

MARKET WATCH

09 APR. - 09 MAY

BY: Yassen Mahmoud

2024
JUNE



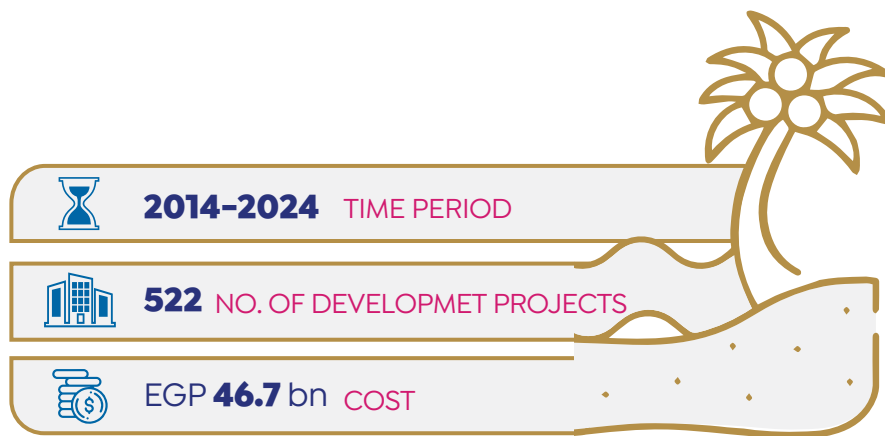
REAL ESTATE

MARKET
UPDATES

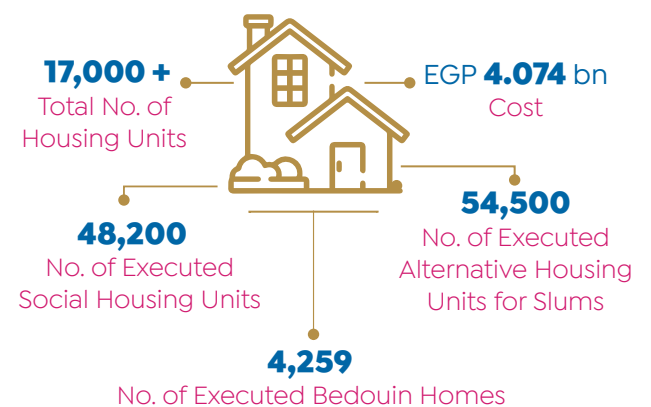
01

Updates 2024 REAL ESTATE MARKET

URBAN DEVELOPMENT IN SINAI & CANAL CITIES



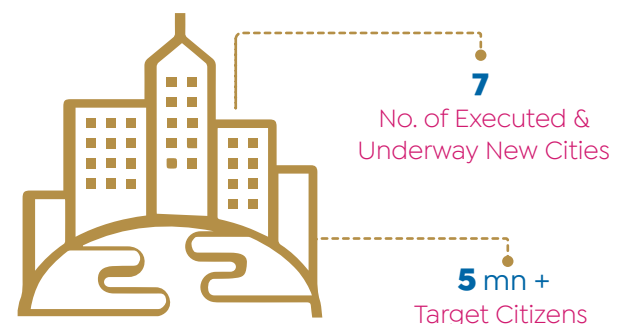
HOUSING PROJECTS



URBAN COMMUNITIES



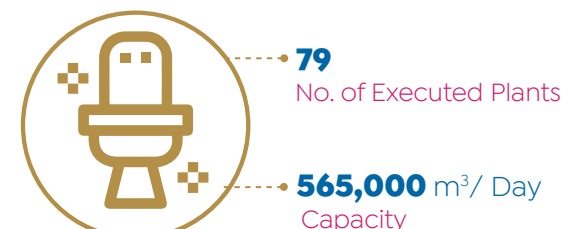
NEW CITIES



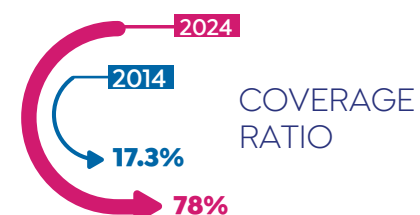
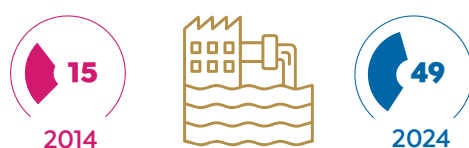
POTABLE WATER PROJECTS



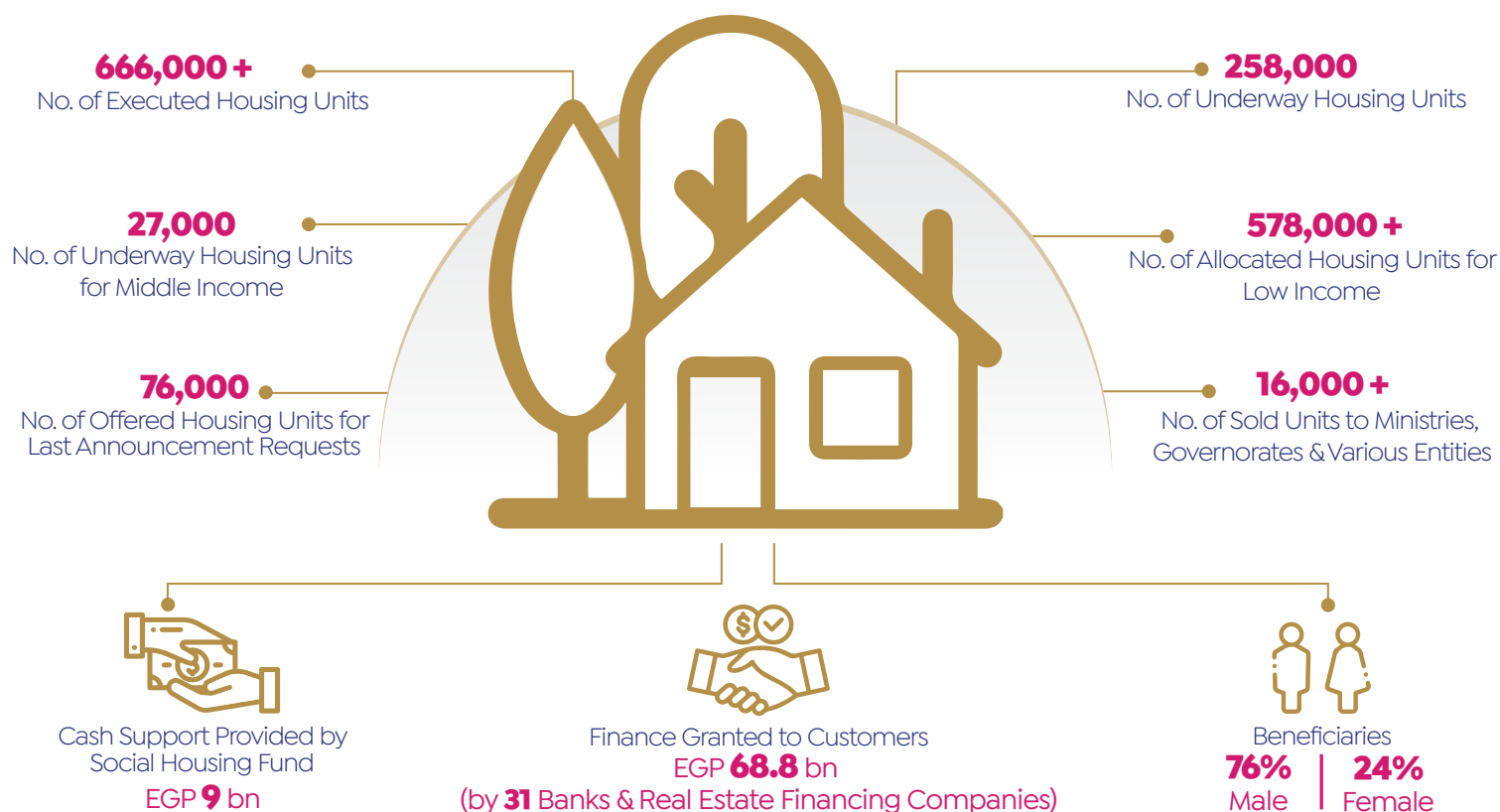
SANITATION PROJECTS



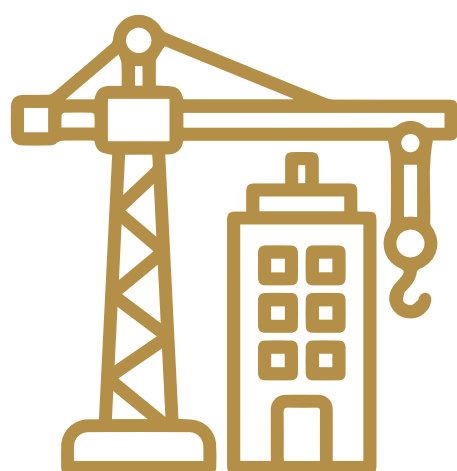
NO. OF SEAWATER DESALINATION PLANT



HOUSING FOR ALL EGYPTIANS INITIATIVE



SAWARY PROJECT



West Carrefour, Alexandria
LOCATION



419.74 Acres
AREA



80%+
COMPLETION RATE

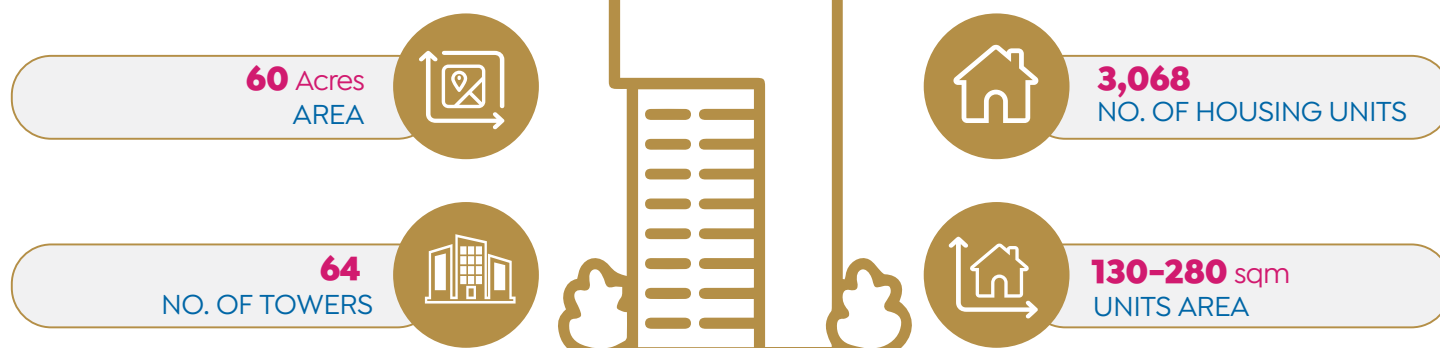
VILLAS PROJECT



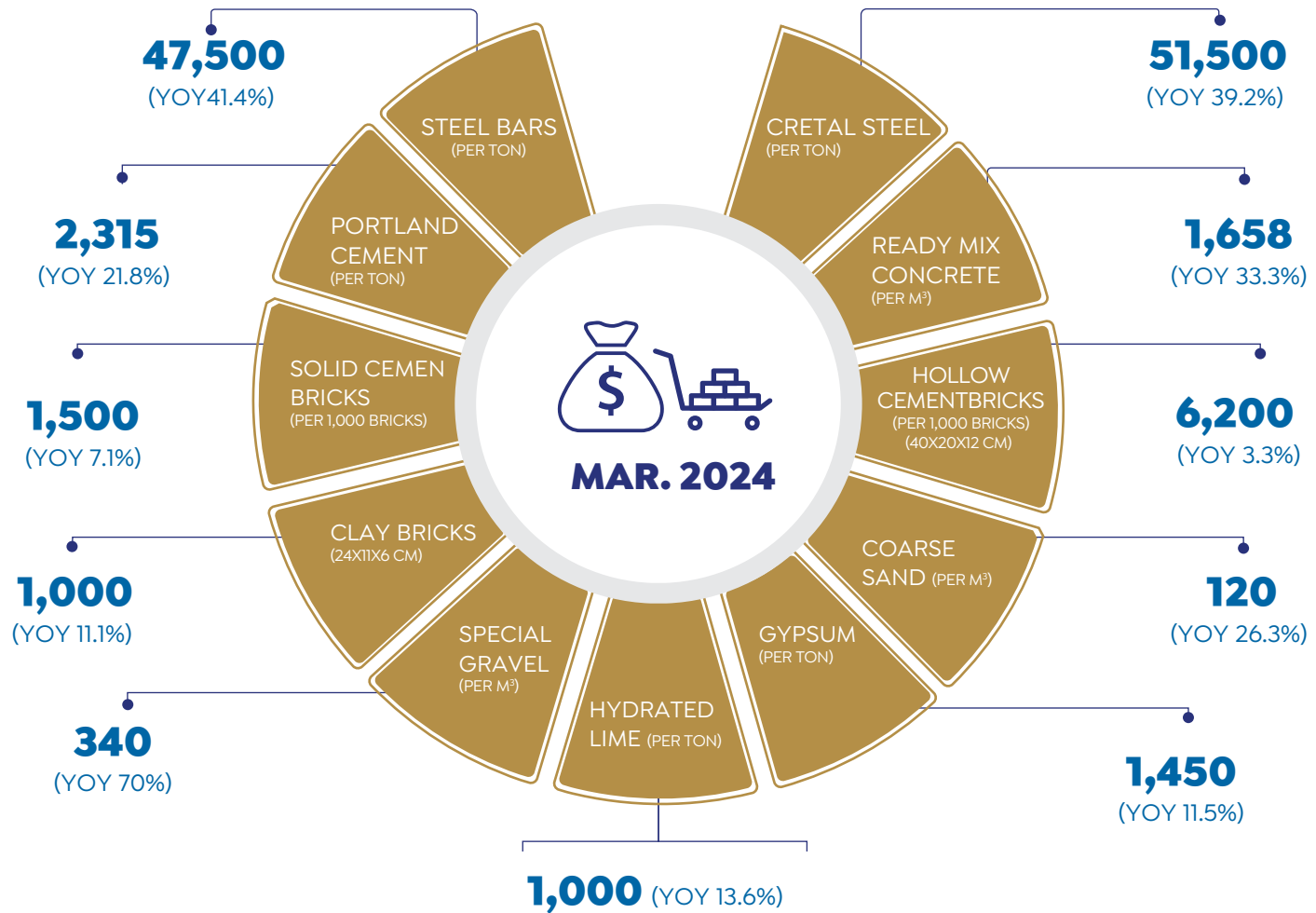
57 Acres
AREA

310
NO. OF VILLAS

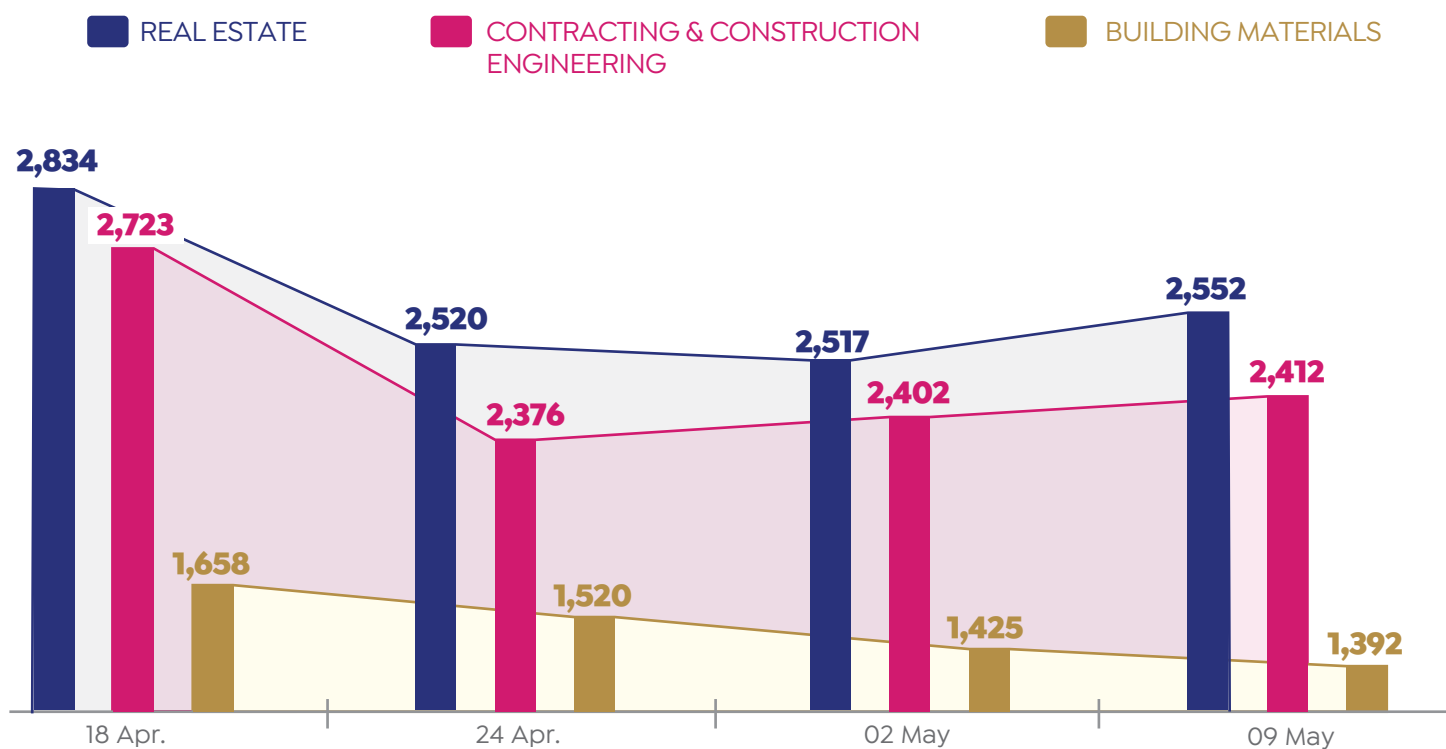
RESIDENTIAL TOWER PROJECT



PRICES OF CONSTRUCTION MATERIALS (EGP)



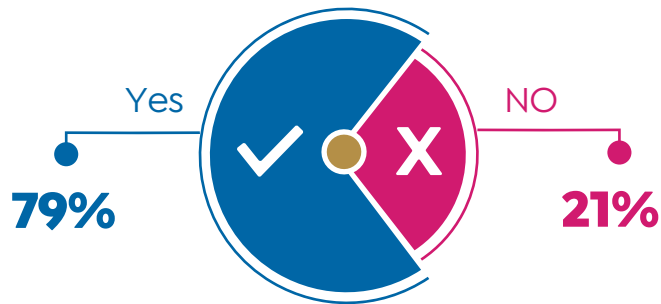
PERFORMANCE OF REAL ESTATE, CONSTRUCTION & BUILDING MATERIALS' INDICES IN EGX



Source: MHUC & EGX

MONTHLY SURVEY (PURCHASING POWER)

DESIRE TO PURCHASE



ABILITY TO PURCHASE



MOST SUITABLE PAYMENT METHODS



OPTIMUM PAYMENT PLANS (YRS)



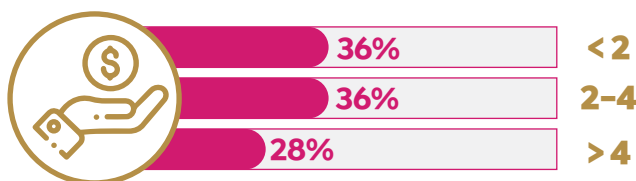
HIGH-DEMAND UNIT TYPES



HIGH-DEMAND RESIDENTIAL UNIT TYPES



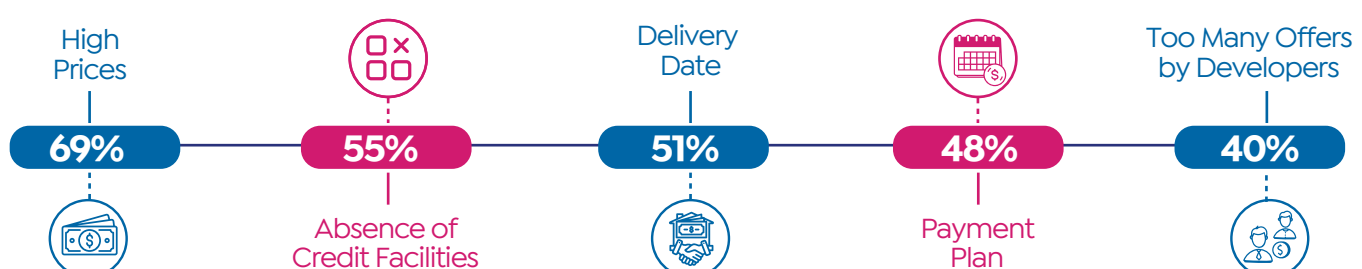
PREFERRED PRICES (MN)



EXPECTED FUTURE PRICES



OBSTACLES FACING POTENTIAL BUYERS



Source: Invest-Gate R&A



NEW CITIES

UPDATE



NEW CITIES Updates 2024



NEW ALAMEIN CITY

BEACH TOWERS


15

NO. OF TOWERS


 Interior Finishing Work: Underway
CURRENT STATUS

MAZARINE


707 Acres
AREA

 Underway
CURRENT STATUS

7,498

NO. OF BUILDINGS, CHALETs & VILLAS

BADR CITY

RESIDENCES FOR NAC'S EMPLOYEES

► PHASE II


196

NO. OF BUILDINGS


98.5%

COMPLETION RATE


4,704

NO. OF HOUSING UNITS

HOUSING FOR ALL EGYPTIANS INITIATIVE FOR MIDDLE INCOME


44

NO. OF BUILDINGS


55%

COMPLETION RATE


1,056

NO. OF HOUSING UNITS

NEW RASHID CITY

DISTINGUISHED RESIDENTIAL PROJECT WITH COASTAL CHARACTER


25

NO. OF BUILDINGS


 Underway
CURRENT STATUS

600

NO. OF HOUSING UNITS

HOUSING FOR ALL EGYPTIANS INITIATIVE FOR MIDDLE INCOME


4

NO. OF BUILDINGS


 Underway
CURRENT STATUS

96

NO. OF HOUSING UNITS

NEW DAMIETTA

JANNA



33 Acres
AREA



59
NO. OF EXECUTED
BUILDINGS



1,416
NO. OF EXECUTED HOUSING UNITS



100-150 sqm
UNITS AREA



Complete
CURRENT STATUS



SUPPLY VOLUME
Market
Mosque
Swimming Pool
Green Area

SAKAN MISR



South of 4th Neighborhood
LOCATION



40
NO. OF BUILDINGS



80%
COMPLETION RATE

NEW OCTOBER CITY

► HOUSING FOR ALL EGYPTIANS INITIATIVE



West Airport
LOCATION



24,432
NO. OF EXECUTED HOUSING UNITS

► SOCIAL HOUSING PROJECT



10,608
NO. OF HOUSING UNITS OF PHASE V



4,000
NO. OF EXECUTED HOUSING UNITS OF PHASE V



55,000
NO. OF HOUSING UNITS OF PHASE VI

10TH OF RAMADAN

HOUSING FOR ALL EGYPTIANS INITIATIVE

► REGIONAL SERVICES AREA



68
NO. OF BUILDINGS



1,632
NO. OF HOUSING UNITS



1,152
NO. OF EXECUTED HOUSING UNITS



100-120 sqm
UNITS AREA



80%
COMPLETION RATE

► NEIGHBORHOOD NO.20



98
NO. OF BUILDINGS



90 sqm
UNITS AREA



Underway
CURRENT STATUS

▶ NEIGHBORHOOD NO.21

 **178**
NO. OF BUILDINGS

 **90 sqm**
UNITS AREA

 Underway
CURRENT STATUS

NEW OBOUR CITY

HOUSING FOR ALL EGYPTIANS INITIATIVE

▶ GREEN BUILDINGS

 **13th Neighborhood**
LOCATION

 **180**
NO. OF BUILDINGS

 **3,924**
NO. OF HOUSING UNITS

ALTERNATIVE HOUSING FOR SLUMS

 **14th Neighborhood**
LOCATION

 **96**
NO. OF BUILDINGS

 **3,360**
NO. OF HOUSING UNITS

 **96**
NO. OF COMMERCIAL UNITS

 **96**
NO. OF ADMINISTRATIVE UNITS

SAKAN MASR

 **130**
NO. OF BUILDINGS

 **3,120**
NO. OF HOUSING UNITS

NEW CAIRO

HOUSING FOR ALL EGYPTIANS INITIATIVE

 **3rd Settlement**
LOCATION

 **222**
NO. OF BUILDINGS

 **5,208**
NO. OF HOUSING UNITS

 **90-120 sqm**
UNITS AREA

 **81**
NO. OF COMMERCIAL UNITS

 **174**
NO. OF ADMINISTRATIVE UNITS

 Underway with Very Advanced Completion Rate
CURRENT STATUS



PRIVATE REAL ESTATE PROJECTS

UPDATE



Updates 2024



PRIVATE REAL ESTATE PROJECTS



NEW RESIDENTIAL PROJECTS / 1 PROJECT

SHEYA

Developer: Madinet Masr



Near NAC
LOCATION



228,212 sqm
AREA



SUPPLY VOLUME

Total No. of Units: **744**

No. of S-Villas: **420**

No. of Apartments, Studios & Duplexes: **324**

Clubhouse, Water Lagoons & Vast Green Landscapes



within **4** Yrs
COMPLETION DATE



NEW MIXED-USE PROJECTS / 2 PROJECTS

MORAY

Developer: Main Marks Developments



Fifth Settlement, New Cairo
LOCATION



16.5 Acres
AREA



EGP **30** bn +
INVESTMENTS



SUPPLY VOLUME

Commercial, Administrative & Medical Units

Commercial Area: **50,000** sqm

No. of Commercial Units: **190**

NEW PROJECT (NAME N/A)

Developer: Mazaya Developments



MU23, NAC
LOCATION



EGP **5** bn
INVESTMENTS



SUPPLY VOLUME
Commercial, Medical & Administrative Units

3 Underground, Ground & **9** Floors



PROJECTS UNDERWAY / 12 PROJECTS

HADABA

Developer: PRE Developments



6th of October City
LOCATION



33 Acres
AREA



Green Spaces, Serene
Water Features, Swimming
Pools & Shopping Center
SERVICE FACILITIES



Strating Initial Delivery
Phase
CURRENT STATUS

ASAYLA MEDICAL PARK

Developer: Mabany Edris For Real Estate Investment



New Assiut City
LOCATION



SUPPLY VOLUME

No. of Buildings: 6

Clinics, Hospitals, Diagnostic
Centers & Radiology Services



14,000 sqm
AREA

THE ROOK

Developer: Mazaya Developments



NAC
LOCATION



60%
SALES RATE



40%
CONSTRUCTION COMPLETION RATE

LA VITA 2

Developer: La Vita Development



North Coast
LOCATION



SUPPLY VOLUME

No. of Units: 160

Units Area: 50-90 sqm



within 2 Yrs
DELIVERY DATE



Starting Concrete Works
CURRENT STATUS

STONE RESIDENCE

Developer: PRE Developments



New Cairo
LOCATION



4,000 +
NO. OF HOUSING UNITS

ROCK GOLD MALL

Developer: El Batal Developments



New Cairo
LOCATION



11,000 sqm
AREA



40,000 sqm
BUA

MONARK

Developer: Royal Developments



Mostakbal City
LOCATION



40 Acres
AREA



Launching Phase III
CURRENT STATUS

THE SPINE



30,000 sqm
AREA



SUPPLY VOLUME
Apartments Area:
63-225 sqm

Duplexes Area:
Up to 280 sqm

IL BAYOU

Developer: The Land Developers (TLD)

Sahl Hasheesh, Red Sea
LOCATION**125,000** sqm
AREA**5**
NO. OF PHASESEGP **8** bn
INVESTMENTS

LAGUNA

**80,000** sqm
AREASUPPLY VOLUME
Chalets, Townhouses &
Twin HousesEGP **550** mn
TARGET SALESTownhouses & Twin Houses
Area: **177-212** sqmChalets Area: **105-130** sqm

SEA SHORE

Developer: Hyde Park Developments

Ras El Hekma City,
North Coast
LOCATIONCURRENT STATUS
Town Islands Phase is Sold out
Lagoon Town Phase is
Launched

LAGOON TOWN

SUPPLY VOLUME
No. of Chalets: **1,500**Swimming Lagoon Spanning
22,000 sqmChalets Area: **65-138** sqm

LA VITA 4

Developer: La Vita Development

North Coast
LOCATION**6** Acres
AREASUPPLY VOLUME
Residential & Tourist Units
6 Swimming Pools, Aqua
Park, Artificial Waterfalls,
Green Spaces &
Commercial Mall

HELIO SUN

Developer: IMS Developments

New Heliopolis
LOCATIONSUPPLY VOLUME
Residential Units
Units Area: **101-155** sqmCURRENT STATUS
Sales of Phase I is
Completed
Launching Phase II

DISTRICT PEOPLE

Developer: Dubleuse

New Cairo
LOCATION**5,000** sqm
AREAUp to EGP **2.5** bn
TARGET SALES OF PHASE IIAround EGP **400** mn
EXPECTED RECEIVED
INVESTMENTSCURRENT STATUS
Sales of Phase I is Completed
Company Plans to Launch Phase IIApproximately
20,000 sqm
BUAwithin **3** Yrs
DELIVERY DATE



ECONOMIC SNAPSHOT

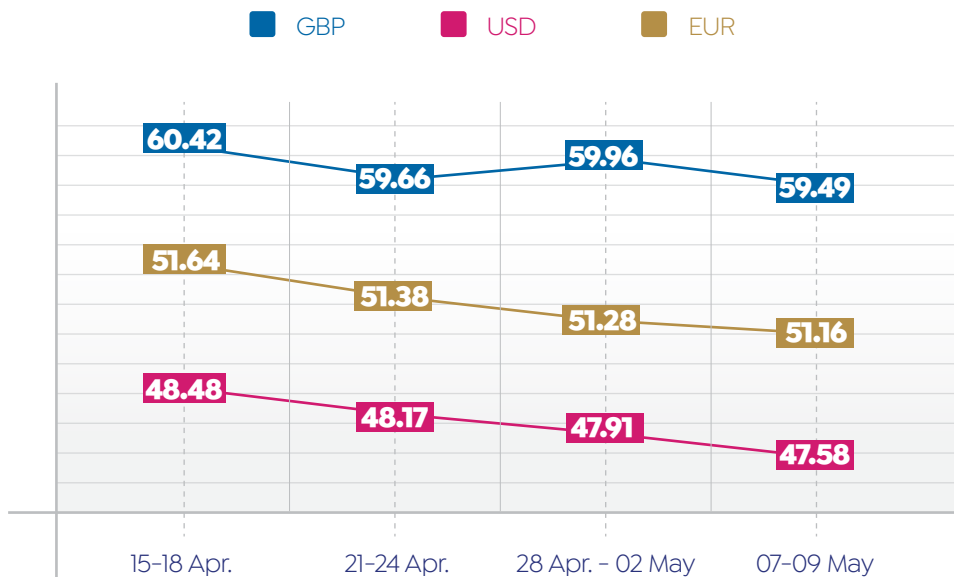
04

Updates 2024

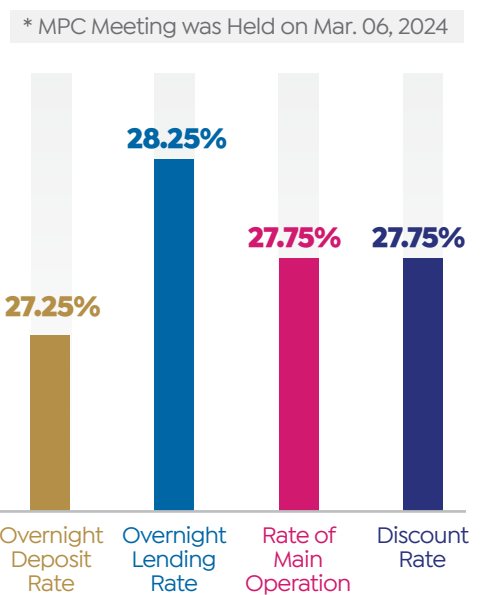
ECONOMIC SNAPSHOT



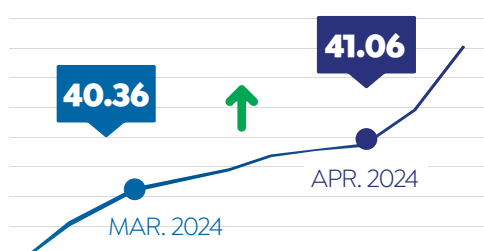
EXCHANGE RATES



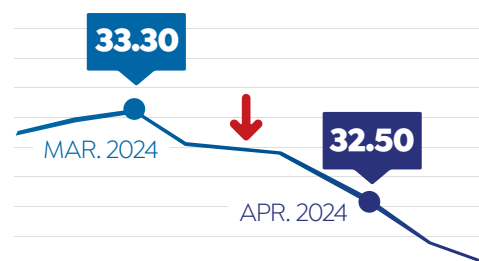
INTEREST RATES



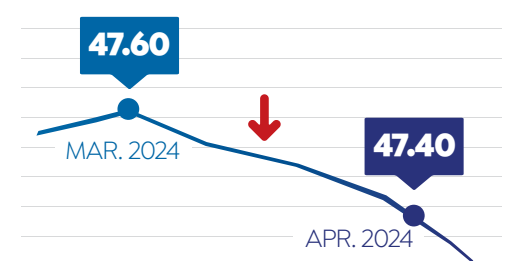
NET INTERNATIONAL RESERVES (USD BN)



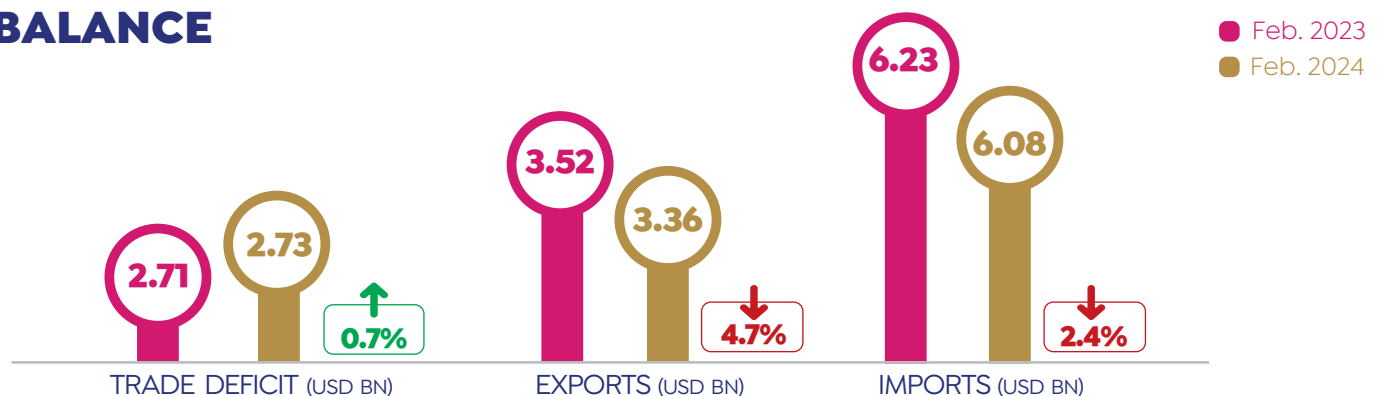
ANNUAL HEADLINE INFLATION RATE



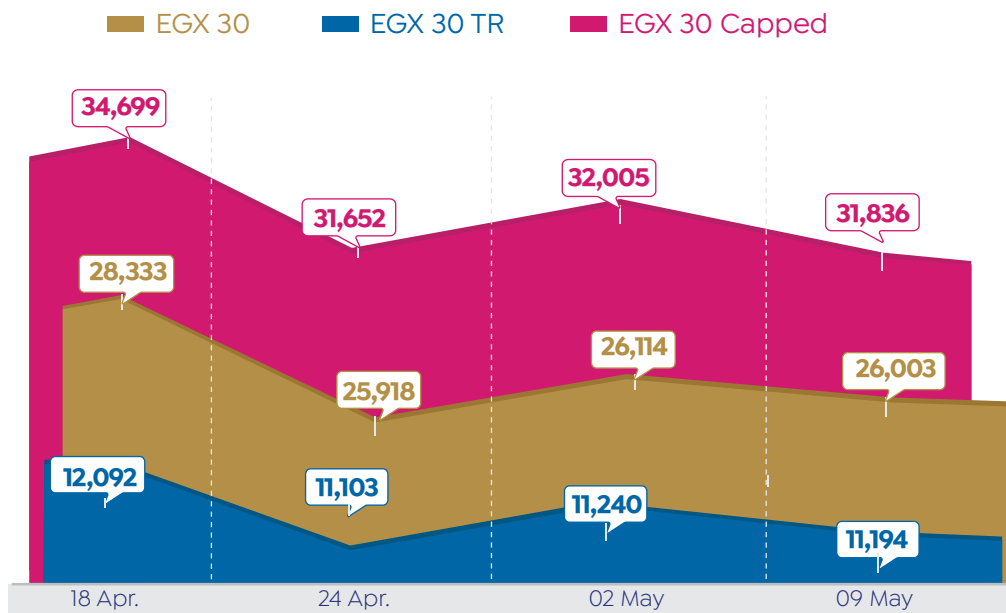
PURCHASING MANAGERS' INDEX (PMI)



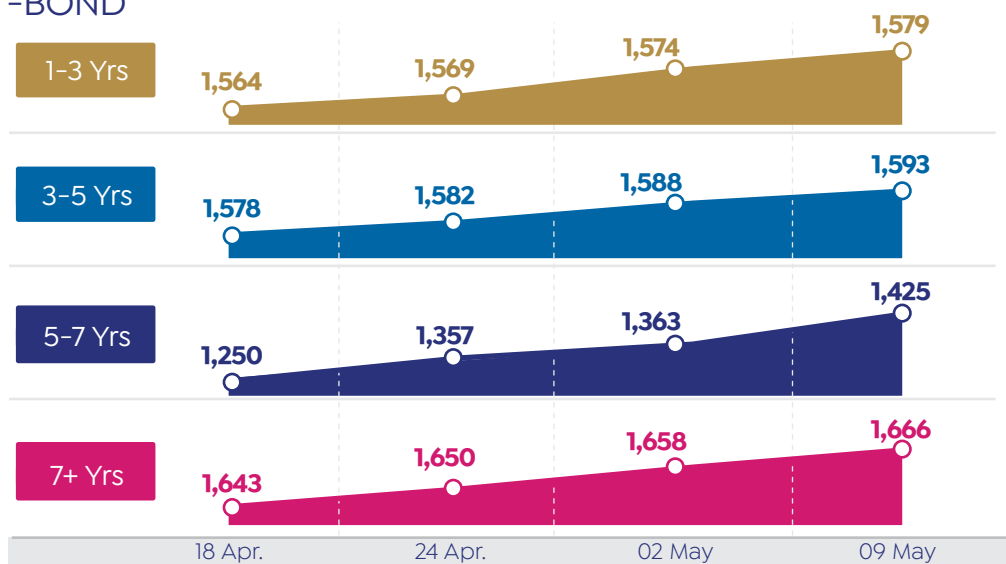
TRADE BALANCE



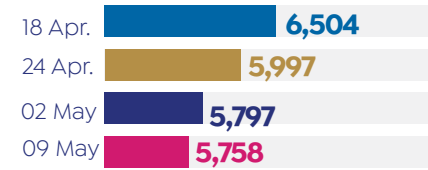
EGX INDICATORS



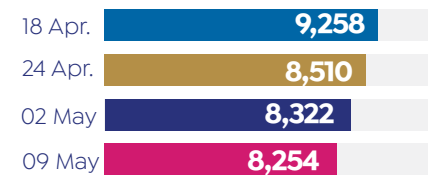
T-BOND



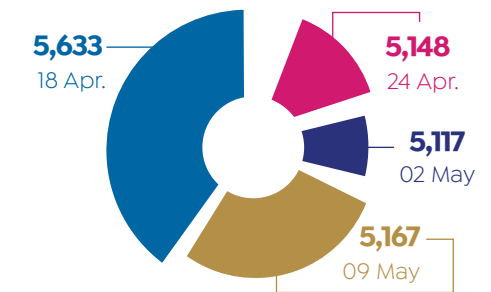
EGX 70 EWI



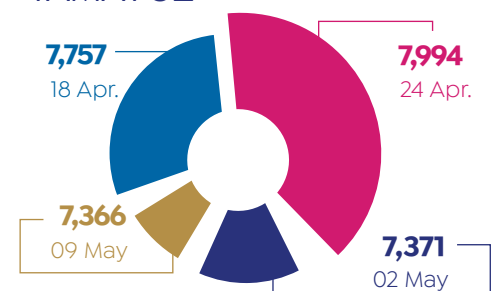
EGX 100 EWI



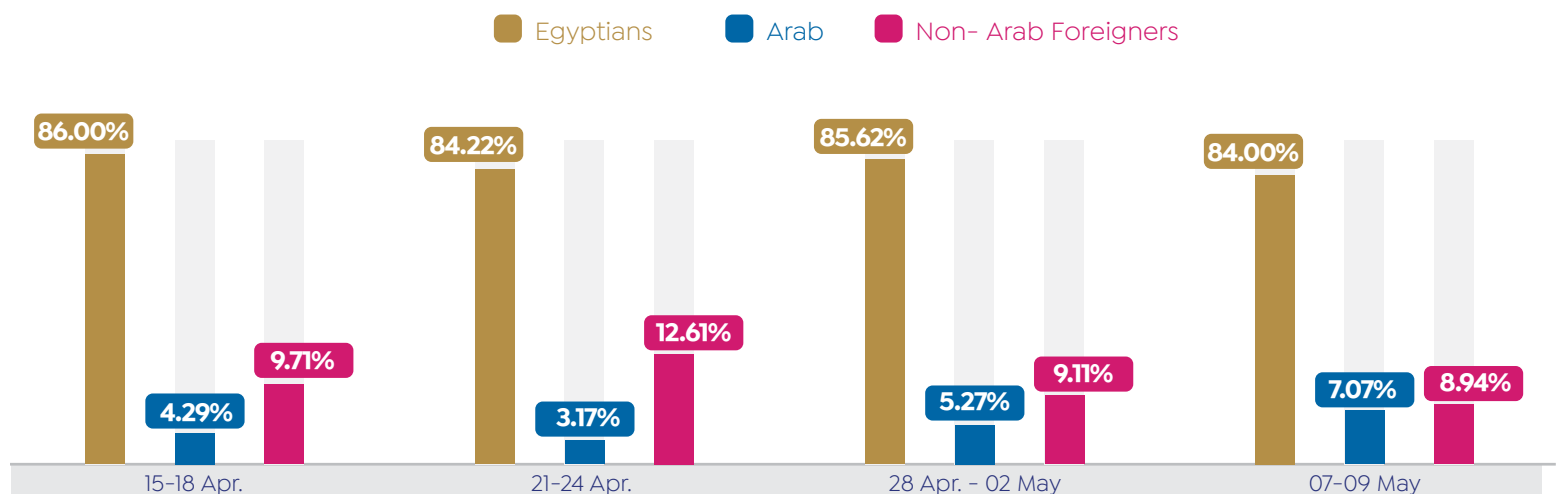
SP/EGX ESG



TAMAYUZ



INVESTORS TYPE



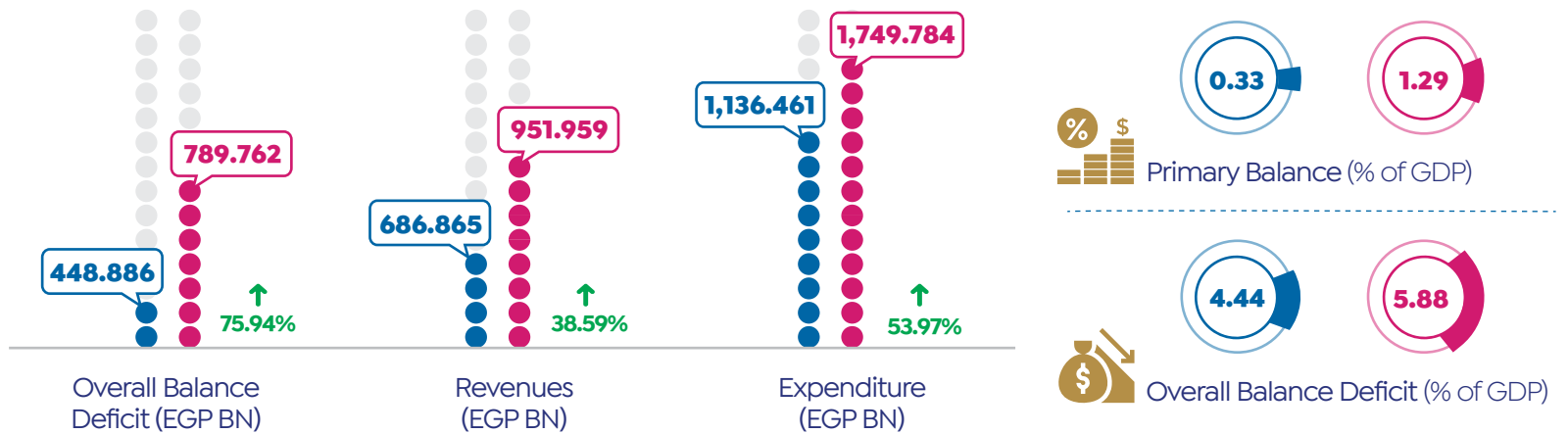
* Listed Institutions & Retail Stocks incl. Deals + Bonds + OTC

Source: EGX

FISCAL SECTOR PERFORMANCE

Jul.-Jan. (FY 2022/23)

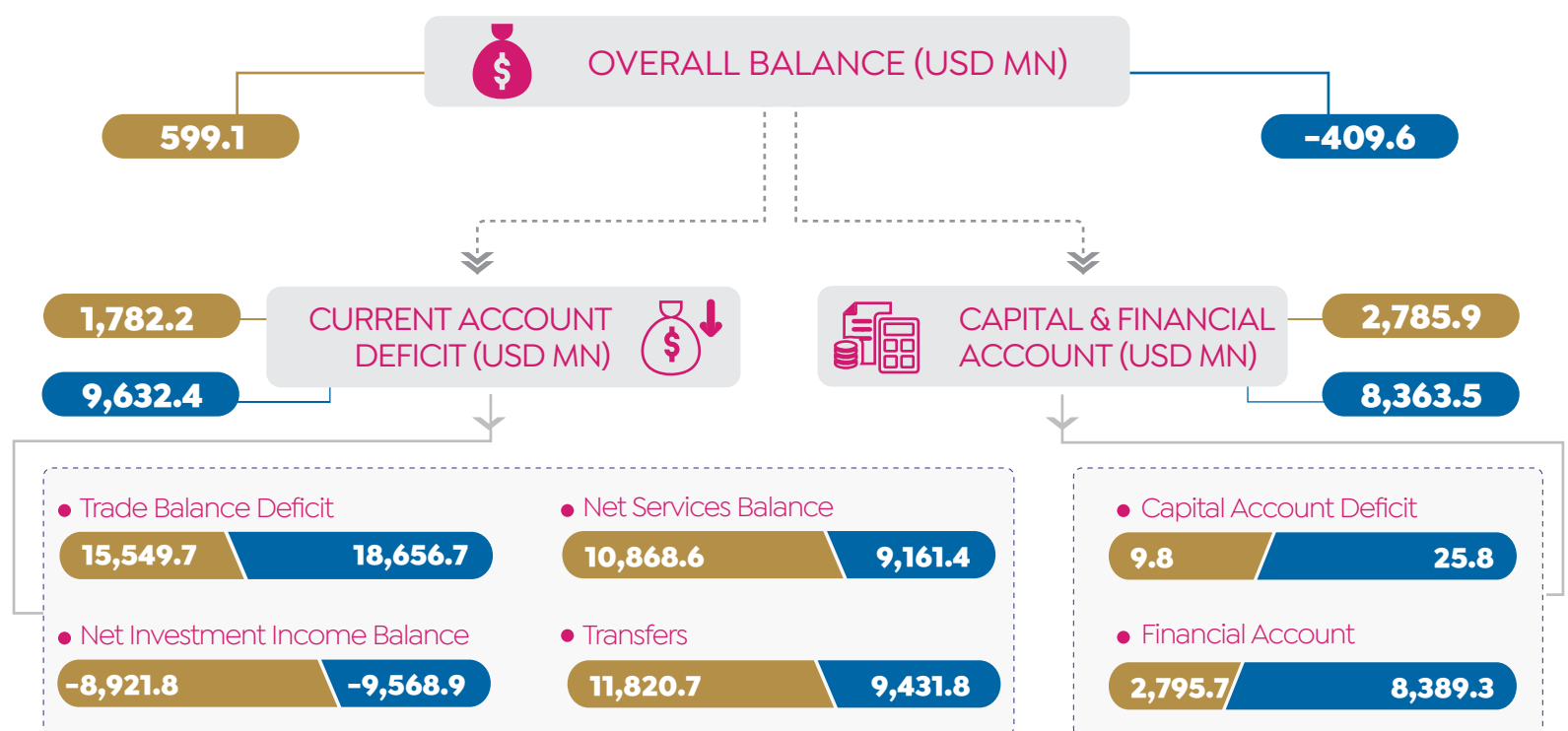
Jul.-Jan. (FY 2023/24)



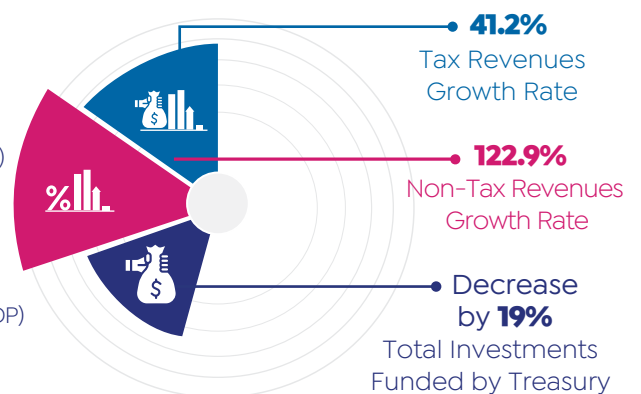
BALANCE OF PAYMENTS PERFORMANCE (H1 2023/24)

H1 2022/23

H1 2023/24

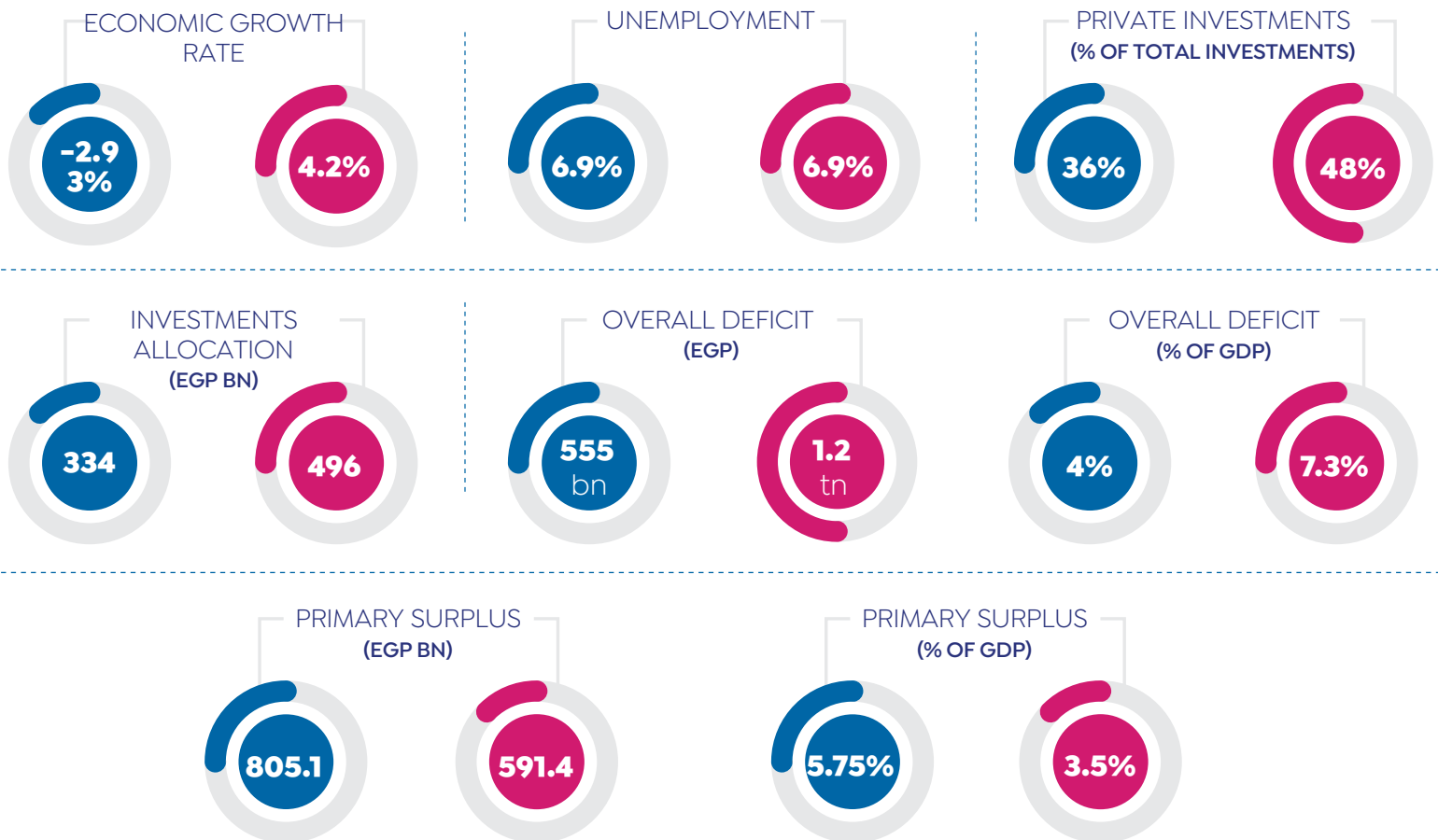


EGYPTIAN ECONOMIC INDICATORS

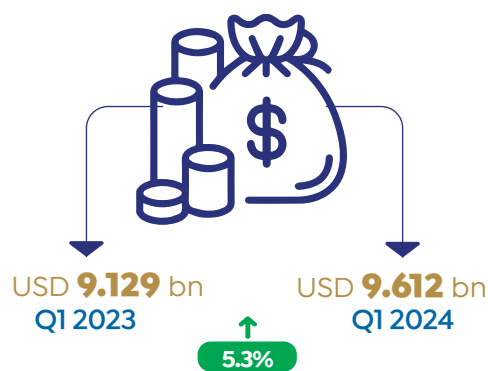
Jul. 2023 - Mar. 2024
Time Period5.42%
Overall Deficit (% of GDP)EGP 416 bn
Primary Surplus3%
Primary Surplus (% of GDP)

EXPECTATIONS FOR EGYPTIAN ECONOMIC INDICATORS

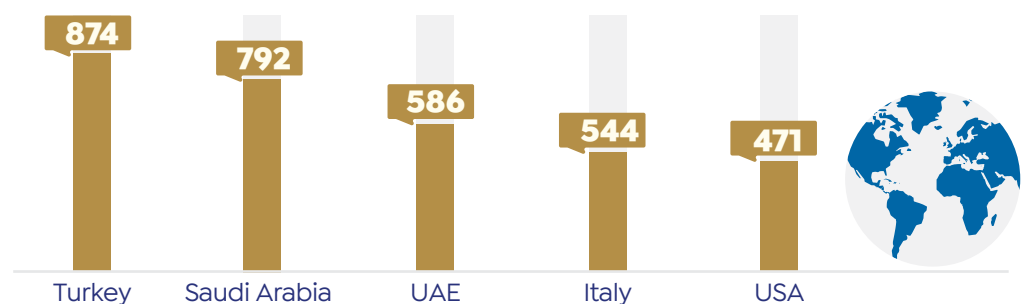
2023/24 2024/25



NON-OIL EXPORTS



TOP 5 IMPORTERS FROM EGYPT (USD MN)



TOP 5 SECTORS OF NON-OIL EXPORTS



CITIZEN INVESTMENT PLAN (2023/24)

EL-WADI EL-GEDID GOVERNORATE

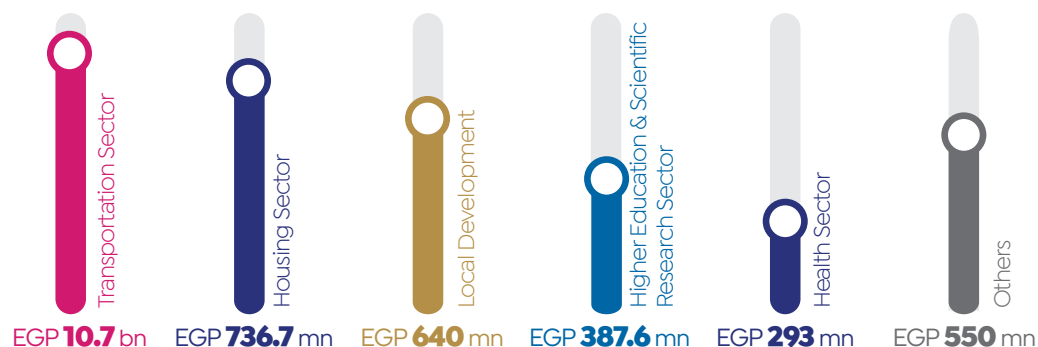


EGP **13.2** bn
TOTAL INVESTMENTS



242
NO. OF PROJECTS

INVESTMENTS BREAKDOWN



NORTH SINAI GOVERNORATE

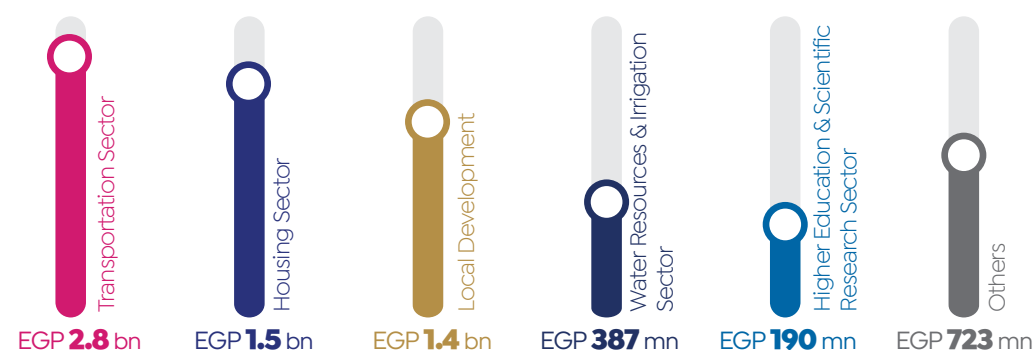


EGP **7** bn
TOTAL INVESTMENTS



231
NO. OF PROJECTS

INVESTMENTS BREAKDOWN



SOUTH SINAI GOVERNORATE

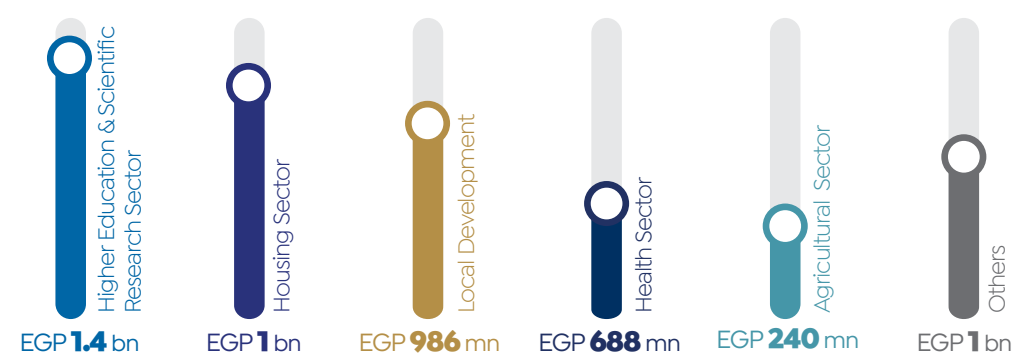


EGP **5.4** bn
TOTAL INVESTMENTS



178
NO. OF PROJECTS

INVESTMENTS BREAKDOWN



ISMAILIA GOVERNORATE

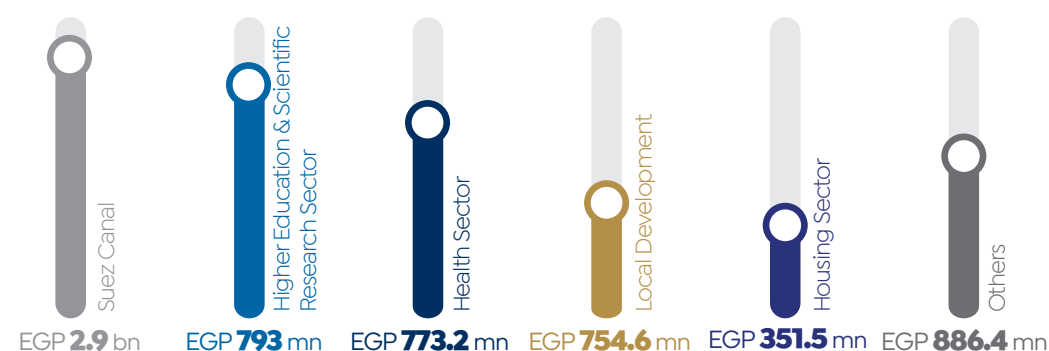


EGP **6.5** bn
TOTAL INVESTMENTS



333
NO. OF PROJECTS

INVESTMENTS BREAKDOWN



QALYUBIA GOVERNORATE

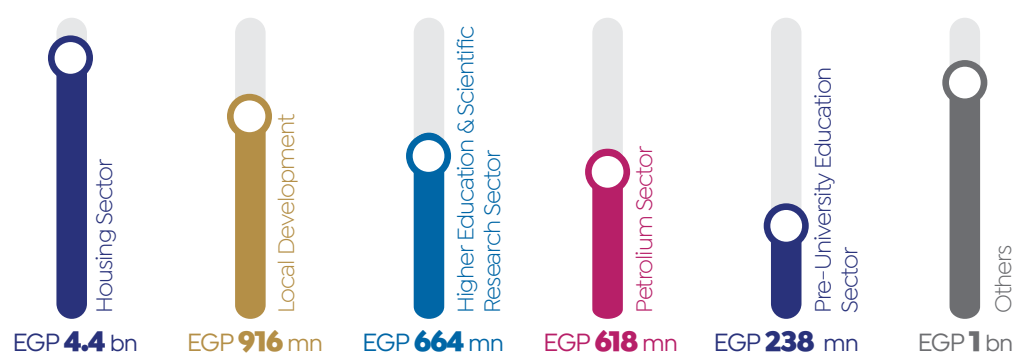


EGP **8 bn**
TOTAL INVESTMENTS



367
NO. OF PROJECTS

INVESTMENTS BREAKDOWN



SOHAG GOVERNORATE

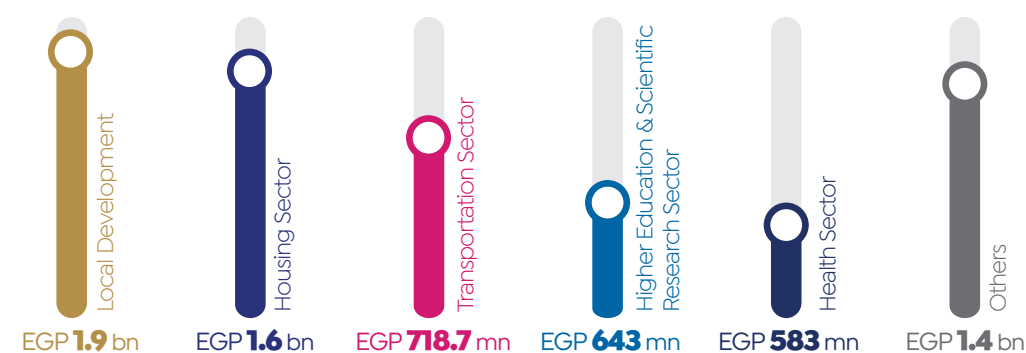


EGP **6.8 bn**
TOTAL INVESTMENTS



489
NO. OF PROJECTS

INVESTMENTS BREAKDOWN



ASYUT GOVERNORATE



EGP **11.6 bn**
TOTAL INVESTMENTS



478
NO. OF PROJECTS

INVESTMENTS BREAKDOWN

