Reliant Surveyors
ADVISORY & CONSULTANCY

Q3 2026

DUBAI INDUSTRIAL MARKET REPORT

Precision-Derived Decisions.



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EXECUTIVE FOREWORD

Contrasting Rental Trends Across Dubai's Industrial Segments

Dubai's industrial leasing market recorded contrasting rental trends during Q3 2026. Warehouse rents showed limited quarterly movement, ranging from 3.0% lower to unchanged across the four reported locations, while annual increases of 18.2% to 30.0% were retained. Labour accommodation rents increased across all four reported locations on both a quarterly and an annual basis.

The highest average warehouse rents were recorded in Al Quoz and Ras Al Khor, at AED 65 per sq.ft per year. Ras Al Khor recorded the strongest annual growth at 30.0%, while Al Quoz and Jebel Ali registered quarterly declines of 3.0% and 2.0% against annual increases of 18.2% and 25.0%.

Labour accommodation recorded quarterly growth of 4.53% to 6.63% and annual growth of 31.83% to 44.06%. The highest average rent was recorded in Al Quoz, at AED 2,000 per room per month, while Sonapur/Muhaisnah recorded the strongest annual increase at 44.06%.

This edition sets out rental levels, quarterly movements and annual changes across Dubai's key industrial locations to provide an evidence led assessment of the market.

IN THIS REPORT

03 Market Overview
04 Industrial Pricing Landscape
05 Outlook & Considerations
06 Methodology

THREE THINGS TO KNOW

01 **Warehouse rents steady.** Quarterly moves of −3.0% to 0.0%, with annual gains retained.

02 **Labour accommodation up everywhere.** Rises at all four locations, led by Sonapur/Muhaisnah at 44.06% a year.

03 **Al Quoz commands the top rents.** AED 65 per sq.ft for warehouses and AED 2,000 per room per month.

Industrial Snapshot

Headline rental movements across the four reported locations in each segment.

YOY WAREHOUSE RENTAL GROWTH

+23.9%

Unweighted mean of annual changes across the four warehouse locations (range 18.2% to 30.0%).

QOQ WAREHOUSE RENTAL MOVEMENT

−1.25%

Unweighted mean of quarterly changes across the four warehouse locations (range –3.0% to 0.0%).

YOY LABOUR ACCOMMODATION GROWTH

+38.6%

Unweighted mean of annual changes across the four labour accommodation locations (range 31.83% to 44.06%).

Unweighted arithmetic means of the reported location changes; not weighted Dubai wide indices. Source: Reliant Surveyors calculations based on REIDIN location benchmarks.

Dubai Industrial Market

Divergent Rental Trends Across Warehouse and Labour Accommodation Segments

Dubai's industrial rental market recorded divergent trends in Q3 2026. Limited quarterly movement was recorded in warehouse rents, ranging from 3.0% lower to unchanged, while annual increases of 18.2% to 30.0% were retained across the four reported locations.

Labour accommodation rents increased across all four reported locations, with quarterly growth of 4.53% to 6.63% and annual growth of 31.83% to 44.06%. The contrast highlights differing rental dynamics across industrial property uses, with location specific variation evident in both.

DUBAI INDUSTRIAL RENTS

Key highlights

Warehouse rents held broadly steady

–3.0% to 0.0%

Quarterly change

Across four reported locations.

18.2% to 30.0%

Annual growth

Labour accommodation rents rose

44.06%

Highest annual growth · Sonapur/Muhaisnah

Monthly room rents rose across all four reported locations.

Highest rents by location

AED 65

per sq. ft. per year

Average warehouse rent
Al Quoz and Ras Al Khor

AED 2,000

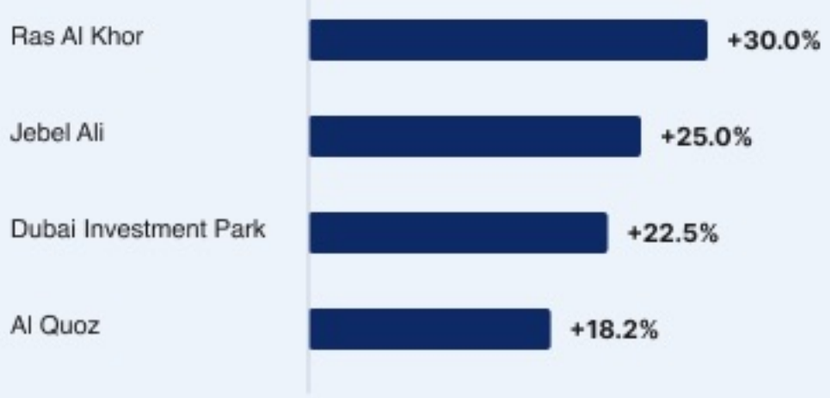
per room per month

Labour accommodation rent
Al Quoz



Warehouse Rents, Annual Change

Year on year change in average rent to Q3 2026, by location



Source: Reliant Surveyors REIDIN Data Sets Q3 2026.

Labour Accommodation Rents, Annual Change

Year on year change in average room rent to Q3 2026, by location



Source: Reliant Surveyors REIDIN Data Sets Q3 2026.

Industrial Pricing Landscape

Warehouse Rentals & Labour Accommodation Rates I Q3 2026

Warehouse rents showed limited quarterly movement, with declines in Al Quoz (–3.0%) and Jebel Ali (–2.0%), while Dubai Investment Park and Ras Al Khor were unchanged. Annual rental growth remained positive across all four reported locations, led by Ras Al Khor at 30.0%.

Labour accommodation recorded stronger quarterly and annual increases across all four reported locations. Sonapur/Muhaisnah recorded the highest annual increase at 44.06%, while Al Quoz recorded the highest average monthly room rent at AED 2,000.

Warehouse Rentals

AED per sq.ft per year

LOCATION	MIN	MAX	AVERAGE	QOQ	YOY
Dubai Investment Park	42	55	**49**	0.0%	+22.5%
Al Quoz	60	70	**65**	–3.0%	+18.2%
Jebel Ali	44	55	**50**	–2.0%	+25.0%
Ras Al Khor	60	70	**65**	0.0%	+30.0%

AED 65

Highest average rent: Al Quoz and Ras Al Khor

+30.0%

Strongest annual growth: Ras Al Khor

Source: Reliant Surveyors REIDIN Data Sets Q3 2026.

Labour Accommodation Rentals

AED per room per month

LOCATION	MIN	MAX	AVERAGE	QOQ	YOY
Al Quoz	1,800	2,200	**2,000**	+4.58%	+38.21%
Dubai Investment Park	1,080	1,320	**1,200**	+4.53%	+31.83%
Jebel Ali	1,440	1,760	**1,600**	+5.14%	+40.23%
Sonapur/Muhaisnah	1,350	1,650	**1,500**	+6.63%	+44.06%

AED 2,000

Highest average room rent: Al Quoz

+44.06%

Strongest annual growth: Sonapur/Muhaisnah

Source: Reliant Surveyors REIDIN Data Sets Q3 2026.



RENTAL SPREAD

Average warehouse rents range from AED 49 to AED 65 per sq.ft per year; labour accommodation from AED 1,200 to AED 2,000 per room per month.

Market Outlook & Key Considerations

Limited Quarterly Movement in Warehouse Rents as Labour Accommodation Rents Rise

Dubai's industrial rental market showed mixed trends in Q3 2026. Limited quarterly movement was recorded in warehouse rents, while annual increases of 18.2% to 30.0% were retained across the four reported locations. Labour accommodation rents increased across all four reported locations, with annual growth of 31.83% to 44.06%.

OUTLOOK FOR Q4 2026 I COMMENTARY

During Q4 2026, comparable lease evidence, renewals and available premises should be monitored alongside workforce accommodation requirements. This commentary identifies matters to monitor and does not represent a rental forecast.



Key Market Considerations

01 Warehouse Rental Movement

Quarterly movements ranged from 3.0% lower to unchanged across the four reported locations, while annual increases of 18.2% to 30.0% were retained.

02 Labour Accommodation Rental Growth

An unweighted mean annual rental increase of 38.6% was calculated across the four reported labour accommodation locations, with quarterly increases recorded at every location.

03 Location Based Rental Differentials

The highest average warehouse rents were recorded in Al Quoz and Ras Al Khor at AED 65 per sq.ft per year, while Dubai Investment Park recorded the lowest average at AED 49.

+23.9%	−1.25%	+38.6%	AED 49
Warehouse annual change, mean	Warehouse quarterly change, mean	Labour accommodation annual change, mean	Lowest average warehouse rent, DIP

Methodology

Registered Valuer with Dubai Land Department (DLD-RERA), ADGM & Ajman Land Department

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This report is based on the warehouse and labour accommodation rental benchmarks in Reliant Surveyors REIDIN Data Sets Q3 2026. Quarterly changes compare Q3 2026 with Q2 2026 and annual changes compare Q3 2026 with Q3 2025. Location rankings are drawn directly from those benchmarks.

Headline growth figures are unweighted arithmetic means of the four reported location changes in each segment and are not weighted Dubai wide indices. Figures are location level benchmarks; individual properties and lease terms may perform differently from the averages shown.

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