

Aseer Region

Residential Market Overview

The text 'H1 2025' is rendered in a large, white, sans-serif font. The 'H' and '1' are enclosed within a white, stylized circular frame that resembles a double 'O' or a partial circle.



Aseer Region’s Residential Market Performance Indicators

Residential Prices

The first half of 2025 saw Aseer’s residential sector prices increasing by 4% YoY against H1 2024. This stands in line with the national trend, where residential property prices increased by 4.6% YoY during the same period, primarily driven by rising values of land plots, villas, and apartments.

Aseer region’s residential sector prices have not seen substantial fluctuations over the years. In H1 2025 the prices of villas and apartments stood at SAR 2700 per sqm and 2220 per square meter, respectively. These average prices grew by 1.2% and 1.4% YoY against H1 2024, respectively.

Rental Rates

The residential market in the Aseer region is demonstrating stable demand dynamics as of H1 2025, underpinned by its growing appeal as a livable, climate-friendly destination in Saudi Arabia’s southwest. Average rental rates reflect this demand, with apartments commanding SAR 15,600 and villas reaching SAR 46,000 per annum—indicative of a maturing market with differentiated price points across asset classes.

Transactional activity remains concentrated in the apartment segment, which recorded 137,608 deals, highlighting a preference for compact urban living.

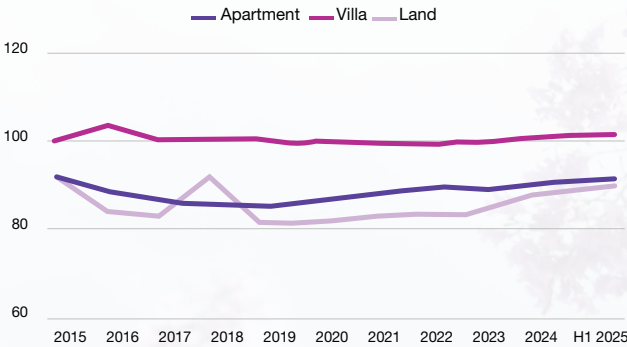
In contrast, villas accounted for 370 transactions, reflecting their positioning as premium, low-density housing options. As infrastructure and lifestyle offerings continue to evolve under Vision 2030, the Aseer residential sector is poised for gradual, sustained growth in both volume and value.

Figure 1: Residential Prices (per sqm), H1 2025

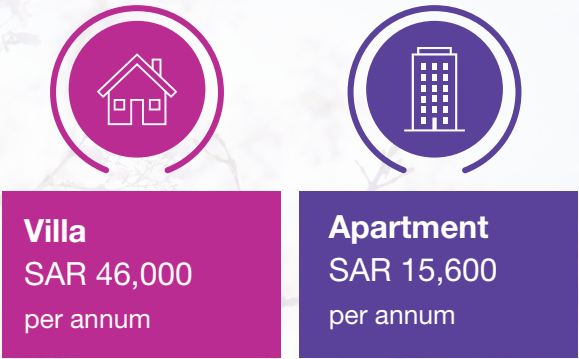


Source: GASTAT/Insights Research

Figure 2: Residential Price Index, H1 2025



Source: GASTAT/Insights Research



Source: EJAR/Insights Research

YoY Change (%) in Sales Prices



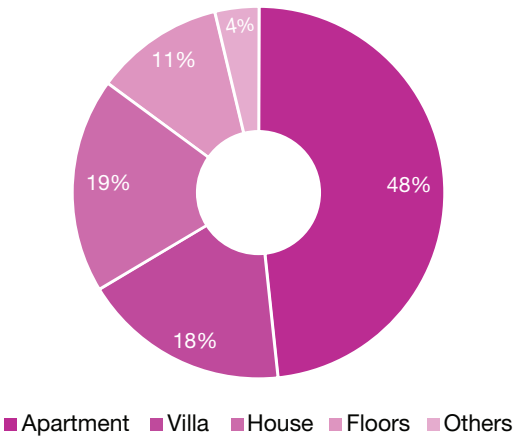
Source: GASTAT/Insights Research

Residential Supply

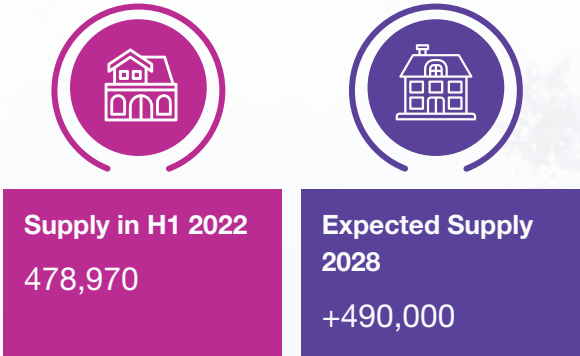
As of H1 2022, the Aseer region’s residential stock comprises approximately 478,970 units, with projections indicating a modest increase with more than 490,000 units being added by 2028. Apartments constitute the majority of the housing inventory, accounting for 48% of the total, followed by houses at 19% and villas at 18%.

The latest available data on residential dwellings dates back to 2022. However, this is complemented by a series of significant developments recently initiated in the Aseer region, offering valuable insights into emerging trends. Programs such as Sakani and the National Housing Company (NHC) are playing a pivotal role in this transformation—working to establish Aseer as a vibrant, livable region defined by modern infrastructure, sustainable communities, and an enhanced quality of life. Most of these projects are currently in the delivery phase, with full completion anticipated by 2028.

Figure 3: Housing Units by Type



Source: GASTAT/Insights Research



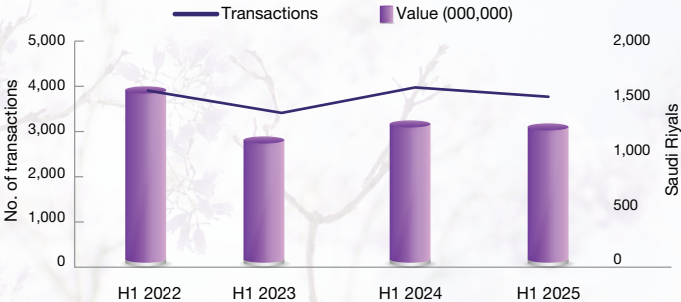
Source: GASTAT/Insights Research

Residential Sale Transactions

The total number of residential sale transactions taking place in H1 2025, stands at 3,229 valuing SAR 1.5 billion. In H1 2024, 3,291 number of sale transactions took place, which valued at SAR 1.57 billion.

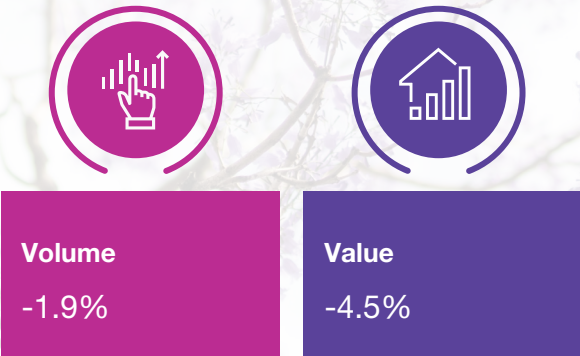
Over the past three years, Abha has led the Aseer region in residential transaction volumes, underscoring its position as the administrative and economic heart of the province. The city's elevated livability, cultural significance, and improved infrastructure have made it a magnet for both homebuyers and developers. Khamis Mushait, a rapidly urbanizing center and hub for major residential projects, closely follows, benefiting from strategic connectivity and a growing population.

Figure 4: Housing Sales Transactions and Value



Source: MOJ/Insights Research

YoY Change (%) in Residential Transactions



Source: MOJ/Insights Research

Rising from the heart of the Aseer region, the **AlWadi Project** by ARDARA represents a visionary step toward redefining luxury living in southern Saudi Arabia. Spanning an impressive 2.5 million square meters, this masterfully planned development is more than a residential undertaking—it is the crafting of a lifestyle destination. Set for completion by 2027, AlWadi will offer 2,000 meticulously designed residential units, blending modern elegance with the natural beauty of the landscape. With homes—ranging from sophisticated high-end apartments to refined villas—will be thoughtfully interwoven across five architecturally distinct districts, each curated to reflect a unique identity while maintaining a cohesive, elevated urban experience.



Soudah Peaks	
Locations	Soudah
Developer	Soudah Development Company
Product Mix	Hotel rooms, residential and commercial units
No. of Residential units	1336
Project Completion	2033 (Phase 1 with 391 residential units will be completed by 2027)

Abha Residential Prices and Rental Rates

As of H1 2025, the residential property market in Abha reflects a maturing pricing structure, with average apartment prices reaching SAR 2,620 per sqm and villas priced at SAR 3,150 per sqm. This pricing differential underscores the premium placed on larger, standalone units within the region’s expanding urban fabric.

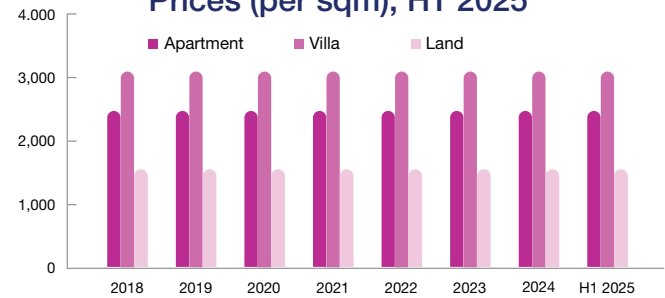
In terms of rental performance, villas command an average annual rate of SAR 39,000 per annum, significantly outpacing apartments at SAR 17,200 per annum, indicating stronger yield expectations for high-end residential assets. In H1 2025, a total of 41,364 rental transactions for apartments and 137 rental deals for villas were recorded, reflecting continued demand in the residential leasing market.

Abha Residential Sale Transactions and Supply

The residential supply of Abha stood at 104,349 in H1 2022, with apartments making more than half of the supply at 58.2%.

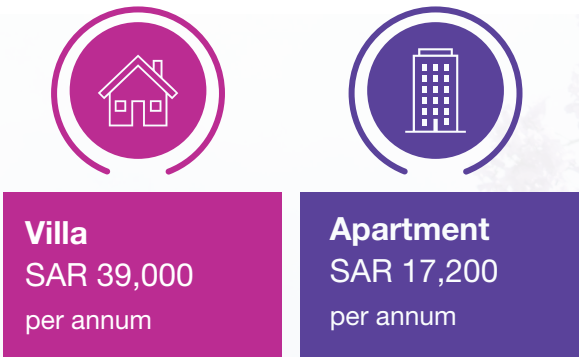
869 number of sale transactions took place in Abha, valuing at SAR 598 million during H1 2025. Although the number of transactions increased by about 6.75%, compared to H1 2024, the value of transactions saw a decline of about 11.6%.

Figure 5: Abha Residential Prices (per sqm), H1 2025



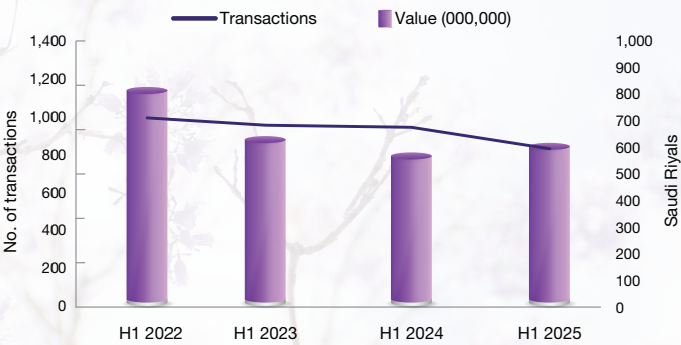
Source: MOJ/Insights Research

Residential Rentals



Source: MOJ/Insights Research

Figure 6: Abha Housing Sales Transactions and Value



Source: MOJ/Insights Research

YoY Change (%) in Residential Sale Transactions



Source: GASTAT/Insights Research

Source: MOJ/Insights Research



Rising in the heart of Khamis Mushait, the **Al Sadeem project** stands as a hallmark of modern urban living in the Aseer region, reflecting Saudi Arabia’s Vision 2030. Developed by the National Housing Company, it constitutes 5,056 units of contemporary villas, apartments, and townhouses; blending them within a thoughtfully planned community. Strategically located near key transport and educational hubs, Al Sadeem offers seamless connectivity alongside a full spectrum of amenities—including schools, mosques, parks, and healthcare facilities—creating a self-sufficient, sustainable lifestyle rooted in both progress and place.



Tilal Al-Khamis	
Locations	Khamis Mushait
Developer	Bin Jarallah Construction Co.
Product Mix	Apartments
No. of Residential units	816
Project Completion	2026



Khamis Oasis	
Locations	Khamis Mushait
Developer	Abdulrahman bin Saad Al-Rashed & Sons
Product Mix	Townhouse
No. of Residential units	1041
Project Completion	N/A

Khamis Mushait Residential Prices and Rental Rates

As of H1 2025, Khamis Mushait continues to assert its role as a key residential hub within the Aseer region, underpinned by a balance of affordability and market activity. Average apartment prices stand at SAR 2,500 per sqm, while villas are priced at SAR 3,058 per sqm, reflecting moderate pricing dynamics relative to regional benchmarks.

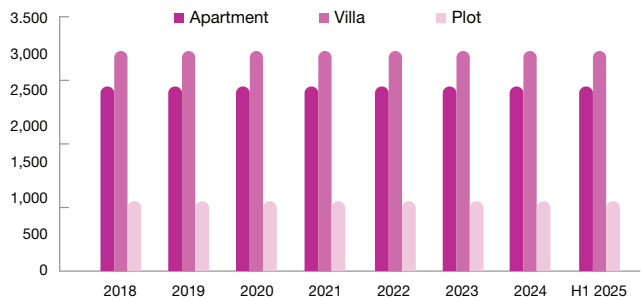
The rental market remains active, with apartments generating 33,077 rental transactions—a clear indication of strong demand for mid-market urban living. Villas, while commanding a higher average annual rent of SAR 30,023 per sqm compared to SAR 15,100 per sqm for apartments, recorded a more selective 142 transactions, highlighting their status as premium, lower-density offerings.

Khamis Mushait Residential Sale Transactions and Supply

The residential supply of Khamis Mushait stands at 150,513 in H1 2022, with apartments making more than half of the supply at 59.8%.

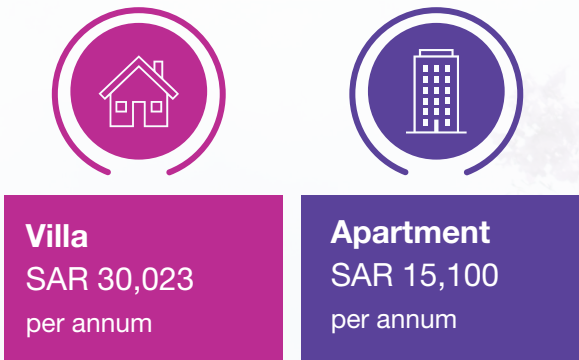
724 number of sale transactions took place in Khamis Mushait, valuing at SAR 450.5 million during H1 2025. The number of transactions decline in the first half of 2025 compared to H1 2024 by about 34%.

Figure 5: Khamis Mushait Residential Prices (per sqm), H1 2025



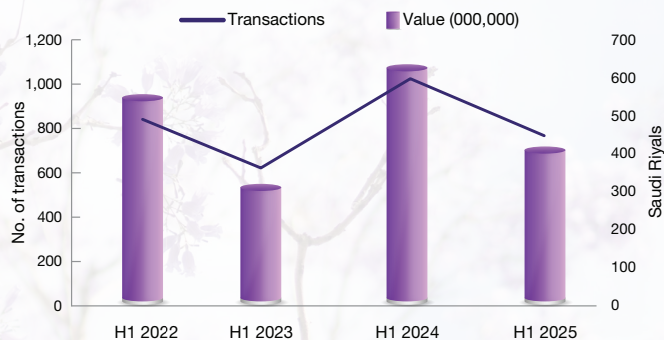
Source: MOJ/Insights Research

Residential Rentals



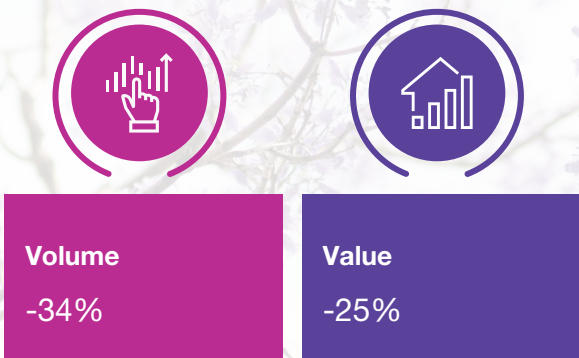
Source: EJAR/Insights Research

Figure 6: Khamis Mushait Housing Sales Transactions and Value



Source: MOJ/Insights Research

YoY Change (%) in Residential Sale Transactions



Source: MOJ/Insights Research



Source: GASTAT/Insights Research

2025

Contact Us

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