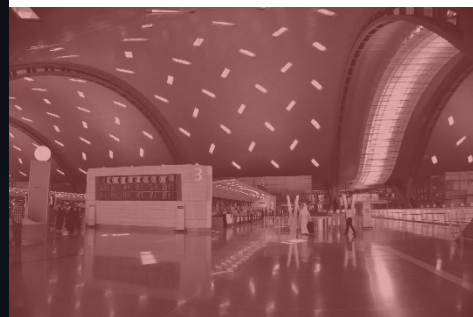




QuickStats

Qatar Real Estate June 2020



VALUATIONS & APPRAISALS

TRUST
INTEGRITY
DEPENDABILITY

We are the only QATARI company in the region that is Regulated by RICS and a member of International Valuation Standard Council (IVSC).

- PROPERTY VALUATION
Residential, Commercial, Retail, Healthcare, Educational, Land
- HOSPITALITY VALUATION
Ultra Luxury to Budget Hotels, Resorts, Hotel Apartments
- INDUSTRIAL VALUATION
Warehouse, Factory, Plant & Machinery, Heavy Equipment
- MASTERPLAN VALUATION
Integrated Masterplan, Development Appraisal

Our valuations reports, and feasibility study are accepted by all major banks in Qatar.

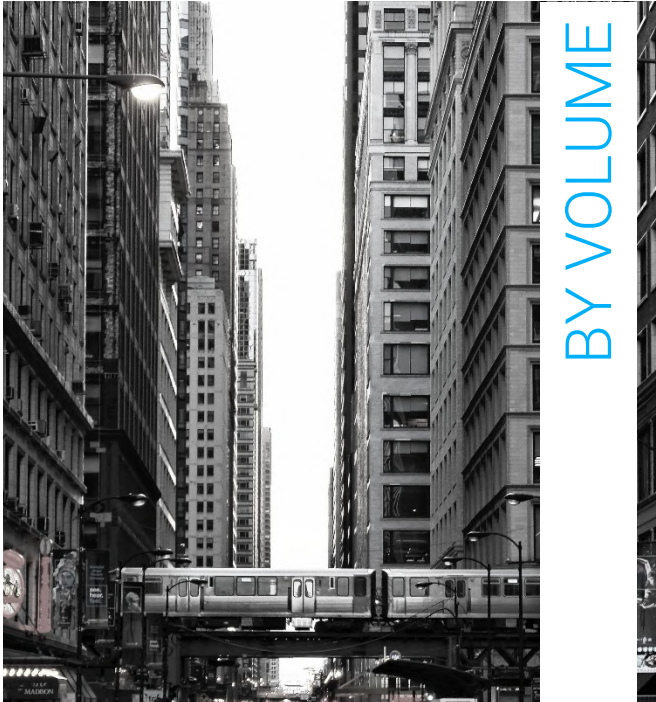
Other services we offer:

- CONSULTING AND ADVISORY
 - Real Estate Market Research
 - Feasibility, Highest and Best Use Studies
 - Development Advisory
 - Portfolio Analysis
- CORPORATE DEAL ADVISORY
 - Property Buying/Selling/Leasing Assistance
 - Merger, Acquisition, and Joint-Venture
 - Portfolio Restructuring
- CAPITAL MARKET SERVICES
 - Project Finance Services
 - Loan Restructuring
 - Securitizations and Structured Finance
 - Private Placements – Equity or Debt

www.aredcadvisory.com

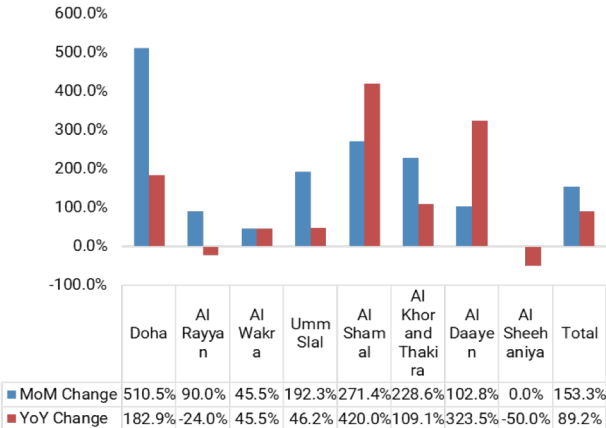
Real Estate Transactions

By Municipality



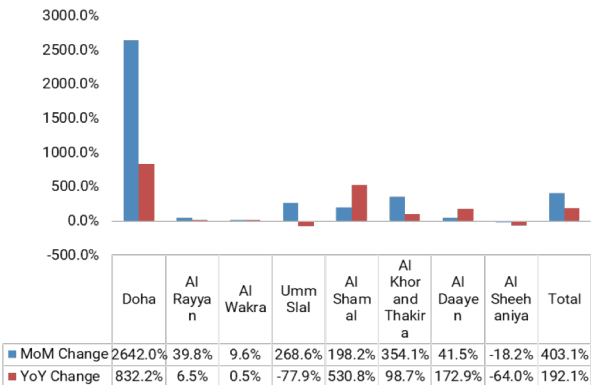
BY VOLUME

Count	June-19	May-20	June-20
Doha	41	19	116
Al Rayyan	100	40	76
Al Wakra	22	22	32
Umm Slal	26	13	38
Al Shamal	5	7	26
Al Khor and Thakira	11	7	23
Al Daayen	34	71	144
Al Sheehaniya	2	1	1
Total	241	180	456



BY VALUE

Value (QAR Mn)	June-19	May-20	June-20
Doha	301.5	102.5	2,810.6
Al Rayyan	381.9	290.9	406.8
Al Wakra	64.6	59.2	64.9
Umm Slal	393.1	23.6	87
Al Shamal	5.2	11	32.8
Al Khor and Thakira	22.4	9.8	44.5
Al Daayen	134.9	260.3	368.2
Al Sheehaniya	2.5	1.1	0.9
Total	1,306.1	758.4	3,815.7



Transaction count have more than doubled in comparison to the previous month while the value of transactions has taken a leap five folds compared to last month.

By Property Type

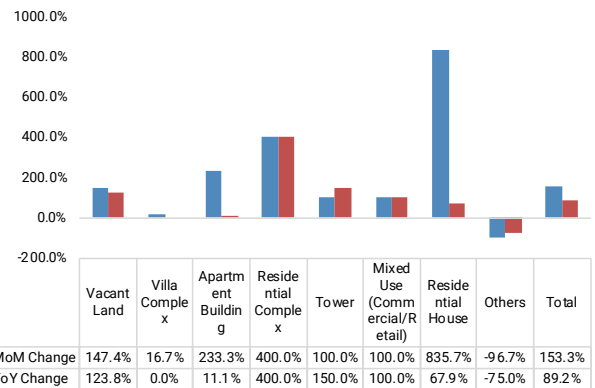


BY VOLUME

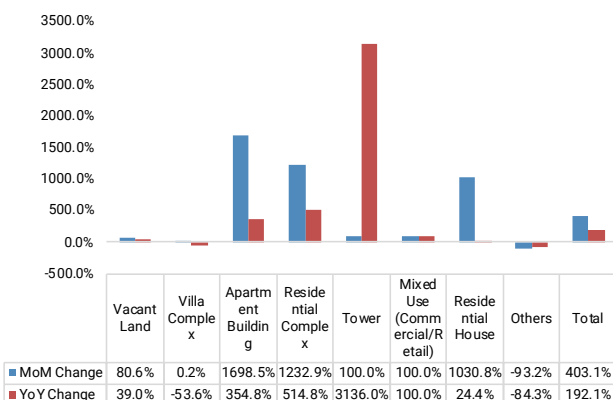
BY VALUE

Value (QAR Mn)	June-19	May-20	June-20
Vacant Land	641.5	493.8	891.8
Villa Complex	111.3	51.5	51.6
Apartment Building	51.8	13.1	235.6
Residential Complex	31	14.3	190.6
Tower	61.7	0*	1,996.6
Mixed Use (Commercial/Retail)	0*	0*	9.8
Residential House	345.3	38	429.7
Others	63.5	147.7	10
Total	1,306.1	758.4	3,815.7

Count	June-19	May-20	June-20
Vacant Land	126	114	282
Villa Complex	21	18	21
Apartment Building	9	3	10
Residential Complex	1	1	5
Tower	2	0*	5
Mixed Use (Commercial/Retail)	0*	0*	1
Residential House	78	14	131
Others	4	30	1
Total	241	180	456



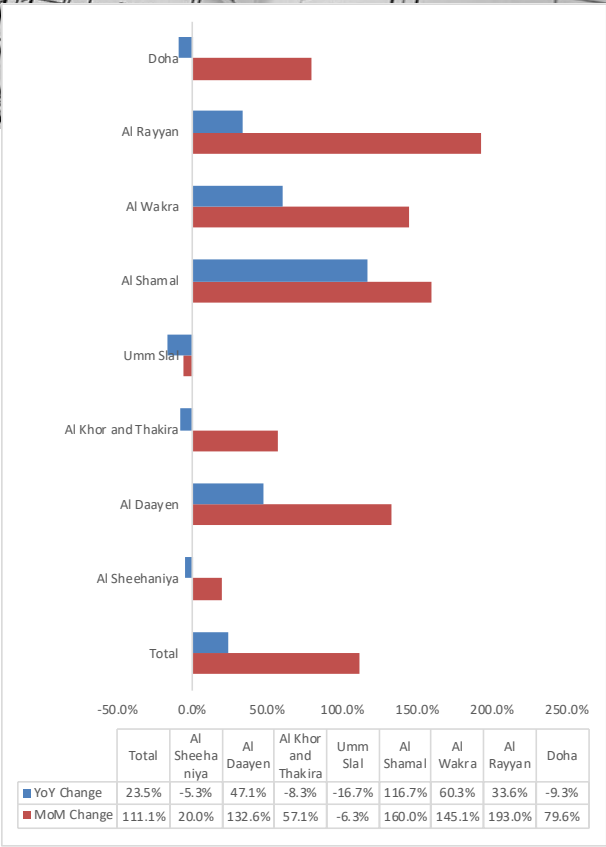
The investor sentiments are more inclined towards single family houses where the individuals and small investors are involved. The trend also points out investor interest towards apartment building and vacant lands.



* Change is assumed at 100% where base is 0

Building Permits

Municipality	June-19	May-20	June-20
Doha	107	54	97
Al Rayyan	125	57	167
Al Wakra	78	51	125
Al Shamal	6	5	13
Umm Slal	36	32	30
Al Khor and Thakira	24	14	22
Al Daayen	68	43	100
Al Sheehaniya	19	15	18
Total	463	271	572



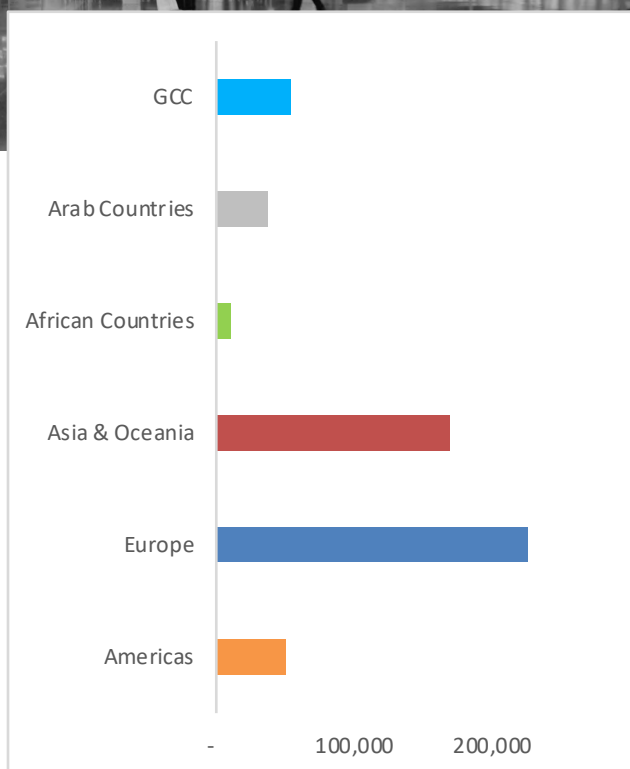
The highest number of permits were issued in Al Rayyan, Al Shamal and Al Daayen municipality respectively indicating rapid development of peripheral areas of Doha.

Visitor Arrivals

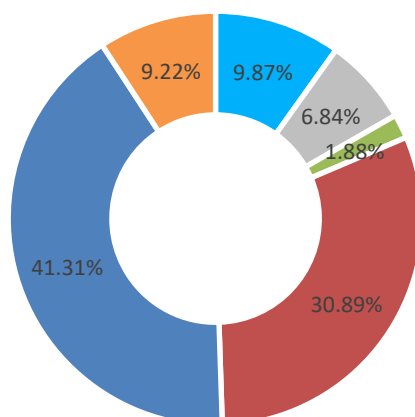
By Region



Regions	YTD June 2020	% Share
GCC	54,159	9.87%
Arab Countries	37,555	6.84%
African Countries	10,320	1.88%
Asia & Oceania	169,514	30.89%
Europe	226,689	41.31%
Americas	50,575	9.22%
Total	548,812	

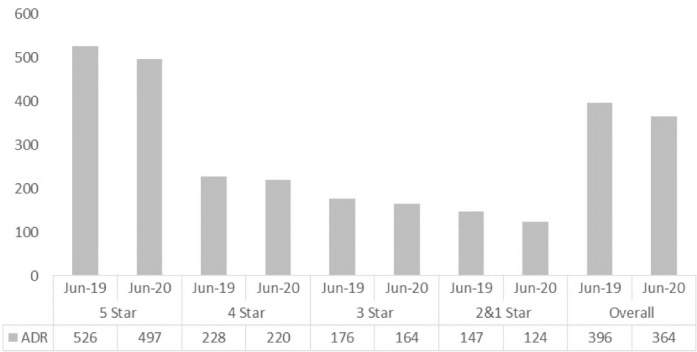


The flow of visitors have been restricted to the country due to ban on international travel hence marginal fluctuations have been noticed as compared to previous month.



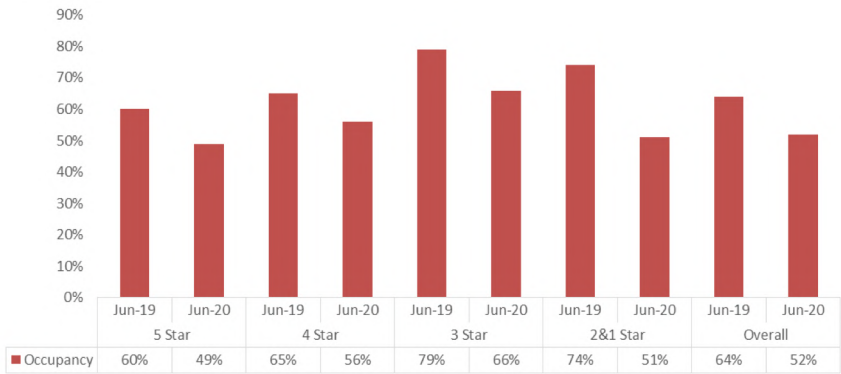
Hotel Performance

ADR

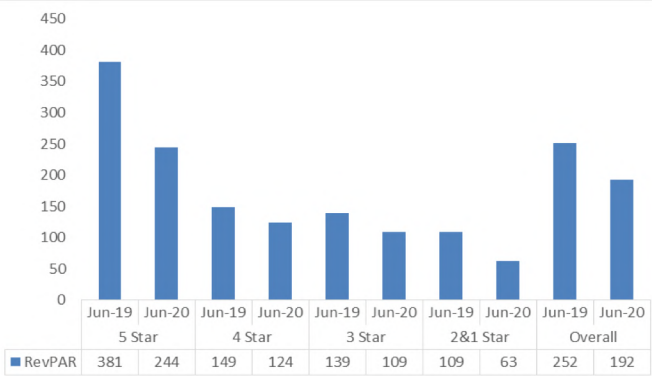


* ADR – Average Daily Rates (QAR)

OCCUPANCY



RevPAR



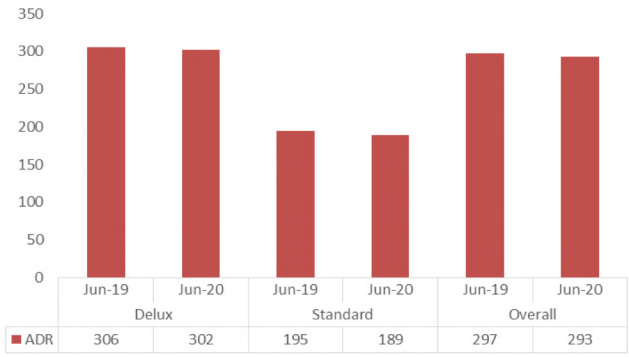
* RevPAR – Revenue Per Available Room (QAR)

The hotel performance is mainly impacted by the ongoing travel restrictions on international travelers. However, government initiative to convert hotels into quarantine facilities has proven hotel performance at par.

Hotel Apartment Performance

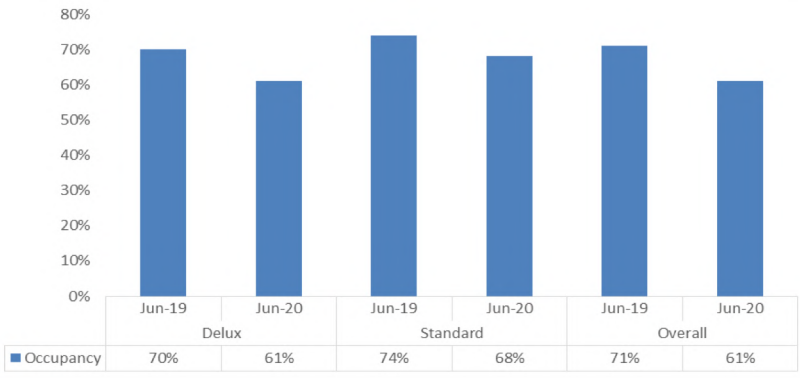


ADR

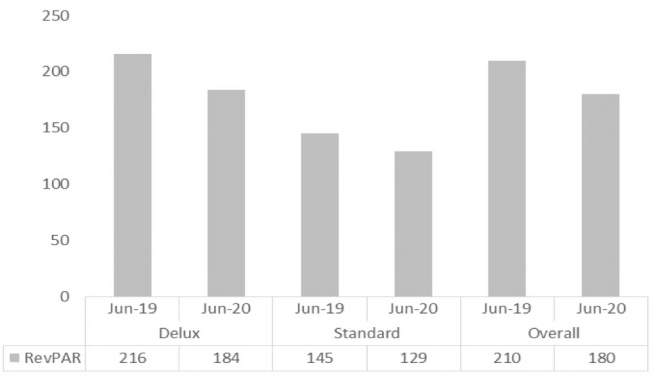


* ADR – Average Daily Rates (QAR)

OCCUPANCY



RevPAR

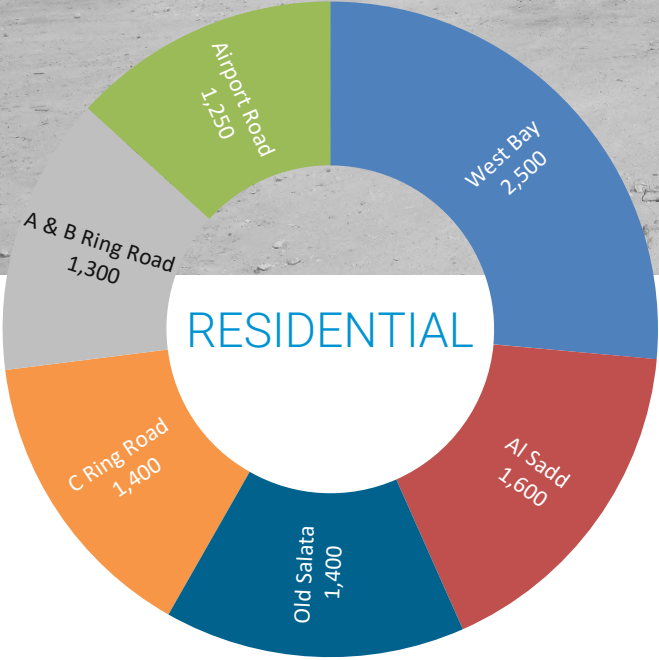


* RavPAR – Revenue Per Available Room (QAR)

Many hotel apartments extended their booking policy from daily to monthly that counter steady ADR in last one year. An average of 14% decline is noticed in occupancy that compresses RevPAR.

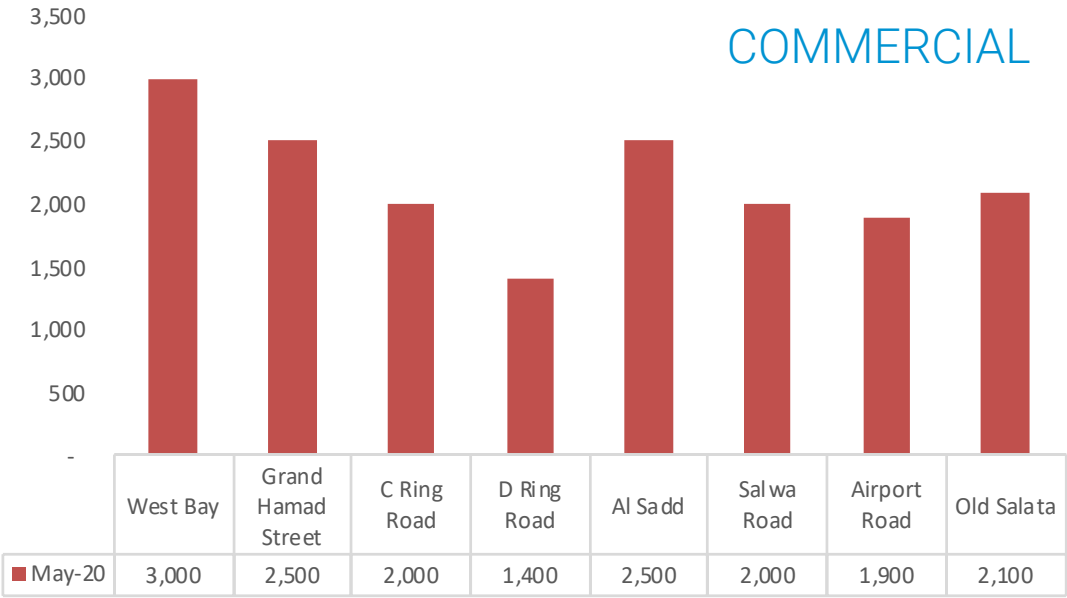
Land Rates

By QAR/sq.ft



RESIDENTIAL

Land rates have stabilized over couple of quarters thereby keeping the investors sentiments intact. Land parcel with G+5 to G+10 storied approval is most sought after by the investors in and around Doha.



COMMERCIAL

Rental Market

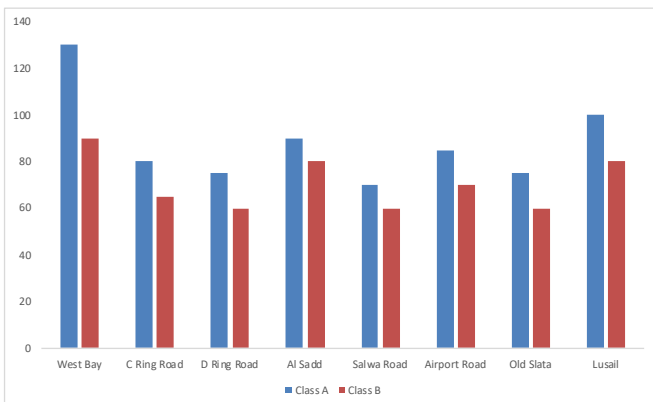


RESIDENTIAL

OFFICE

PSM per month

Location	Rental Rates (QAR)	
	Class A	Class B
West Bay	130	90
C Ring Road	80	65
D Ring Road	75	60
Al Sadd	90	80
Salwa Road	70	60
Airport Road	85	70
Old Slata	75	60
Lusail	100	80



Type	Location	Rental Rates (QAR)
4BR Villa in Compound	West Bay Lagoon	22,000
	Al Waab	14,000
	Ain Khalid	11,000
	Abu Hamour	10,500
	Al Hilal	10,500
	Al Gharrafa	10,000
	Wakra	6,500
2BR Apartment	The Pearl	10,000
	West Bay	10,000
	Lusail	7,500
	Al Sadd	5,500
	Bin Omran	5,000
	Al Mansoorah	4,500
	Old Airport	4,250
	Al Muntazah	4,000
	Wakra	3,800



The overall outlook of office market is stable in spite ongoing restrictions due to COVID-19. Class A offices in West Bay still command a monthly rental in the range QAR 120 – QAR 140 per sq.m.

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Data Reference: Planning
and Statistics Authority and
Internal Research

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