

Qatar Residential Real Estate - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Qatar Residential Real Estate Market size is estimated at USD 3.16 billion in 2025, and is expected to reach USD 4.52 billion by 2030, at a CAGR of 7.42% during the forecast period (2025-2030).

Key Highlights

- After a dip in Q2 2023 of apartment rental rates across Qatar, some sectors stabilized as demand picked up in Q4 of 2023. Lower rents, coupled with rent-for-rent incentives, saw a surge in demand for apartments in Pearl Qatar and Lusail during August and September 2023, coinciding with the start of the school year.
- As supply increases, there is a growing gap between occupancy rates across the market. High-quality buildings with quality property management are beginning to attract high demand from potential tenants despite evidence of higher vacancies across the market.
- A number of master-planned apartments, including those in the new developments such as Madinatna and Ezdan Oasis - which benefited from strong demand due to the World Cup - had been steadily building occupancy throughout 2023 and offered attractive rental deals for new tenants.
- Compound villas continued to enjoy high occupancy across Doha, and rents have remained relatively stable throughout the year. On Pearl Island, one-bedroom apartments can usually be rented with rents ranging from QAR 7,000 (USD 1922.55) to QAR 9,500 (USD 2609.17) a month, depending upon the location and the quality of the building. The majority of three-bedroom apartments on the Island are now available for rent, ranging from QAR 13,500 (USD 3707.77) to QAR 16,500 (USD 4531.72) a month.
- For example, in Fox Hills, a one-bedroom unit is usually priced between QAR 5,000 (USD 1373.25) and QAR 6,500 (USD 1785.22) a month, while a three-bedroom unit is priced between QAR 8,500 (USD 2334.52) and QAR 10,000 (USD 2746.50) a month.

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Apartment Segment Observing Significant Growth

Rental rates in Doha declined significantly in the first six months of 2023 as a result of the reopening of apartments following the World Cup. However, residential rents have stabilized in recent months of 2024.

There has been strong demand for apartments in new, higher-end buildings as annual leases end and new residents flock to Qatar. As a result, many newly built buildings in high-end neighborhoods often reach 100% occupancy in as little as three months.

In the Pearl, there has been a trend of premium end tenants moving from older towers to new constructions. As a result, the occupancy rates vary from building to building depending on the age and quality of the buildings. In Q4 2023, it was also noted that the newer apartments in Fox Hills, Erkiyah City, and Lusail that are often offered at similar rental prices are becoming increasingly attractive to the residents of some of the older suburbs in Doha.

It was also noted that while new apartment buildings tend to have lower occupancy rates than older ones, villas across Doha tended to have high occupancy rates, and rents will start to increase gradually beginning in 2024.

More than 400,000 apartments and villas will be available in Doha by the end of 2024, which represents a 6.2% increase over the past decade.

Apartments are often offered rent-free for a month. Furnished units command a premium, ranging from QAR 500 (USD 137.32) to QAR 1,000 (USD 274.65) per month, depending on the size of the room. Pearl Island's rental prices are on the rise as new supply is added to the market in areas such as Floresta Gardens/Giardino Village. Many older properties have lowered their asking rents in an effort to attract new tenants.

Increasing Occupancy Rates in the Residential Segment

Residential rentals continue to drop in Qatar, boosting the occupancy rate. The residential real estate market has been at the forefront of Qatar's economic transformation. It has been instrumental in diversifying the country's revenue streams and increasing foreign investments. These factors have helped Qatar's economy become more resilient and less reliant on oil and natural gas exports, which have traditionally been the main source of income.

The government's vision and dedication to developing a strong and sustainable infrastructure have been among the driving forces behind Qatar's impressive growth in the residential real estate market. The country's leaders have invested in a variety of infrastructure projects, including top-tier stadiums, notations, commercial centers, and residential properties.

The government has traditionally implemented investor-friendly policies and initiatives to provide incentives for both domestic and foreign real estate investors to engage in the property market. The introduction of harte zones, tax exemptions, and simplified business rules have created a business environment that encourages more investors to invest in Qatar's booming property market.

The rapid urbanization and population growth of Qatar have led to an increase in the need for residential properties. As a result, developers have been concentrating on the development of residential projects that provide modern amenities and sustainable solutions. These developments are particularly appealing to expatriates, who make up a large part of Qatar's population and are looking for high-quality housing.

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Although the Qatari residential real estate market has seen rapid growth, there is a need to ensure that the growth is sustainable and managed properly. Preventing speculation, providing affordable housing, and maintaining a balance between demand and supply are important for the long-term sustainability of the market.

Qatar Residential Real Estate Industry Overview

There is huge competition between residential real estate companies in Qatar. The market is dominated by a few players. The sales proportion of residential real estate properties through online channels has consistently grown, owing to the rising internet penetration, growing demand, increasing personal disposable incomes, the surging youth population in the middle-income group, and rising opportunities offered by government infrastructure investments.

Foreign investments in the Qatari residential real estate market are estimated to increase in the coming years, as non-Qataris may invest in selected real estate projects, such as the West Bay Lagoon and The Pearl. Major real estate players in the market are Al Mana Real Estate, United Development Company, Qatari Diar Real Estate Company, Ezdan Holdings, and Barwa Real Estate Company.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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