

MARKET WATCH

DECEMBER 2025

1 DEC. - 31 DEC.

BY

YASSEN MAHMOUD
MOHAMED SAYED
ROLA MOUSTAFA



REAL ESTATE

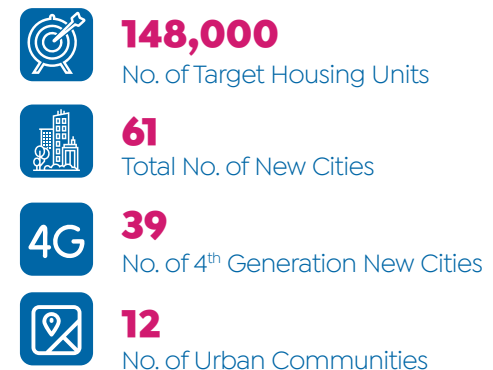
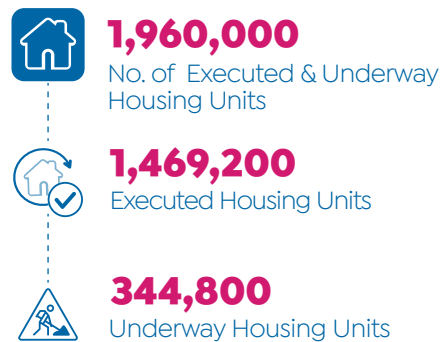
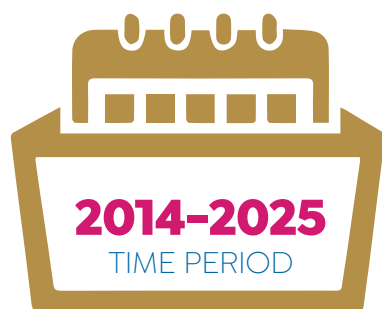
MARKET
UPDATES

01

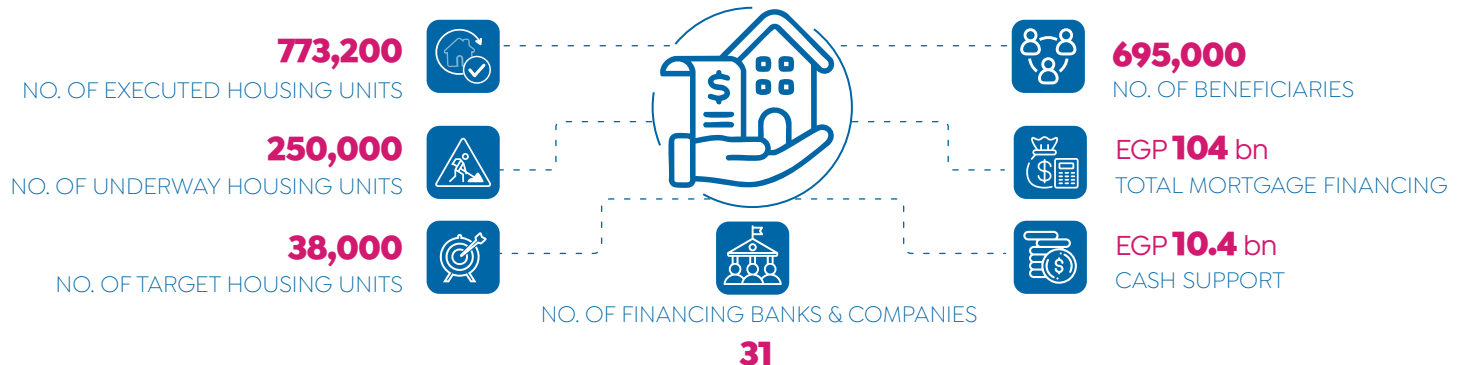
Updates 2025

REAL ESTATE MARKET

MINISTRY OF HOUSING, UTILITIES & URBAN COMMUNITIES ACHIEVEMENTS



HOUSING FOR ALL EGYPTIANS INITIATIVE



► FOR LOW-INCOME



► FOR MIDDLE-INCOME



Source: Cabinet

DIARNA PROJECT

60,008
No. of Target Housing Units



11,076 in **23** New Cities
No. of Underway Housing Units

GOZOR PROJECT FOR MIDDLE-INCOME



No. of Target Housing Units

20,016

YOUR HOME IN EGYPT INITIATIVE



No. of Underway Units

5,055 Housing Units
Phase I

5,364 Mixed-Use Units
Phase II

BEIT EL-WATAN INITIATIVE



No. of Allocated

37,517
Plots

3,089
Housing Units

41
Service Plots



No. of Target Units in **Mar.2026**

3,000 Mixed-Use Units
Phase III

POTABLE WATER & SANITATION PROJECTS



POTABLE WATER PROJECTS

2014

2025

DESIGNED
CAPACITY

24 mn m³/ Day

44 mn m³/ Day

ACTUAL
CAPACITY

24.7 mn m³/ Day

30.7 mn m³/ Day

COVERAGE
RATIO



SANITATION PROJECTS

2014

2025

DESIGNED
CAPACITY

10.9 mn m³/ Day

18.9 mn m³/ Day

ACTUAL
CAPACITY

10.5 mn m³/ Day

15.2 mn m³/ Day

COVERAGE
RATIO

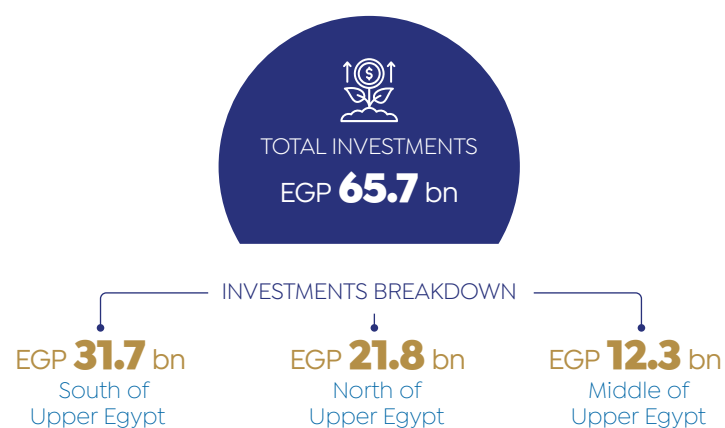


GREEN BUILDINGS INITIATIVE



UPPER EGYPT'S DEVELOPMENT

GOVERNMENT INVESTMENTS IN FY 2025/26



QENA GOVERNORATE

POTABLE WATER PROJECTS

13
No. of Projects

EGP 200 mn
Total Cost

100%
Coverage Rate

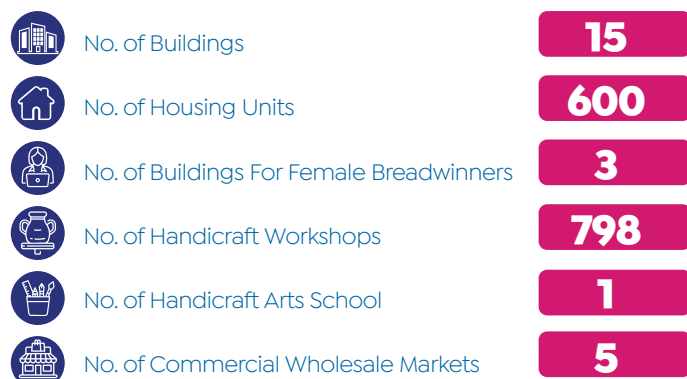
SANITATION PROJECTS

14
No. of Projects

EGP 1.3 bn
Total Cost

URBAN DEVELOPMENT IN CAIRO GOVERNORATE

HANDICRAFT INDUSTRIES COMPLEX



RAWDAT EL-SAYEDA 2



RAWDAT EL-SAYEDA 3



DEVELOPMENT OF WARRAQ ISLAND

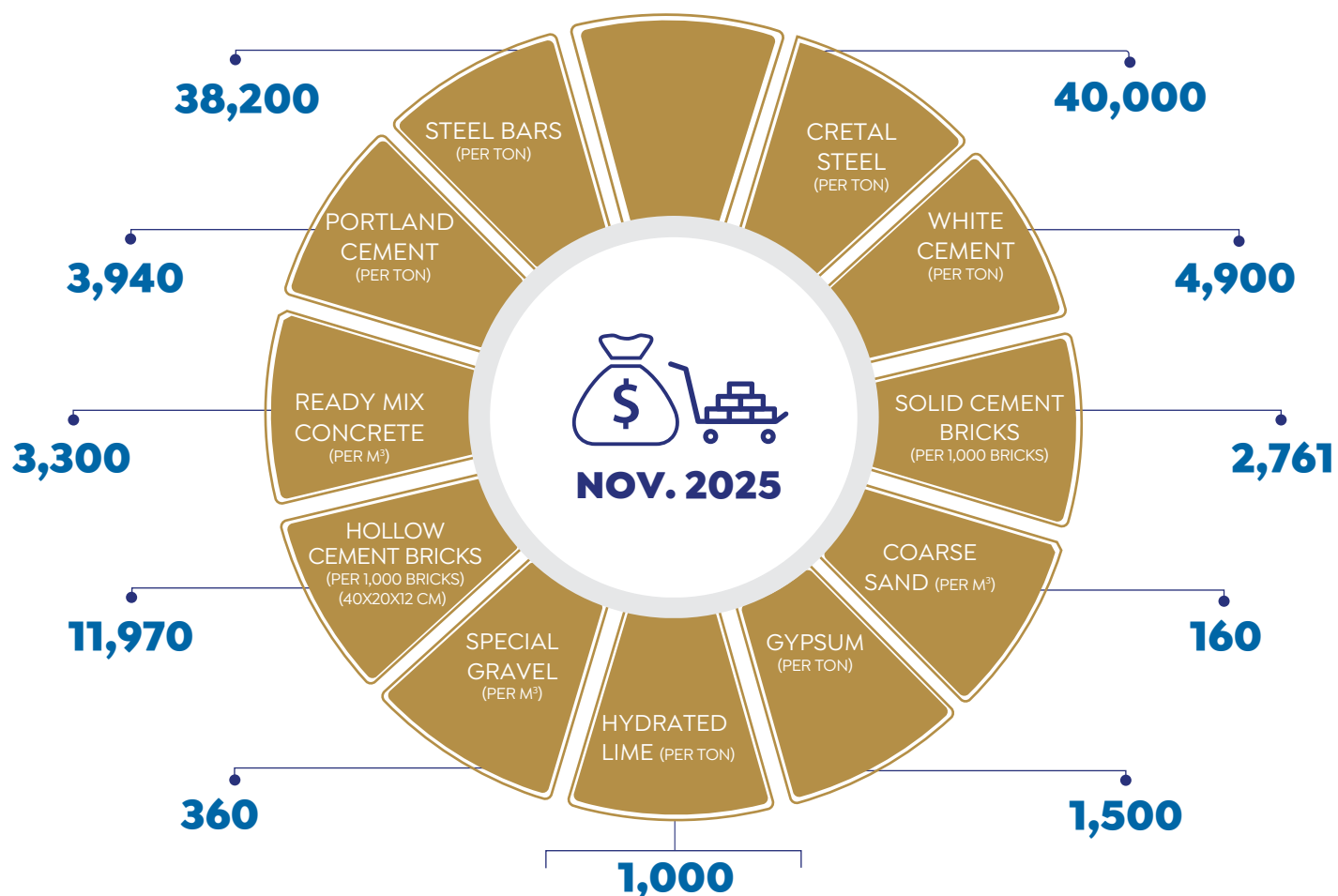
ALTERNATIVE HOUSING



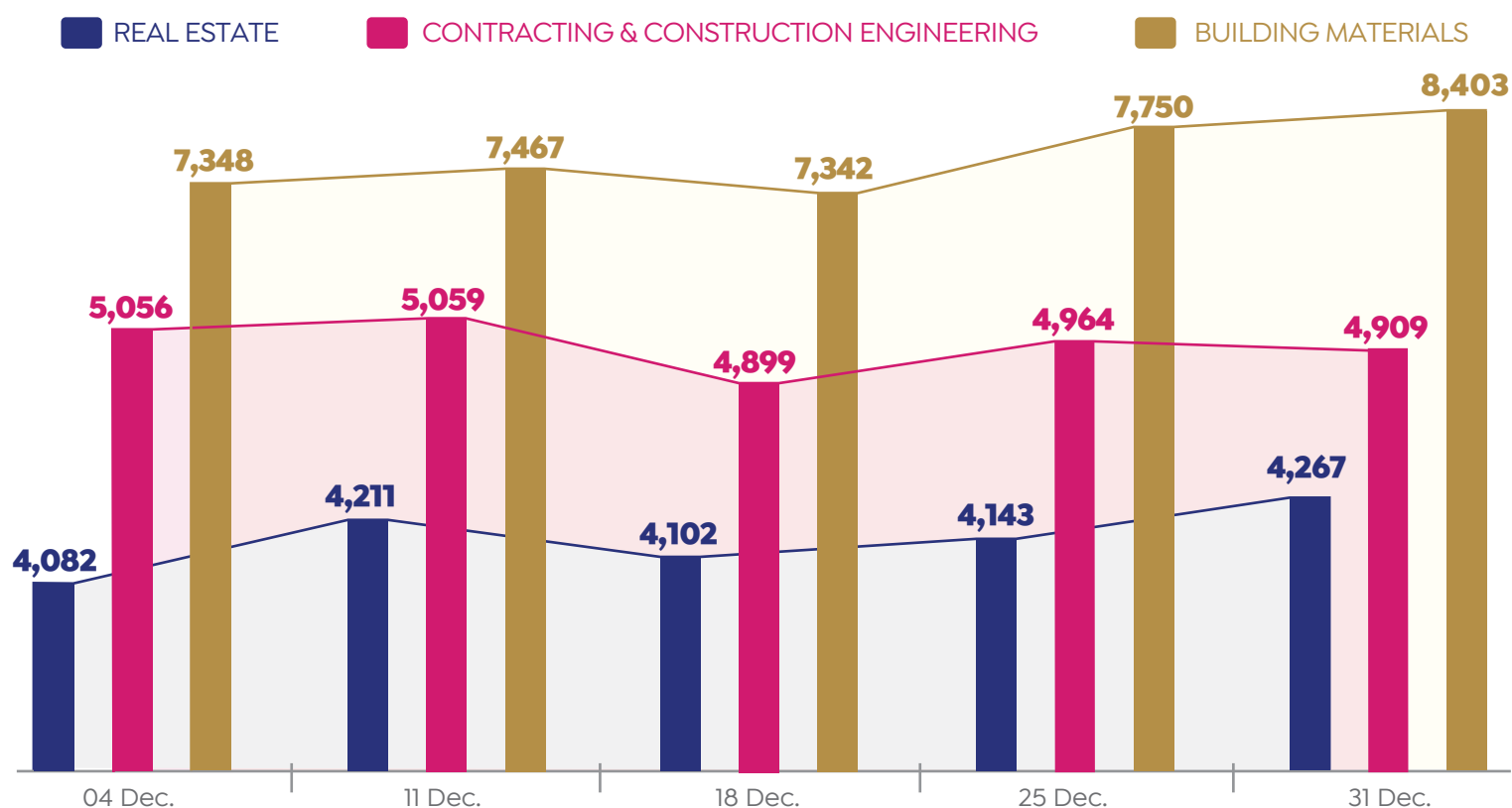
SERVICE FACILITIES

Services Complex Primary & Secondary School
Nursery Youth Center Commercial Center
Medical Unit

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)

CENTRAL BUSINESS DISTRICT

► 10 MIXED USE TOWERS



806,000 sqm
AREA



80-175 m
HEIGHT

► CRESCENT TOWERS



4 Connected Towers
NO. OF TOWERS



64 m
HEIGHT

► 5 RESIDENTIAL TOWERS



102,000 sqm
AREA



152-200 m
HEIGHT



1,700
NO. OF HOUSING UNITS

► ICONIC TOWER



266,000 sqm
AREA



400 m
HEIGHT



NO. OF FLOORS
40 Floors for Administrative Units
10 Floors for Hotel Apartments
(52 Apartments)
30 Floors for Hotel **(183 Rooms)**

R3



1,016 acres
AREA



24,130+
NO. OF HOUSING UNITS



151,360 sqm

COMMERCIAL & ADMINISTRATIVE ZONE AREA

697 Residential Buildings **(19,944 Housing Units)**

64 Mixed Residential Buildings **(2,560 Housing Units)**

328 Villas

157 Townhouses

NEW GARDEN CITY (R5)



885 acres
AREA



278
NO. OF RESIDENTIAL BUILDINGS



107
NO. OF MIXED USE BUILDINGS



633
NO. OF COMMERCIAL UNITS



22,567
NO. OF HOUSING UNITS

NEW ALAMEIN

HOUSING FOR ALL EGYPTIANS INITIATIVE


83

NO. OF BUILDINGS


1,992

NO. OF HOUSING UNITS

HERITAGE CITY


260 acres

AREA


70

NO. OF SERVICE BUILDINGS

LATIN AREA


398.79 acres

AREA


6

NO. OF ZONES


65

NO. OF HOUSING COMPLEXES


10,597

NO. OF HOUSING UNITS

MAZARINE


700 acres

AREA


7,956

NO. OF HOUSING UNITS



Chalets, Apartments & Villas

UNIT TYPES


285

NO. OF VILLAS

MARINA 8


179 acres

AREA


243

NO. OF BUILDINGS


917

NO. OF HOUSING UNITS



Chalets & Villas

UNIT TYPES



Underway

CURRENT STATUS

M8 BY THE LAKE


1,183

NO. OF HOUSING UNITS



Apartments & Villas

UNIT TYPES



Underway

CURRENT STATUS

CAPITAL GARDENS

HOUSING FOR ALL EGYPTIANS INITIATIVE

► FOR MIDDLE-INCOME


7,368

NO. OF HOUSING UNITS

► FOR LOW-INCOME (PHASE VI)


834

NO. OF BUILDINGS



Underway

CURRENT STATUS


20,016

NO. OF HOUSING UNITS

DIARNA PROJECT

► FOR MIDDLE-INCOME (PHASE I)

Mostaqbal Neighborhood
LOCATION**37**
NO. OF BUILDINGS

NEW CAIRO

JANNA

3rd Neighbourhood
LOCATION**365**
NO. OF BUILDINGS**8,760**
NO. OF HOUSING UNITS**359**
NO. OF DELIVERED BUILDINGS

SAKAN MISR

Fair Zone Area
LOCATION**364**
NO. OF BUILDINGS
1st Zone: **196**
2nd Zone: **149**
3rd Zone: **19**

DIARNA PROJECT

**34**
NO. OF BUILDINGS**104-154** sqm
UNITS AREA

DAR MISR

El-Andalos
LOCATION**70**
NO. OF BUILDINGS

BADR CITY

GREEN BUILDING

**112**
NO. OF BUILDINGS**2,688**
NO. OF HOUSING UNITSJun. **2025**
CONSTRUCTION BEGINNING DATEUnderway
CURRENT STATUSRESIDENCES FOR NAC'S EMPLOYEES
(ZAH RAT EL-ASSIMA)**295**
NO. OF BUILDINGS**7,080**
NO. OF HOUSING UNITS**202**
NO. OF EXECUTED BUILDINGS**93**
NO. OF UNDERWAY BUILDINGS15TH MAY CITY

HOUSING FOR ALL EGYPTIANS INITIATIVE

► FOR LOW-INCOME

El-Narges
LOCATION**465**
NO. OF BUILDINGS**11,160**
NO. OF HOUSING UNITS

SHEIKH ZAYED CITY

JANNA 4



34

NO. OF BUILDINGS



816

NO. OF HOUSING UNITS

NEW OBOUR CITY

HOUSING FOR ALL EGYPTIANS INITIATIVE

► GREEN BUILDING

| 13TH NEIGHBOURHOOD



180

NO. OF BUILDINGS



3,924

NO. OF HOUSING UNITS

| 37TH NEIGHBOURHOOD



143

NO. OF BUILDINGS



3,432

NO. OF HOUSING UNITS

10TH OF RAMADAN

HOUSING FOR ALL EGYPTIANS INITIATIVE

► FOR MIDDLE-INCOME



68

NO. OF BUILDINGS



1,632

NO. OF HOUSING UNITS



100,110 & 120 sqm

UNITS AREA



95%

COMPLETION RATE

NEW SOHAG CITY

HOUSING FOR ALL EGYPTIANS INITIATIVE



36th Neighbourhood

LOCATION



735 acres

AREA



54

NO. OF BUILDINGS



1,356

NO. OF HOUSING UNITS



Underway

CURRENT STATUS

► FOR MIDDLE-INCOME



49

NO. OF BUILDINGS



90 sqm

UNITS AREA

► FOR LOW-INCOME



5

NO. OF BUILDINGS



75 sqm

UNITS AREA

Source: NUCA & Cabinet



PRIVATE REAL ESTATE PROJECTS

UPDATE



Updates 2025

PRIVATE REAL ESTATE PROJECTS



NEW RESIDENTIAL PROJECTS / 4 PROJECTS

HOM

Developer: ZAYA Real Estate Development



6th of October City,
West Cairo
LOCATION



24 acres
AREA

PHASE I



400
NO. OF RESIDENTIAL
UNITS



60-170 sqm
UNITS AREA



EGP 1.5 bn
TARGET SALES

NASEEM COMPOUND

Developer: Golden Land Development



Sheikh Zayed
LOCATION



8.5 acres
AREA



EGP 5 bn
TOTAL INVESTMENTS



10
NO. OF RESIDENTIAL
BUILDINGS



Each Building: Ground & **4** Floors
NO. OF FLOORS



Within **3** Yrs
DELIVERY DATE

NEW PROJECT (NAME: N/A)

Developer: AlQamzi Developments



Mostakbal City, New Cairo
LOCATION



95 acres
AREA



EGP 50 bn
TOTAL INVESTMENTS



Villas, Apartment
Buildings & Townhouses
UNIT TYPES



Within **5** Yrs
COMPLETION DATE

CITRA RESIDENCE

Developer: Wealth Holding



New Sheikh Zayed City
LOCATION



30 acres
AREA



EGP 10 bn
TOTAL INVESTMENTS



Serviced Apartments,
Twin Houses, Townhouses
& Standalone Villas
UNIT TYPES



NEW MIXED-USE PROJECTS / 4 PROJECTS

GATE 9 MALL

Developer: Centro Real Estate



Obour City
LOCATION



3,000 sqm+
RETAIL SPACE



EGP **500** mn
INVESTMENTS



EGP **200** mn
TARGET SALES OF PHASE I



Commercial, Administrative
& Medical Units
UNIT TYPES



Basement, Ground
& **3** Floors
NO. OF FLOORS



UNITS AREA
Commercial: Starting from -> **26** sqm
Administrative & Medical: Starting from -> **20** sqm



Within **3** Yrs
DELIVERY DATE



Green Spaces, Restaurants, Cafes, Underground Parking
Garage, Elevators & Smart Security Systems
FACILITIES

NINETY 90

Developer: Perfect Developments



New Obour City
LOCATION



2,400 sqm
AREA



3,800 sqm
BUA



EGP **400** mn
INITIAL INVESTMENTS



Commercial, Medical
& Administrative Units
UNIT TYPES



End-**2027**
COMPLETION DATE

AXENT MALL

Developer: Project Gate Developments



South Academy, New Cairo
LOCATION



1,510 sqm
AREA



EGP **600** mn
TARGET SALES



2 Basement, Ground
& **3** Floors
NO. OF FLOORS



Commercial & Administrative Units
UNIT TYPES

KAVI

Developer: Karma Urban Development



New Cairo
LOCATION



Commercial,
Administrative &
Medical Units
UNIT TYPES



PROJECTS UNDERWAY / 9 PROJECTS

OPTIMA BUSINESS COMPLEX

Developer: Maqam for Urban Development



**Downtown,
New Capital (NC)**
LOCATION



2,400 sqm
AREA



13
NO. OF FLOORS



32
NO. OF COMMERCIAL UNITS



157
NO. OF ADMINISTRATIVE
OFFICES



45 sqm on Average
UNITS AREA

THE NOVELIST

Developer: Ghoneim Developments Group (GDG)



Mokattam
LOCATION



30 acres
AREA

LIFEWISE

Developer: Eons Developments



New Cairo
LOCATION



29 acres
AREA



EGP 10 bn+
TOTAL INVESTMENTS



EGP 1 bn+
ACHIEVED SALES



**Residential, Commercial
& Administrative Units**
UNIT TYPES



**Underground, Ground &
3 Floors**
NO. OF FLOORS OF
COMMERCIAL & ADMINI-
STRATIVE STRIP



UNITS AREA
Residential: **85-265 sqm**
Commercial: **75-1,000 sqm**
Administrative: **35-183 sqm**

SARAI

Developer: Madinet Masr



**Cairo-Suez Road
& Al-Amal Axis**
LOCATION



5.5 mn sqm
AREA



Apartments, S-Villas & Townhouses
UNIT TYPES

RAI VIEWS



80
NO. OF RESIDENTIAL BUILDINGS



EGP 1.2 bn
TOTAL INVESTMENTS



End-2027
COMPLETION DATE

RAI



EGP 1.45 bn
CONSTRUCTION WORK'S COST



95
NO. OF VILLAS



End-2027
COMPLETION DATE

TESLA RESIDENCE

Developer: Tesla Developments

6th of October City,
West Cairo
LOCATION**26** acres
AREAResidential, Commercial, Administrative,
Medical & Hotel Units
UNIT TYPES**98-184** sqm
RESIDENTIAL UNITS AREAPhase I is Sold out
CURRENT STATUSWithin **3** Yrs
DELIVERY DATE

VAL PLAZA MALL

Developer: Jawad Developments

6th of October City,
West Cairo
LOCATION**6,250** sqm
AREA**285**
NO. OF UNIT
Commercial Units: **100**
Administrative &
Medical Units: **185**Ground & **4** Floors
NO. OF FLOORSConstructions of The Project are Completed
CURRENT STATUS

RESIDENCE 8

Developer: Sky Abu Dhabi Developments

R8, New Capital (NC)
LOCATION**350**
NO. OF UNITS (PHASE I)

CITYGATE NEW CAIRO

Developer: Qatari Diar Egypt

New Cairo
LOCATION**8.5** mn sqm
AREAEGP **3.5** bn
CONSTRUCTION COSTUSD **12** bn+
TOTAL EXPECTED
INVESTMENTS**300**
NO. OF RESIDENTIAL UNITSWithin **2.5** Yrs
DELIVERY DATE

MORAY

Developer: Main Marks Developments

New Cairo
LOCATION**16.5** acres
AREA**50%**
SALES RATE**60%**
COMPLETION RATE
OF PHASE I



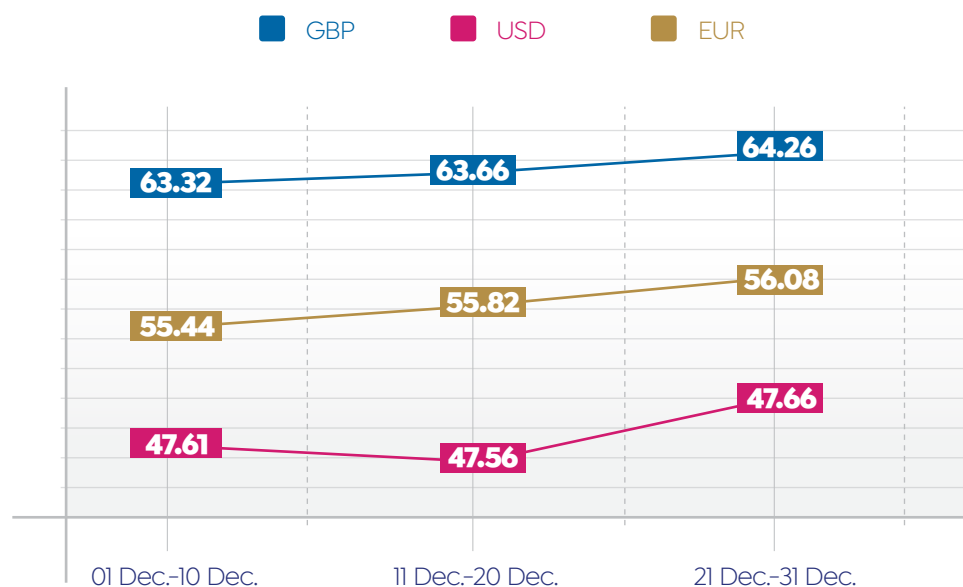
ECONOMIC SNAPSHOT



Updates 2025 ECONOMIC SNAPSHOT

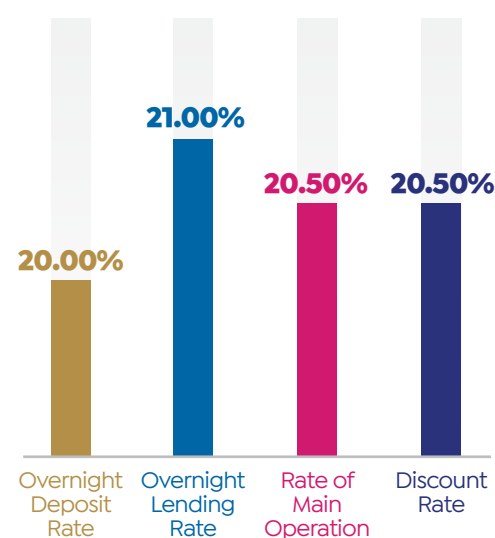


EXCHANGE RATES

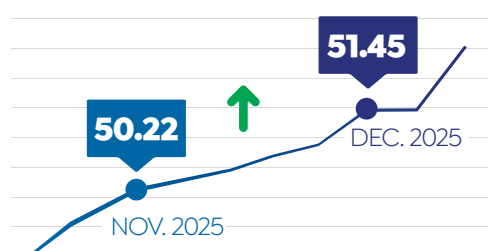


INTEREST RATES

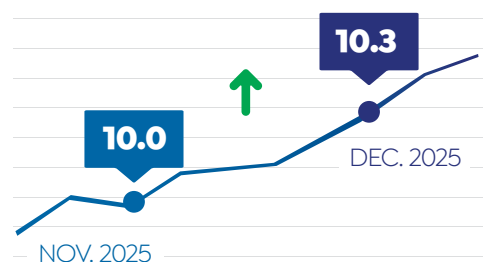
* MPC Meeting was Held on Dec. 25, 2025



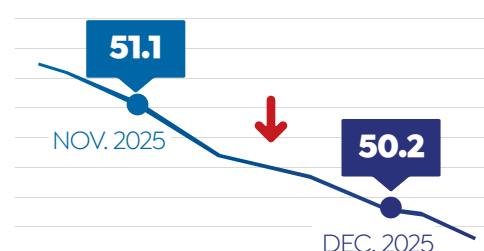
NET INTERNATIONAL RESERVES (USD BN)



ANNUAL HEADLINE INFLATION RATE (%)



PURCHASING MANAGERS' INDEX (PMI)



EGYPT CREDIT RATING



RATING

Caal

B

B

MOODY'S

S&P GLOBAL

FITCH

OUTLOOK

Positive

Stable

Stable

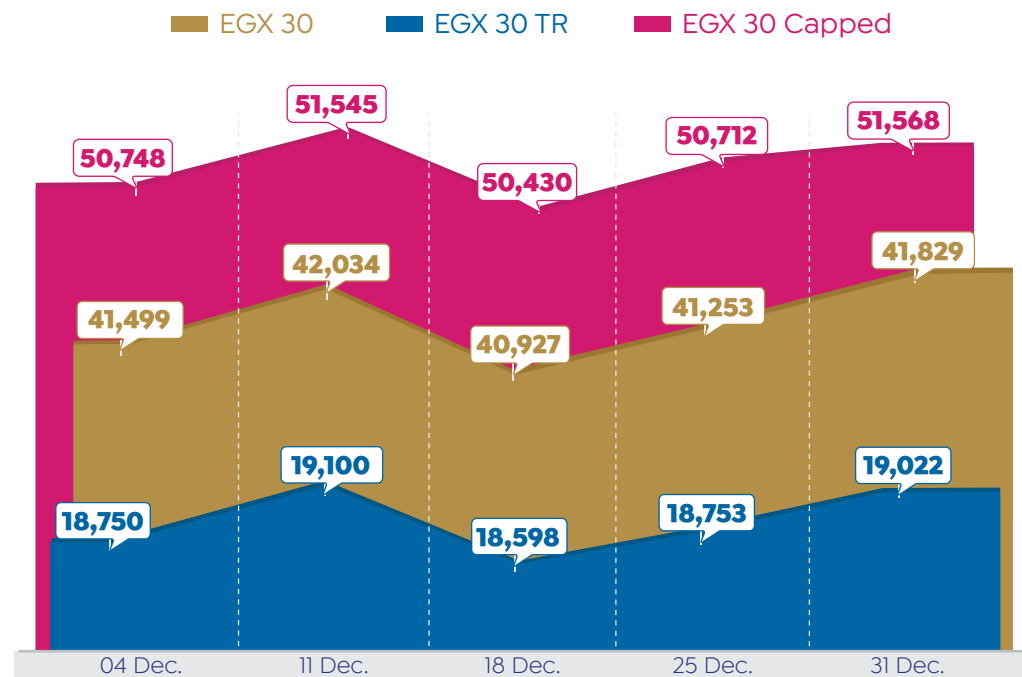
* According to Last Review Date on Feb. 19, 2025

* According to Last Review Date on Oct. 10, 2025

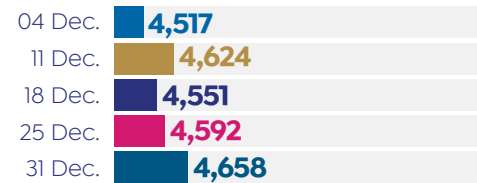
* According to Last Review Date on Oct. 10, 2025

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

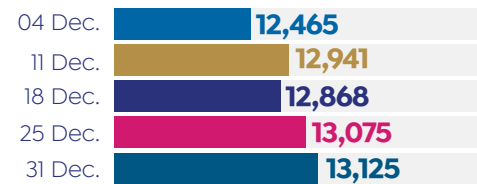
EGX INDICATORS



EGX 35 LV



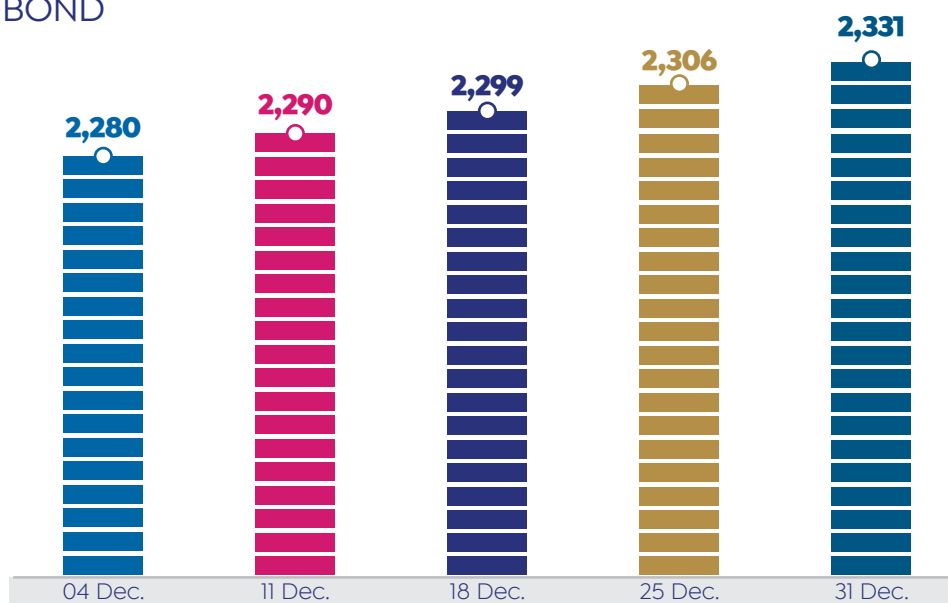
EGX 70 EWI



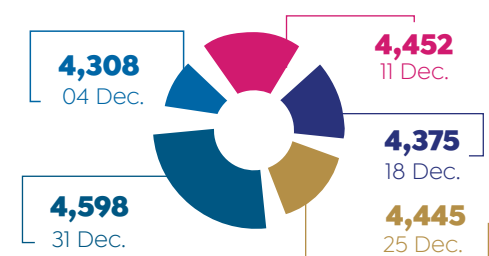
EGX 100 EWI



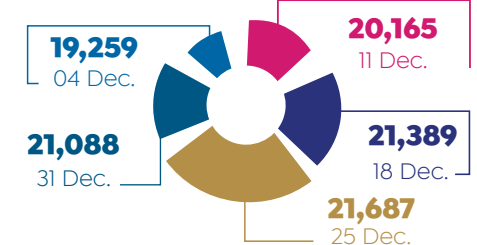
T-BOND



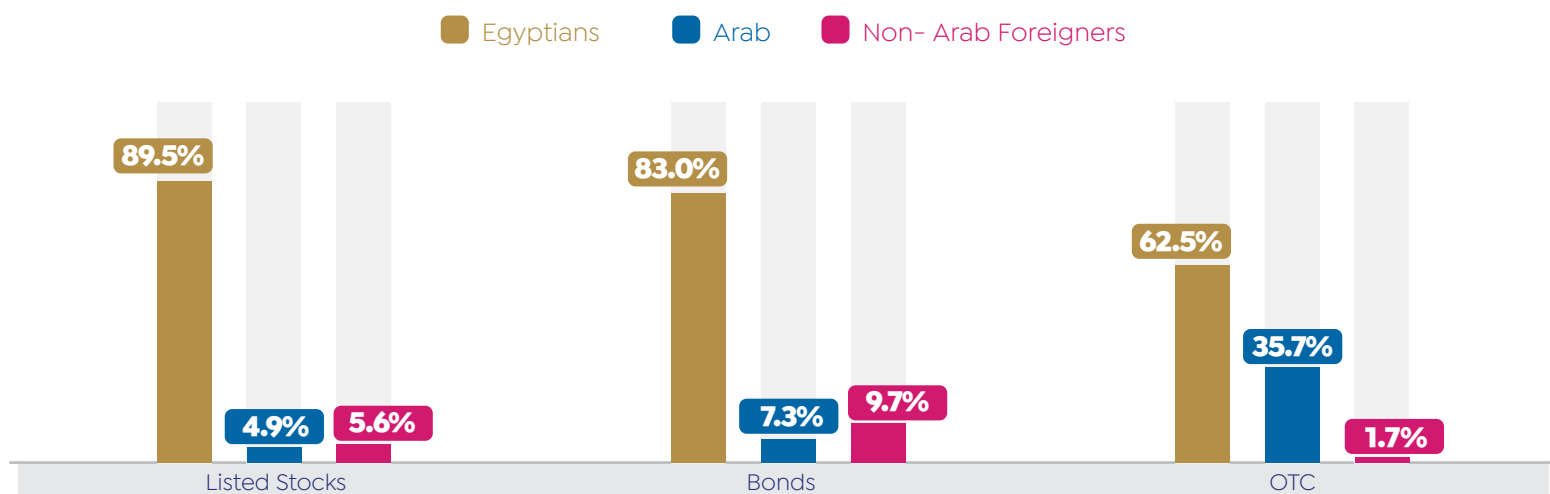
EGX 33 SHARIAH



TAMAYUZ



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

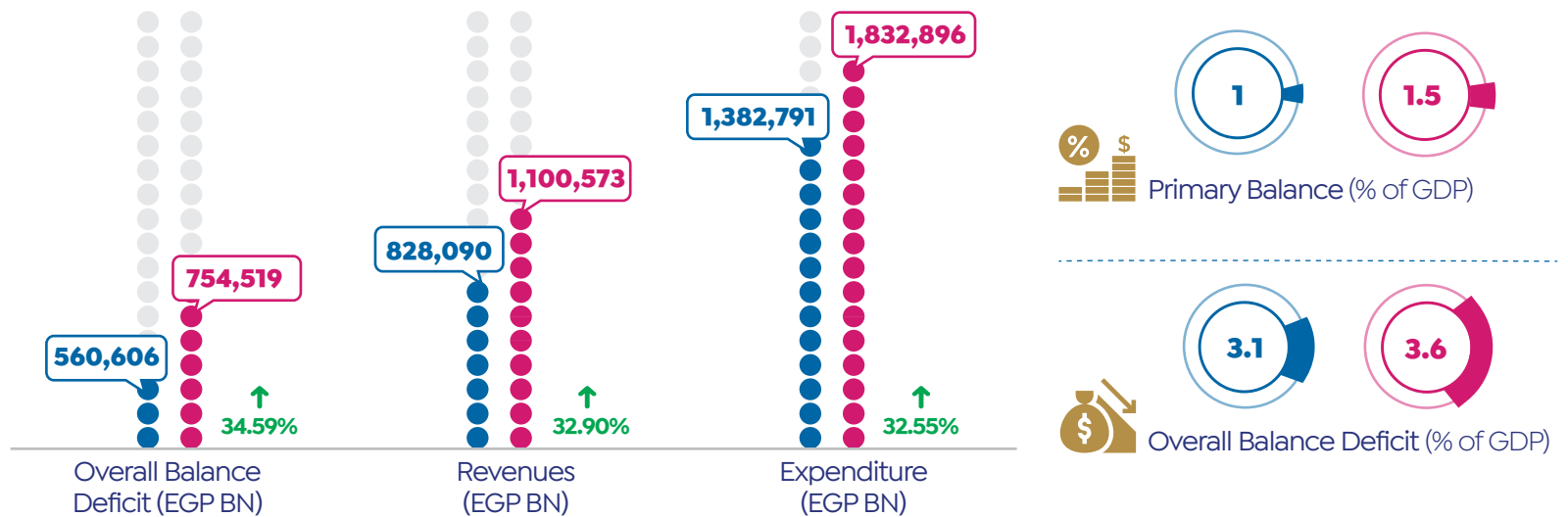


* Total Buy + Sell

Source: EGX

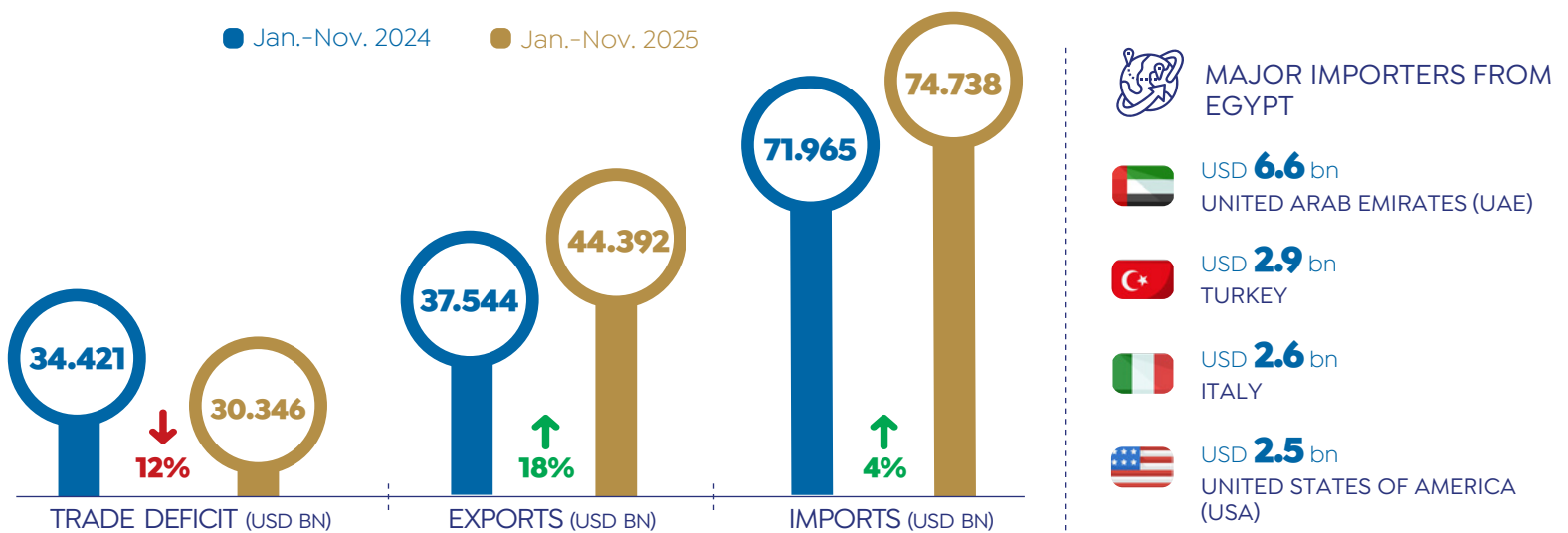
FISCAL SECTOR PERFORMANCE

■ Jul.-Nov. (FY 2024/25) ■ Jul.-Nov. (FY 2025/26)



TRADE BALANCE

■ Jan.-Nov. 2024 ■ Jan.-Nov. 2025



KEY EXPORT SECTORS (USD)

13.7 bn Building Materials

8.6 bn Chemical Products & Fertilizers

6.4 bn Food Industries

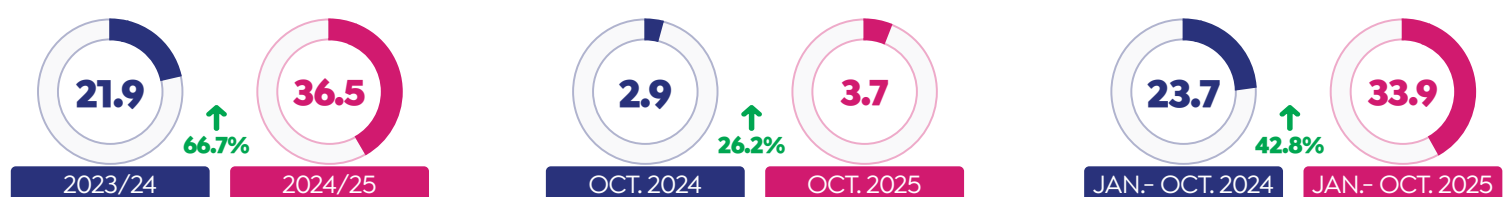
5.9 bn Engineering & Electronic Goods

3.1 bn Ready-Made Garments

1.1 bn Yarn & Textiles

898 mn Medical Industries

REMITTANCES OF EGYPTIANS WORKING ABROAD (USD BN)



SUEZ CANAL

	Jul.-Dec. 2024	Jul.-Dec. 2025	↑ Increase
 Total Revenues (USD Bn)	1.68	1.97	17.3%
 No. of Transiting Ships	5,584	5,874	5.2%
 Total Net Tonnage (mn Tons)	216.0	247.2	14.4%



EGYPTIAN ECONOMIC PERFORMANCE

ECONOMIC GROWTH RATE

4.4% 2024/25 **5.3%** Q1 2025/26

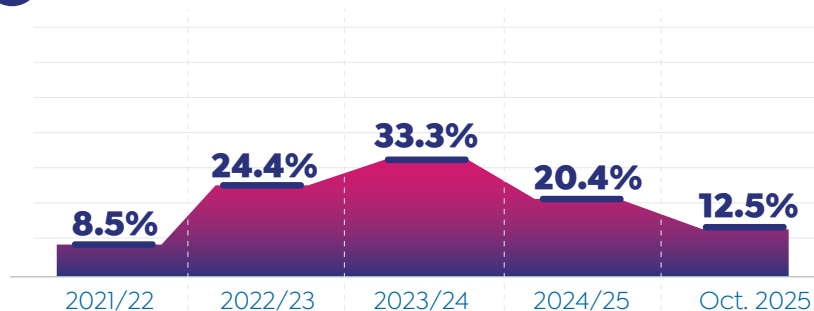
MERCHANDISE EXPORTS (USD Bn)

42.4 2023/24 **49.4** 2024/25 **↑ 16.5%**

SERVICE EXPORTS (USD Bn)

30.2 2023/24 **32.1** 2024/25 **↑ 6.3%**

INFLATION RATE FOR URBAN



PUBLIC DEBT TO GDP



LABOUR MARKET

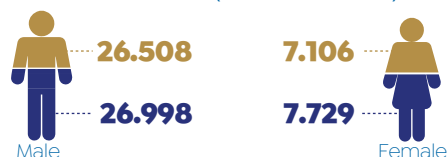
■ Q2 2025

■ Q3 2025

LABOUR FORCE (MN PERSONS)



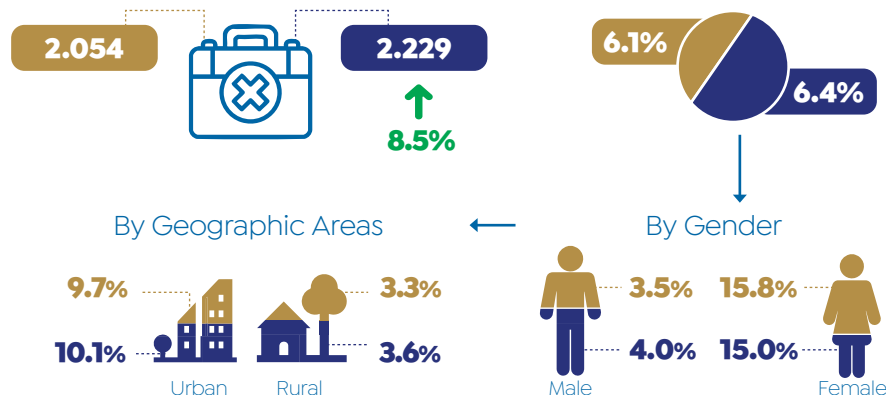
BY GENDER (MN PERSONS)



BY GEOGRAPHIC AREAS IN Q3 2025 (MN PERSONS)



NO. OF UNEMPLOYEES (MN PERSONS) → UNEMPLOYMENT RATE



NO. OF EMPLOYEES (MN PERSONS)



BY GEOGRAPHIC AREAS IN Q3 2025 (MN PERSONS)

