

MARKET WATCH

APRIL 2025

1 APR. - 30 APR.

BY
YASSEN MAHMOUD
MOHAMED SAYED



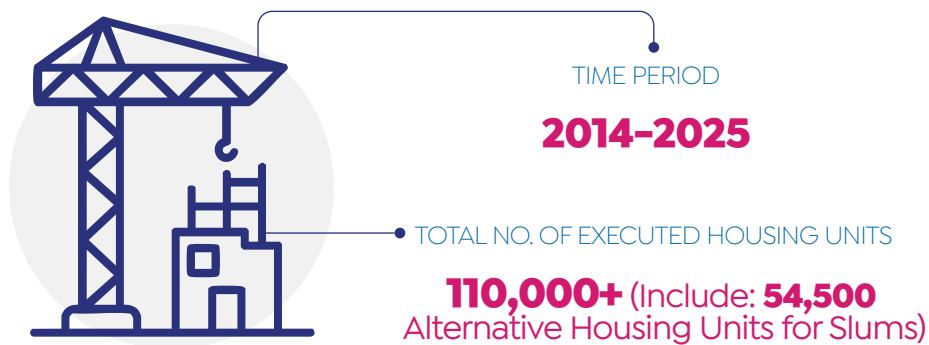
REAL ESTATE

MARKET
UPDATES

01

Updates 2025 REAL ESTATE MARKET

DEVELOPMENT OF SINAI & CANAL CITIES



BEDOUIN HOUSING

No. of Executed & Underway Bedouin Homes

5,216 (Cost: EGP **6.9** bn)

No. of Underway Bedouin Communities

4

POTABLE WATER PROJECTS

No. of Executed Projects

78

Capacity

1 mn
m³/ Day

Coverage Ratio

84.4%

2014

96.5%

2025

SANITATION PROJECTS

No. of Executed Projects

86

Capacity

793,000
m³/ Day

Coverage Ratio

17.3%

2014

78%

2025

IMPLEMENTATION STATUS OF INVESTMENT PLAN FOR NORTH & SOUTH SINAI (FY 2024/25)

Allocated Investments

EGP **875.5** mn



EGP **490** mn

North Sinai



EGP **385.5** mn

South Sinai

DEVELOPMENTAL RESIDENTIAL COMMUNITIES

No. of Executed Communities

18

No. of Underway Communities

17

NEW CITIES

No. of Executed & Underway New Cities

7

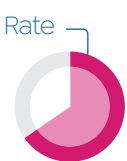
Target Citizens

5 mn+



67%

North Sinai



65%

South Sinai

HOUSING FOR ALL EGYPTIAN INITIATIVE

722,000 No. of Executed Housing Units

649,000 No. of Allocated Housing Units

298,000 No. of Underway Housing Units



Total Real Estate Financing EGP **82.86** bn



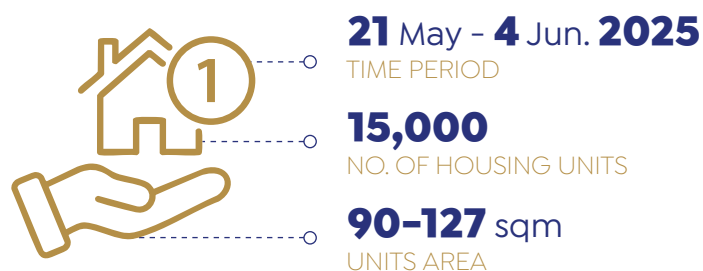
Cash Support EGP **10.13** bn



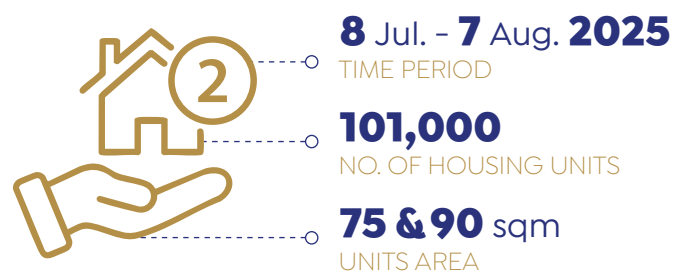
Source: Cabinet

"HOUSING FOR ALL EGYPTIANS 7" ANNOUNCEMENT

FIRST OFFERING FOR MIDDLE-INCOME

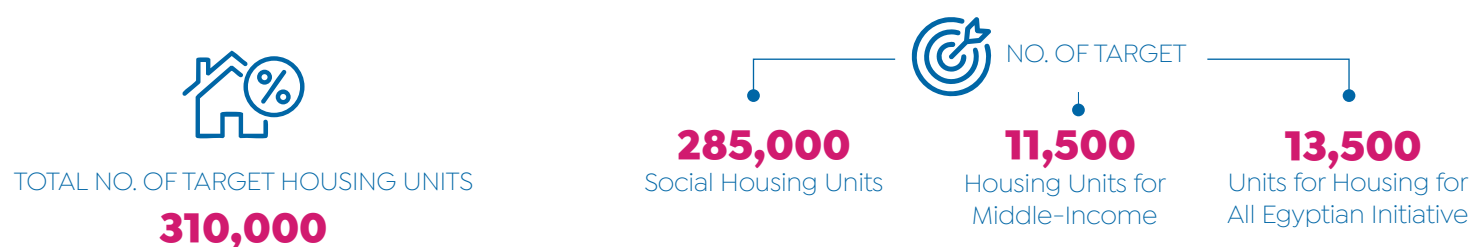


SECOND OFFERING FOR LOW & MIDDLE INCOME

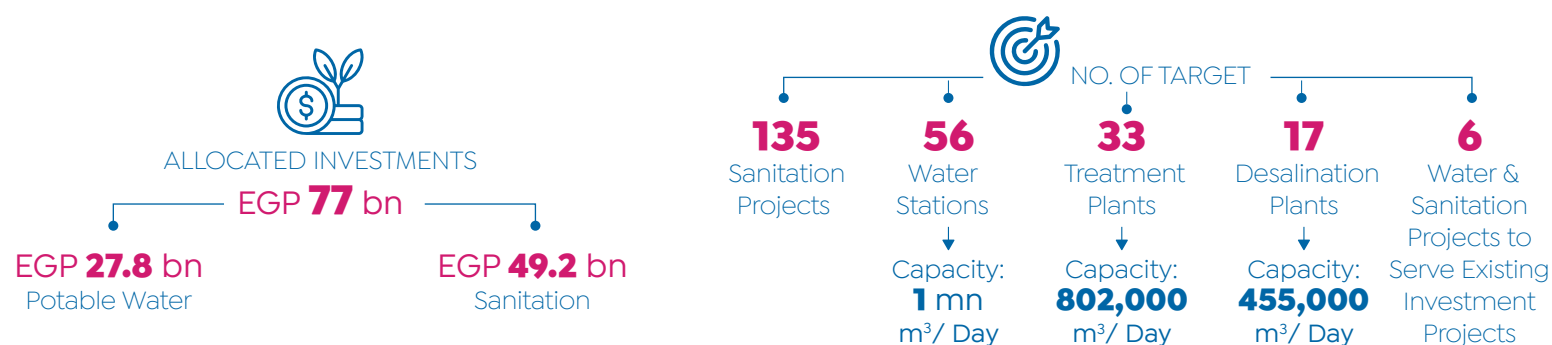


HOUSING, WATER & SANITATION SECTORS TARGET PLAN (FY 2025/26)

HOUSING SECTOR



POTABLE WATER & SANITATION SECTOR



COMMUNITY DEVELOPMENT PROGRAM



Improving Quality of Life for **2 mn** Citizen
MAIN TARGET



5,000
NO. OF PROVIDED JOB OPPORTUNITIES



EUR **15 mn**
TOTAL INVESTMENTS



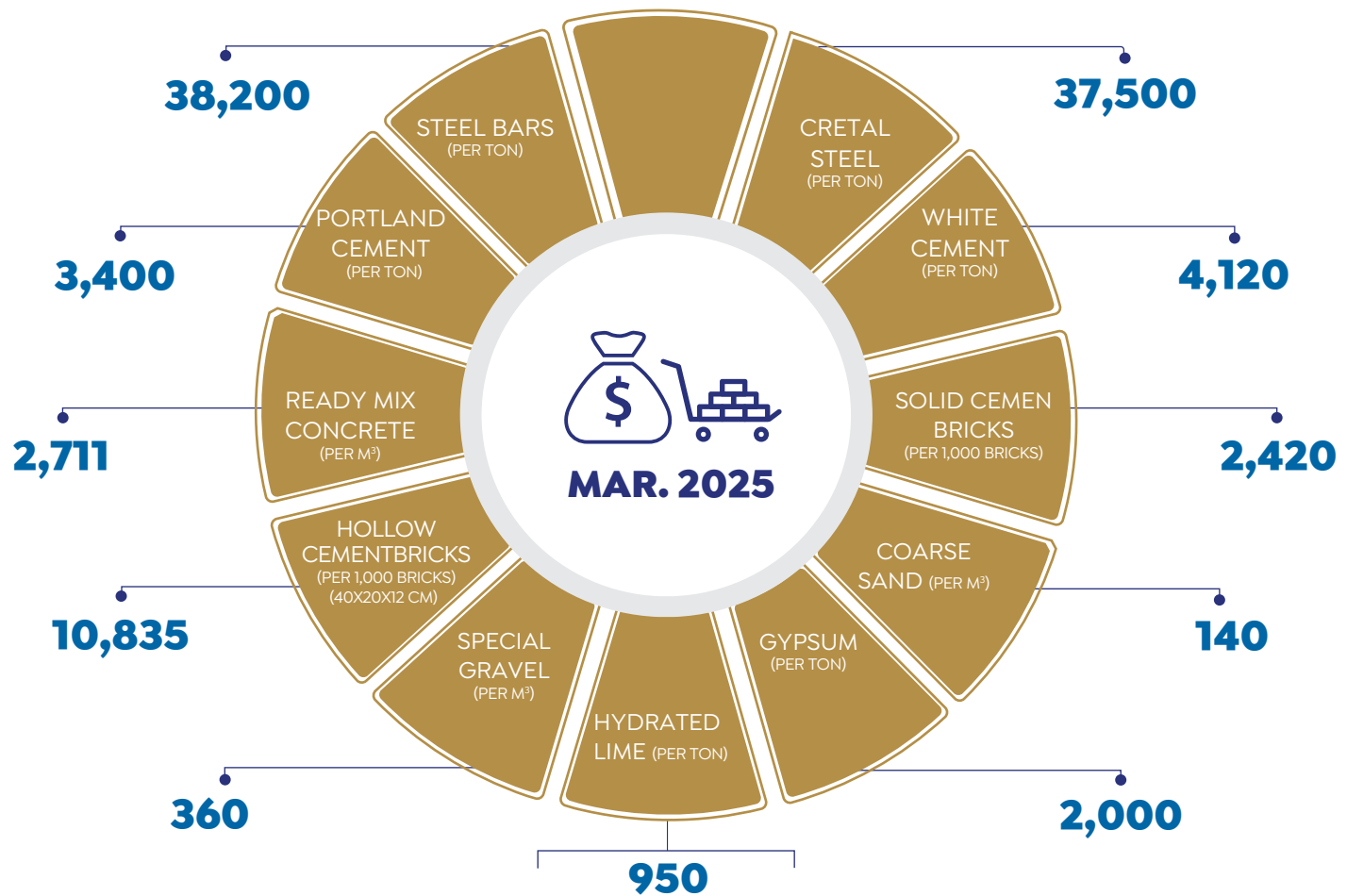
86
NO. OF PROJECTS



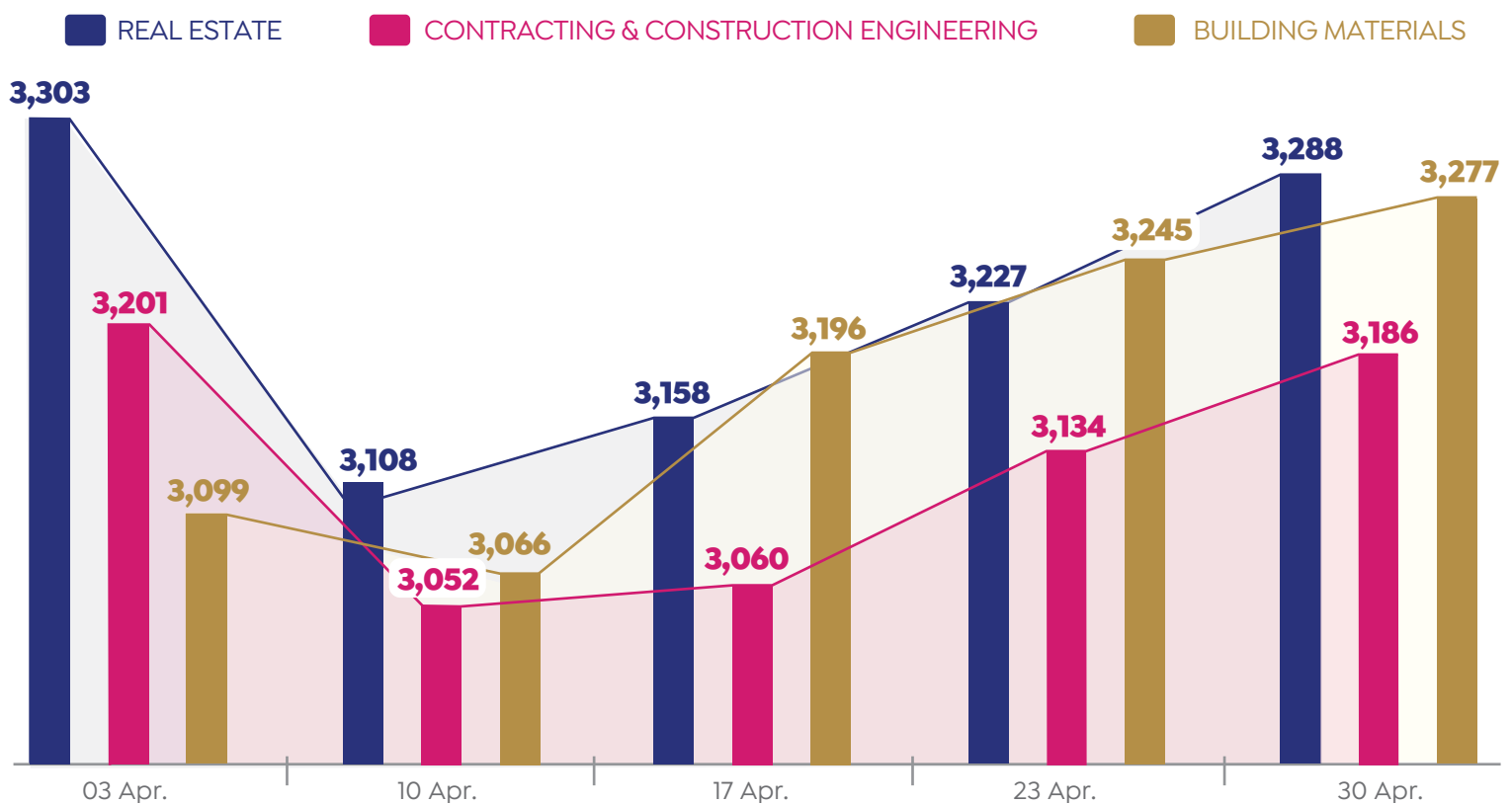
TARGET GOVERNORATES

- Alexandria
- Port Said
- Sharqia
- Monufia
- Giza
- Assiut

PRICES OF CONSTRUCTION MATERIALS (EGP)



PERFORMANCE OF REAL ESTATE, CONSTRUCTION & BUILDING MATERIALS' INDICES IN EGX



Source: MHUC & EGX



NEW CITIES

UPDATE



NEW CITIES

Updates 2025



NEW CAPITAL (NC)



230,000 Acres
TOTAL AREA



4
NO. OF PHASES



8-9 mn
NO. OF TARGET POPULATION



480
NO. OF PARTICIPATING DEVELOPERS

► PHASE I



2.5 mn
NO. OF TARGET POPULATION



8 (600,000 Housing Units)
NO. OF RESIDENTIAL DISTRICTS



40 (500 Units)
NO. OF MIXED USE TOWERS

EDUCATIONAL PROJECTS



3
NO. OF PUBLIC SCHOOLS



56
NO. OF PRIVATE SCHOOLS



7
NO. OF BRANCHES OF INTERNATIONAL UNIVERSITIES

MEDICAL CITY (CAPITAL MED)



400 Acres
AREA



12
NO. OF EXECUTED HOSPITALS



30 Hospitals, alongside Central Health Insurance Hospital
NO. OF TARGET HOSPITALS

SPORT CITY



92 Acres
AREA



SUPPLY VOLUME

- Covered Hall (Capacity: **7,000 Spectators**)
- Swimming Pool
- Squash Complexes
- **14 Playgrounds**

CITY OF ARTS & CULTURE



100 Acres
AREA



SUPPLY VOLUME

- New Opera House
- Museum of Modern Art
- Arts Creativity Center
- Vast Library

GOVERNMENT DISTRICT

**400** Acres
AREA**34**
NO. OF MINISTERIAL BUILDINGS

SUPPLY VOLUME

- 10** Government Complexes
- Senate
- Parliament

CENTRAL BUSINESS DISTRICT (CBD)

**200** Acres
AREA**20** (Housing, Administrative & Hotel Units)
NO. OF TOWERS

► ICONIC TOWER

**385** m
HEIGHT**79**
NO. OF FLOORS

DIPLOMATIC DISTRICT

**1,500** Acres
AREA**200**
NO. OF ALLOCATED PLOTS
FOR EMBASSIES

INCLUDE

- The Headquarters of United Nations Organizations
- African Export-Import Bank (Afreximbank)

TRANSPORTATION

CAPITAL INTERNATIONAL
AIRPORT
Yearly Capacity:
380,000 Passengers

LIGHT RAIL TRANSIT (LRT)

- No. of Stations: **20** (12 Stations already Operational)
- Daily Capacity: **500,000** Passengers for Phase I & II



HIGH-SPEED ELECTRIC TRAIN

- No. of Stations: **21**
- No. of Regional Stations: **8**
- No. of Express Stations: **13**



MONORAIL (EAST NILE)

- No. of Stations: **22**
- Daily Capacity: **500,000** Passengers

CENTRAL BUS STATION
Area: **100** Acres

NEW ALAMEIN

PHASE I

**28,975**
NO. OF HOUSING UNITS**15,295**
NO. OF SOLD HOUSING
UNITS**6,396**
NO. OF DELIVERED HOUSING
UNITS**11,320**
NO. OF HOUSING UNITS READY TO
BE DELIVEREDBefore **30 Jun. 2025**
DELIVERY DATE OF ALL SOLD UNITS

PHASE II

 **11,616**
NO. OF HOUSING UNITS

HOUSING FOR ALL EGYPTIANS INITIATIVE

 **83**
NO. OF BUILDINGS

 **1,992**
NO. OF HOUSING UNITS

 **Underway**
CURRENT STATUS

MARINA 8

 **179 Acres**
AREA

 **243**
NO. OF BUILDINGS

 **917**
NO. OF HOUSING UNITS

 **Apartments, Chalets & Villas**
UNIT TYPES

 **45%**
COMPLETION RATE

M8 BY THE LAKE

 **265,000 sqm**
AREA

 **330**
NO. OF BUILDINGS

 **1,183**
NO. OF HOUSING UNITS

 **Chalets, Apartments, Villas & Townhouses**
UNIT TYPES


HERITAGE CITY

 **260 Acres**
AREA

 **70**
NO. OF SERVICE BUILDINGS

 **Many Service Buildings are Operating now**
CURRENT STATUS

DOWNTOWN PROJECTS

 **33.79 Acres**
AREA

 **40**
NO. OF HOUSING BUILDINGS

 **1,320**
NO. OF HOUSING UNITS

 **90-300 sqm**
UNITS AREA

 **705**
NO. OF DELIVERED HOUSING UNITS

 **13**
NO. OF DELIVERED COMMERCIAL UNITS

► DOWNTOWN EXTENTION

 **21.65 Acres**
AREA

 **24**
NO. OF BUILDINGS

 **896**
NO. OF HOUSING UNITS

 **125-245 sqm**
UNITS AREA

 **85%+**
COMPLETION RATE

► TOWERS PROJECT

**5**NO. OF HOUSING
TOWERS**2,631**NO. OF HOUSING
UNITS**231**

NO. OF COMMERCIAL UNITS

**114**

NO. OF ADMINISTRATIVE UNITS

| ICONIC TOWER

**250 m**

HEIGHT

| OTHER 4 TOWERS

**200 m** for each Tower

HEIGHT

BEACH TOWERS

**23**

NO. OF UNDERWAY TOWERS

► 18 TOWERS

**6,300**

NO. OF HOUSING UNITS

**759**

NO. OF COMMERCIAL UNITS

**Concrete Structure Work is Completed**

CURRENT STATUS



DELIVERY DATE

Before **30 Jun. 2025** for
15 TowersBefore **31 Mar. 2026** for The
other **3 Towers**

► MARINA TOWERS

**7**

NO. OF TARGET TOWERS

**5**

NO. OF UNDERWAY TOWERS

**2,648**

NO. OF HOUSING UNITS

LATIN AREA

**404 Acres**

AREA

**65**

NO. OF HOUSING COMPLEXES

**6**

NO. OF ZONES

**10,597**

NO. OF HOUSING UNITS



CURRENT STATUS

Concrete Structure Work is
CompletedDelivery Date of Allocated
Units: Before **30 Jun. 2025**

MAZARINE

**707 Acres**

AREA

**7,956**

NO. OF HOUSING UNITS

**Apartments, Chalets & Villas**

UNIT TYPES



CURRENT STATUS

Many Units are Completed &
DeliveredDelivery Date of Sold Units:
Before **30 Jun. 2025**

CAPITAL GARDENS

HOUSING FOR ALL EGYPTIANS INITIATIVE


120,186

TOTAL NO. OF HOUSING UNITS


112,818

NO. OF HOUSING UNITS FOR LOW-INCOME


38,928

 NO. OF UNDER-DELIVERY HOUSING UNITS
FOR LOW-INCOME

7,368

 NO. OF UNDERWAY HOUSING UNITS FOR
MIDDLE-INCOME

NEW OCTOBER CITY

WEST AIRPORT ZONE


2,800 Acres

AREA


90,000

NO. OF HOUSING UNITS


27

 NO. OF UNDERWAY SERVICE
BUILDINGS

► SOCIAL CLUB


100,000 sqm

AREA


88%

COMPLETION RATE

NEW DAMIETTA

DIARNA PROJECT FOR MIDDLE-INCOME


33

NO. OF BUILDINGS


858

NO. OF HOUSING UNITS


Underway

CURRENT STATUS

NEW SUEZ

URGENT PHASE


300 Acres

AREA


86

NO. OF BUILDINGS



SERVICE BUILDINGS


2,064

NO. OF HOUSING UNITS


 Up to **90 sqm**

UNITS AREA

- Commercial Market (**8** Shops)
- Primary School (**33** Classrooms)
- Nursery

NEW OBOUR CITY

VALLEY TOWERS EAST PROJECT



14th Neighbourhood
LOCATION



96
NO. OF BUILDINGS



SERVICE BUILDINGS



3,360
NO. OF HOUSING UNITS



89-116 sqm
UNITS AREA

Commercial Mall
Primary School
Medical Center

Nursery
Post Office
Mosque

SOCIAL HOUSING PROJECT



125
NO. OF BUILDINGS



3,000
NO. OF HOUSING UNITS

EL-NOZHA PROJECT



The 2,600-Acre Area
LOCATION



66
NO. OF BUILDINGS



1,584
NO. OF HOUSING UNITS

DIARNA PROJECT



118
NO. OF BUILDINGS

SADAT CITY

HOUSING FOR ALL EGYPTIANS INITIATIVE



GREEN HOUSING PROJECT

No. of Buildings: **82**
No. of Housing Units: **1,968**



EL-NOUR DISTRICT

No. of Buildings: **51**
Units Area: **90 sqm**



EL-FIRDOUS DISTRICT

No. of Housing Units: **2,180**



PRIVATE REAL ESTATE PROJECTS

UPDATE



Updates 2025

PRIVATE REAL ESTATE PROJECTS



NEW RESIDENTIAL PROJECTS / 1 PROJECT

GRAND VALLEYS

Developer: Mountain View



Kayan City, East Cairo
LOCATION



500 Acres
AREA



Various Villas
UNIT TYPES



Within 1 Year
DELIVERY DATE OF PHASE I



Spanning 15 Distinct "Valleys",
Allocates 93% of Total Space
to Open Landscapes
FEATURES



NEW MIXED-USE PROJECTS / 4 PROJECTS

NEW PROJECT (NAME: N/A)

Developer: Najma Walk



New Cairo
LOCATION



12,000 sqm
AREA



Commercial, Administrative
& Medical Units
UNIT TYPES



EGP 5 bn+
INVESTMENTS



Q2 2025
ROLLED OUT DATE OF PHASE I

JUNCTION

Developer: Majid Al Futtaim



Next to the Mall of
Egypt, West Cairo
LOCATION



129,000 sqm+
AREA



EGP 15 bn
INVESTMENTS



13
NO. OF OFFICE BUILDINGS



F&B Destinations, Parking
Spaces & Retail Outlets
FACILITIES

THE MORNINGS

Developer: Al Ahly Sabbour Developments

New Cairo
LOCATIONEGP **11** bn
TARGET SALES**630+**
NO. OF UNITS**14** Acres
AREAResidential, Commercial,
Administrative &
Medical Units
UNIT TYPES**60-150** sqm
RESIDENTIAL UNITS AREA

TRACK REV

Developer: DIG

Downtown, NC
LOCATIONEGP **3.4** bn
INVESTMENTSGround & **11** Floors
NO. OF FLOORS**4,000** sqm
AREA**30%**
CONSTRUCTION COMPLETION
RATECommercial,
Administrative & Medical
Units
UNIT TYPES

PROJECTS UNDERWAY / 9 PROJECTS

D.O.S.E

Developer: Akam Al Rajhi Developments

North Coast
LOCATION**125** Acres
AREAEGP **9** bn+ till Apr. **2025**
INVESTMENTS

I SHERATON

Developer: Winvestor Development

Heliopolis
LOCATION**4,650** sqm
AREACURRENT STATUS
Completion Rate of
Concrete Work: **50%**
Sales Rate: **70%****4**
NO. OF RESIDENTIAL BUILDINGS

MIURA

Developer: Al Oula Developments

New Sheikh Zayed
LOCATIONVarious Villas
UNIT TYPESGreen Spaces, Children's Areas & Expansive Open Spaces
FACILITIES

GREEN AVENUE

Developer: New Jersey Developments

R7, NC
LOCATION11.6 Acres
AREAPhase I & II is Delivered
CURRENT STATUS

JAMILA

Developer: New Jersey Developments

North Coast
LOCATIONCURRENT STATUS
Phase I is Sold outStarting Construction of
Phase I

205 PROJECT

Developer: Arkan Palm Development

Sheikh Zayed
LOCATION205 Acres
AREAResidential, Commercial, Hotel & Medical Units
UNIT TYPES3
NO. OF HOTELS

INFINITY TOWER

Developer: Infinity Towers for Urban Development

NC
LOCATION230 m
HEIGHTResidential, Commercial &
Administrative Units
UNIT TYPES

THE ROOK

Developer: Mazaya Developments

Downtown, NC
LOCATION2,650 sqm
AREA94%
CONCRETE STRUCTURE
COMPLETION RATEDec. 2025
COMPLETION DATE

GEMINI RED

Developer: Mazaya Developments

Downtown, NC
LOCATION38%
STRUCTURAL COMPLETION
RATEJun. 2026
DELIVERY DATE



ECONOMIC SNAPSHOT

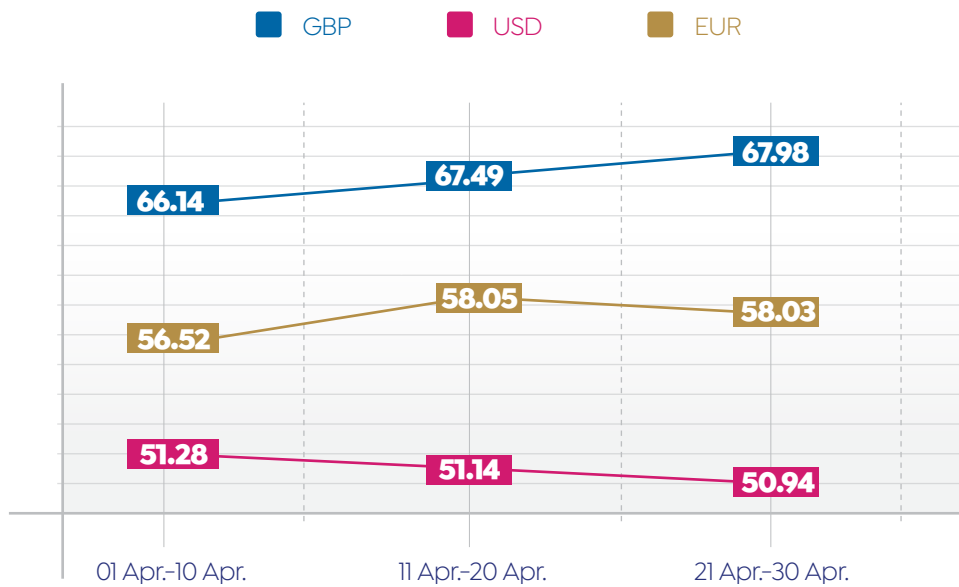


Updates 2025

ECONOMIC SNAPSHOT

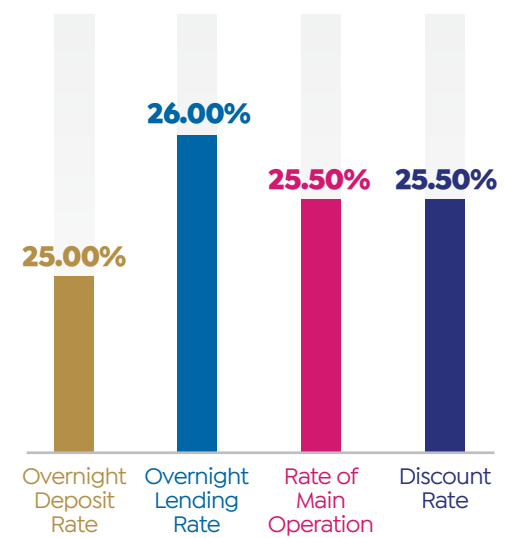


EXCHANGE RATES

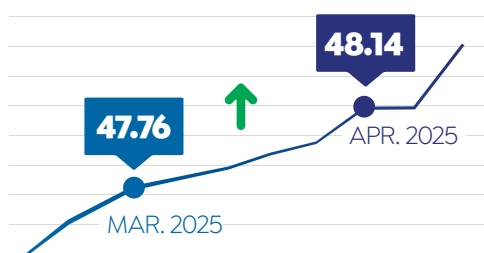


INTEREST RATES

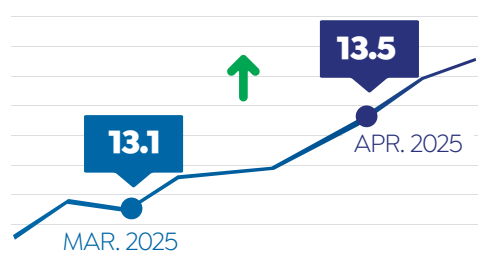
* MPC Meeting was Held on Apr. 17, 2025



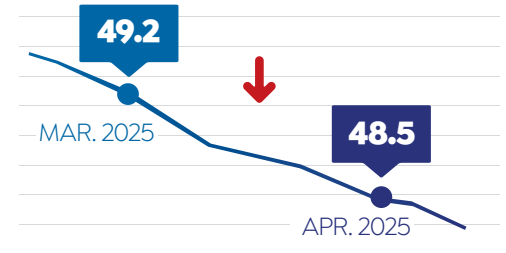
NET INTERNATIONAL RESERVES (USD BN)



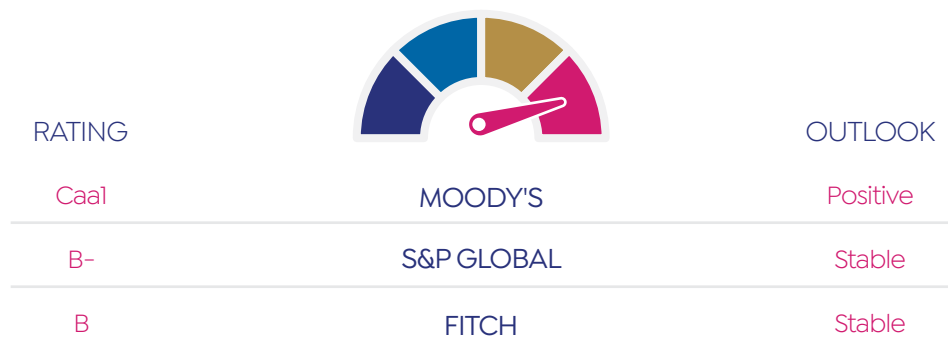
ANNUAL HEADLINE INFLATION RATE (%)



PURCHASING MANAGERS' INDEX (PMI)



EGYPT CREDIT RATING



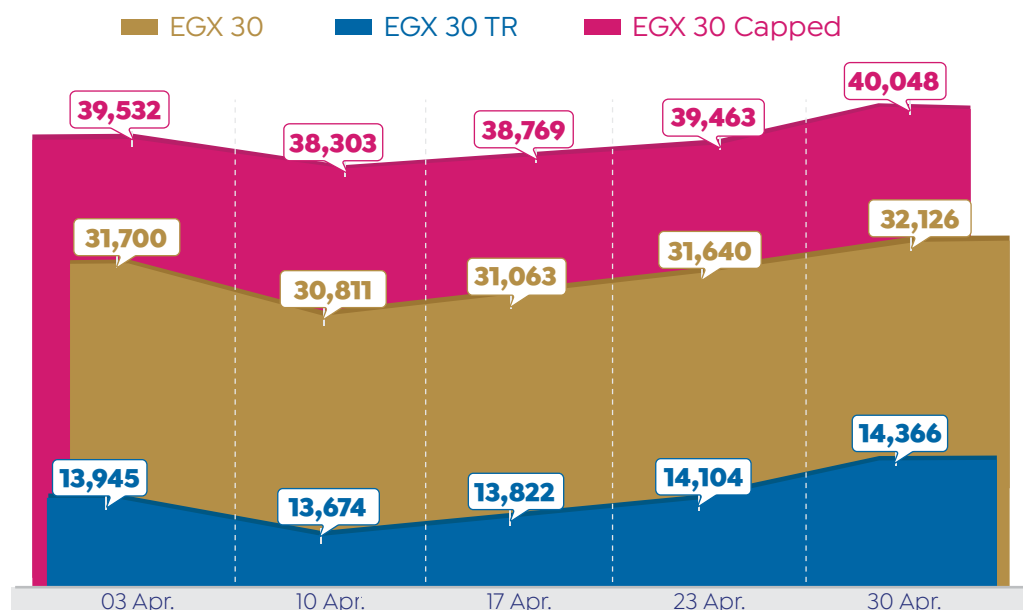
* According to Last Review Date on Feb. 19, 2025

* According to Last Review Date on Apr. 11, 2025

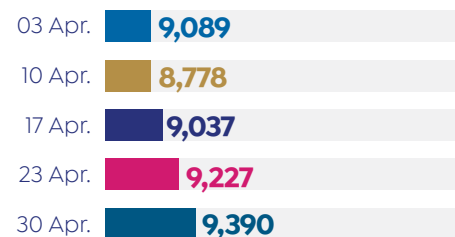
* According to Last Review Date on Apr. 11, 2025

Source: CBE, CAPMAS, Moody's, S&P Global & Fitch

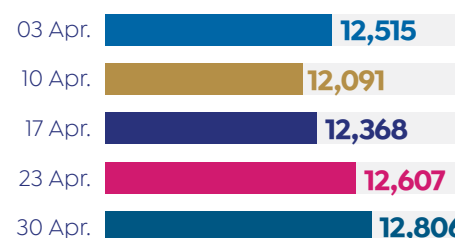
EGX INDICATORS



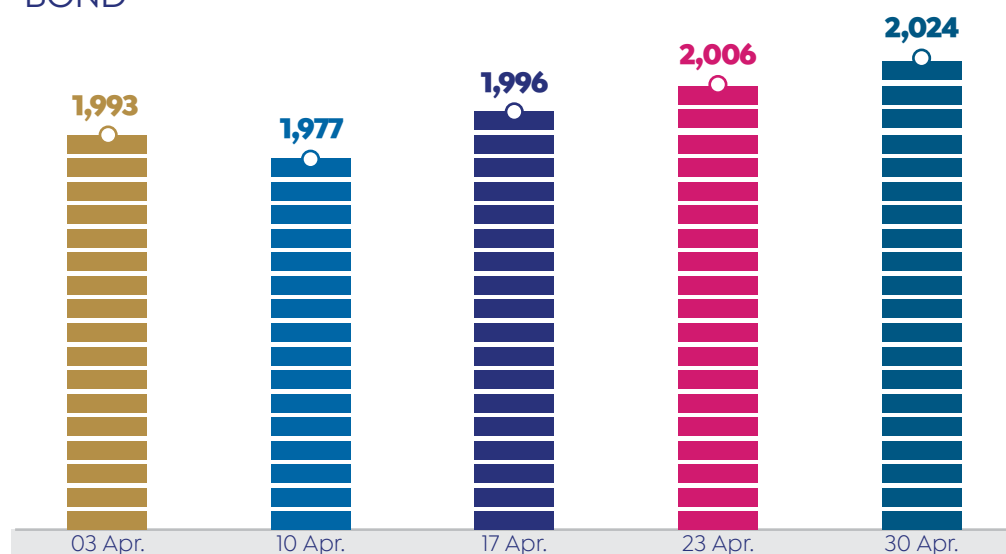
EGX 70 EWI



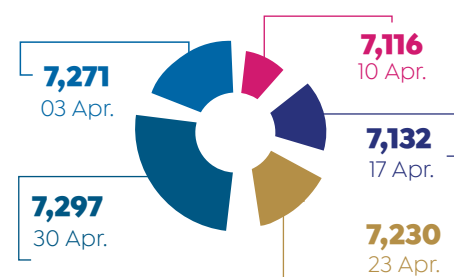
EGX 100 EWI



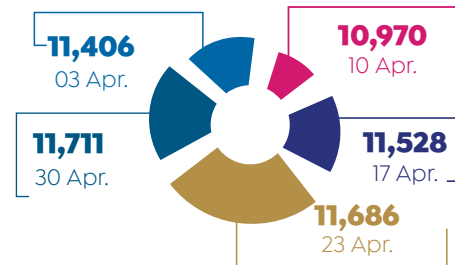
T-BOND



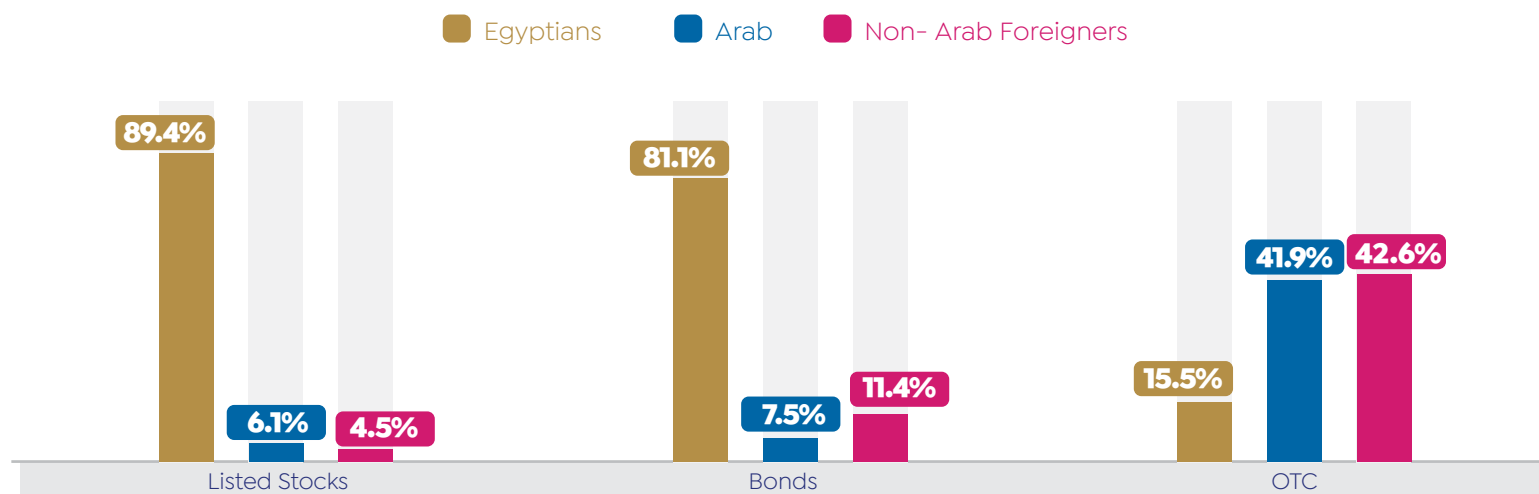
SP/EGX ESG



TAMAYUZ



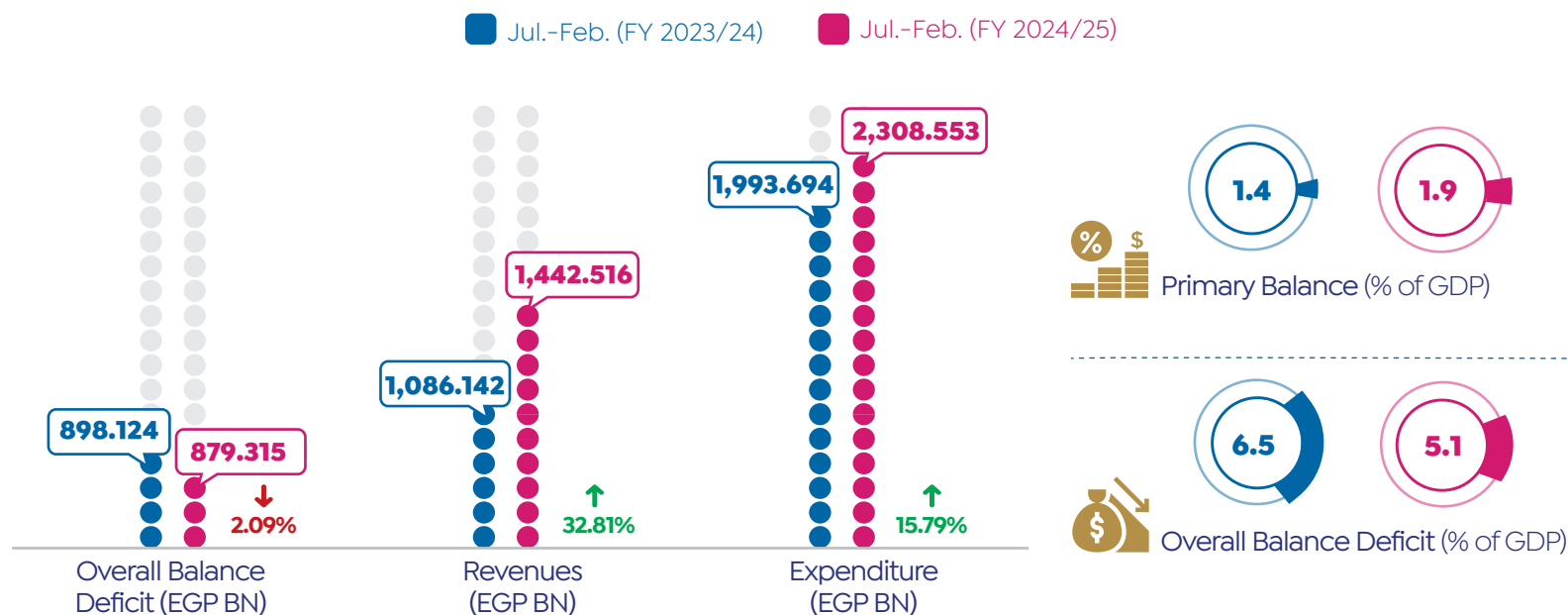
TOTAL INVESTORS' TRADING ACTIVITIES BY MARKETS DURING APR. 2025 (INC. DEALS)*



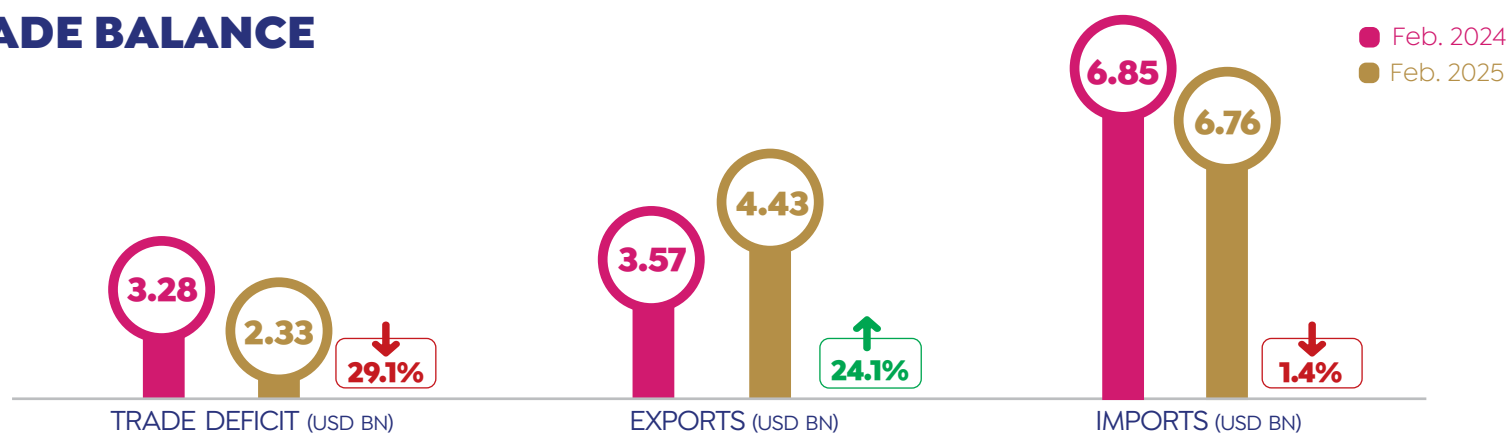
* Total Buy + Sell

Source: EGX

FISCAL SECTOR PERFORMANCE



TRADE BALANCE



ECONOMIC & SOCIAL DEVELOPMENT PLAN (FY 2025/26)



ECONOMIC GROWTH RATE
4.5%



GDP AT CURRENT PRICE
EGP **20.4 tn** (18% Growth Rate)



GDP AT CONSTANT PRICE
EGP **9.1 tn**

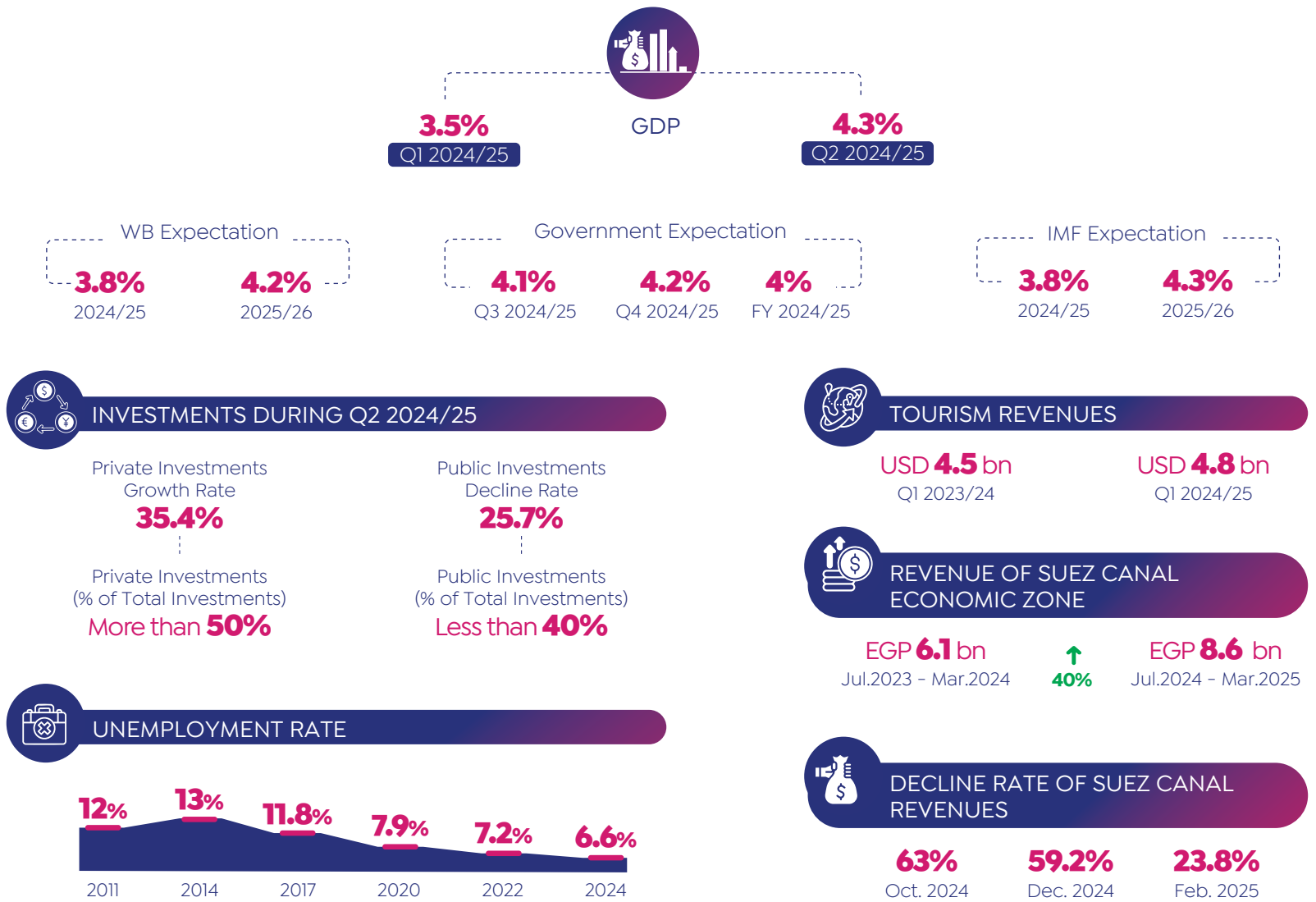
	TOTAL INVESTMENTS	INVESTMENT RATE (% OF GDP)
2025/26	EGP 3.5 tn	17.1%
2024/25	EGP 2.6 tn	15%
2023/24	EGP 1.8 tn	13%

INVESTMENTS BREAKDOWN IN 2025/26

62.7% Private Investments
(% of Total Investments)

37.3% Public Investments
(% of Total Investments)

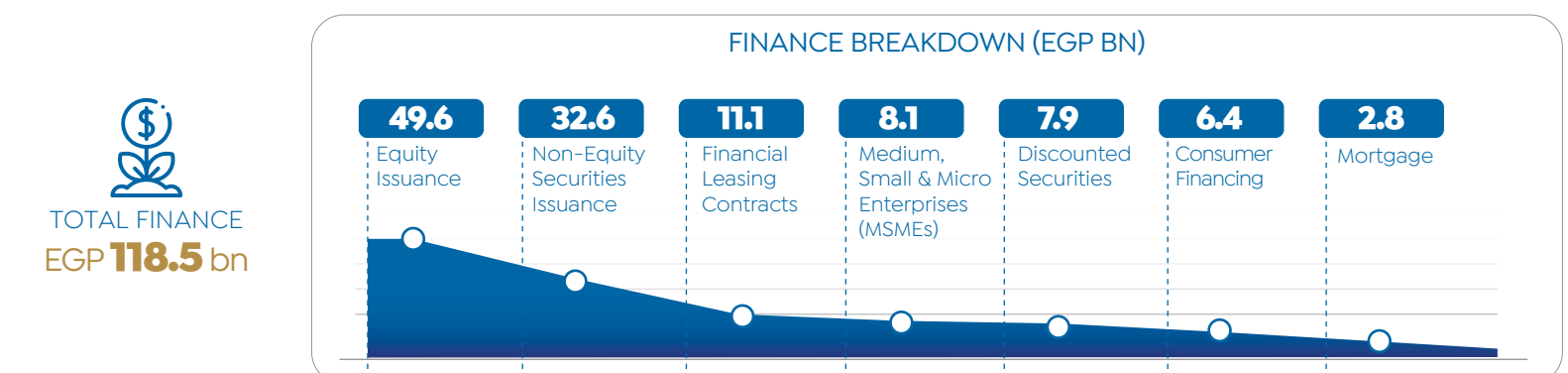
EGYPTIAN ECONOMIC INDICATORS



REMITTANCES OF EGYPTIANS WORKING ABROAD (USD BN)



NON-BANKING FINANCIAL ACTIVITIES DURING FEB.2025



Source: MPED, Cabinet & CBE

EGYPTIAN FINANCIAL PERFORMANCE



Jul. 2024 – Mar. 2025
Time Period



6.3%
Overall Deficit (% of GDP)



32%
Public Revenue Growth Rate



EGP 435 bn
Primary Surplus



2.5%
Primary Surplus (% of GDP)



24%
Expenditure Growth Rate



EGP 1.4 tn
Tax Revenues



USD 1 bn
External Debt Decline

DRAFT BUDGET FOR FY 2025/26



Public Revenue **EGP 3.1 tn**
Growth Rate **23%**



Expenditure **EGP 4.6 tn**
Growth Rate **19.2%**



Primary Surplus **EGP 807 bn**
(% of GDP) **4%**



Tax Revenues **EGP 2.6 tn**
(% of GDP) **13%**



Overall Deficit (% of GDP) **7.3%**
Public Debt (% of GDP) **81%**



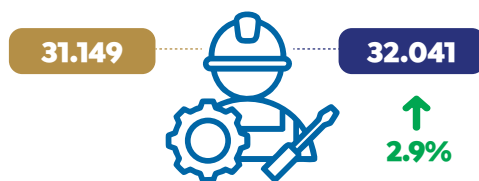
USD 1-2 bn
External Debt Decline

LABOUR MARKET DURING 2024

2023

2024

LABOUR FORCE (MN PERSONS)



BY GENDER (MN PERSONS)



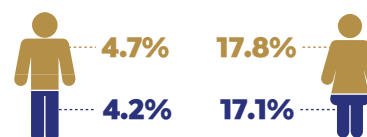
NO. OF UNEMPLOYEES (MN PERSONS)



UNEMPLOYMENT RATE



By Gender



By Geographic Areas



NO. OF EMPLOYEES (MN PERSONS)



By Geographic Areas in 2024 (MN Persons)

