

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

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Report description:

Qatar Residential Real Estate Market Analysis

Qatar residential real estate market is valued at USD 13.45 billion in 2025 and is projected to reach USD 19.45 billion by 2030, expanding at a 7.15% CAGR. Demand is anchored by post-World Cup infrastructure, liberalized foreign-ownership rules and a permanent-residency-for-investment program that links property purchases above QAR 730,000 to long-term visas. Rising tourism, government-backed mortgages for nationals and the forthcoming 2030 Asian Games further reinforce owner-occupier and rental demand. At the same time, oversupply in mid-tier apartments and higher building-material costs continue to pressure yields and margins. Developers therefore pivot toward premium villas, mixed-use megaprojects and technology-driven sales channels to sustain growth in the Qatar residential real estate market.

Qatar Residential Real Estate Market Trends and Insights

Foreign Ownership Law (Law 16 of 2018) broadening expat titles

The statute opened 10 freehold and 16 usufruct zones to non-Qataris, effectively converting the sector into a global investment destination. Residency is granted automatically to buyers exceeding QAR 730,000, stimulating cross-border demand. Partnerships such as Al Rayan Bank's UK campaign offer Sharia-compliant finance up to 60% of purchase value, lowering entry barriers for foreign investors. Transaction volumes reached QAR 8.16 billion in 1H 2024, up markedly from the prior year. The Office for Non-Qatari Real Estate Ownership centralizes approvals, shortening deal cycles and adding transparency. These measures

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heighten liquidity and broaden the buyer pool for the Qatar residential real estate market over the long term.

FIFA World Cup 2022 legacy infrastructure catalyzing residential demand

Mass-transit lines, airport expansion and expressways funded for the World Cup have improved access to once-peripheral zones, encouraging developers to release new inventory in Lusail, Al Rayyan and along the Doha Metro corridor. The tournament attracted 1 million visitors and boosted GDP 1% in tourism receipts, validating the long-term capacity of this infrastructure to handle population surges. Demand is now migrating toward transit-oriented projects such as Lusail Towers, where 1.1 million m² of mixed-use floor space is under development. Hotel-to-residence conversions around Hamad International Airport further bridge hospitality and housing. Collectively, these linkages underpin steady absorption in the Qatar residential real estate market during the medium term.

Oversupply in mid-tier apartment segment depressing rental yields

Residential stock stood at 394,000 units by Q2 2024 with another 9,200 units scheduled for delivery the same year. Median apartment rents slid 6% year-over-year to QAR 6,000, while concessions such as one-month-free leases became common. The mismatch is greatest in the mid-market, which forms 51% of inventory but faces thinning demand as occupants either trade up to luxury or downsize for cost savings. The Real Estate Regulatory Authority counters by launching an open-data platform to aid market clearing, yet near-term oversupply will continue to pressure returns in the Qatar residential real estate market.

Other drivers and restraints analyzed in the detailed report include:

Upcoming 2030 Asian Games & tourism vision elevating rental demand / Government-backed mortgage scheme for nationals boosting home purchases / Volatility in hydrocarbon revenues influencing employment and housing demand /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Apartments and condominiums dominated with 66% share of the Qatar residential real estate market in 2024, largely reflecting urban density and expatriate leasing preferences. Villas, however, post the fastest 7.36% CAGR to 2030 on demand from nationals and high-net-worth expatriates seeking larger plots. Projects such as Al Dana Garden II deliver 142 villas worth QAR 119 million, signaling robust premium appetite. Hybrid waterfront schemes like The Grove combine apartment convenience with villa-style amenities, blurring category lines and reinforcing upscale supply. Consequently, developers rebalance portfolios toward low-density formats to absorb purchasing-power migration within the Qatar residential real estate market.

Villa momentum also benefits from the residency-by-investment option because typical ticket sizes exceed the QAR 730,000 threshold. Mortgage programs reserve favorable terms for single-family housing, amplifying take-up. Meanwhile, apartment landlords refresh mid-tier stock via refurbishments to defend occupancy. Over time, a two-speed pattern emerges: compact city-core units for transient renters and suburban villas for ownership seekers, jointly sustaining depth and liquidity in the Qatar residential real estate market.

The mid-range properties retained 51% of the 2024 volume, yet oversupply eroded rents and moderated pricing power. Construction-cost inflation passes through more acutely to affordable brackets, tightening developer margins. Contrastingly, the luxury band records a 7.45% CAGR to 2030, lifted by trophy projects such as the Trump International Golf Club villas and Lusail waterfront penthouses. Wealth inflow from foreign buyers seeking long-term visas underpins resilience. This bifurcation means premium units increasingly anchor headline value in the Qatar residential real estate market size, whereas mid-market stock

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delivers liquidity but lower returns.

Government housing allowances and supply-chain subsidies steady affordable demand but cannot fully offset rising steel and cement costs. Developers therefore bundle energy-efficient fittings and rent-to-own offers to widen mid-segment appeal. Yet, capital appreciation stays strongest at the top end where scarcity and lifestyle amenities differentiate. These dynamics collectively guide pricing strategy across the Qatar residential real estate industry.

Qatar Residential Real Estate Market is Segmented by Property Type (Apartments & Condominiums, and Villas & Landed Houses), by Price Band (Affordable, Mid-Market, and Luxury), by Business Model (Sales, and Rental), by Mode of Sale (Primary (New-Build), and Secondary (Existing-Home Resale)), and by Key Municipalities (Doha, Al Rayyan, Al Khor, and Rest of Qatar). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Ezdan Holding Group / Barwa Real Estate / United Development Company / Qatari Diar Real Estate Company / Al Mana Real Estate / Zukhrof Real Estate / Al Asmakh Real Estate / First Qatar Real Estate Development Co. / Ariane Real Estate / Mazaya Real Estate Development / Les Roses Real Estate / Mirage International Property Consultants / Msheireb Properties / SAK Holding Group / Retaj Real Estate / Just Real Estate / UPO Real Estate / Regency Real Estate / Al Emadi Enterprises / Qetaifan Projects* /

Additional Benefits:

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

Table of Contents:

1 Introduction

1.1 Study Assumptions & Market Definition

1.2 Scope of the Study

2 Research Methodology

3 Executive Summary

4 Market Landscape

4.1 Overview of the Economy and Market

4.2 Real Estate Buying Trends - Socio-economic and Demographic Insights

4.3 Government Initiatives and Regulatory Aspects for the Residential Real Estate Sector

4.4 Regulatory Outlook

4.5 Technological Outlook

4.6 Focus on Technology Innovation, Start-ups, and PropTech in Real Estate

4.7 Insights into Rental Yields in Real Estate Segment

4.8 Real Estate Lending Dynamics

4.9 Insights into Affordable Housing Support Provided by Government and Public-private Partnerships

4.10 Market Drivers

4.10.1 FIFA World Cup 2022 Legacy Infrastructure Catalyzing Residential Demand

4.10.2 Expansion of Lusail & Pearl Freehold Zones Attracting Foreign Buyers

4.10.3 Foreign Ownership Law (Law 16 of 2018) Broadening Expat Titles

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- 4.10.4 Government-backed Mortgage Scheme for Nationals Boosting Home Purchases
- 4.10.5 Upcoming 2030 Asian Games & Tourism Vision Elevating Rental Demand
- 4.10.6 Rapid Growth in PropTech Platforms Improving Market Transparency
- 4.11 Market Restraints
 - 4.11.1 Oversupply in Mid-tier Apartment Segment Depressing Rental Yields
 - 4.11.2 Volatility in Hydrocarbon Revenues Influencing Employment & Housing Demand
 - 4.11.3 Rising Construction-Input Costs Squeezing Developer Margins
 - 4.11.4 Restrictive Expat Residency Tenure Limiting Long-term Ownership Appetite
- 4.12 Value / Supply-Chain Analysis
 - 4.12.1 Overview
 - 4.12.2 Real-estate Developers & Contractors - Key Quantitative and Qualitative Insights
 - 4.12.3 Real-estate Brokers and Agents - Key Quantitative and Qualitative Insights
 - 4.12.4 Property-management Companies - Key Quantitative and Qualitative Insights
 - 4.12.5 Insights on Valuation Advisory and Other Real-estate Services
 - 4.12.6 State of the Building-materials Industry & Partnerships with Key Developers
 - 4.12.7 Insights on Key Strategic Real-estate Investors/Buyers in the Market
- 4.13 Porter's Five Forces
 - 4.13.1 Bargaining Power of Suppliers
 - 4.13.2 Bargaining Power of Buyers
 - 4.13.3 Threat of New Entrants
 - 4.13.4 Threat of Substitutes
 - 4.13.5 Intensity of Competitive Rivalry

5 Market Size & Growth Forecasts (Value)

- 5.1 By Property Type
 - 5.1.1 Apartments & Condominiums
 - 5.1.2 Villas & Landed Houses
- 5.2 By Price Band
 - 5.2.1 Affordable
 - 5.2.2 Mid-Market
 - 5.2.3 Luxury
- 5.3 By Business Model
 - 5.3.1 Sales
 - 5.3.2 Rental
- 5.4 By Mode of Sale
 - 5.4.1 Primary (New-Build)
 - 5.4.2 Secondary (Existing-home Resale)
- 5.5 By Key Municipalities
 - 5.5.1 Doha
 - 5.5.2 Al Rayyan
 - 5.5.3 Al Khor
 - 5.5.4 Rest of Qatar

6 Competitive Landscape

- 6.1 Market Concentration
- 6.2 Strategic Moves (M&A, JV, Land-bank Acquisitions, IPOs)
- 6.3 Market Share Analysis

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6.4 Company Profiles (includes Global-level Overview, Market-level Overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share, Products & Services, Recent Developments)

6.4.1 Ezdan Holding Group

6.4.2 Barwa Real Estate

6.4.3 United Development Company

6.4.4 Qatari Diar Real Estate Company

6.4.5 Al Mana Real Estate

6.4.6 Zukhrof Real Estate

6.4.7 Al Asmakh Real Estate

6.4.8 First Qatar Real Estate Development Co.

6.4.9 Ariane Real Estate

6.4.10 Mazaya Real Estate Development

6.4.11 Les Roses Real Estate

6.4.12 Mirage International Property Consultants

6.4.13 Msheireb Properties

6.4.14 SAK Holding Group

6.4.15 Retaj Real Estate

6.4.16 Just Real Estate

6.4.17 UPO Real Estate

6.4.18 Regency Real Estate

6.4.19 Al Emadi Enterprises

6.4.20 Qetaifan Projects*

7 Market Opportunities & Future Outlook

7.1 White-space & Unmet-Need Assessment (Senior-Living, Green-Certified Homes, Co-Living)

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