kw EGYPT
KELLERWILLIAMS

Gateway
Financial Services

PROPERTY INTELLIGENCE

Locations, demand and investment returns

Empowering buyers, investors, developers, and real estate professionals

ONE MARKET. ONE VISION.

Q3 2026 market edition

Egypt real estate sales YTD Q3

Market Gross contracted sales estimate / January–September 2026

1,348 BN
Estimated sales / EGP

103,643
Sold units / EGP 13m ticket

5–10%
Down payment

8–12 years
Installment period

2026 Quarterly Performance

Q1
SALES VALUE / EGP BN

375.6

SOLD UNITS

29,301

Q2
SALES VALUE / EGP BN

584.0

SOLD UNITS

42,660

Q3
SALES VALUE / EGP BN

388.5

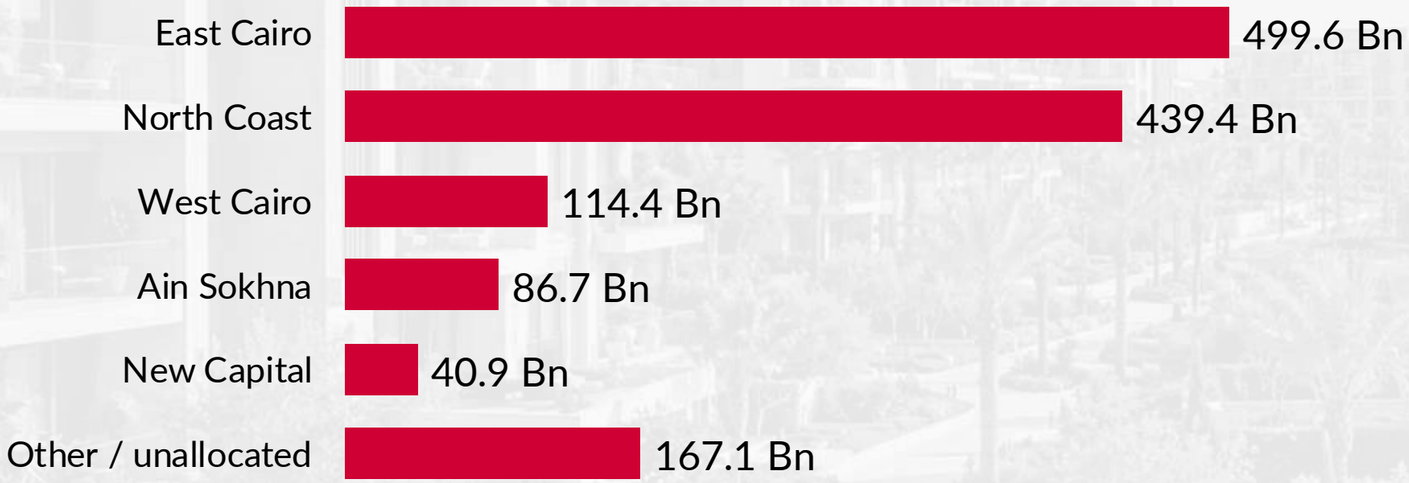
SOLD UNITS

31,682

Source: Gateway Financials management inputs, 1 November 2026. Top 10: EGP 1,069.9bn + 26% other developers EGP 278.2bn = EGP 1,348.1bn.
Units are at an average ticket of EGP 13mn. Totals use unrounded sales values.

Where buyer demand is concentrated

Sales by area / January–September 2026 / EGP bn



Area	Market share
East Cairo	**37.1%**
North Coast	**32.6%**
West Cairo	**8.5%**
Ain Sokhna	**6.4%**
New Capital	**3.0%**
Other / unallocated	**12.4%**

East Cairo and the North Coast account for EGP 939.0bn, or 69.7% of estimated sales.
East Cairo: EGP 499.6bn (37.1%). North Coast: EGP 439.4bn (32.6%).
Other / unallocated: EGP 167.1bn (12.4%). Total estimated sales EGP 1,348.1bn.

Source: Gateway Financials management inputs, 1 November 2026.
The five locations total EGP 1,181bn. Remaining unallocated sales: EGP 167.074bn.

Top 10 developers YTD Q3

Estimated Gross contracted sales / January–September 2026 / EGP billion

Top 10 sales
1,069.9
BN EGP

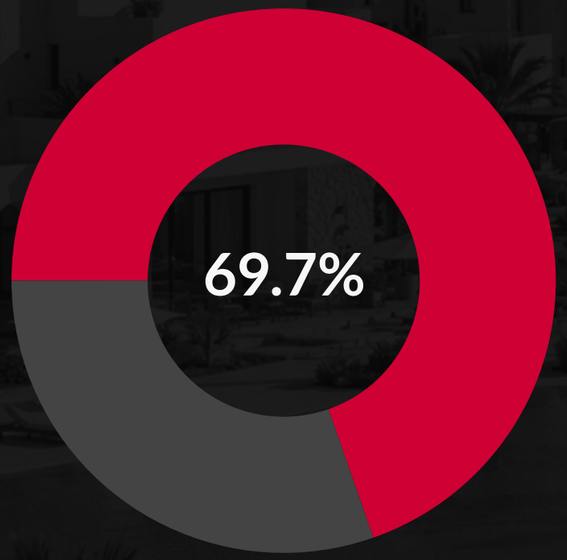
Units sold
73,920
top 10 sold units

1 TMG — 311 BN	2 PALM HILLS DEVELOPMENTS — 193 BN	3 EMAAR MISR — 106 BN	4 HYDE PARK DEVELOPMENTS / FOUNDERS — 91.4 BN	5 MOUNTAIN VIEW — 80 BN
6 MOUNTAIN VIEW — 80 BN	7 tatweer MISR — 62.5 BN	8 LAVISTA DEVELOPMENTS — 46.9 BN	9 مدينة مصر Madinet Masr تأسست ١٩٥٩ — 45.4 BN	10 SODIC — 42.4 BN

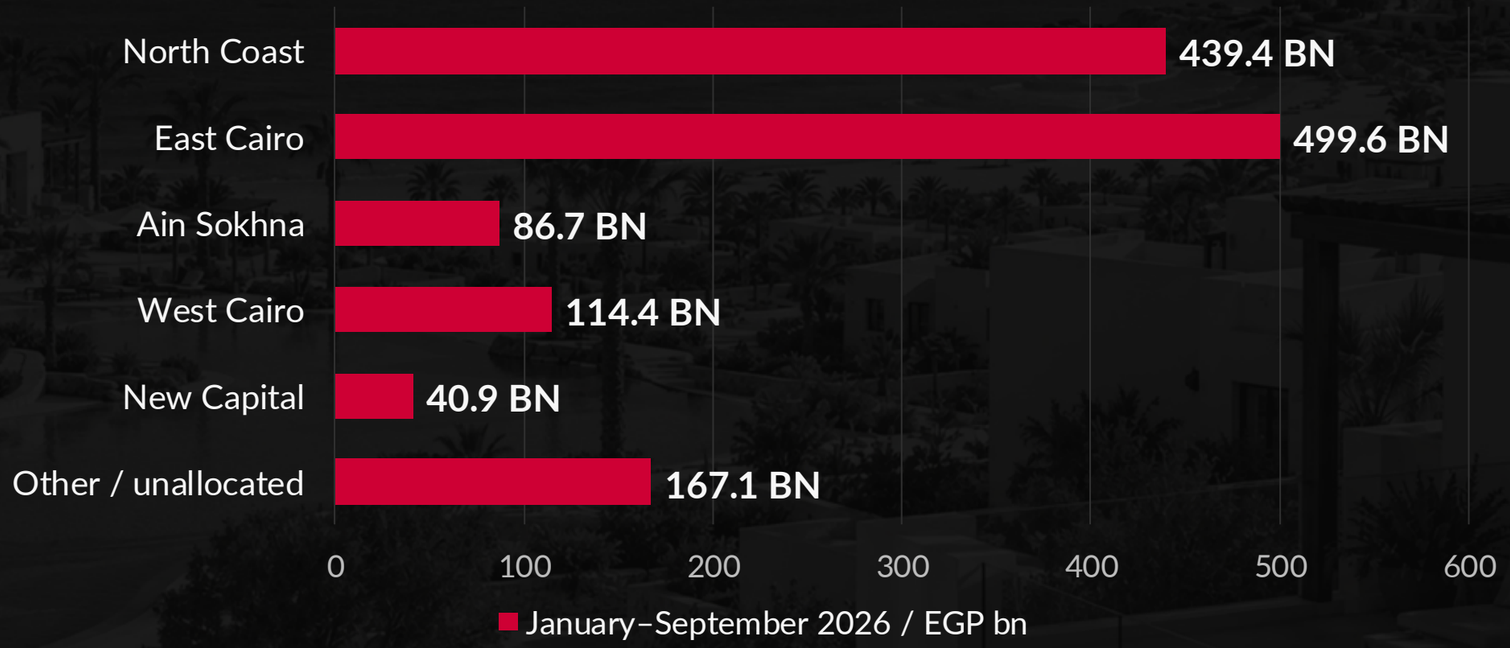
Source: Developer management figures supplied to Gateway Financials, updated 1 November 2026. Ranking covers the supplied developer set.
Top 10: EGP 1,069.9bn. Other developers: EGP 278.2bn (26% of top 10).

North Coast and East Cairo capture 69.7% of YTD sales

January–September 2026 / Estimated market sales: EGP 1,348.1bn



NORTH COAST + EAST CAIRO
32.6% + 37.1% of YTD sales

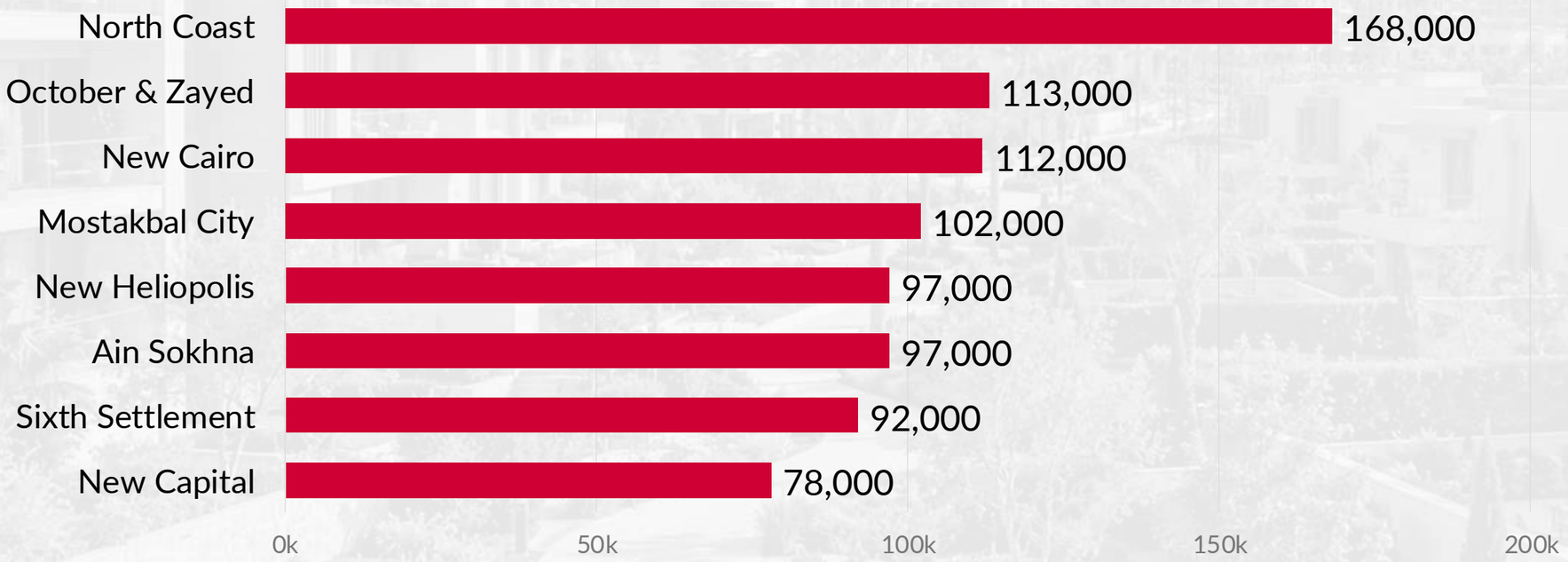


EGP 1,348.1bn
Estimated YTD sales

Source: Gateway Financials management inputs, 1 November 2026.
North Coast + East Cairo: EGP 939.0bn. Five named locations: EGP 1,181bn. Other / unallocated: EGP 167.1bn.

Average residential price per square metre

Advertised prices across all residential types / EGP per m²



EGP 78k

New Capital
listed average

EGP 168k

North Coast
listed average

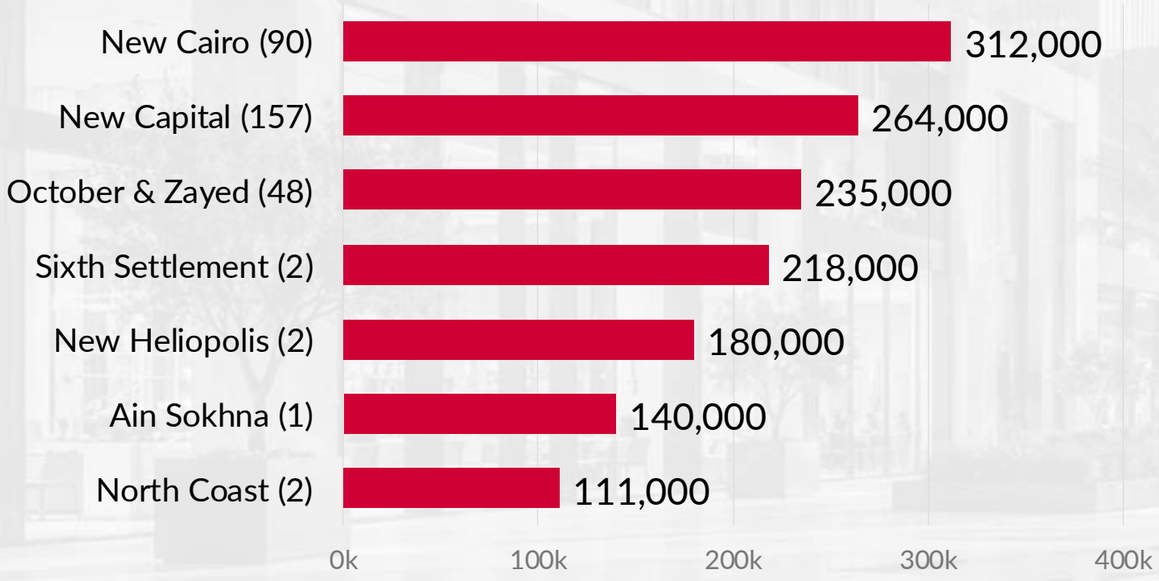
New Cairo and October & Zayed have similar averages, at about EGP 112,000–113,000 per m².

Source Gateway residential dashboard, YTD Q3 2026. All 1,315 price listings. Listed prices and scheduled dates.
Each listing has equal weight. Prices rounded to EGP 1,000. October, Sheikh Zayed and New Zayed share one dashboard group.

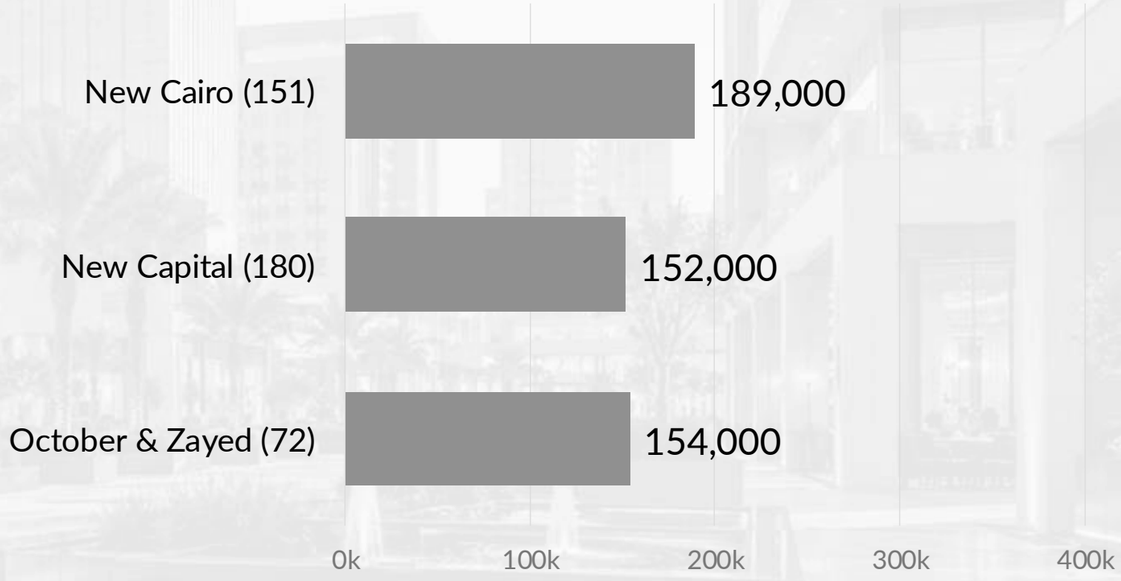
Average commercial asking prices by property use

EGP per m² / Brackets show the number of listings behind each district average

Shops & commercial space



Offices & clinics

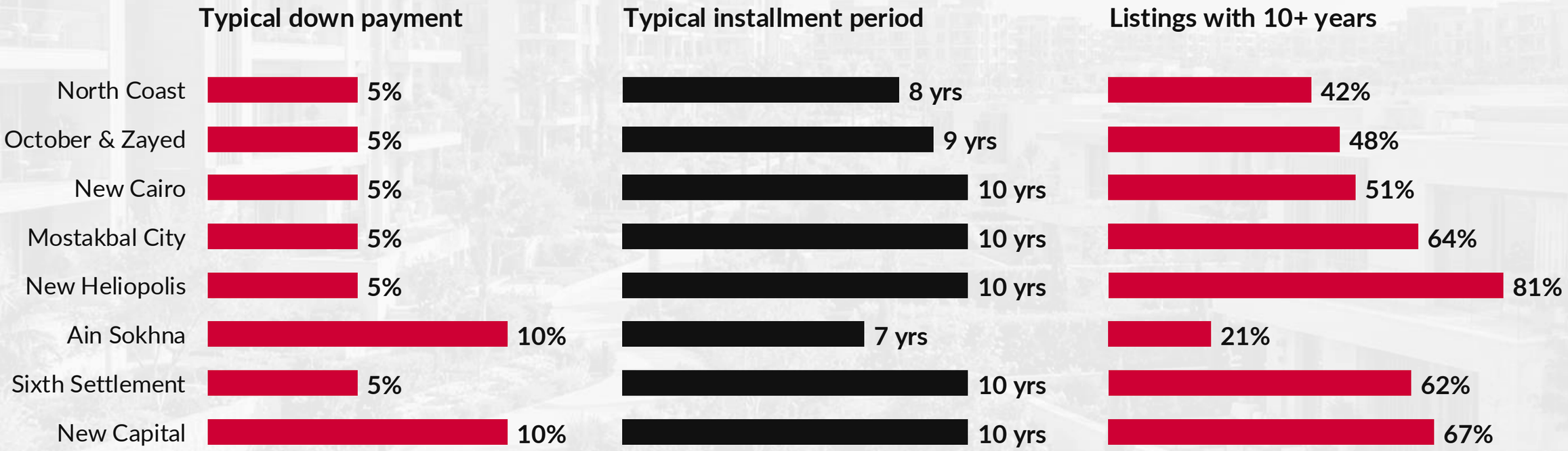


In New Cairo, shops and commercial space average EGP 312,000/m², compared with EGP 189,000 for offices and clinics.

Source: Gateway commercial dashboard, YTD Q3 2026. Source coverage: 705 listings.
Equal weight per listing. Prices rounded to EGP 1,000. Shops include retail, cafés, food and beverage outlets, showrooms and banks. Offices / clinics include administrative and medical units.
Some district averages use only 1–3 listings.

Payment plans by district

Compare typical down payments, installment periods and plans of 10 years or more.

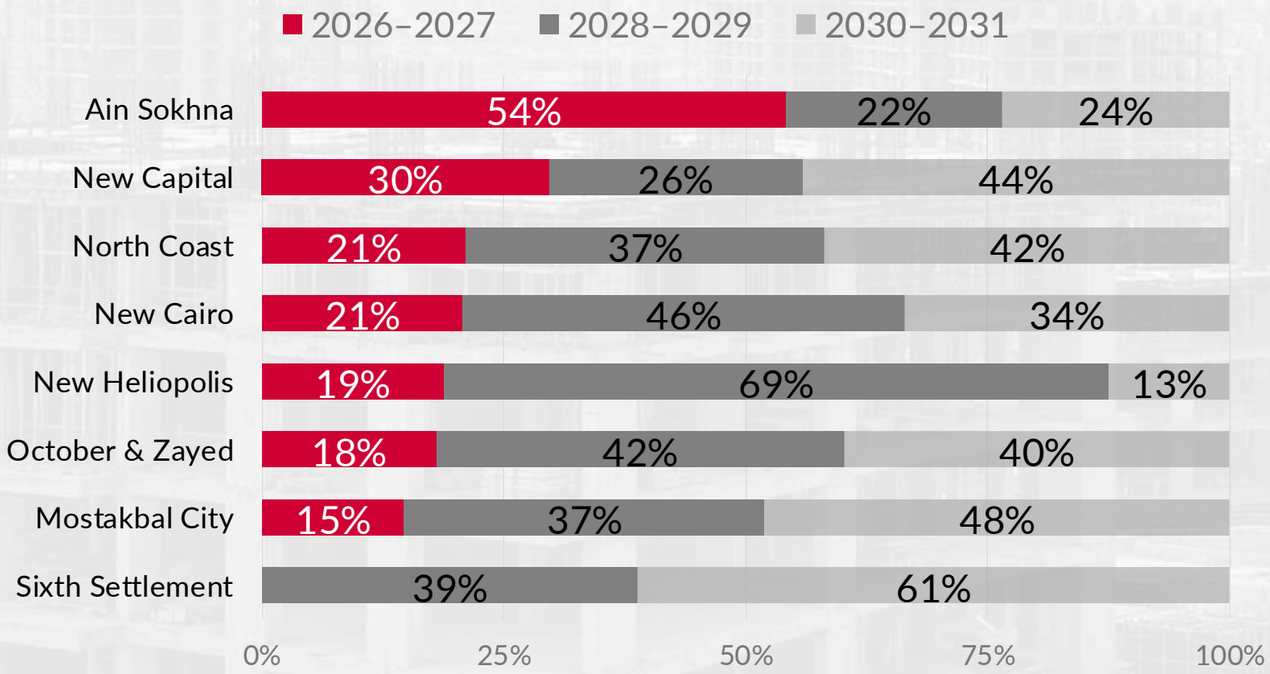


Typical down payments are 5% in most districts and 10% in Ain Sokhna and New Capital.

Source: Gateway residential dashboard and source-deck notes, YTD Q3 2026. 1,315 listings across all eight districts.
Typical payment terms represent the middle listed offer for each measure. Down payment and installment period are separate measures, not a combined offer.

Homes scheduled for delivery

Share of residential listings by scheduled handover period. These dates do not measure delivery track records.



54% of Ain Sokhna listings show 2026–2027 delivery. Sixth Settlement listings all show 2029–2030 delivery.

Number of residential projects with a listed delivery date in each year

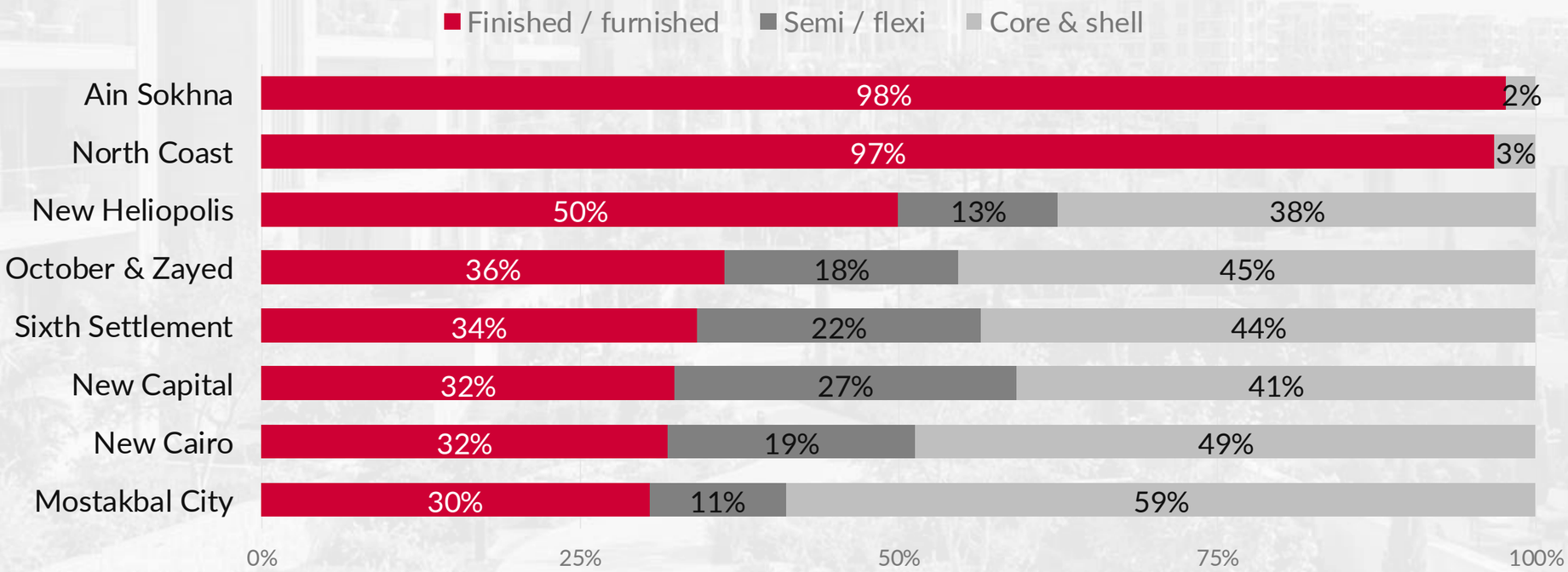


The tracked market includes 207 projects scheduled for 2030, compared with 94 for 2026.

Source Gateway residential dashboard, YTD Q3 2026. Listed prices and scheduled dates.
Each district totals 100% before rounding. These are scheduled dates. New Heliopolis has 16 listings.

Residential finishing by district

Share of advertised residential listings, grouped by handover specification



98%

Ain Sokhna finished or furnished

97%

North Coast finished or furnished

Coastal listings overwhelmingly include finishing. Urban districts have a broader mix of handover specifications.

Source: Gateway residential dashboard and source-deck notes, YTD Q3 2026. Each district totals 100% before rounding.
Finishing describes the advertised handover condition. It does not measure construction completion. New Heliopolis: 16 listings.

Rental yields change with both location and unit size

Gross annual residential yield by location and bedroom category, before vacancy and operating costs.

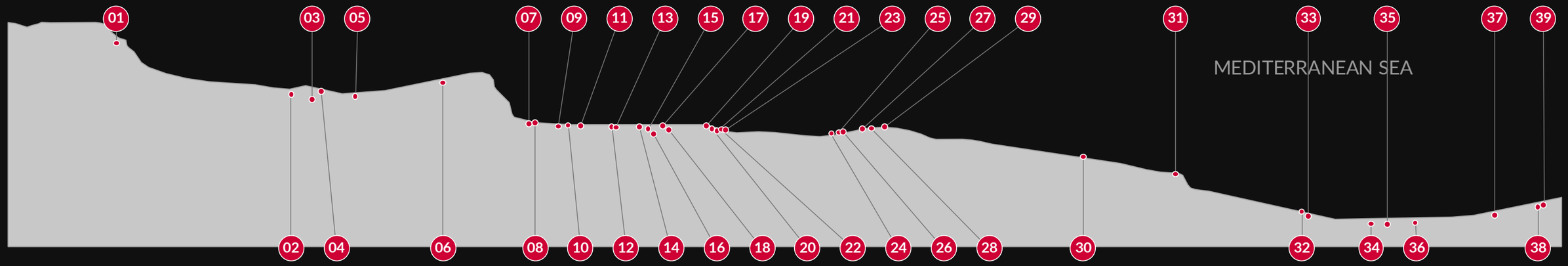
Location	2 bedroom	3 bedroom	4+ bedrooms
New Cairo	6.6%	5.3%	5.8%
Sheikh Zayed	5.92%	5.16%	7.22%
North Coast	8.2%	7.6%	8.16%
Ain Sokhna	5.13%	6.14%	4.15%



Figures have not all been independently verified, and the New Cairo figures include planning assumptions.

North Coast launch map

PROJECTS, NEW PHASES & SALES RELEASES / JANUARY–SEPTEMBER 2026



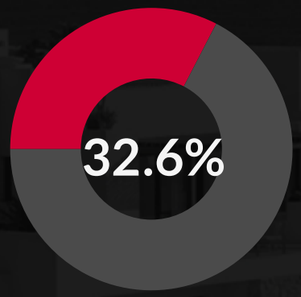
ALAM AL ROUM | SIDI HENEISH | RAS EL HEKMA | AL DABAA | ALAMEIN / EASTERN COAST

01	**Alam Al Roum** Qatari Diar · Phase 1	Q3	11	**Ogami** SODIC · Nobu / Bloom Island	Q3	21	**Azzar** Reedy Group · Beyond Blue	Q3	31	**Zahra** Morshedy Group · The Island	Q2
02	**Silversands** Ora · The Cove	Q2	12	**MV Ras El Hekma** Mountain View · Indigo	Q3	22	**C North** IL Cazar · New project	Q3	32	**Dayz / Marina 6** Mercon · New release	Q3
03	**Horya** Reportage · New project	Q2	13	**Solare** Misr Italia · Maison / Amare	Q2–3	23	**Katameya Coast** Starlight · Phase 2	Q3	33	**Marsa / Marina 5** Mercon · New release	Q3
04	**Beit Al Bahr** BAM · Ray	Q3	14	**Seashell Ras El Hekma** G Developments · Waterfront / villa release	Q2–3	24	**Perla** Nations of Sky · New project	Q3	34	**Q Bay** Q Developments · New project	Q3
05	**Hacienda Ras El Hekma** Palm Hills / Miran Hills · New project	Q2–3	15	**Gaia** Al Ahly Sabbour · Ready-unit release	Q1	25	**Waterway North Coast** Waterway · O Residence	Q3	35	**Soly Lagoons** Seif Developments · New project	Q3
06	**Wadi Yemm** Modon · Waterfront / Yemm Views / Nammos	Q3	16	**June** SODIC · Aqua Lagoons	Q2	26	**Seazen** Al Qamzi · May release	Q2	36	**PAUSE** K Developments · New project	Q3
07	**Azha North** Madaar · Elea / Ophelia	Q3	17	**Cali Coast** Maven · Boardwalk Condos	Q3	27	**Lasirena** Lasirena Group · Extension / Mawj	Q3	37	**Mersea** Toledo / Apache · Project announcement	Q3
08	**Naia Bay** Naia Developments · Swissotel Residences	Q3	18	**The Med** People & Places · Gray Laguna / Sachi	Q3	28	**D-Bay** Tatweer Misr · Athinio	Q3	38	**Layana Residence** Toledo · New project	Q3
09	**Seashore** Hyde Park · Sealine / Shore Residence	Q3	19	**YOUD** Al Ahly Sabbour · Youd Al Bahr	Q3	29	**SouthMED** TMG · Summer sales offer	Q2	39	**Sadaf** New Plan · New launch	Q2
10	**Playa Ras El Hekma** G Developments · Phase 3 / G Hotel chalets	Q2	20	**Salt Marina** Tatweer Misr · New extension	Q3	30	**Amwaj** Al Ahly Sabbour · Ready-unit release	Q1			

* Sales-source timing / announcement status: see linked source register and slide notes. Pins show project reference locations; phases are grouped.

North Coast market performance

Residential market overview / Prices, project coverage, handovers and buyer terms

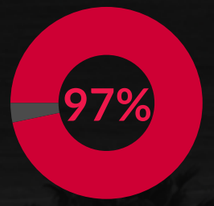


North Coast share of estimated January–September 2026 sales

132

Projects tracked

90 developers
366 residential listings



354 of 366 listings

Finished or furnished

at handover

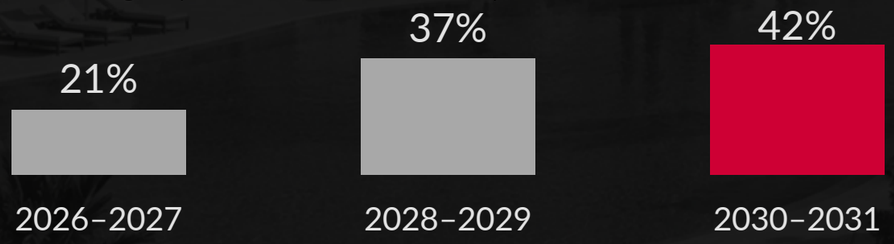
9.4%

Average down payment

8.4 years
Average installment period

Delivery calendar

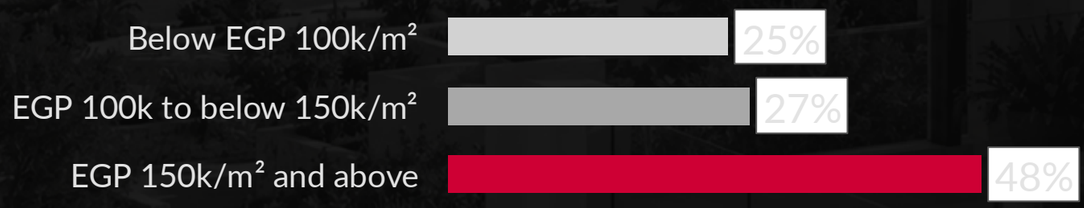
Share of listings by scheduled handover period



21% of listings show delivery by end-2027

North Coast price mix

Share of listings in each price band



42% offer installment periods of 10 years or more

42% of North Coast listings show 2030–2031 delivery. Around half cost EGP 150,000/m² or more.



THANK YOU

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Q3 2026 Egypt Real Estate industry Newsletter