THE BOARD CONSULTING

Actualizing Opportunities

WHAT IS

THE BOARD CONSULTING

THE BOARD is a
BUSINESS CONSULTANCY
with a **COMMERCIAL PHILOSOPHY**

WE SUPPORT DEVELOPERS TO STRATEGISE AND GROW

BUSINESS STRATEGY

COMMERCIAL MIX STRATEGY

Healthy
P&L

DEVELOPMENT MIX STRATEGY

THE PURPOSE OF THE NEWSLETTER

THE BOARD CONSULTING vision is to be a positive economy catalyst, we believe that knowledge forms the core foundation for sustainable growth.

With knowledge and information, developers, manufacturers and service providers will be capable of measuring their performance and build solid strategies.

Hence, we passionately share knowledge with the purpose of evolving the market and enable developers take better decisions.

WE SHARE KNOWLEDGE WITH PASSION

At The Board Consulting, we believe that by knowledge Industries and economies grow.

We would like to thank those who appreciate knowledge, the people taking of their valuable time to review and share this report.

Hope you find it useful and informative to your business decisions.

THE BOARD CONSULTING
Actualizing Opportunities

H1 2022 REAL ESATE SECTOR SALES

AUGUST 2022

The First Half Of 2022

POSITIVE, TOUGH HALF YEAR!

Right after a **VERY FRUITFUL AND REWARDING FIRST QUARTER**, expectations were set that **Q2** would have a relatively **POOR PERFORMANCE**. this is mainly driven by the global economic crisis and EGP devaluation that directly impacted the material costs; leading to **AN IMPOSED PRICE ESCALATIONS FROM THE DEVELOPER SIDE AND, IN DUE COURSE, AFFECTING THE DECISION MAKING OF THE CUSTOMER /SLOWED DOWN THE PANIC BUYING SYNDROME.**

CONTRARY TO EXPECTATIONS, Q2 PERFORMED WELL, with some developers improving their performance and a few other deteriorating.

THERE IS NO SIGNIFICANT DIFFERENCE BETWEEN THE SALES OF THE TWO QUARTERS.

DEVELOPERS PERFORMANCE IS PREDOMINETLY MEASURED BY THEIR CAPABILITY IN DELIVERING THE LIFE PROMISED TO THEIR CUSTOMERS.

SALES WILL REMAIN ONE OF THE MAIN KPIS YET NOT THE ONLY PARAMETER.

NOW THAT THE FIRST HALF OF 2022 YEAR IS OVER,
LET US SEE HOW THE MARKET AND DEVELOPERS PERFORMED IN TERMS OF SALES FROM JAN TILL END OF JUNE 2022.

Top 20 Developers Sales Figures In H1 2022

THE TOP 20 DEVELOPERS IN THE MARKET ACHIEVED ALMOST **120 BN** EGP IN H1 GROSS SALES WITH **103** PROJECTS WITH AVAILABLE INVENTORY

1	EMAAR MISR	13.5 BN
2	Talaat Moustafa Group	11.3 BN
3	MOUNTAIN VIEW	11 BN
4	PALM HILLS DEVELOPMENTS	10.7 BN
5	ORA	8 BN
6	NEWGIZA	7.8 BN
7	SODIC	6.68 BN
8	CITY EDGE DEVELOPMENTS	6 BN
9	ORASCOM DEVELOPMENT	5 BN
10	LAVISTA DEVELOPMENTS	4.7 BN
11	SAUDI EGYPTIAN DEVELOPERS	4.6 BN
12	LMD	4.4 BN
13	MISR ITALIA PROPERTIES	4.2 BN
14	Tatweer Misr	4 BN
15	HASSAN ALLAM PROPERTIES	3.5 BN
16	mnhd	3.3 BN
17	HYDE PARK DEVELOPMENTS	3.1 BN
18	QATARI DIAR	3 BN
19	Capital Group Properties ALBUROUJ	2.2 BN
20	AL AHLY SABBOUR DEVELOPMENTS	2.2 BN

Insights on the top 10 Developers of H1 2022

1

13.5 BN

Emaar continues to hold **THE LEADING POSITION,** Q2 sales saw an **8%** growth compared to Q1, yet it is expected that **Q3** will be **THE BOOMING QUARTER** for Emaar due to their latest project **LAUNCH** in North Coast **"SOUL".**

2

11.3 BN

TMG had a **SUCCESSFUL Q2** sales compared to Q1 with around **18%** growth, raising the rank from 4th in Q1 to the 2nd in total H1, **MADINATY** project had a big role in pushing the sales in Q2, especially with some **BULK DEALS** made

3

11 BN

Mountain View is on of **THE GREATEST SUCCESS STORIES** in the Egyptian market, Mountain view is expected to reach **HIGHER SALES IN H2** due to the expected launch of their new lands.

4

10.7 BN

Palm Hills remains to have very **STEADY PERFORMANCE, BADYA & PHNC** projects were the top leaders in H1 sales, also PHD for the first time launched their **COMMERCIAL OFFERINGS** in East and West of Cairo.

5

8 BN

Out of the **TOP SELLERS IN Q1**, Ora saw the greatest growth in Q2, S**ILVERSANDS** led the sales of ORA in Q2 with it's newest phase **SILVERTOWN.**

Insights on the top 10 Developers of H1 2022

6 NEWGIZA

7.8 BN
New Giza remains the **SILENT HORSE** in the race that continues to prove its strength. With a **SMALL NUMBER OF PROJECTS. WITHOUT USING BROKERS**, New Giza are steadily **CLIMBING THE LADDER OF TOP SELLERS.**

7 SODIC

6.7 BN
SODIC Under **AL Daar**, continue to cement its positioning as one of the leading and most institutionalized developers. High expectations for sales for their North Coast **JUNE** project that is expected to increase the total YOY sales of SODIC

8 CITY EDGE DEVELOPMENTS

6 BN
City Edge achieves **THE HIGHEST GROWTH FROM Q1 TO Q2** with a **100% INCREASE IN CONTRACTED SALES** due to their new project **MASPERO BUSINESS TOWER THAT WAS PREDOMINANTLY SOLD TO CLINICS AND OFFICES.**

9 ORASCOM DEVELOPMENT

5 BN
O West led the sales of Orascom by **51%**, followed by **El-Gouna** with **42%,** supported by the launch of "**The Nines**", and finally **Makadi by 6%**

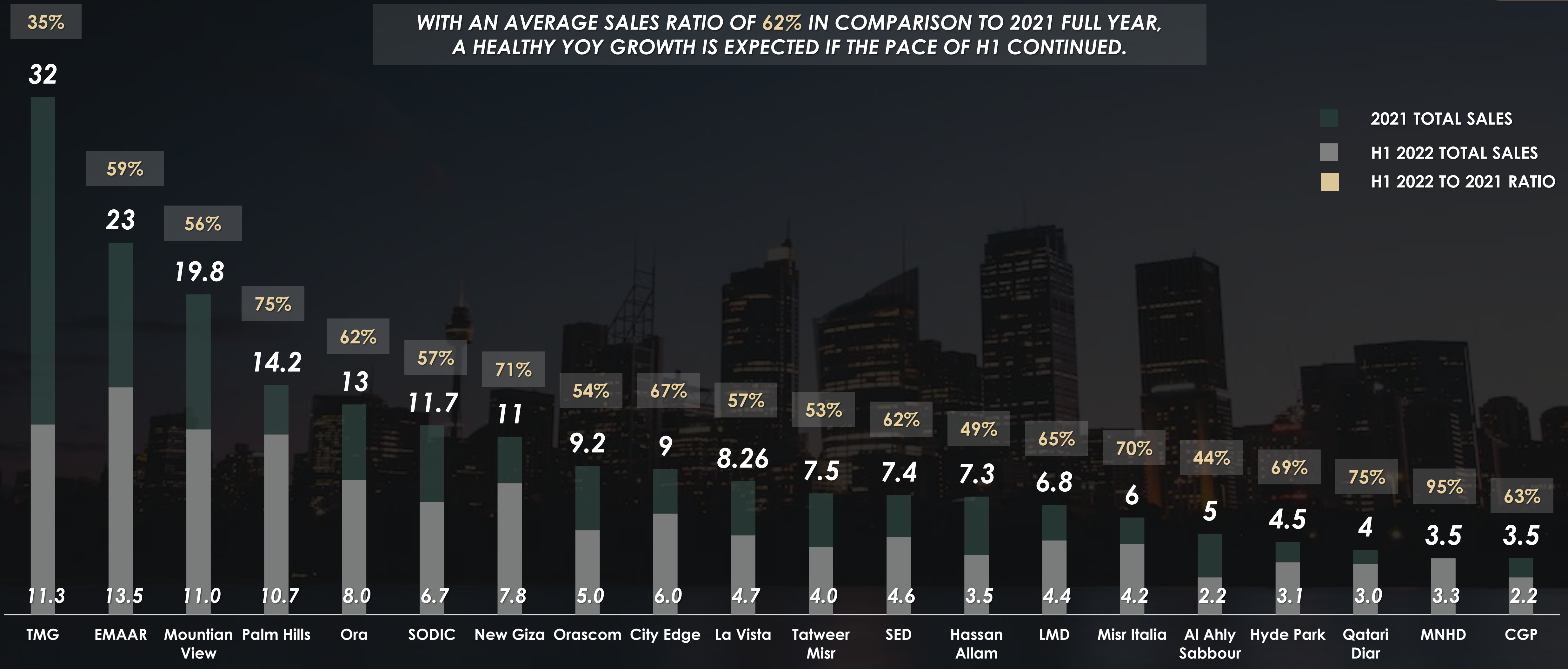
10 LAVISTA DEVELOPMENTS

4.7 BN
With very consistent steps, **LA VISTA** could sustain their sales performance by achieving equal sales in Q1 vs Q2, **Al-Shorouk** projects played a big role in supporting the sales performance in H1

LET'S HAVE A CLOSER LOOK ON **TOP DEVELOPERS' SALES PERFORMANCE** IN H1 2022 VS FULL 2021 SALES

H1 2022 Vs Total Year Sales 2021

WITH AN AVERAGE SALES RATIO OF 62% IN COMPARISON TO 2021 FULL YEAR, A HEALTHY YOY GROWTH IS EXPECTED IF THE PACE OF H1 CONTINUED.



North Coast Guesstimates

NORTH COAST IS **THE SECOND LARGEST** MARKET IN SALES VALUE AFTER EAST CAIRO, WITH SALES THAT EXCEED 55 BN IN 2021.

NORTH COAST SEASON SALES (JULY AND AUGUST) ARE NOT REFLECTED IN THE DEVELOPERS' SALES OF H1.

THOUGH WE WILL BE PUBLISHING A DEDICATED NEWSLETTER FOR NORTH COST WITH SEASON CLOSURE.

STAY TUNED FOR OUR NORTH COAST NEWSLETTER

CONTACT US

CONTACT US TO GET THE FULL DETAILED REPORT THAT INCLUDES THE FOLLOWING TOPICS:

- Total sales of developers historically for the past 4 years per region
- Region sales value per developer for the past 4 years (East Cairo, West Cairo, and North Coast)
- Forecasts for 2022 closure targets for top 10 players
- Ratio of direct vs indirect sales per developer
- Deep dive into current pricing of different regions as per request (East Cairo, West Cairo, and North Coast)

Contact us on e-mail: info@theboardconsulting.com or call us at +201222811118 or +201000630921

What is Next?

JOIN US IN CITY SCAPE “DAY 2” IN OUR DEDICATED SESSION THAT WILL UNVEIL MARKET PERFORMANCE OF NORTH COAST in 2022

STAYE TUNED FOR THE BIGGEST DATA BASED REAL ESTATE SUMMIT THAT WILL TAKE PLACE IN NOVEMBER 2022

THANK YOU

THE BOARD CONSULTING

Actualizing Opportunities