



OSOOL
MARKET

INDEPENDENT MARKET RESEARCH

THE SAUDI REAL ESTATE SERIES

Saudi Rental Market Monitor

Rent levels, inflation and the districts behind the averages.



OCTOBER 2026 / ENGLISH EDITION

Rental CPI: August 2026 | Contract benchmarks: Q1 2026

03

EXECUTIVE BRIEF

Rents rise more slowly, unevenly

The national inflation reading and city contract benchmarks offer complementary views.

+3.93%

National rental inflation
August 2026 | Year on year

30,791

Riyadh apartment rent
SAR / year | Q1 2026

18,690

Dammam apartment rent
SAR / year | Q1 2026

01 Inflation has moderated

Annual growth in the national actual-rent component fell from 7.59% in August 2025 to 3.93% in August 2026. The level still increased.

02 Regions do not share one pace

August annual rental inflation ranged from -1.37% in Jazan to +16.04% in the Northern Borders region.

03 City averages can hide the product mix

Khobar's all-type rent average declined slightly year on year in Q1 2026, while its apartment average increased. A mix shift can change the headline.

[G2] GASTAT | Actual rentals for housing, CPI tables, August 2026 · [R] REGA | Residential rental indicators via Osool, Q1 2026 · [riyadh] Riyadh | Osool city evidence · [dammam] Dammam | Osool city evidence · [khobar] Khobar | Osool city evidence

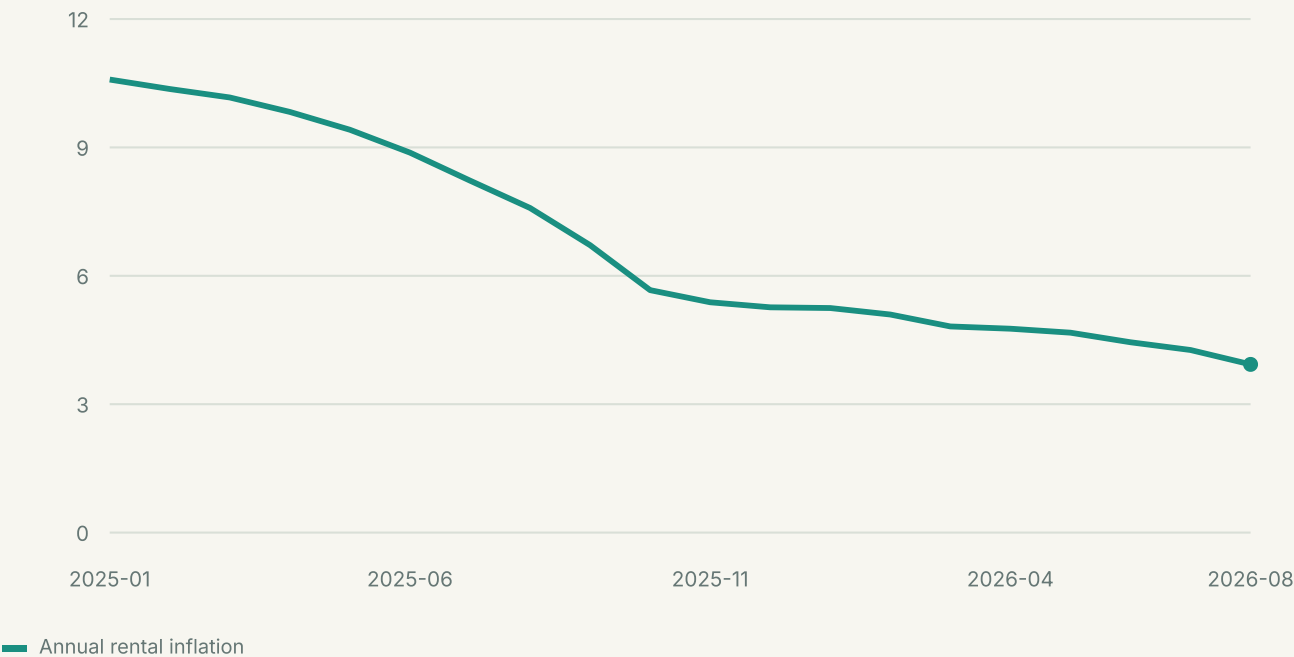
04 / RENTAL CONTEXT

Slower growth is still growth

National rental inflation fell by about 3.7 percentage points between August 2025 and August 2026.

Actual rentals for housing: annual change

Monthly observations | % year on year



7.6%

August 2025
Annual change

3.9%

August 2026
Annual change

+0.23%

August 2026
Monthly change

The national rental index increased to 122.78 on a 2023=100 basis. This index measures price movement, not an annual rent quote in SAR. It should not be substituted for a district contract benchmark.

[G2] GASTAT | Actual rentals for housing, CPI tables, August 2026

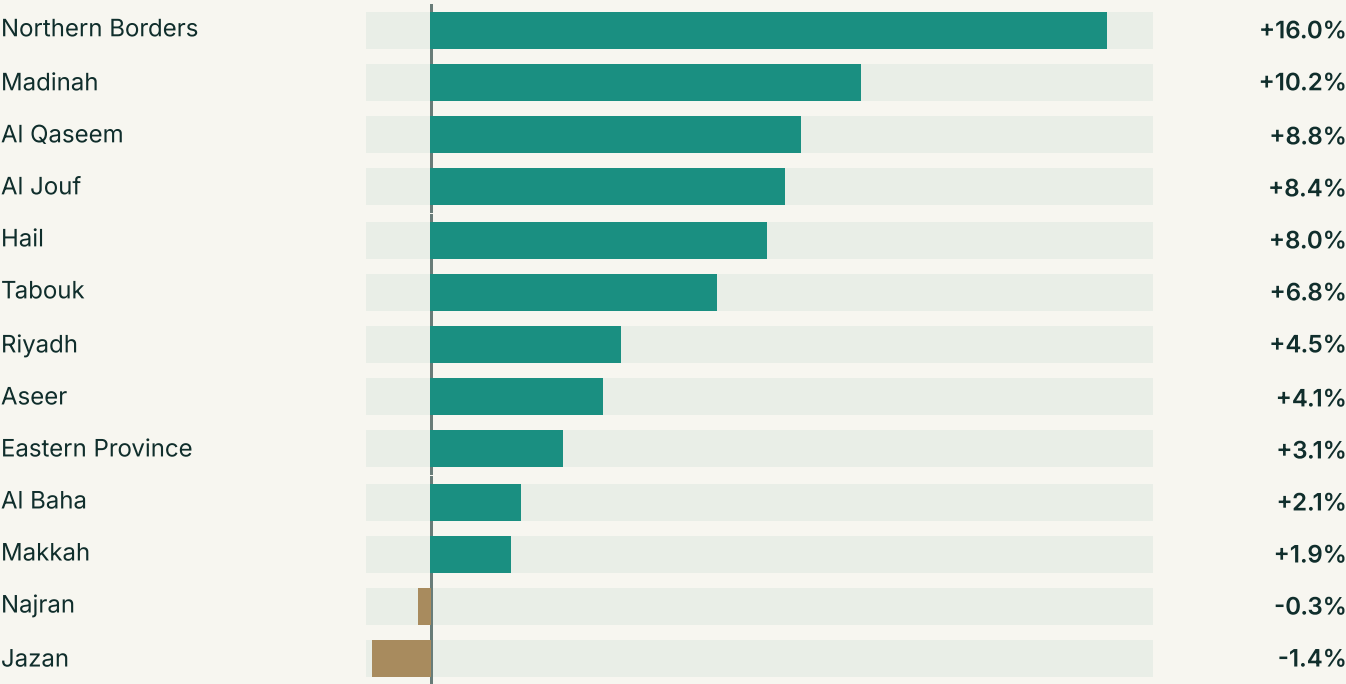
02 / REGIONAL INFLATION

A wide range of rental pressures

Administrative-region inflation rates describe change, not which region has the highest annual rent in SAR.

Actual housing rents: annual change

August 2026 | %



These are regional CPI readings. They should not be labelled as city or district rental inflation.

[G2] GASTAT | Actual rentals for housing, CPI tables, August 2026

03 / CITY BENCHMARKS

A like-type comparison

Riyadh’s apartment benchmark is about 65% above Dammam’s in the same observed quarter.

Annual apartment rent

Q1 2026 | SAR / year



CITY	APARTMENTS	ALL RESIDENTIAL TYPES
Riyadh	30,791	34,533
Jeddah	24,519	26,019
Dammam	18,690	19,311
Khobar	21,891	23,985

Interpretation

The 64.7% Riyadh-Dammam difference is calculated from displayed city apartment means. It is not a quality-adjusted rent premium: sizes, condition and district composition can differ.

[R] REGA | Residential rental indicators via Osool, Q1 2026 · [riyadh] Riyadh | Osool city evidence · [jeddah] Jeddah | Osool city evidence · [dammam] Dammam | Osool city evidence · [khobar] Khobar | Osool city evidence

04 / DISTRICT DETAIL

Riyadh: the larger apartment samples

Eight district benchmarks selected by the number of recorded apartment contracts.

DISTRICT	SAR / YEAR	APARTMENT CONTRACTS
ظهرة لبن	28,267	7,505
طويق	23,338	4,975
الرمال	31,364	4,814
اليرموك	29,546	4,327
النرجس	49,524	3,988
المونسية	35,060	3,846
الدار البيضاء	21,814	3,790
العزيزة	21,275	3,724

Q1 2026. Selected by apartment contract count, with at least 30 contracts. Source district names are preserved. No adjustment for size, condition, furnishing or exact location.

A larger observed contract count supports context for the published mean, but does not guarantee complete district coverage or represent every apartment segment.

[R] REGA | Residential rental indicators via Osool, Q1 2026 · [riyadh] Riyadh | Osool city evidence

04 / DISTRICT DETAIL

Jeddah: the larger apartment samples

Eight district benchmarks selected by the number of recorded apartment contracts.

DISTRICT	SAR / YEAR	APARTMENT CONTRACTS
الصفاء	23,011	8,041
البوادي	21,302	5,586
السلامة	28,148	5,495
المروة	25,682	4,962
الفيصلية	24,462	4,837
مشرفة	22,447	4,594
العزيزية	23,521	3,733
الربوة	23,015	3,140

Q1 2026. Selected by apartment contract count, with at least 30 contracts. Source district names are preserved. No adjustment for size, condition, furnishing or exact location.

A larger observed contract count supports context for the published mean, but does not guarantee complete district coverage or represent every apartment segment.

[R] REGA | Residential rental indicators via Osool, Q1 2026 · [jeddah] Jeddah | Osool city evidence

05 / EASTERN APARTMENT MARKETS

Dammam and Khobar contract evidence

High-count apartment districts, shown separately for each city.

Dammam

DISTRICT	SAR / YEAR	APARTMENT CONTRACTS
النور	17,944	2,801
ضاحية الملك فهد	18,559	1,903
طيبة	19,949	1,741
الشعلة	28,166	1,677

Q1 2026. Selected by apartment contract count, with at least 30 contracts. Source district names are preserved. No adjustment for size, condition, furnishing or exact location.

Khobar

DISTRICT	SAR / YEAR	APARTMENT CONTRACTS
الثقبة	15,077	4,367
الخبر الشمالية	16,981	3,422
الخبر الجنوبية	16,600	3,257
العليا	33,514	1,828

Q1 2026. Selected by apartment contract count, with at least 30 contracts. Source district names are preserved. No adjustment for size, condition, furnishing or exact location.

[R] REGA | Residential rental indicators via Osool, Q1 2026 · [dammam] Dammam | Osool city evidence · [khobar] Khobar | Osool city evidence

06 / PRODUCT MIX

The average can tell two stories

The same city can show different directions when all housing types and apartments are compared.

CITY	ALL-TYPE RENT CHANGE	APARTMENT RENT CHANGE
Riyadh	+5.0%	+2.5%
Jeddah	+3.0%	+2.8%
Dammam	+5.6%	+3.9%
Khobar	-0.6%	+4.3%

Changes compare Q1 2026 with Q1 2025 using rounded published city values. Khobar illustrates the issue: its all-type mean moves down while the apartment mean moves up.

A benchmark is not a renewal rule

Contract averages describe the observed evidence. A property-specific decision needs its own comparable contracts and the applicable current contract and legal conditions.

These comparisons are not repeat-rent indices and do not track the same units between quarters.

[R] REGA | Residential rental indicators via Osool, Q1 2026 · [riyadh] Riyadh | Osool city evidence · [jeddah] Jeddah | Osool city evidence · [dammam] Dammam | Osool city evidence · [khobar] Khobar | Osool city evidence

07 / APPLYING THE EVIDENCE

A practical rental comparison

Use a sequence that narrows the benchmark to the property being studied.

- 01 Start with the same product**

Choose apartment, studio, floor or villa before comparing district means. Avoid treating an all-type average as the rent of a typical apartment.
- 02 Match the physical characteristics**

Record area, rooms, furnishing, age, parking and maintenance condition from actual comparables. The aggregate dataset does not control these.
- 03 Keep evidence dates separate**

Present the Q1 2026 contract benchmark, August 2026 regional inflation and any current asking rent with their own dates and labels.
- 04 Explain the uncertainty**

Show the sample count and a range of suitable comparables. Avoid a precise property valuation based only on a city mean.

[R] REGA | Residential rental indicators via Osool, Q1 2026 · [G2] GASTAT | Actual rentals for housing, CPI tables, August 2026

REFERENCE DESK

Sources & editorial notes

Traceable evidence, explicit periods and reproducible calculations.

G2

GASTAT | Actual rentals for housing, CPI tables, August 2026

[Open the cited source or evidence page ↗](#)

R

REGA | Residential rental indicators via Osool, Q1 2026

[Open the cited source or evidence page ↗](#)

riyadh

Riyadh | Osool city evidence

[Open the cited source or evidence page ↗](#)

jeddah

Jeddah | Osool city evidence

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dammam

Dammam | Osool city evidence

[Open the cited source or evidence page ↗](#)

khobar

Khobar | Osool city evidence

[Open the cited source or evidence page ↗](#)

Sources retrieved or retained on 2-4 October 2026. GASTAT workbook and normalized-file hashes were checked against the retained import manifest. Osool city pages and public rental responses were captured on 4 October 2026. Reporting cutoffs are shown beside every chart.

Apartment district tables require at least 30 contracts and use a deterministic count-based selection. Rent figures are annual SAR; no monthly-to-annual inference was needed.

Osool modifications: translated labels, rounded display values, charting and explicitly identified arithmetic comparisons. Cover art is a conceptual AI-generated illustration, not a photograph or geographic map. Research and market context; not an individual property valuation or investment recommendation.

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