



QuickStats

Qatar Real Estate November 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

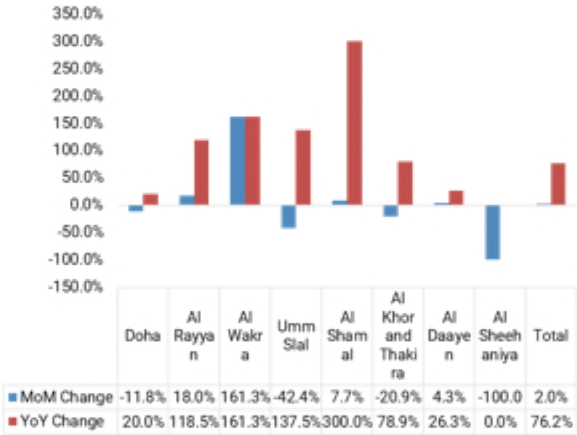
www.aredcadvisory.com

Real Estate Transactions

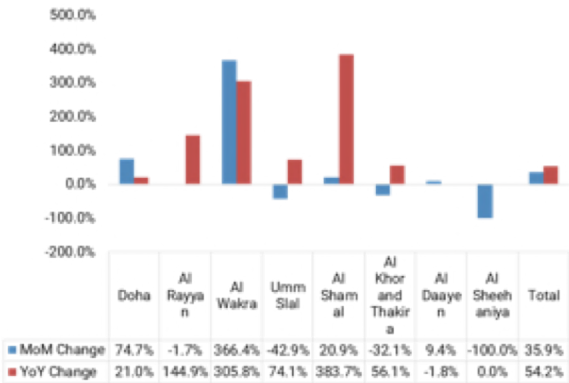
By Municipality



Count	Nov-19	Oct-20	Nov-20
Doha	75	102	90
Al Rayyan	54	100	118
Al Wakra	31	31	81
Umm Slal	24	99	57
Al Shamal	7	26	28
Al Khor and Thakira	19	43	34
Al Daayen	76	92	96
Al Sheehaniya	0	1	0
Total	286	494	504



Value (QAR Mn)	Nov-19	Oct-20	Nov-20
Doha	860.3	596	1,041.1
Al Rayyan	200.1	498.6	490.1
Al Wakra	87.7	76.3	355.9
Umm Slal	67.5	205.6	117.5
Al Shamal	8.6	34.4	41.6
Al Khor and Thakira	37.6	86.5	58.7
Al Daayen	283.2	254.4	278.2
Al Sheehaniya	0	1.7	0
Total	1,545	1,753.5	2,383.1



The number of transactions in comparison to Nov-19 has almost doubled. Highest transactions by count were recorded in Al Rayyan followed by Al Daayen, and by value in Doha followed by Al Rayyan.

* Change is assumed at 100% where base is 0

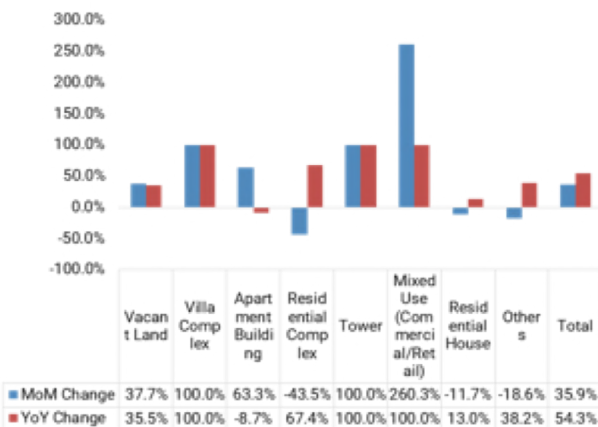
By Property Type



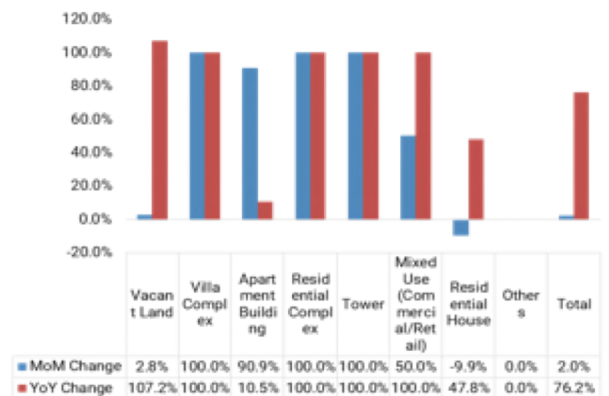
BY VOLUME

BY VALUE

Value (QAR Mn)	Nov-19	Oct-20	Nov-20
Vacant Land	698.9	687.7	947.2
Villa Complex	0	0	38.1
Apartment Building	186.3	104.1	170
Residential Complex	45.7	135.4	76.5
Tower	0	0	356
Mixed Use (Commercial/Retail)	0	25.7	92.6
Residential House	579.8	742.4	655.4
Others	34.3	58.2	47.4
Total	1,545	1,753.5	2,383.2



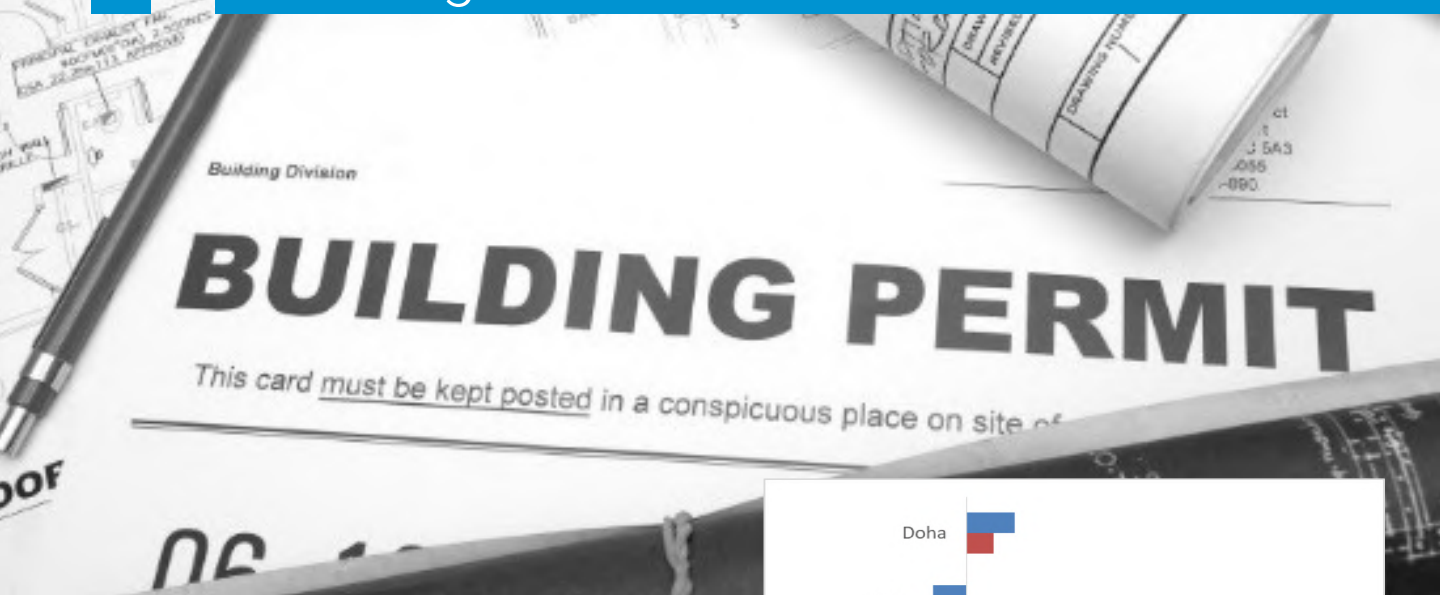
Count	Nov-19	Oct-20	Nov-20
Vacant Land	125	252	259
Villa Complex	0*	0*	11
Apartment Building	19	11	21
Residential Complex	2	2	4
Tower	0	0	1
Mixed Use (Commercial/Retail)	0	2	3
Residential House	136	223	201
Others	4	4	4
Total	286	494	504



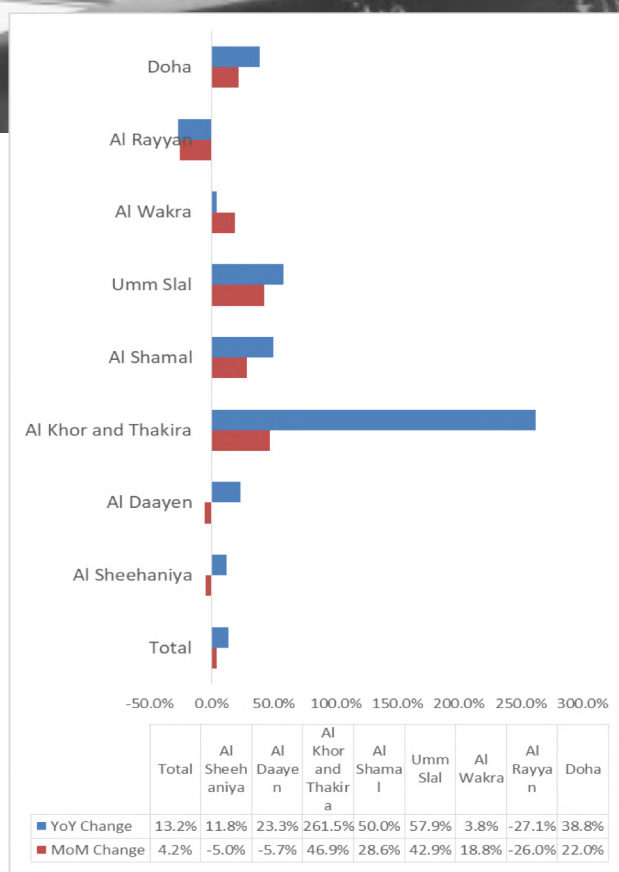
Majority of the transactions are realized under the segment of the vacant land and residential houses indicating smaller size investments and commitments.

* Change is assumed at 100% where base is 0

Building Permits



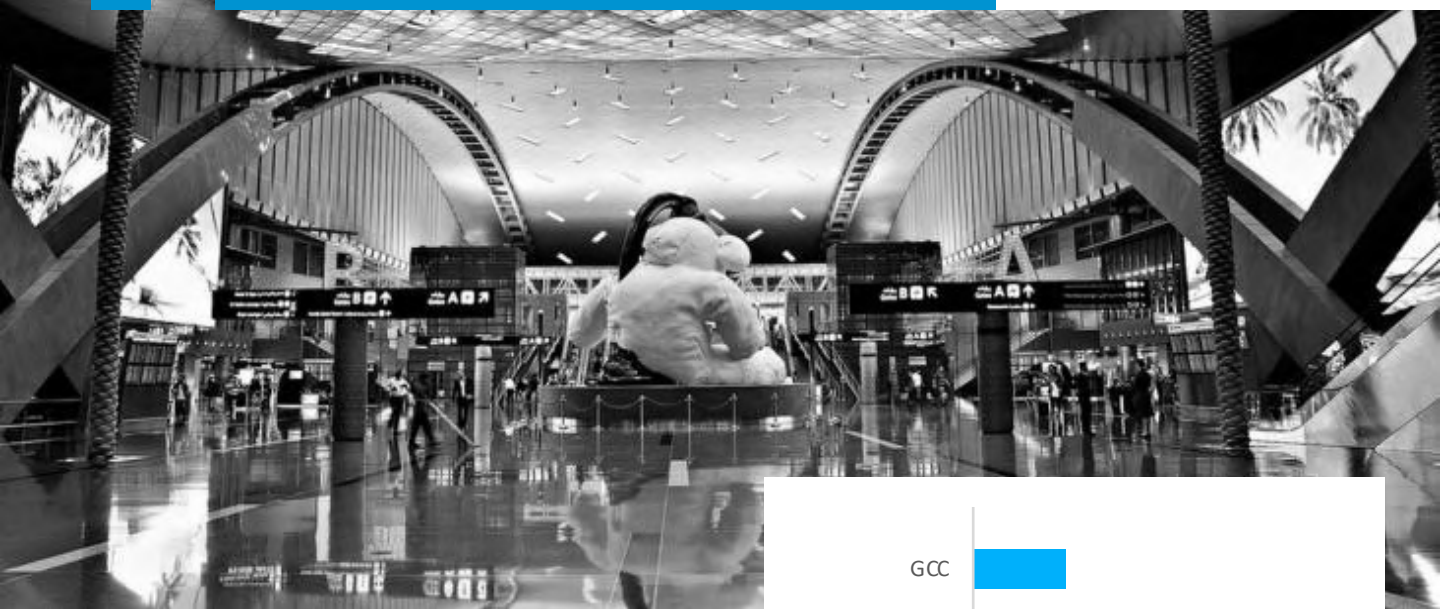
Municipality	Nov-19	Oct-20	Nov-20
Doha	116	132	161
Al Rayyan	199	196	145
Al Wakra	158	138	164
Umm Slal	12	42	60
Al Shamal	38	14	18
Al Khor and Thakira	13	32	47
Al Daayen	120	157	148
Al Sheehaniya	17	20	19
Total	673	731	762



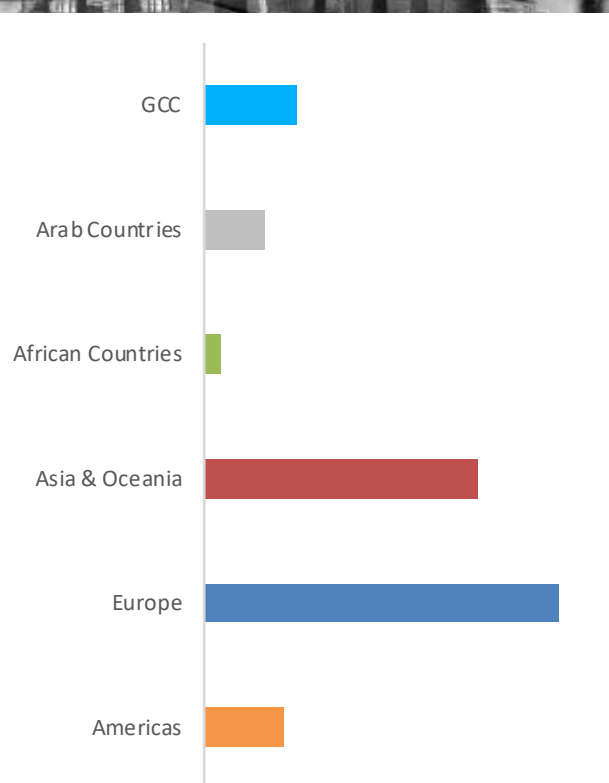
Development concentration remains persistent in the peripheral areas of Doha where 79% building permits were issued in November 2020 with compared to 21% in Doha municipality.

Visitor Arrivals

By Region

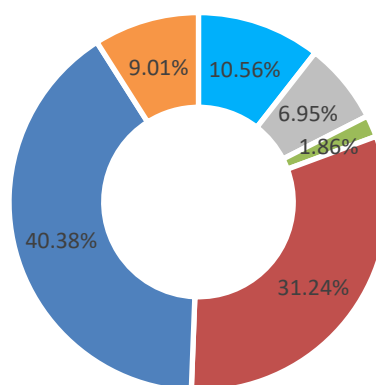


Regions	YTD November 2020	% Share
GCC	60,518	10.56%
Arab Countries	39,811	6.95%
African Countries	10,649	1.86%
Asia & Oceania	179,072	31.24%
Europe	231,439	40.38%
Americas	51,646	9.01%
Total	573,135	



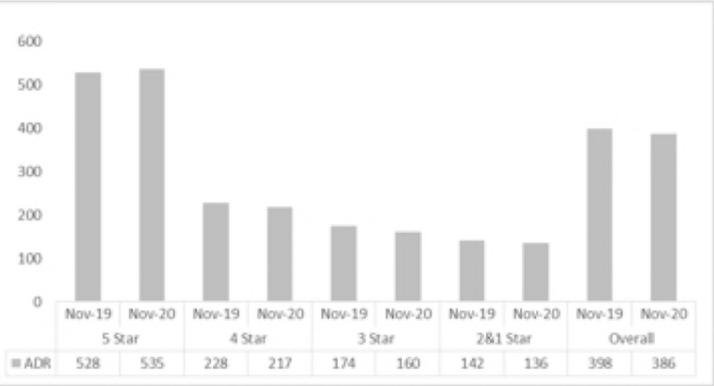
With the restrictions still in place due to COVID-19. The number of visitors to Qatar, remained significantly low.

*Visitor arrivals measures non-residents travelling to Qatar on a short-term basis for all purposes. It includes arrivals at borders under 15 different visa classes, including all business and leisure visa types while excluding work visas.



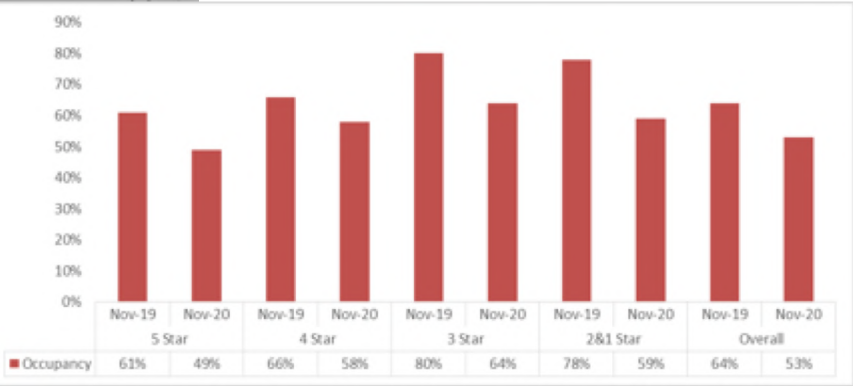
Hotel Performance

ADR

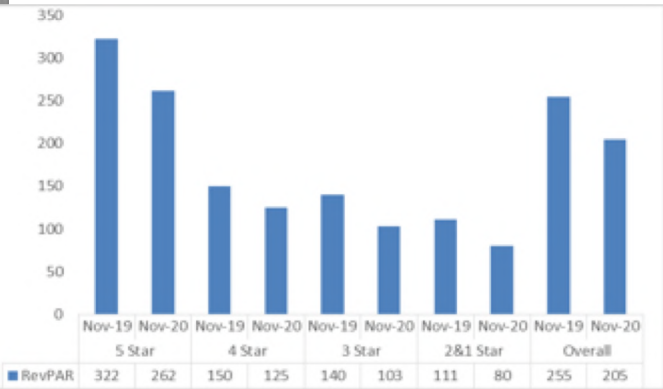


*ADR – Average Daily Rates (QAR)

OCCUPANCY



RevPAR



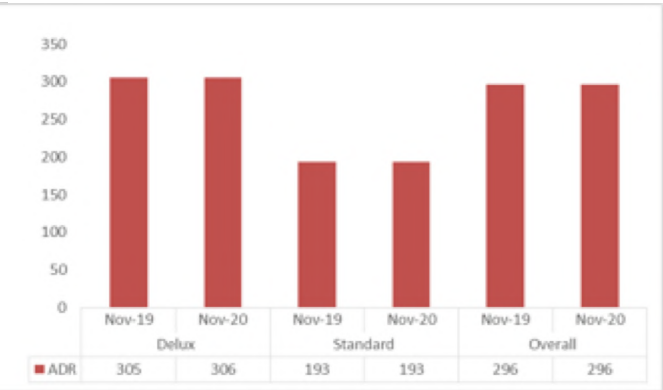
*RavPAR – Revenue Per Available Room (QAR)

The hotel performance in terms of occupancies with compared to the same time previous year has overall declined further by 11% and overall RevPAR compressed by 20%.

Hotel Apartment Performance

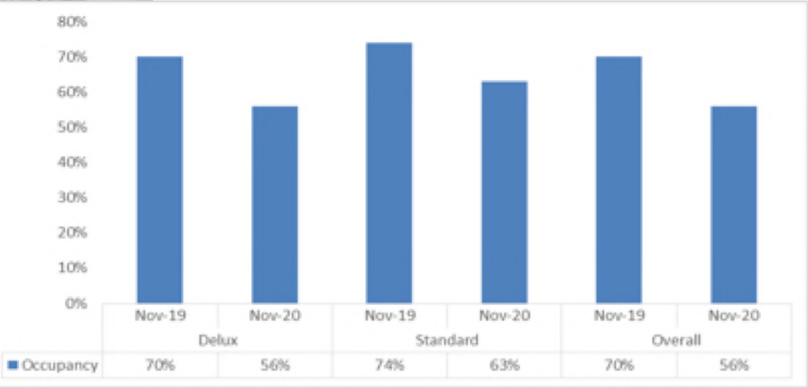


ADR

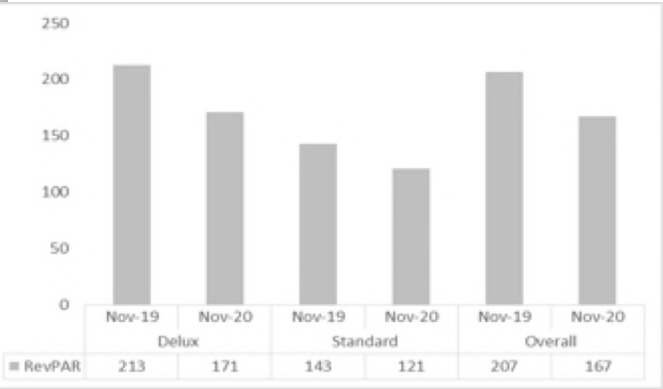


*ADR – Average Daily Rates (QAR)

OCCUPANCY



RevPAR

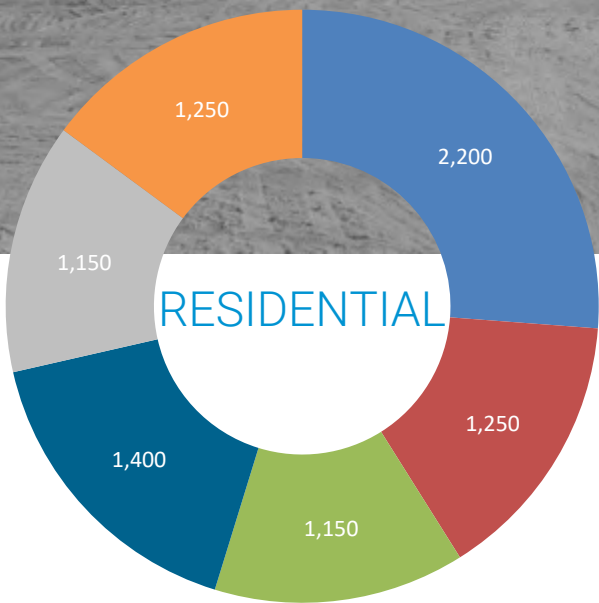


*RavPAR – Revenue Per Available Room (QAR)

The hotel apartment performance are much impacted as compared to Nov-19. Overall occupancy in Nov-20 was 56% that is 14% lower than the occupancy in the same month in 2019.

Land Rates

By QAR/sq.ft



- West Bay
- Al Sadd
- C Ring Road
- Airport Road
- A & B Ring Road
- Old Salata

Land rates continue to stabilize in almost all the municipalities of Qatar. Much of the emphasis is laid on development of peripheral areas of Doha.

COMMERCIAL



Rental Market



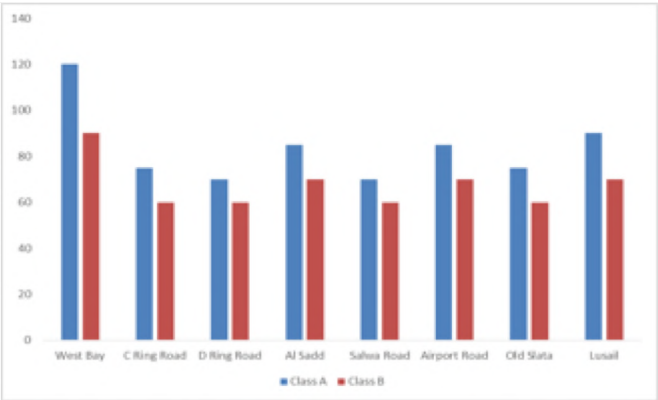
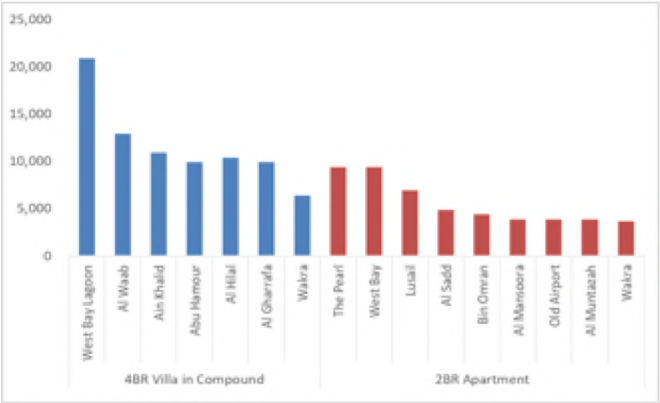
RESIDENTIAL

Type	Location	Rental Rates (QAR)
4BR Villa in Compound	West Bay Lagoon	21,000
	Al Waab	13,000
	Ain Khalid	11,000
	Abu Hamour	10,000
	Al Hilal	10,500
	Al Gharrafa	10,000
	Wakra	6,500
2BR Apartment	The Pearl	9,500
	West Bay	9,500
	Lusail	7,000
	Al Sadd	5,000
	Bin Omran	4,500
	Al Mansoorah	4,000
	Old Airport	4,000
	Al Muntazah	4,000
	Wakra	3,750

OFFICE

PSM per month

Location	Rental Rates (QAR)	
	Class A	Class B
West Bay	120	90
C Ring Road	75	60
D Ring Road	70	60
Al Sadd	85	70
Salwa Road	70	60
Airport Road	85	70
Old Slata	75	60
Lusail	90	70



The rental rates in both segments stabilized due to controlled new supply and overall stability in the market. Next quarter would be highly important to determine the future curve of the property market.

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Data Reference: Planning
and Statistics Authority and
Internal Research

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