

INVESTIGATE
RESEARCH & ANALYSIS

MARKET WATCH

CONTRIBUTOR **YASSEN MAHMOUD**

DECEMBER
2022

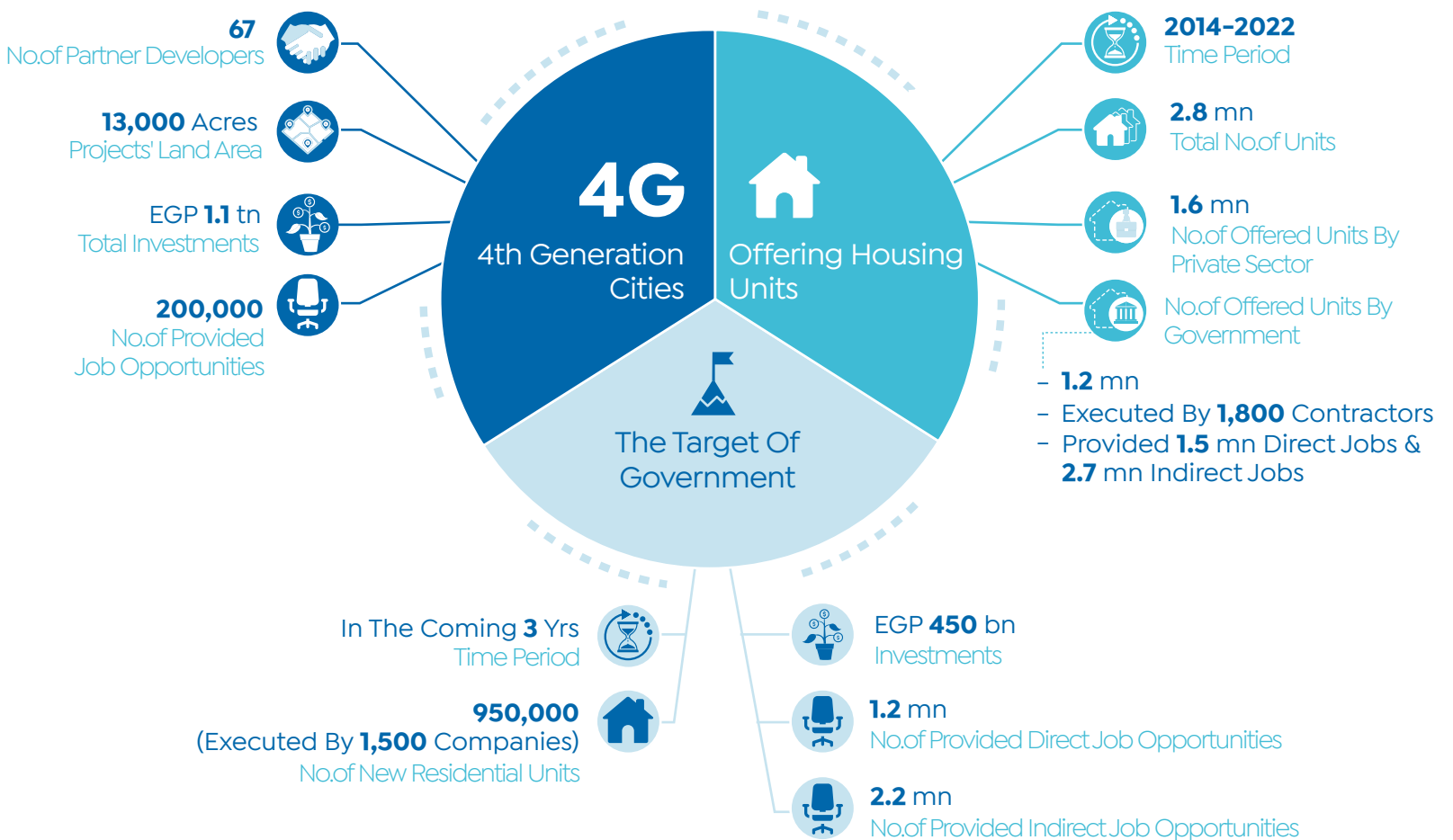


REAL ESTATE

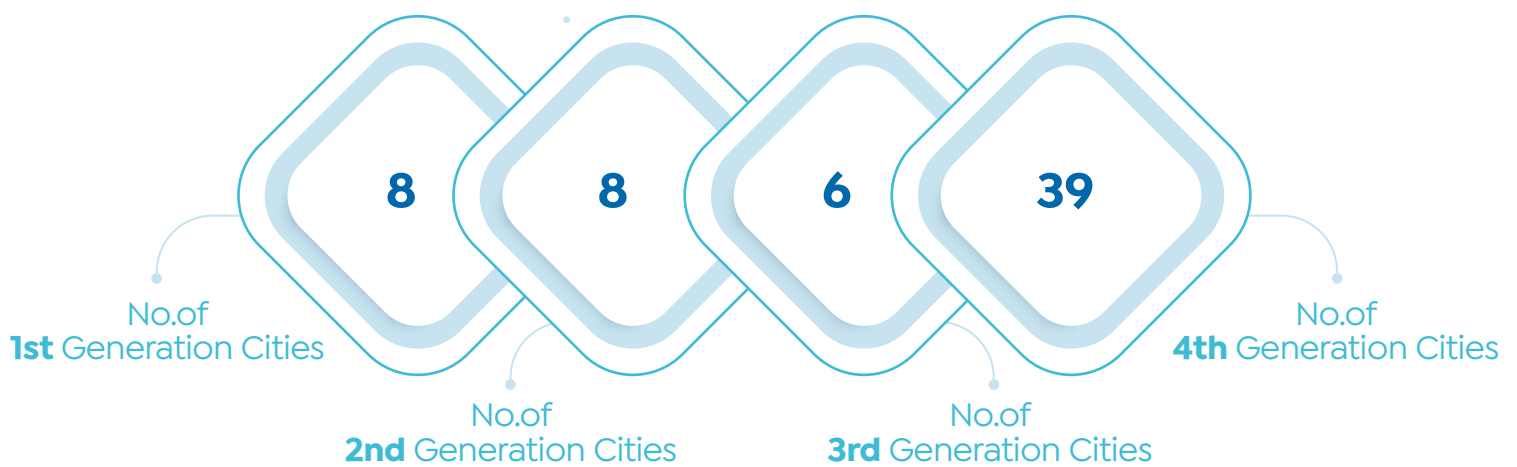
MARKET
UPDATES

01 | REAL ESTATE MARKET UPDATES 2022

PARTNERSHIP WITH PRIVATE SECTOR



NEW CITIES IN EGYPT



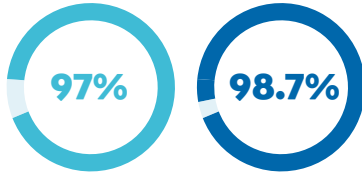
Source: Cabinet & NUCA

POTABLE WATER & SANITATION PROJECTS' ACHIEVEMENTS

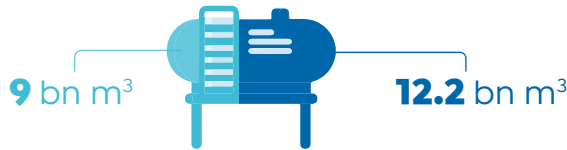
2014 2022

Potable Water Projects

● Coverage Rate



● Capacity Per Year



● Total Length Of Water Networks

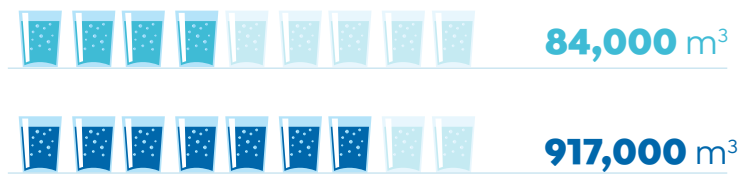


Water Desalination Projects

● No. of Plants



● Capacity Per Day



● Targeted Plants

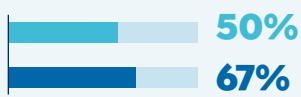
96

● Targeted Capacity

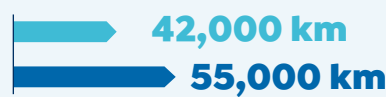
1.44 mn m³/Day

Sanitation Projects

● Coverage Rate



● Total Length Of Sanitation Networks



● Coverage Rate In Villages (Hayah Karima Initiative)



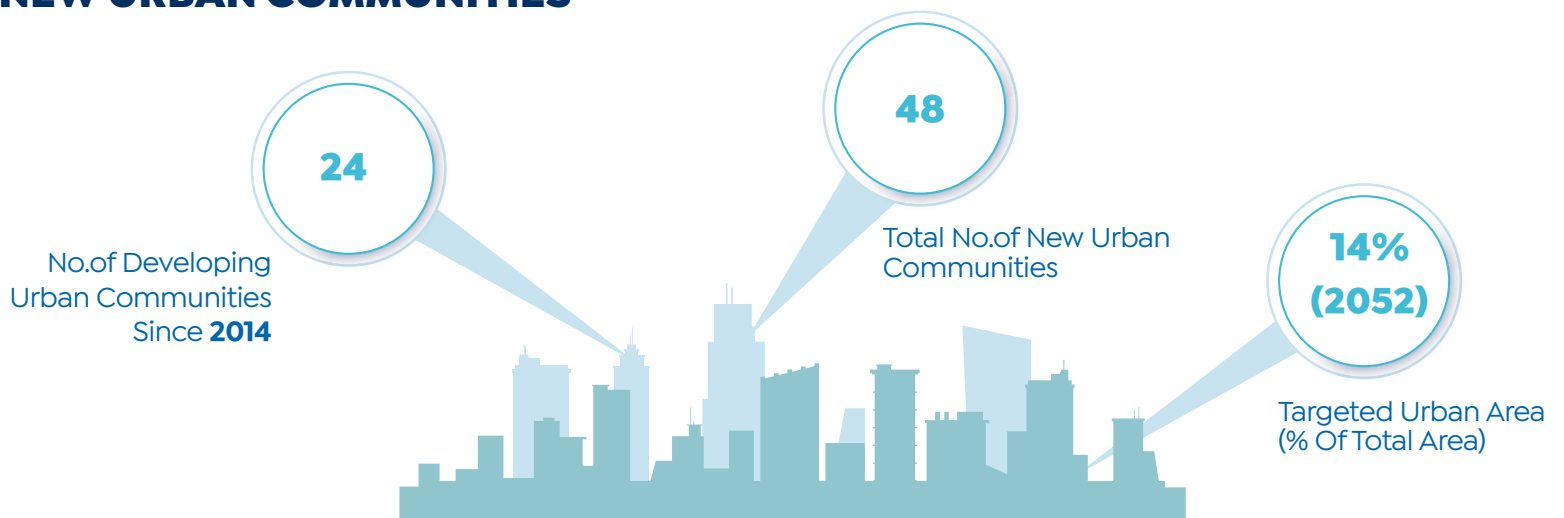
● Capacity Per Year



● Targeted Coverage Rate In The Villages



NEW URBAN COMMUNITIES





Source: NUCA & Cabinet

HAYAH KARIMA INITIATIVE


| Assiut Governorate



- 

Abu-Tig, El-Fath, Abnoub, Sahel Selim, Sedfa, Dayrut & Manfalut
Location
- 

35
No.of Local Units
- 

150
No.of Villages
- 

351
No.of Executed Projects

Supply Volume

- **35** Citizen Service Complexes (Offering **7** Services)
- **35** Agricultural Service Complexes
- Technology Center
- Constructing **12** Youth Centers
- Upgrading **70** Youth Centers
- Constructing **71** Medical Units
- Upgrading **27** Medical Units
- Constructing **33** Ambulance Points
- Upgrading **6** Ambulance Points
- Constructing & Upgrading **167** Bridges
- Development of Electricity Networks
- Constructing **20** Housing Buildings "Sakan Kareem"
- Others

| Beni Suef Governorate



Biba & Nasser
Location



66
No.of Villages



12
No.of Local Units



87
No.of Executed Projects

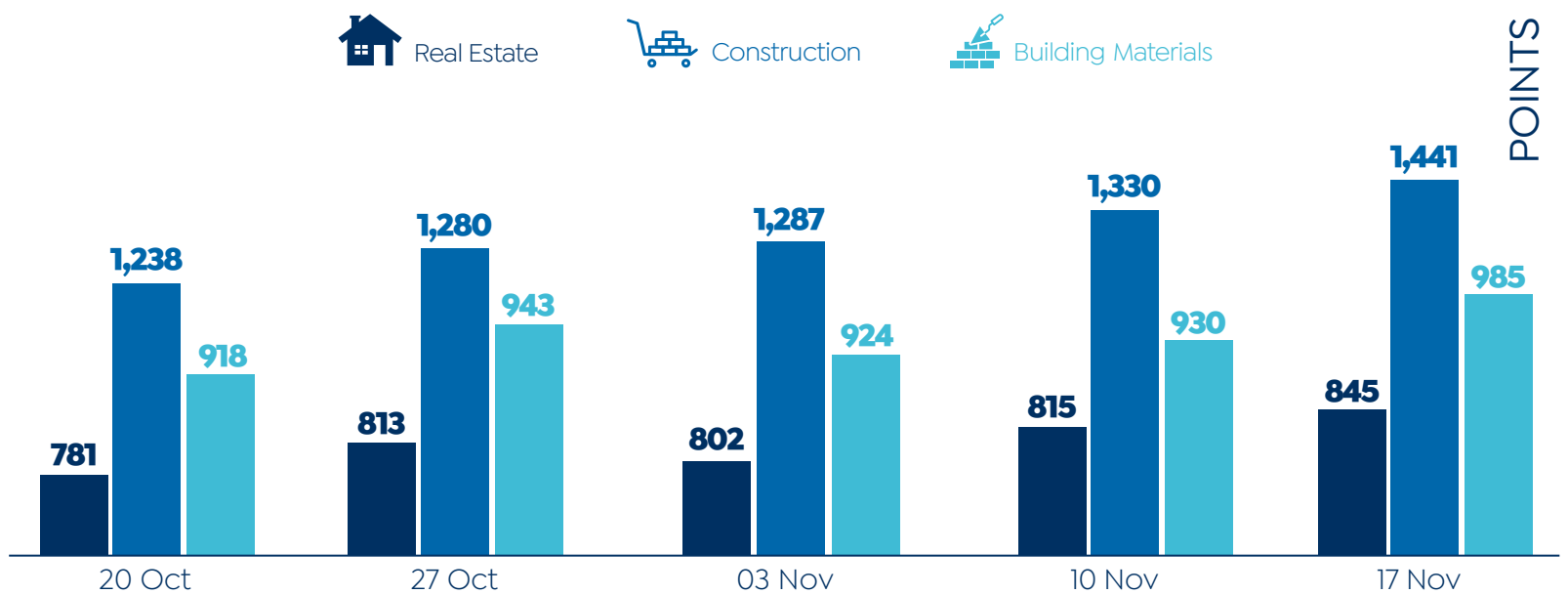
Supply Volume

- **12** Citizen Service Complexes (Offering **7** Services)
- **12** Agricultural Service Complexes
- Technology Center
- Constructing **8** Youth Centers
- Upgrading **20** Youth Centers
- Constructing **35** Medical Units
- Upgrading **7** Medical Units
- Constructing **10** Ambulance Points
- Upgrading **4** Ambulance Points
- Constructing & Upgrading **38** Bridges
- Development of Electricity Networks
- Others

PRICES OF CONSTRUCTION MATERIALS (EGP)



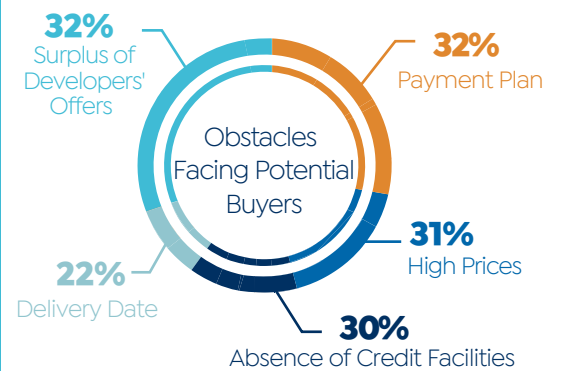
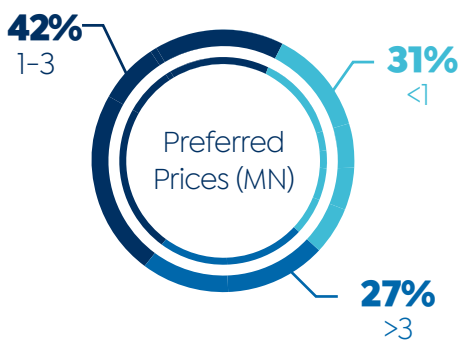
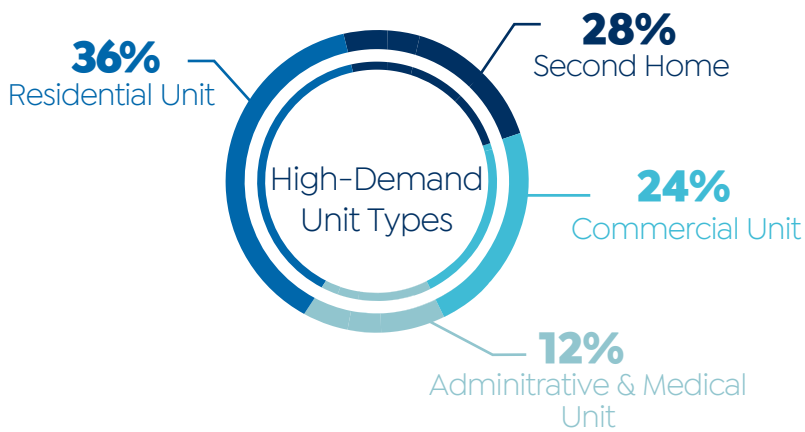
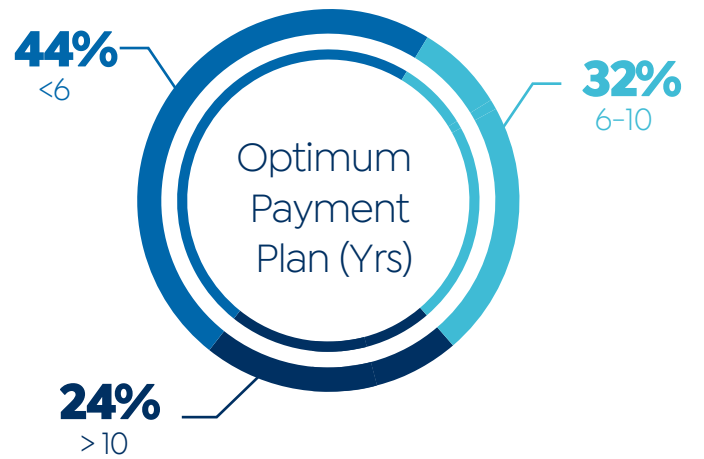
REAL ESTATE & CONSTRUCTION // PERFORMANCE OF STOCK MARKET INDEXES IN EGYPT



Source: Ministry of Housing, Utilities & Urban Communities & Egyptian Exchange (EGX)

MONTHLY SURVEY

Purchasing Power



Source: Invest-Gate R&A



**NEW
CITIES**
UPDATE

02 | NEW CITIES UPDATES 2022

UPDATES ON CAPITAL GARDENS

| Housing For All Egyptians

 **200**
NO. OF BUILDINGS

 **4,800**
NO. OF HOUSING UNITS

 **Underway**
STATUS

UPDATES ON NEW OCTOBER CITY

| Housing For All Egyptians

 **West Airport**
LOCATION

 **8,136**
NO. OF EXECUTED UNITS

 **35,496**
NO. OF UNITS UNDERWAY

 **EGP 9 bn**
COST

UPDATES ON 6TH OF OCTOBER

| Middle-Income Housing Axis

 **Residential Industrial Area**
LOCATION

 **70 Acres**
AREA

 **85**
NO. OF BUILDINGS

 **2,040**
NO. OF HOUSING UNITS

 **68%**
COMPLETION RATE

UPDATES ON OBOUR CITY

| Social Housing

 **2nd Neighbourhood**
LOCATION

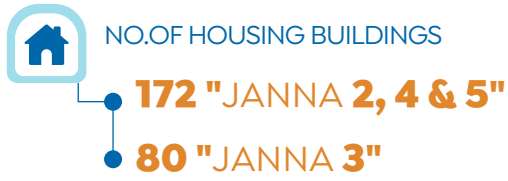
 **32**
NO. OF BUILDINGS

 **616**
NO. OF HOUSING UNITS

 **90 & 132 m²**
UNIT AREA

UPDATES ON SHEIKH ZAYED CITY

| JANNA



Underway With Very Advanced Completion Rate STATUS

UPDATED ON NEW SUEZ CITY

| Housing For All Egyptians



UPDATED ON EL WADI EL GEDID

| Dorat El-Wadi Project



UPDATES ON NEW SOHAG CITY

| Housing For All Egyptians





**PRIVATE
REAL ESTATE
PROJECTS**
UPDATE

03 | PRIVATE REAL ESTATE PROJECTS UPDATES 2022



NEW COASTAL PROJECTS

NEW PROJECT (NAME: N/A)

Developer: Concrete Plus



LOCATION

Sidi Henish,
North Coast



AREA

325 Acres



EXPECTED COST

EGP **8** bn



EXPECTED SALES

EGP **20** bn



NO.OF UNITS

1,300

LAZULI

Developer: Rekaz Developments



LOCATION

Hurghada



AREA

40,000 m²
BUA: **20%** Of
Project Total Area



TOTAL INVESTMENTS

EGP **250** mn

FACILITIES

- Clubhouse
- Swimming Pools
- Sports Track
- Central Park
- Commercial spaces
- Hotel
- Gym & Spa

THE CYAN

Developer: Empire State Developments



LOCATION

Ras Sedr City



AREA

14 Acres



NO.OF UNITS

473



UNITS TYPE

Twin Houses,
Studios & Chalets

FACILITIES

- Swimming Pools
- Kite Surfing
- Central Park
- Hotel
- Cafes & Restaurants



NEW COMPLEX PROJECTS

INNOVIEW

Developer: NCB Developments



LOCATION

NAC



INVESTMENTS

EGP **750** mn



TARGETED SALES OF PHASE I

EGP **350** mn

SUPPLY VOLUME

- 4** Underground, Ground & **14** Floors
- Floors **(1-3)** For Commercial Purposes
- Floors **(4-14)** For Administrative Purposes

Source: Developers' Official Statements

CENTRAL AVENUE

Developer: Mabany Edris For Real Estate Investment

 LOCATION Sheikh Zayed	 AREA 6,200 m²	 INVESTMENTS EGP 235 mn
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SUPPLY VOLUME

- Commercial, Administrative & Medical Units
- Garage, Ground & **2** Floors
- Include **14** Clinics, **24** Administrative Offices & **13** Commercial Units
- Cafes, Banks, Restaurants, Shops & Bazaars

RIVOLI

Developer: Anchor Developments

 LOCATION NAC	 AREA 10,815 m²	 INVESTMENTS EGP 3 bn
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SUPPLY VOLUME

- Commercial & Administrative Units
- Ground & **3** Floors
- Ground Floor** For Commercial Purposes
- 2nd & 3rd** Floor For Administrative Purposes

 **June-2025**
DELIVERY DATE

THE CORE MALL

Developer: Memaar Al-Ashraaf

 LOCATION Lotus Area, New Cairo	 AREA 3,500 m²	 INVESTMENTS EGP 300 mn	 EXPECTED SALES EGP 500 mn	 LAUNCHING DATE Q4 2022
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Upwyde Developments's Projects




PRK VIE

 LOCATION 5th Settlement, New Cairo	 AREA 19,000 m²
 INVESTMENTS EGP 3 bn	 EXPECTED SALES EGP 4.5 bn

SUPPLY VOLUME

- Commercial, Administrative & Medical Units
- Unit Area: **50 - 55 m²**

IT

 LOCATION 5th Settlement, New Cairo	 BUA OF PHASE I 12,000 m²	 MARKET VALUE EGP 1 bn
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SUPPLY VOLUME

- Commercial & Administrative Units
- Ground & **4** Floors
- No. of Phases: **2**

Source: Developers' Official Statements



NEW RESIDENTIAL PROJECTS

PIONEER AVENUE

Developer: Global Pioneers


LOCATION
Sheikh Zayed


INVESTMENTS
EGP **2 bn**

Housing & Development Properties Company's Projects

TERRACE


LOCATION
Sheikh Zayed


NO.OF HOUSING UNITS
700


31 Acres
BUA: **16%** Of Project Total Area
AREA

PARK VALLEY


LOCATION
New Sheikh Zayed


AREA
21,000 m²


NO.OF VILLAS
26


NO.OF TWIN HOUSES
8


UNIT AREA
258-300 m²



PROJECTS UNDERWAY

TAJ CITY

Developer: Madinet Nasr Housing and Development (MNHD)


LOCATION
New Cairo


AREA
5.3 mn m²

Lake Park


UNIT AREA
58-200 m²


DELIVERY DATE
Within **18 Months**

PARAGON 1

Developer: PARAGON Developments


LOCATION
NAC


BUA
23,316 m²


NO.OF FLOORS
Ground & **7 Floors**

 The Project Was Sold Completely While Under Construction
STATUS

ICONIC TRINITY COMPLEX (ITC)

Developer: Dahab Development



LOCATION
MU-23, NAC



AREA
25,000 m²



BUA
2,450 m² Per Floor



SALES RATE
70% For Phase I & II

SUPPLY VOLUME

- Ground & **9** Floors
- **2** Basements
- **16,000** m² Garage (Capacity: **600** Cars)

LA VITA NORTH COAST

Developer: La Vita Development



LOCATION
North Coast



ACHIEVED SALES
EGP **200** mn



DELIVERY DATE
Summer **2023**

SUPPLY VOLUME

- No. of Units: **350**
- Unit Area: **50 - 105** m²
- Swimming Pools, Aqua Parks, Shopping Mall & Landscape



Project Marketing Rate: **65%**
Construction Rate: **92%**

STATUS

Ora Developer's Projects

ZED EAST



LOCATION
Between New
Cairo & NAC



AREA
360 Acres



407
NO. OF RESIDENTIAL UNITS (PHASE I)



Villas, Semi-Detached Houses,
Townhouses & Chalets
UNITS TYPE

SILVERSANDS



LOCATION
North Coast

SUPPLY VOLUME

- Five-Star Hotel
- Villas, Beach Houses & Chalets

TRIO V TOWER

Developer: Nakheel Developments



LOCATION
NAC



AREA
7,000 m²



BUA
2,100 m²



The Company Starts Preparations For
Concrete Works
STATUS

MAKADI HEIGHTS

Developer: Orascom Development



LOCATION
Hurgada



AREA
3.75 mn m²

205 PROJECT

Developer: Arkan Palm


LOCATION
Sheikh Zayed


AREA
205 Acres+

SUPPLY VOLUME

- Commercial, Administrative, Medical & Residential Units
- Administrative Unit Area: 70 - 80 m²

 The Company Launches New Phase Of Offices & Clinics
STATUS

VIVID BUSINESS TOWER

Developer: IHD Developments


LOCATION
Downtown, NAC


INVESTMENTS
EGP 700 mn

SUPPLY VOLUME

- Commercial & Administrative Units
- Ground & 14 Floors

 80%
PROJECT MARKETING RATE

Akadia Developments's Projects

PAGODA BUSINESS TOWER


LOCATION
CBD District, NAC


ACHIEVED SALES
EGP 500 mn


SALES RATE
60%


DELIVERY DATE
End-2025

PAGODA BUSINESS COMPLEX


LOCATION
NAC


ACHIEVED SALES
EGP 400 mn


SALES RATE
90%


DELIVERY DATE
End-2023


INVESTMENTS
EGP 1 bn

VOLCANO MALL

Developer: IMS Investment and Management Solutions


LOCATION
5th Settlement,
New Cairo


AREA
3,000 m²

SUPPLY VOLUME

- Commercial & Medical Units
- 2 Basement, Ground & 2 Floors
- 3,375 m² Hypermarket & 3,375 m² Parking For Rent
- 30 Commercial Units & 16 Medical Units

VALORE EL THAWRA

Developer: El Riyad Castle Company


LOCATION
Al-Thawra Street,
Cairo


AREA
28,800 m²

 Commercial, Administrative, Medical,
Residential & Hotel Units
UNITS TYPE

 Within 3 Yrs
DELIVERY DATE

Source: Developers' Official Statements

DELTA LANDMARK

Developer: Stones District



LOCATION

Monufia Governorate

Phase 1



AREA

10,171.24 m²

SUPPLY VOLUME

- Ground & 4 Floors
- Ground & 1st Floors Include 102 Commercial Units With An Area Of 15,818.34 m²
- 2nd, 3rd & 4th Include 279 Units With An Area Of 31,753.2 m²

PIER MALL

Developer: Dolmen Developments



LOCATION

NAC



AREA

3,000 m²



BUA

6,500 m²



INVESTMENTS

EGP 30 mn

SUPPLY VOLUME

- Ground, 1st & 2nd Floors For Commercial Units
- Last Floor For Administrative Units



Finishing Works: Underway
Project Marketing Rate : 65%

STATUS

Ebny Real Estate Development's Projects

GREEN AVENUE



LOCATION

New Sohag



AREA

20 Acres



INVESTMENTS

EGP 1 bn



NO.OF RESIDENTIAL BUILDINGS

31



NO.OF VILLAS

20

WESTWAY



LOCATION

New Sohag



AREA

10,000 m²

SUPPLY VOLUME

- Includes Brands, Restaurants, Kids' Area, Medical Clinic & Other Services

PLAZA BUSINESS COMPLEX

Developer: Global Pioneers



LOCATION

NAC



TOTAL COST

EGP 1 bn

SUPPLY VOLUME

- Workspace Solutions, Virtual Offices & Coworking Spaces

MOUNTAIN VIEW 4

Developer: Mountain View



LOCATION

6th Of October



AREA

47 Acres



TOTAL INVESTMENT

EGP 1 bn

Source: Developers' Official Statements

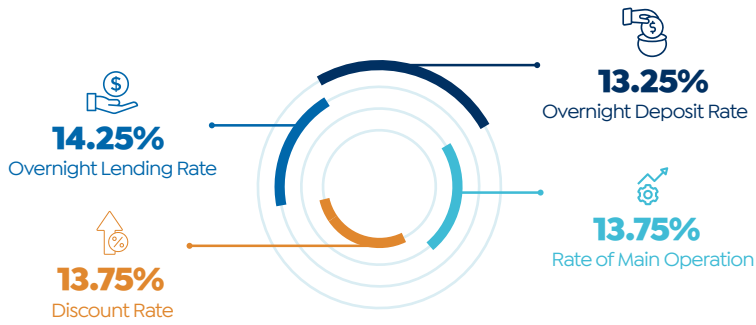


ECONOMIC SNAPSHOT

04 | ECONOMIC SNAPSHOT UPDATES 2022



INTEREST RATES



* MPC Meeting Was Held On Oct 27



MONEY SUPPLY (EGP MN)



DOMESTIC LIQUIDITY (EGP MN)



ANNUAL HEADLINE INFLATION



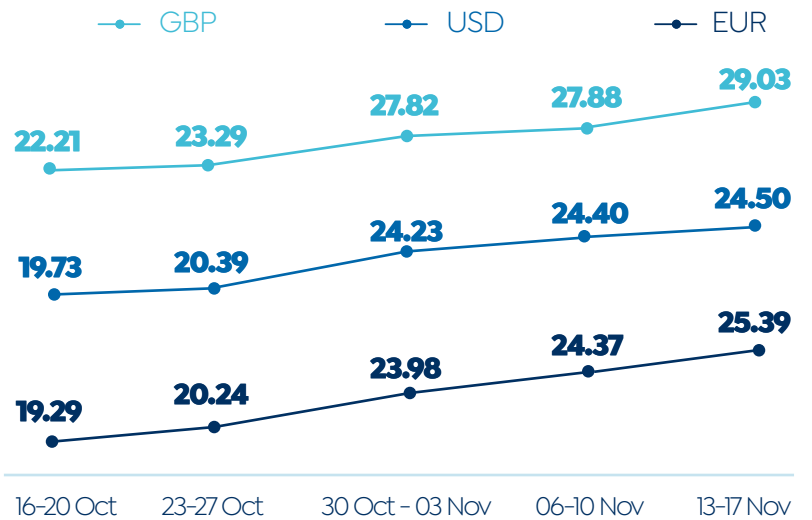
NET INTERNATIONAL RESERVES (USD BN)



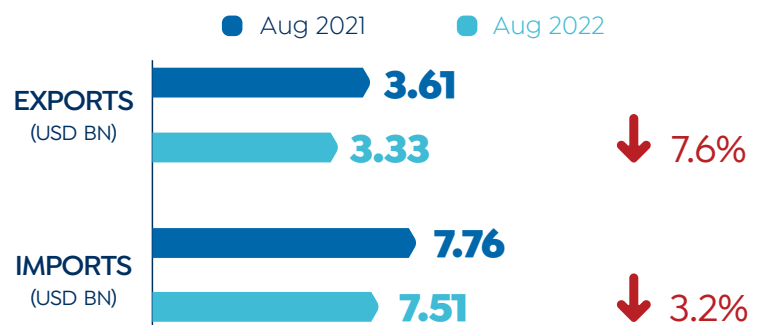
PURCHASING MANAGERS' INDEX (PMI)



EXCHANGE RATES



TRADE DEFICIT (USD BN)

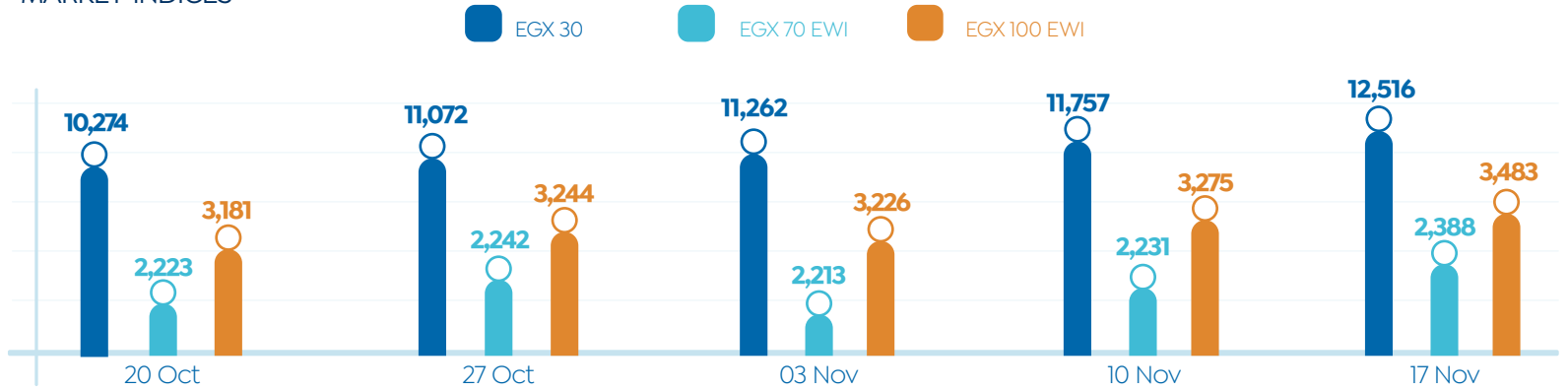


Source: IHS Markit, CAPMAS, CBE & FEDCO

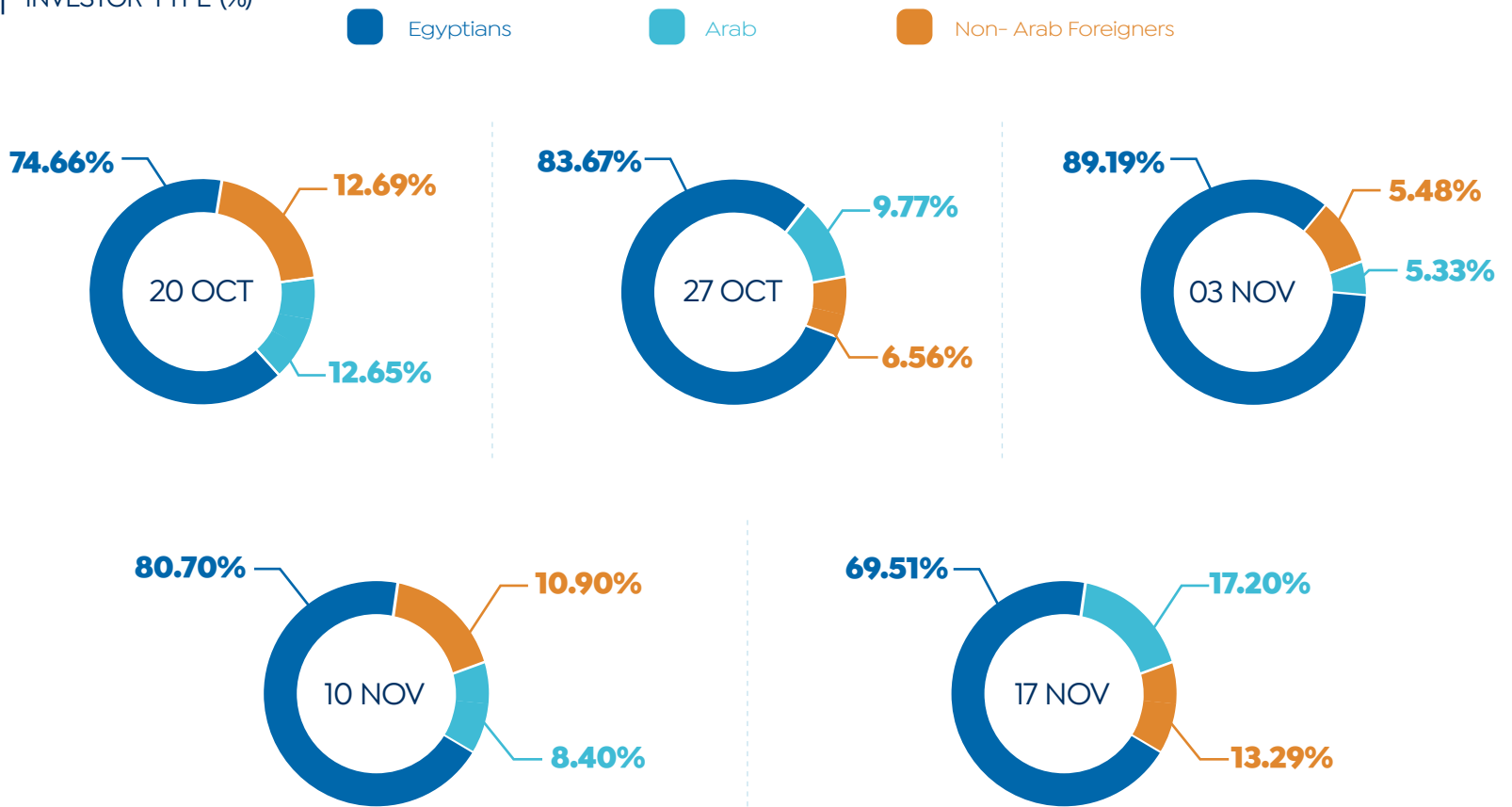


CAPITAL MARKET INDICATORS

MARKET INDICES

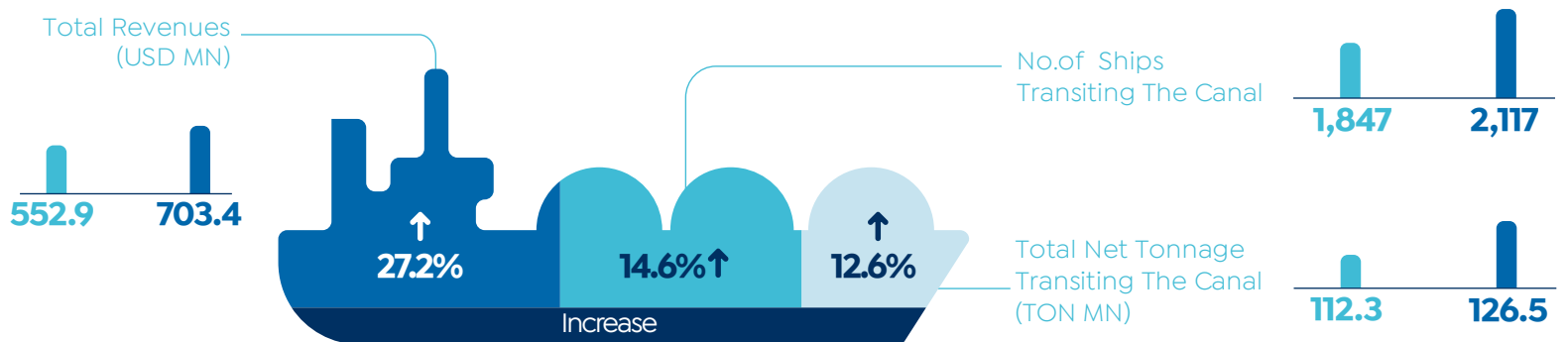


INVESTOR TYPE (%)



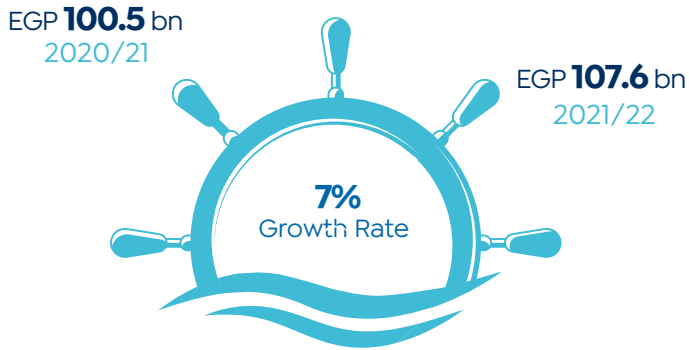
SUEZ CANAL

Oct 2021 Oct 2022



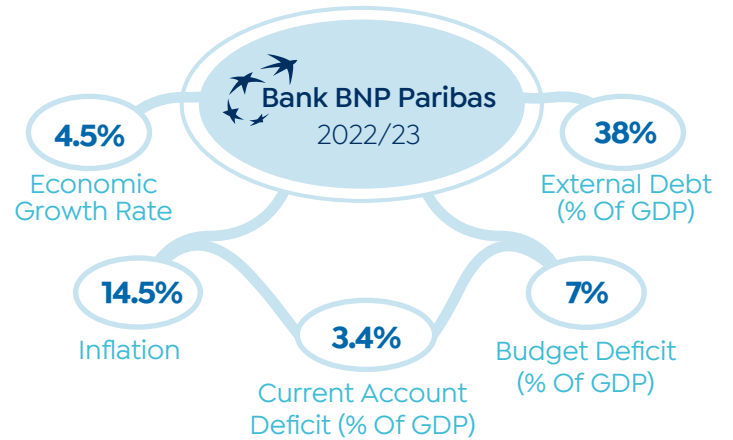
Source: EGX & Suez Canal Authority

GDP OF SUEZ CANAL SECTOR

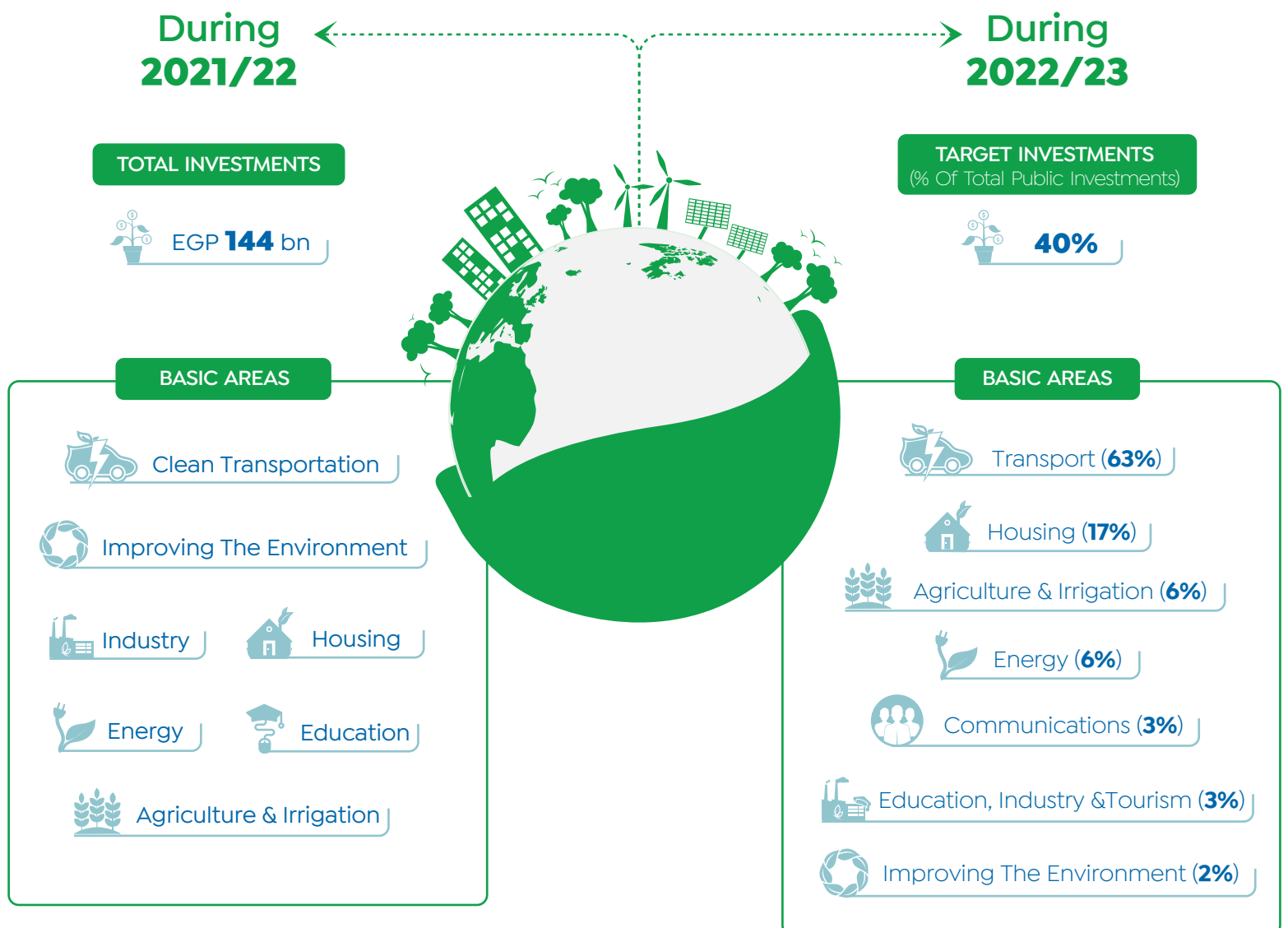


\$ The Target Of FY 2022/23 **EGP 118.4** bn

INTERNATIONAL INSTITUTIONS' EXPECTATION FOR THE EGYPTIAN ECONOMY



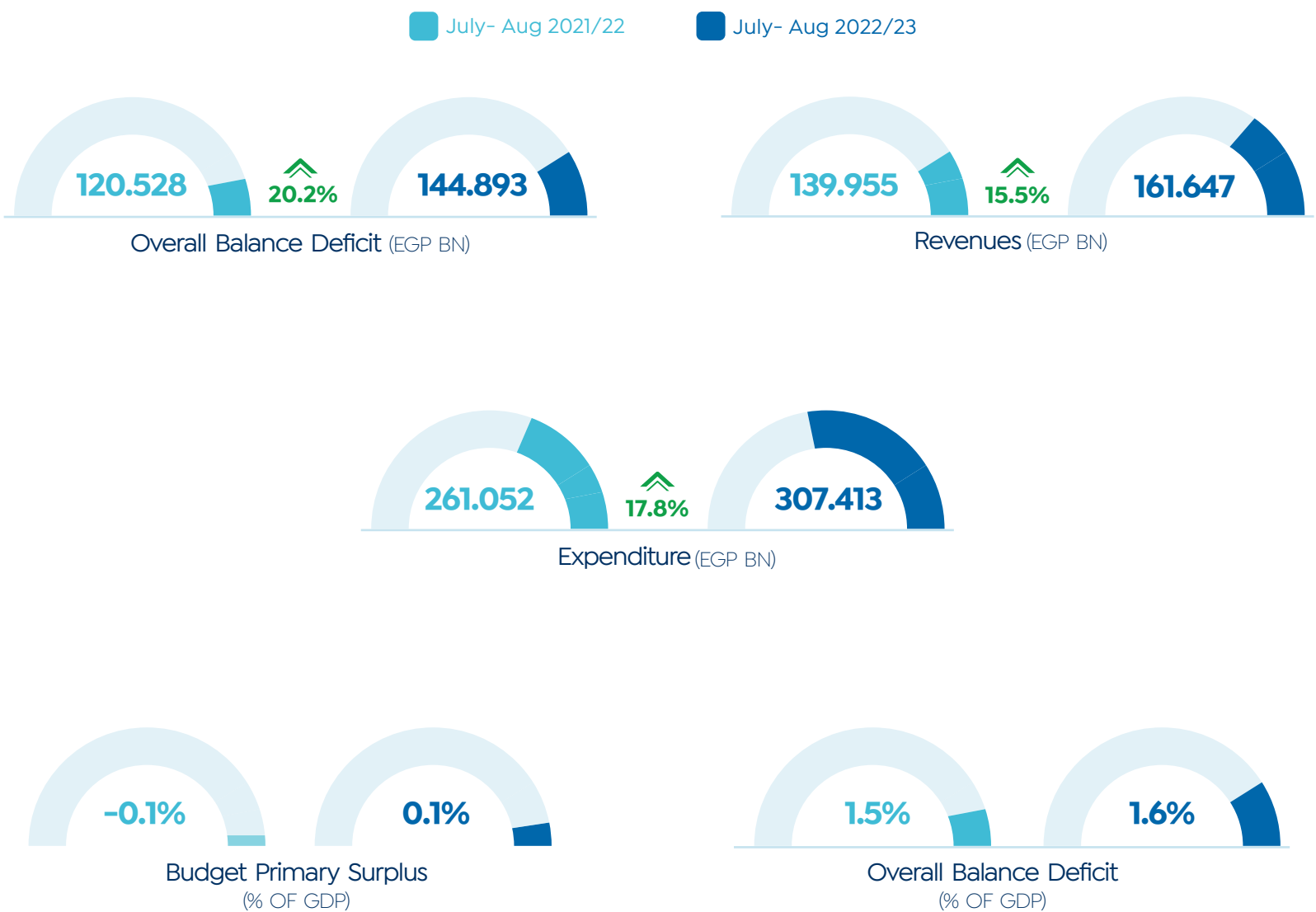
GREEN INVESTMENT PLAN



THE EVOLUTION OF EGYPTIAN ECONOMIC INDICATORS



FISCAL SECTOR PERFORMANCE



Source: MOF, MPED & Cabinet