



# QuickStats

Qatar Real Estate  
August 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

## 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](http://www.aredcadvisory.com)

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

# Real Estate Transactions

## By Municipality

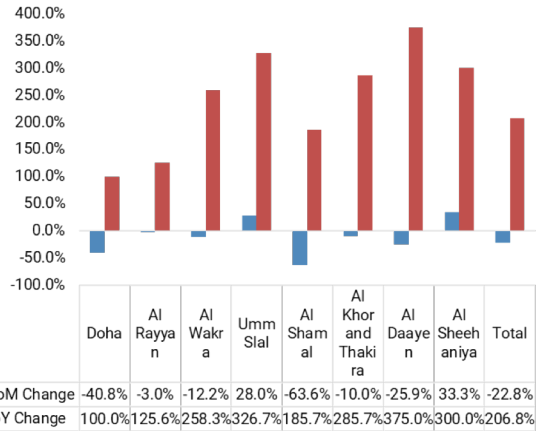


BY VOLUME

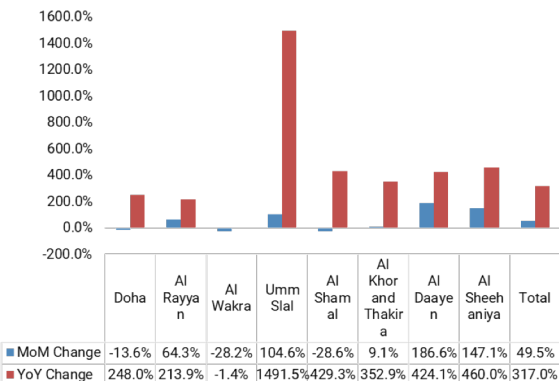
Count	Aug-19	July-20	Aug-20
Doha	45	152	90
Al Rayyan	43	100	97
Al Wakra	12	49	43
Umm Slal	15	50	64
Al Shamal	7	55	20
Al Khor and Thakira	7	30	27
Al Daayen	32	205	152
Al Sheehaniya	1	3	4
Total	162	644	497

BY VALUE

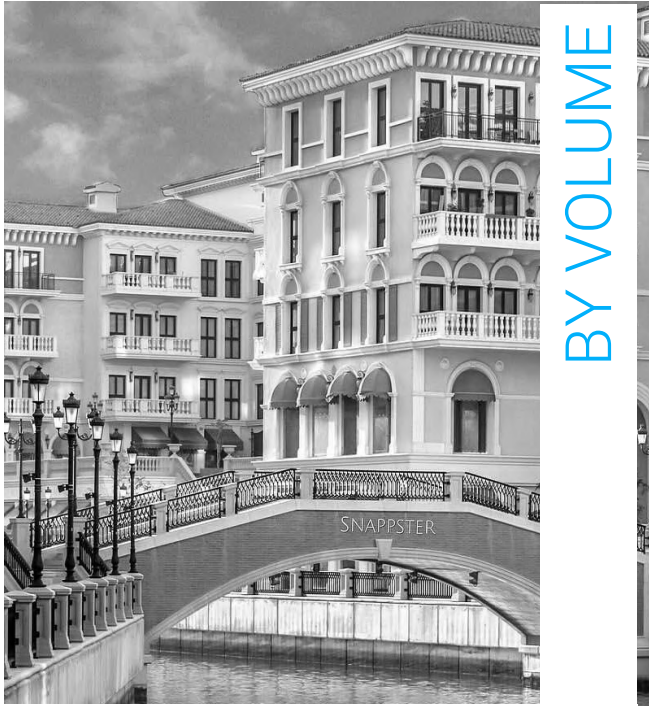
Value (QAR Mn)	Aug-19	July-20	Aug-20
Doha	308.1	1,241.1	1,072.3
Al Rayyan	197.5	377.3	619.9
Al Wakra	123.9	170.3	122.2
Umm Slal	39.8	309.6	633.4
Al Shamal	9.9	73.4	52.4
Al Khor and Thakira	11.9	49.4	53.9
Al Daayen	304.1	556.2	1,593.8
Al Sheehaniya	1.5	3.4	8.4
Total	996.7	2,780.7	4,156.3



Despite decline in transaction count in comparison to the previous month the value of transactions has taken a leap of almost 1.5 times with compared to last month.



## By Property Type

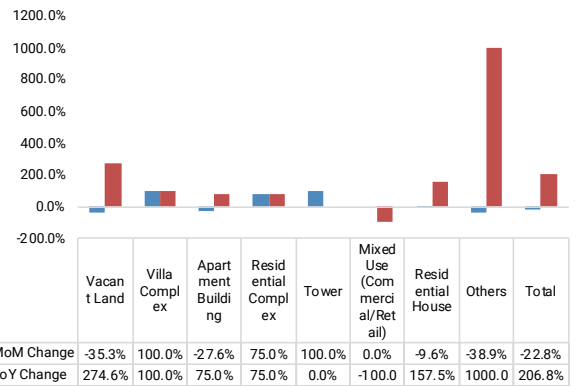


BY VOLUME

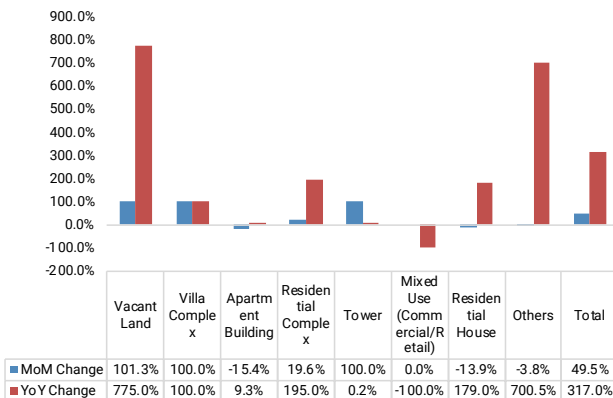
Count	Aug-19	July-20	Aug-20
Vacant Land	63	365	236
Villa Complex	0*	0*	15
Apartment Building	12	29	21
Residential Complex	4	4	7
Tower	1	0*	1
Mixed Use (Commercial/Retail)	1	0*	0*
Residential House	80	228	206
Others	1	18	11
<b>Total</b>	<b>162</b>	<b>644</b>	<b>497</b>

BY VALUE

Value (QAR Mn)	Aug-19	July-20	Aug-20
Vacant Land	290.9	1,264.3	2,545.5
Villa Complex	0*	0*	47.6
Apartment Building	174.6	225.6	190.9
Residential Complex	70	172.7	206.5
Tower	171.1	0*	171.4
Mixed Use (Commercial/Retail)	4.8	0*	0*
Residential House	247.4	801.8	690.2
Others	38	316.2	304.2
<b>Total</b>	<b>996.8</b>	<b>2,780.6</b>	<b>4,156.3</b>



The major transactions are realized under the segment of the vacant land and residential houses that interpret into demand from the end user and counters speculative investments.



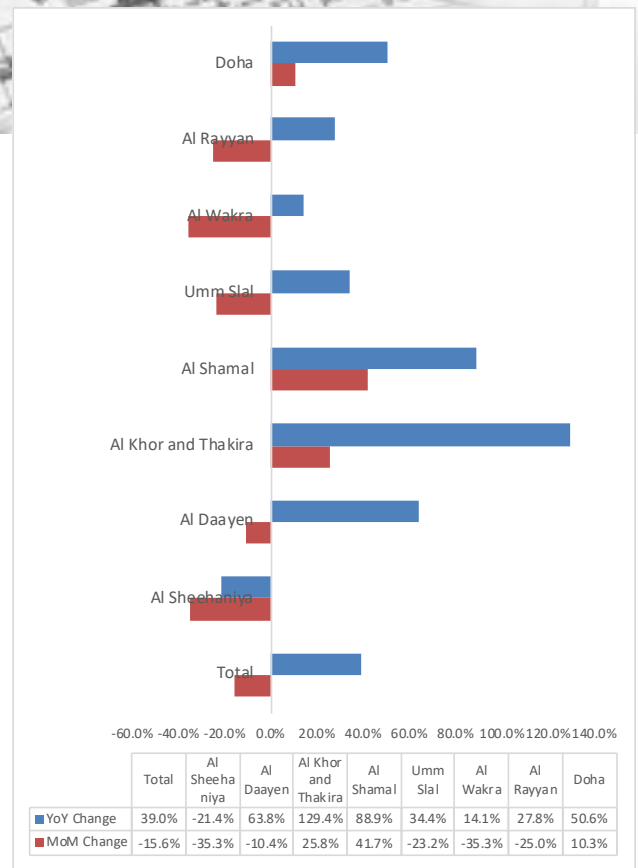
\* Change is assumed at 100% where base is 0



# Building Permits



Municipality	Aug-19	July-20	Aug-20
Doha	85	116	128
Al Rayyan	115	196	147
Al Wakra	85	150	97
Umm Slal	32	56	43
Al Shamal	9	12	17
Al Khor and Thakira	17	31	39
Al Daayen	58	106	95
Al Sheehaniya	14	17	11
Total	415	684	577



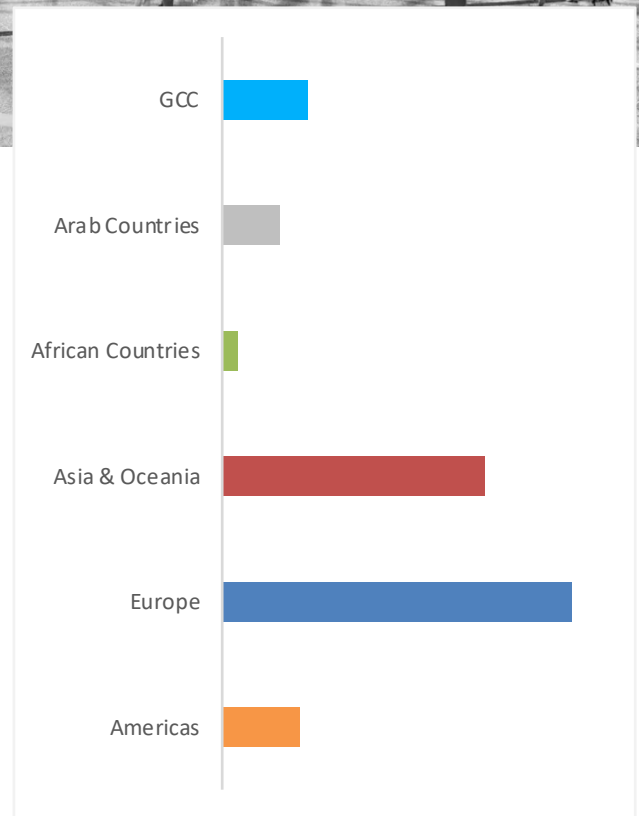
Development concentration remains persistence in the peripheral areas of Doha where 77.82% building permits were issued in August 2020 with compared to 22.18 % in Doha municipality.

# Visitor Arrivals

## By Region

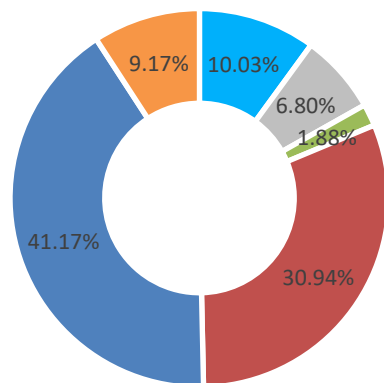


Regions	YTD August 2020	% Share
GCC	55,532	10.03%
Arab Countries	37,675	6.80%
African Countries	10,421	1.88%
Asia & Oceania	171,306	30.94%
Europe	227,950	41.17%
Americas	50,783	9.17%
Total	553,667	



Due to ongoing pandemic and entry restrictions of Qatar, the inflow of visitors\* is significantly lowered down.

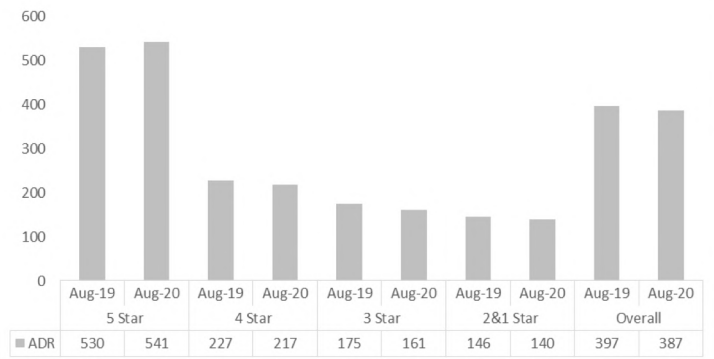
\*Visitor arrivals measures non-residents travelling to Qatar on a short-term basis for all purposes. It includes arrivals at borders under 15 different visa classes, including all business and leisure visa types while excluding work visas.



■ GCC ■ Arab Countries ■ African Countries ■ Asia & Oceania ■ Europe ■ Americas

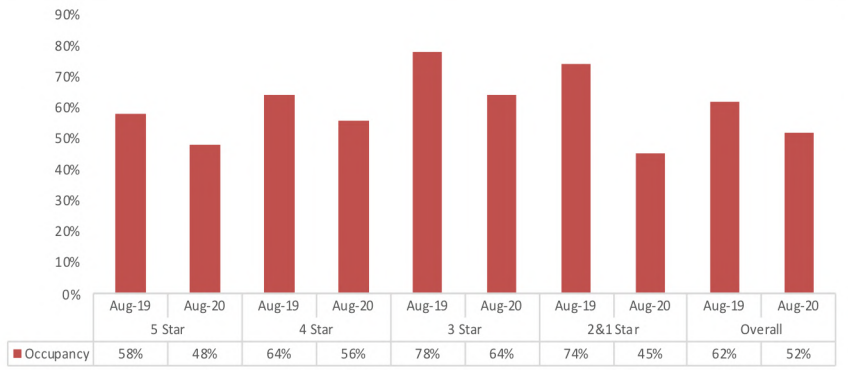
# Hotel Performance

## ADR

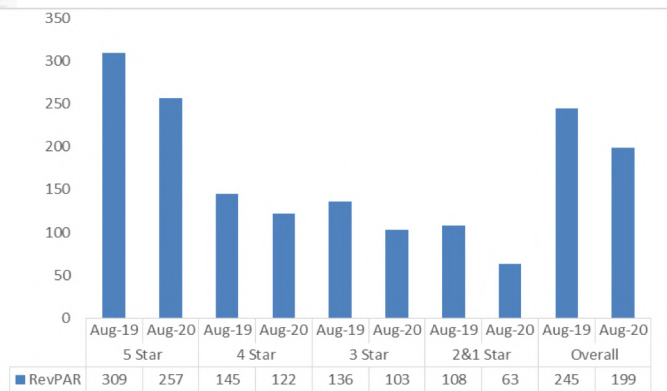


\*ADR – Average Daily Rates (QAR)

## OCCUPANCY



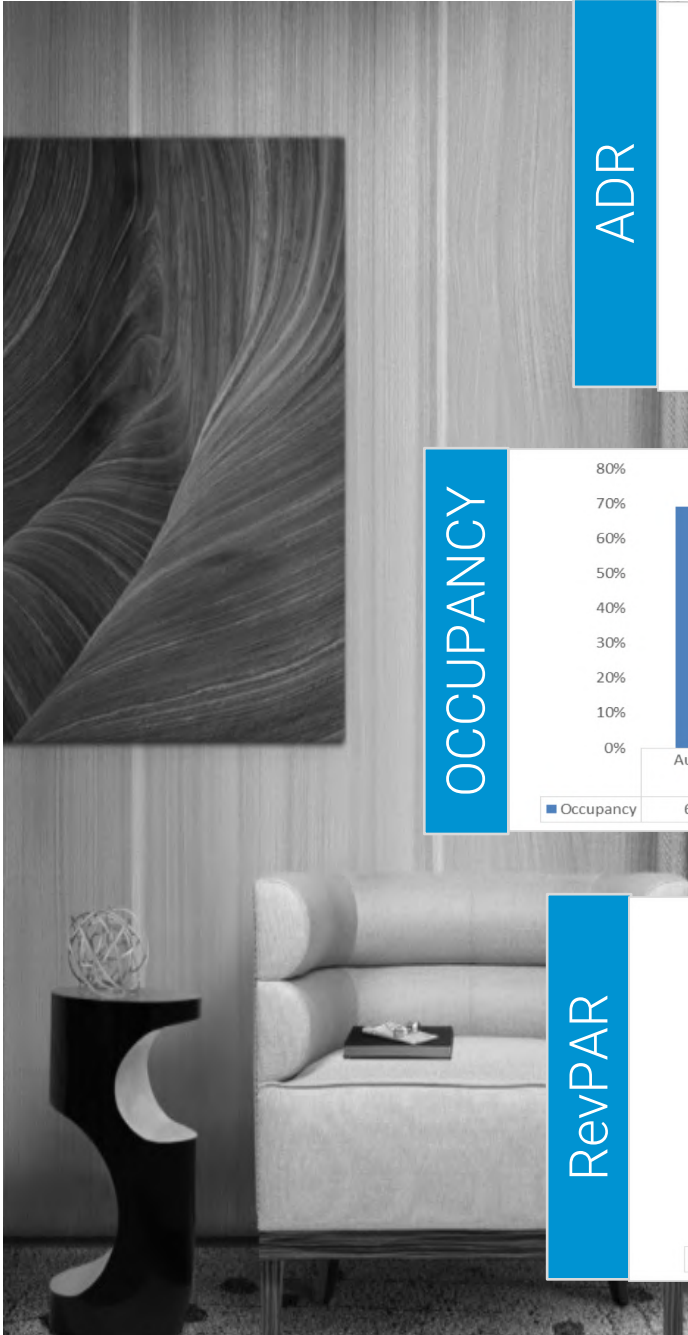
## RevPAR



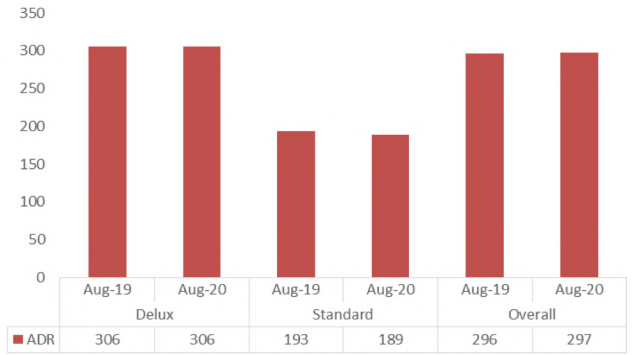
\*RevPAR – Revenue Per Available Room (QAR)

The hotel performance in terms of occupancies compared to the same time previous year has declined further by 10% in the 5 star hotel segment. The overall outlook of RevPAR compresses by 19% compared to Aug-19.

# Hotel Apartment Performance

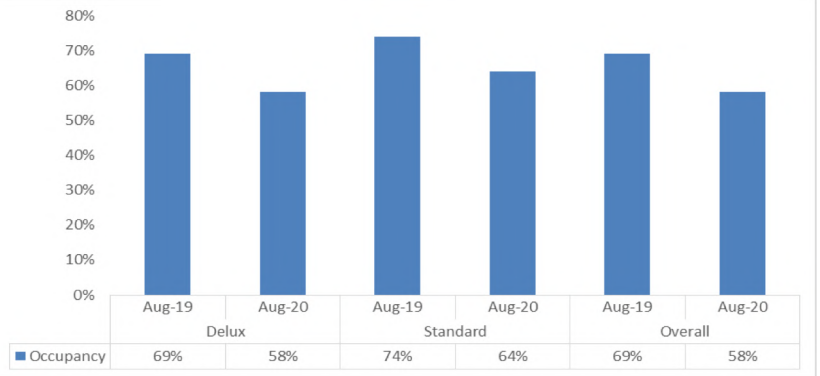


## ADR

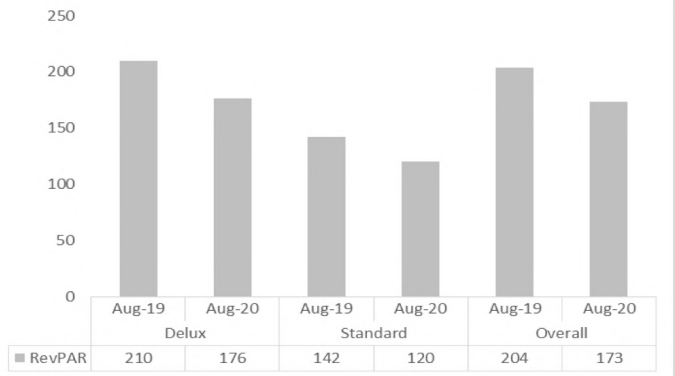


\*ADR – Average Daily Rates (QAR)

## OCCUPANCY



## RevPAR



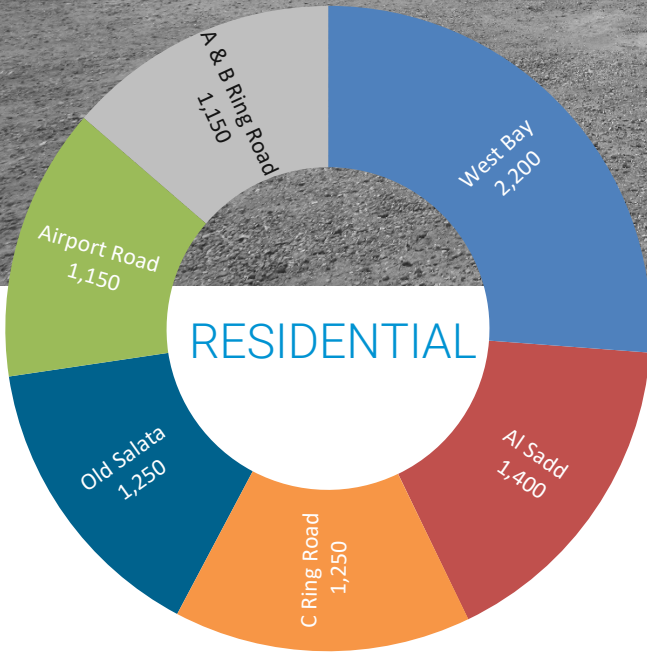
\*RevPAR – Revenue Per Available Room (QAR)

Even though hotel apartments have extended their bookings for quarantine facilities, their performance are much impacted as compared to Aug-19. Overall occupancy in Aug-20 was 58% that is 10% lower than the occupancy in the same month in 2019.



# Land Rates

By QAR/sq.ft



Land rates have not much fluctuated in a few quarters as much emphasis has been laid in developing peripheral areas of Doha where huge land banks are available.

## COMMERCIAL



# Rental Market

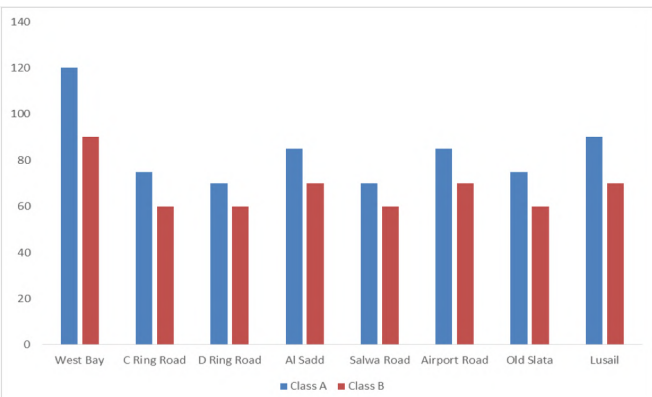


RESIDENTIAL

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



Type	Location	Rental Rates (QAR)
4BR Villa in Compound	West Bay Lagoon	21,500
	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



Key micro markets retains the rental rates by offering incentives in terms of free monthly rentals and waiver on other service charges. Additional supply of commercial spaces may further disrupt the rental market outlook.

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Data Reference: Planning  
and Statistics Authority and  
Internal Research

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