector, fueled by the continued growth of e-commerce, offers robust demand and predictable cash flows, making it a cornerstone of private investment portfolios. These sectors offer a compelling combination of stability and growth potential that aligns with the long-term objectives of private wealth.

The risk-return dynamics driving these preferences are illustrated in the following analysis:





Beyond Tradition: Why "Beds and Sheds" Remain Prime Targets

While 'beds and sheds' are primary, agile private capital increasingly explores alternative and niche assets for diversification and strong returns. Data Centers are gaining traction due to digital infrastructure demand. Other interests include specialized healthcare, student housing, and opportunistic distressed asset investments, showcasing private capital's willingness to look beyond traditional boundaries.

- Residential (Beds)
- Logistics (Sheds)
- Data Centers
- Student Housing
- Healthcare Properties
- Hotels
- Office (Prime)
- Distressed Assets

Dubai's unprecedented global investor reach is mapped in the following visualization:





NAVIGATING THE NEW FRONTIER:

Risks, Opportunities, and the Future of the \$952 Billion Migration

HEADWINDS

NAVIGATING THE RISKS

Geopolitical Volatility:

Disrupts cross-border flows but increases demand for safe-haven assets.

Currency Dynamics:

Creates market uncertainty but offers strategic advantages for cash-rich buyers.

Yield Compression:

Strong demand in prime assets requires exploring new sectors for growth.

TAILWINDS

CAPTURING OPPORTUNITIES

The 'Private Capital Playbook':

Use agility and cash to bypass debt and secure better terms.

Emerging Hotspots:

Capitalize on the rise of MENA and Southern Europe before these markets mature.

Niche Asset Exploration:

Find higher returns in alternative sectors like data centers and healthcare.



Conclusion

Rewriting the Rules: Key Takeaways from the Private Capital Revolution

Key Takeaways for This New Era:

- \$952 Billion Market: Global real estate investment is projected to reach \$952B in 2025, setting the stage for \$1 trillion in 2026.
- Private Capital Dominance: Agile, less debt-reliant private capital is now the dominant force, capturing market share while institutions remain cautious.
- Diverging Regional Markets: Private wealth is reshaping landscapes, from the all-cash dominance in U.S. residential to Dubai's rise as a safe-haven (43% foreign ownership).
- The Winning Playbook: Emphasizes cash advantage, agility, and a focus on resilient assets like residential and logistics ('beds and sheds').
- Navigating the Frontier: Success requires understanding geopolitical risks, currency dynamics, and the opportunities of a private-driven market.

These insights are just the surface.



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Don't Just Witness the Migration. Join It.

Architect Your Advantage

The market shift detailed in this report is not just a trend to be observed; it is a landscape of opportunity waiting to be capitalized upon. The strategic advantage will belong to leaders who leverage digital transformation to move with intelligence and speed.

I invite you to a confidential discussion to explore how these technologies can redefine your operational and revenue models: Explore how blockchain and asset tokenization can create transparent, liquid new markets, enhancing public-private investment frameworks.

For Developers & The Private Sector:

Discover how predictive AI can unlock asset performance, dramatically reduce operational costs, and accelerate revenue growth in this new market.

For Governments & Institutions:

Explore how blockchain and asset tokenization can create transparent, liquid new markets, enhancing public-private investment frameworks.

If you are ready to translate strategic insight into a concrete competitive advantage, let's innovate together.



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