



OSOOL
MARKET

INDEPENDENT MARKET RESEARCH

THE SAUDI REAL ESTATE SERIES

Saudi Housing Landscape

Dwelling patterns and the signals of building activity.



OCTOBER 2026 / ENGLISH EDITION

Saudi-household dwellings: 2025 | Permits: July 2026

05

EXECUTIVE BRIEF

Apartments anchor the observed housing mix

The housing figures cover dwellings occupied by Saudi households, not every dwelling in the Kingdom.

4.51

Million occupied Saudi-household dwellings

2025 | Survey estimate

46.8%

Apartment share

Within this housing population

29.5%

Villa share

Within this housing population

01

Two regions have similar totals, different mixes

Riyadh and Makkah regions each account for about 1.07-1.08 million occupied Saudi-household dwellings. Apartments are much more prevalent in Makkah's mix.

02

The leading three regions hold most of this population

Riyadh, Makkah and the Eastern Region together represent about 63.7% of the measured national total.

03

Permits are a separate activity measure

January-July 2026 building permits were below the same 2025 window. Permits do not establish the number or timing of completed homes.

[G4] GASTAT | Housing Statistics 2025 · [G5] GASTAT | Building permits, July 2026

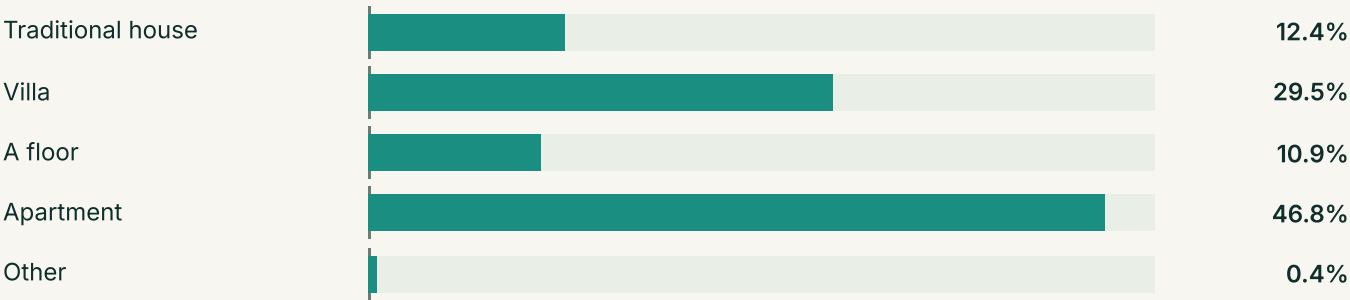
01 / NATIONAL DWELLING MIX

Almost half are apartments

Apartments account for 46.8% of dwellings occupied by Saudi households in the 2025 survey.

Dwelling type share

2025 | % of measured national total



TYPE	DWELLINGS	SHARE
Traditional house	557,431	12.4%
Villa	1,329,847	29.5%
A floor	491,366	10.9%
Apartment	2,108,093	46.8%
Other	19,079	0.4%

Shares are Osool calculations from published counts. Rounded shares may not sum to exactly 100%. Occupancy by a Saudi household does not establish ownership tenure.

[G4] GASTAT | Housing Statistics 2025

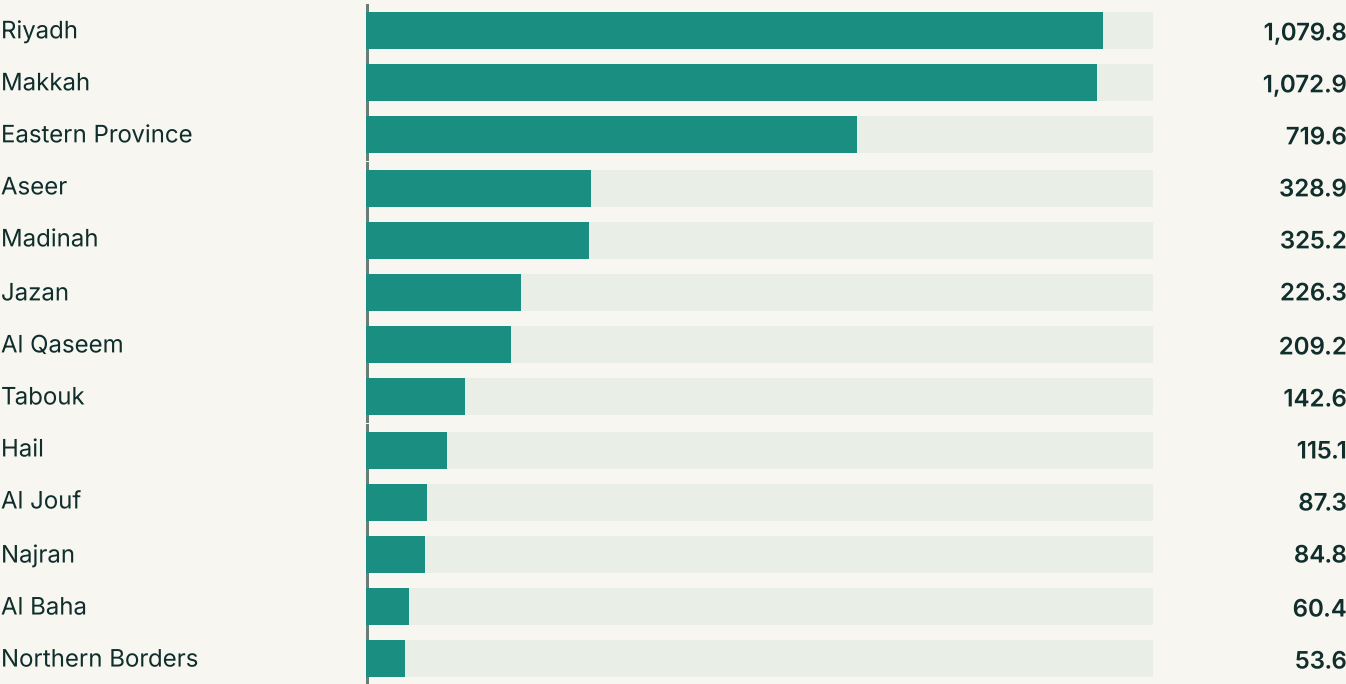
02 / REGIONAL SCALE

Riyadh and Makkah lead the measured total

Regional totals reflect the survey population, not all occupied and vacant housing.

Dwellings occupied by Saudi households

2025 | Thousands of dwellings



Administrative regions are shown. A regional total should not be relabelled as the housing stock of its namesake city.

[G4] GASTAT | Housing Statistics 2025

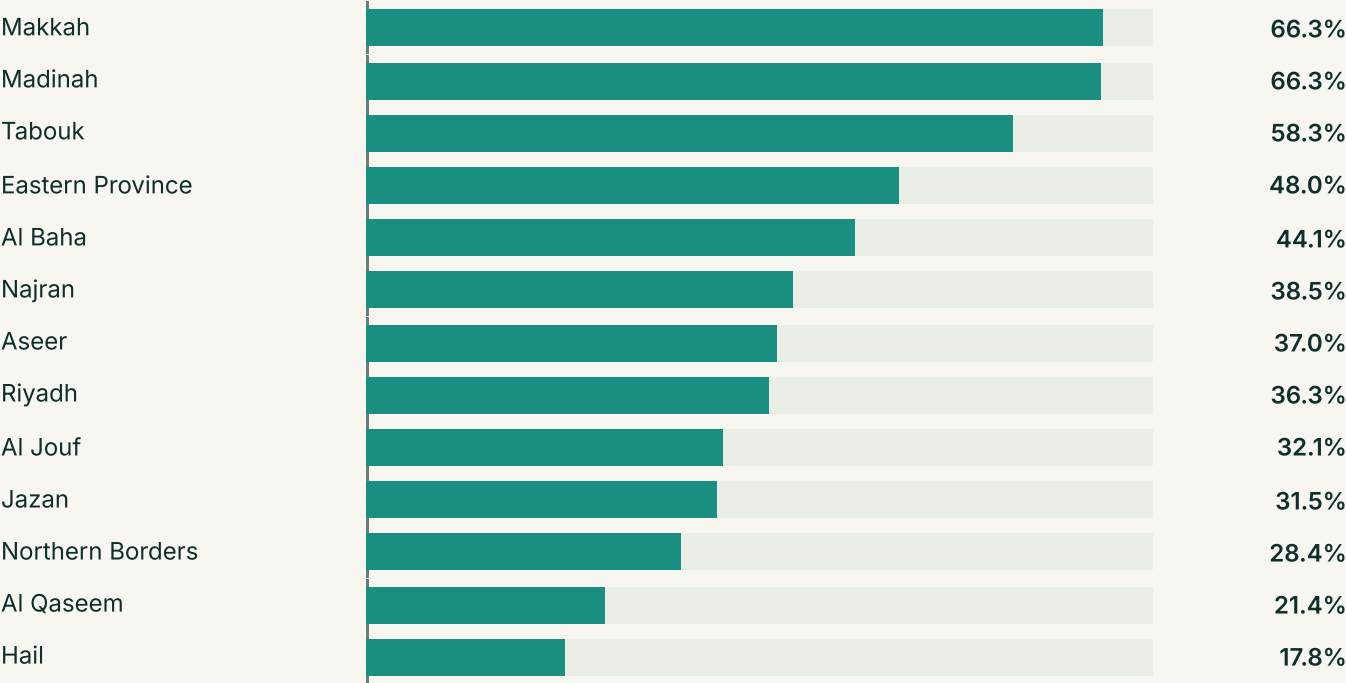
03 / APARTMENT PREVALENCE

Housing form varies markedly by region

Makkah and Madinah have apartment shares above 66% within the measured population.

Apartment share of measured dwellings

2025 | % | Osool calculation



This is a composition measure. A high apartment share does not establish a shortage of villas or a recommendation to develop either product.

[G4] GASTAT | Housing Statistics 2025

04 / THREE REGIONAL PROFILES

Similar scale can conceal different products

Riyadh Region has a much larger villa share than Makkah Region in the Saudi-household dwelling population.

REGION	TOTAL DWELLINGS	APARTMENT SHARE	VILLA SHARE
Riyadh	1,079,764	36.3%	43.8%
Makkah	1,072,902	66.3%	15.6%
Eastern Province	719,566	48.0%	35.1%

Product planning implication

Regional housing form is useful background for a brief. A site-level development decision still needs local demand, household budgets, competing supply and project economics.

The table does not measure vacant inventory, household formation, affordability or absorption. Those questions require additional data rather than inference from dwelling shares.

[G4] GASTAT | Housing Statistics 2025

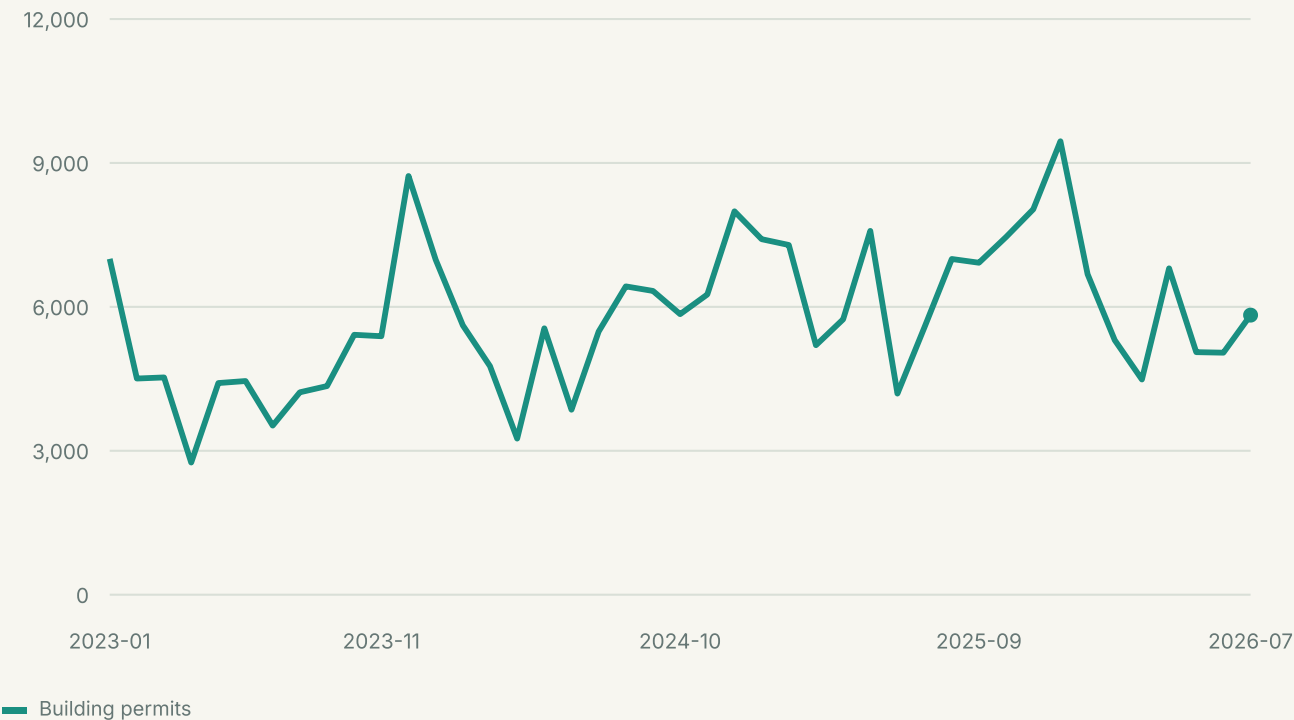
05 / PERMIT TIMELINE

Building activity has a monthly rhythm

Permit counts are variable; matched periods give a more meaningful comparison than a single month.

National building permits

Monthly counts | May-Jul 2026 preliminary



5,828

July 2026 permits
Preliminary

+4.4%

Year-on-year change
July 2026 versus July 2025

+15.5%

Month-on-month change
July versus June 2026

Changes are Osool calculations from the source counts. A permit is not a completed building or a dwelling unit.

[G5] GASTAT | Building permits, July 2026

06 / MATCHED-PERIOD COMPARISON

The seven-month total is lower

The January-July window aligns the same months in both years.

43,000

Jan-Jul 2025 permits
Seven complete calendar months

39,205

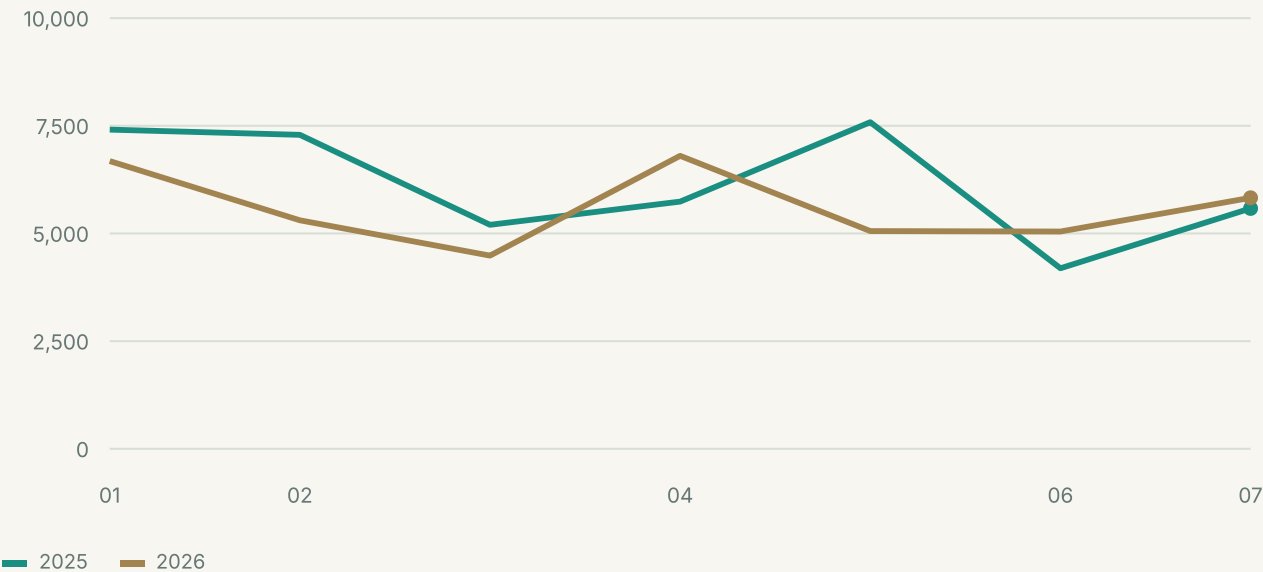
Jan-Jul 2026 permits
May-Jul preliminary

-8.8%

Matched-period change
Osool calculation

Building permits by month

Count | 01 = January, 07 = July



Reading the signal

Lower permit counts describe this administrative activity measure. Without dwelling units per permit and completion dates, they cannot quantify a future housing shortage or surplus.

[G5] GASTAT | Building permits, July 2026

07 / STOCK AND FLOW

Do not subtract permits from households

Housing counts and permits are different units, populations and reference periods.

01 The housing measure

A 2025 survey estimate of dwellings occupied by Saudi households. It does not include every vacant unit or every non-Saudi household dwelling.

02 The permit measure

An administrative monthly count of building permits. It does not specify the number of completed residential units produced.

03 The missing bridge

A supply-demand balance requires household formation, demolitions, vacancy, completions, timing and comparable geographic definitions.

04 The valid use

Use dwelling composition to understand regional housing form, and permit history to describe recorded construction activity.

[G4] GASTAT | Housing Statistics 2025 · [G5] GASTAT | Building permits, July 2026

METHODOLOGY

Transparent arithmetic, narrow claims

The report preserves each source’s statistical population and preliminary flags.

CALCULATION	DEFINITION
Dwelling type share	Type count / total occupied Saudi-household dwellings × 100
Regional share	Regional count / national count in the same survey × 100
January-July total	Sum of the seven published monthly permit counts
Matched-period change	(2026 total / 2025 total - 1) × 100

The housing shares use the published total as the denominator. No inference is made about homeownership, tenure, vacancy or household income because these variables are outside the retained housing table used here.

May, June and July 2026 permit counts are preliminary. Revised releases can change both monthly growth and the seven-month total.

[G4] GASTAT | Housing Statistics 2025 · [G5] GASTAT | Building permits, July 2026

REFERENCE DESK

Sources & editorial notes

Traceable evidence, explicit periods and reproducible calculations.

G4

GASTAT | Housing Statistics 2025[Open the cited source or evidence page ↗](#)

G5

GASTAT | Building permits, July 2026[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.

The term housing landscape in this report refers to the specified Saudi-household dwelling population plus a separate national permit series. It is not an estimate of all Saudi housing stock.

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.

Publication date: 4 October 2026. Prepared by Osool Market.