

aqarmap Know more..



Egypt Real Estate Trends 2022



Know more..

Continuing on the momentum of our brand's focus on knowledge sharing, this year we lay on your hands the most comprehensive and impactful set of data ever released in Egypt's real estate industry. We aspire to help our clients take key investment decisions with actionable, granular, and relevant data points.

The biggest challenge that faces Real Estate companies and consumers in Egypt is the lack of credible market information. Most buyers rely on anecdotal information from friends or family, and many companies launch projects without investing enough time in understanding consumer needs and the shifting demand trends.

Know more.. is our brand essence. We are here to help companies and consumers gain more confidence in every real estate decision they take.



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Research Methodology

This report is based exclusively on our primary research and our proprietary data sources. All of our research activities are quantitative and electronic. Aqarmap mainly monitors and tracks 3 types of data trends:

- **Demographic & Socioeconomic Consumer Trends**

2 Million consumers use Aqarmap every month, and to use our service they must register their information in our database. As the consumers progress in the usage of the portal, we ask them bite-sized questions to collect demographic and socioeconomic information gradually. We also send seasonal surveys to the users to learn more about their insights on different topics and we link their responses to their profiles. Finally, we combine the users' profiles on Aqarmap with their profiles on Facebook to build the most holistic consumer profile that exists in the market to date.

- **Behavioral Consumer Demand Trends**

On top of the holistic consumer profile, we collect behavior-based consumer real estate preferences; such as: location, price, size, type, configuration, architecture, payment method, seriousness, frequency, and much more. We believe that there is a gap between what the consumer usually says they want, and what they actually do go after. Instead of asking the consumers what their price budget is for example, we simply monitor the prices of the properties they actually inquire about. This unique and close proximity to the consumer intent allows us to arguably understand the consumers more than they understand themselves.

- **Current and Historic Price Trends**

The majority of real estate developers in Egypt list their projects and units' prices on Aqarmap, and they regularly contact us to adjust their prices. Being at the center of this activity allows us to gain insights into pricing trends especially in new homes. In addition, we have thousands of brokers and private owners using Aqarmap to list new, resale, commercial, and rental properties. Every time a price gets increased or decreased, we record the movement and gain an insight. The number of days a property remains listed on Aqarmap before getting sold or removed combined with the number of views and leads each property gets in each different location helps us gain a deeper understanding of how price impacts demand.

Socioeconomic segments were defined based on budget, income, job title, and residential address. However, budget was the factor with the heaviest weight. A segment are consumers searching for properties worth more than 4.8M EGP and C segment are consumers searching properties worth below 1.2M EGP and B segment are consumers between A & C segments.

If you have any questions about our research methodology, please contact us at:
research@aqarmap.com

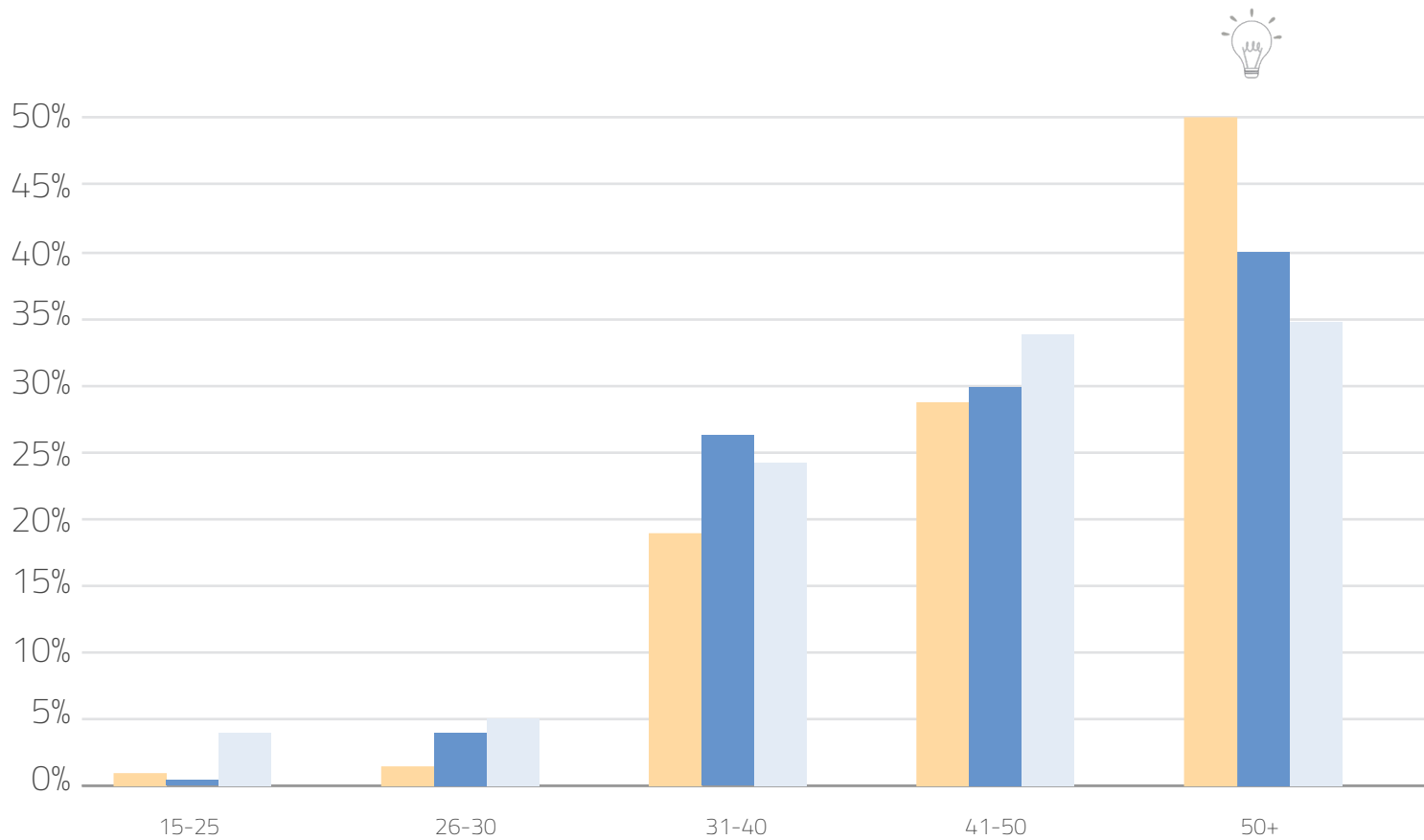


Demand Trends

This section presents the results of an elaborate survey that was sent by Aqarmap to more than 2,500,000 consumer. The continuous shifts in the demand encourage us to conduct this periodical survey to keep Real Estate companies always on top of the fluid market dynamics.



Respondants Age

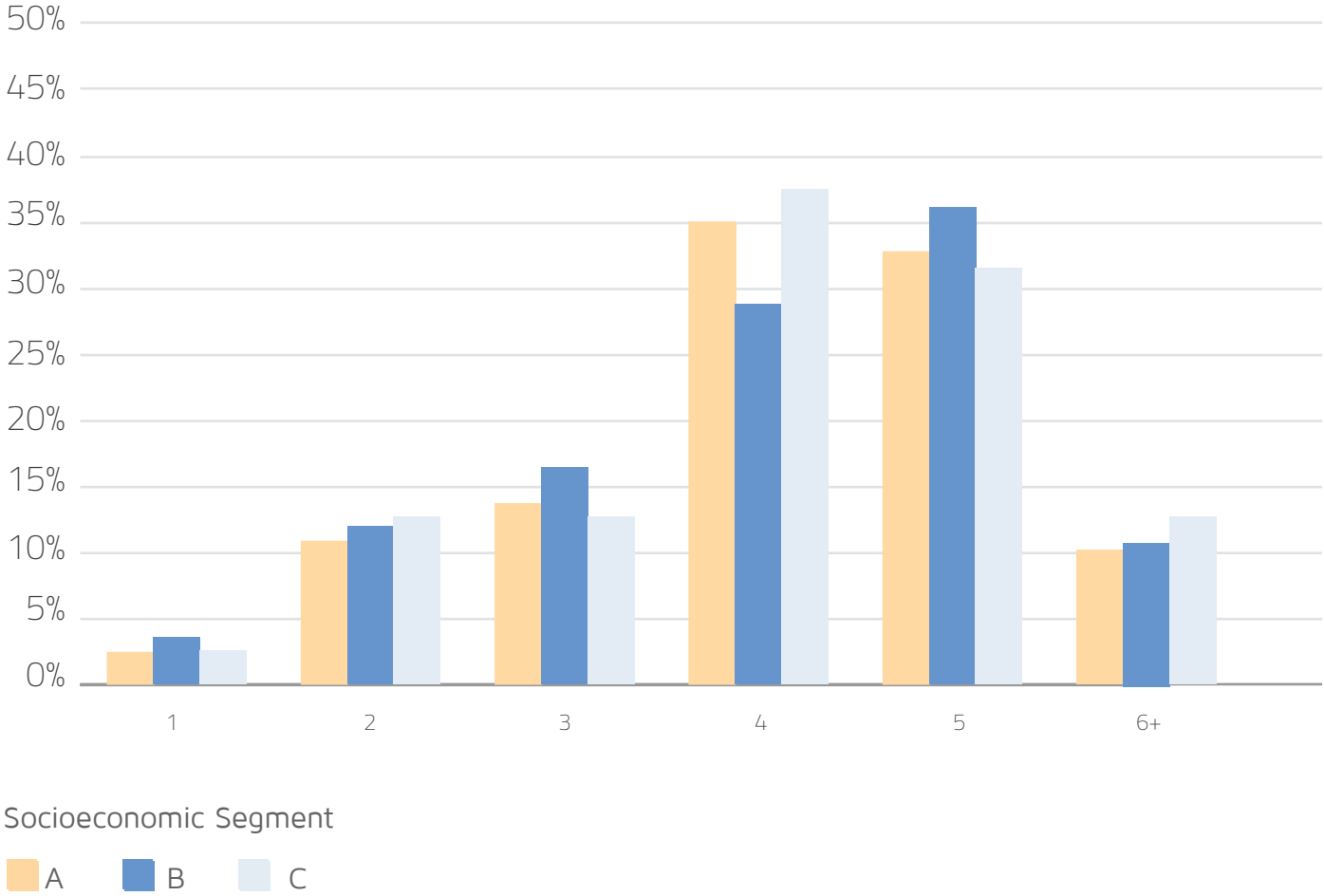


Socioeconomic Segment

A B C

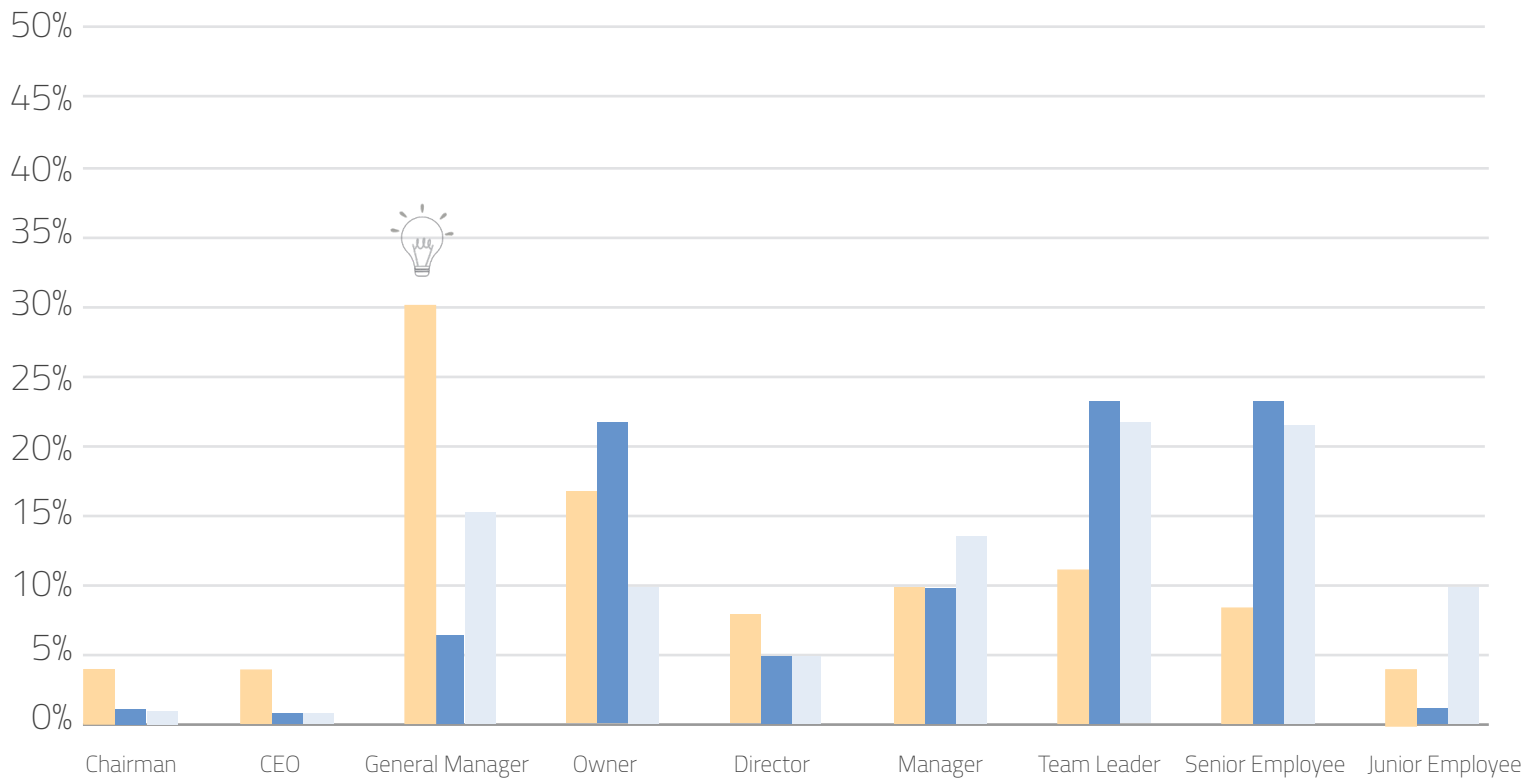


Respondants Family Size





Respondants Job Position

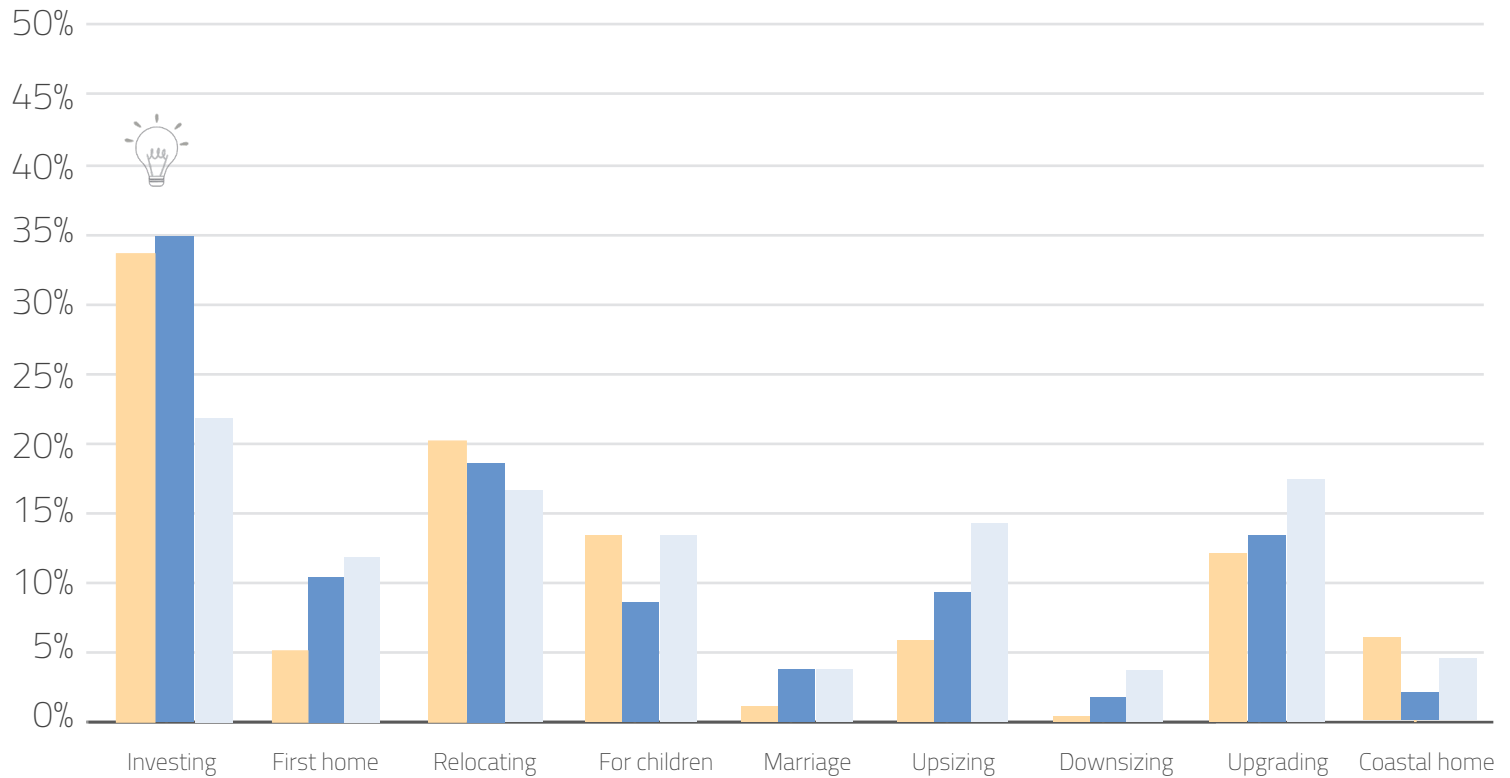


Socioeconomic Segment

A B C



Respondants Purchasing Objective

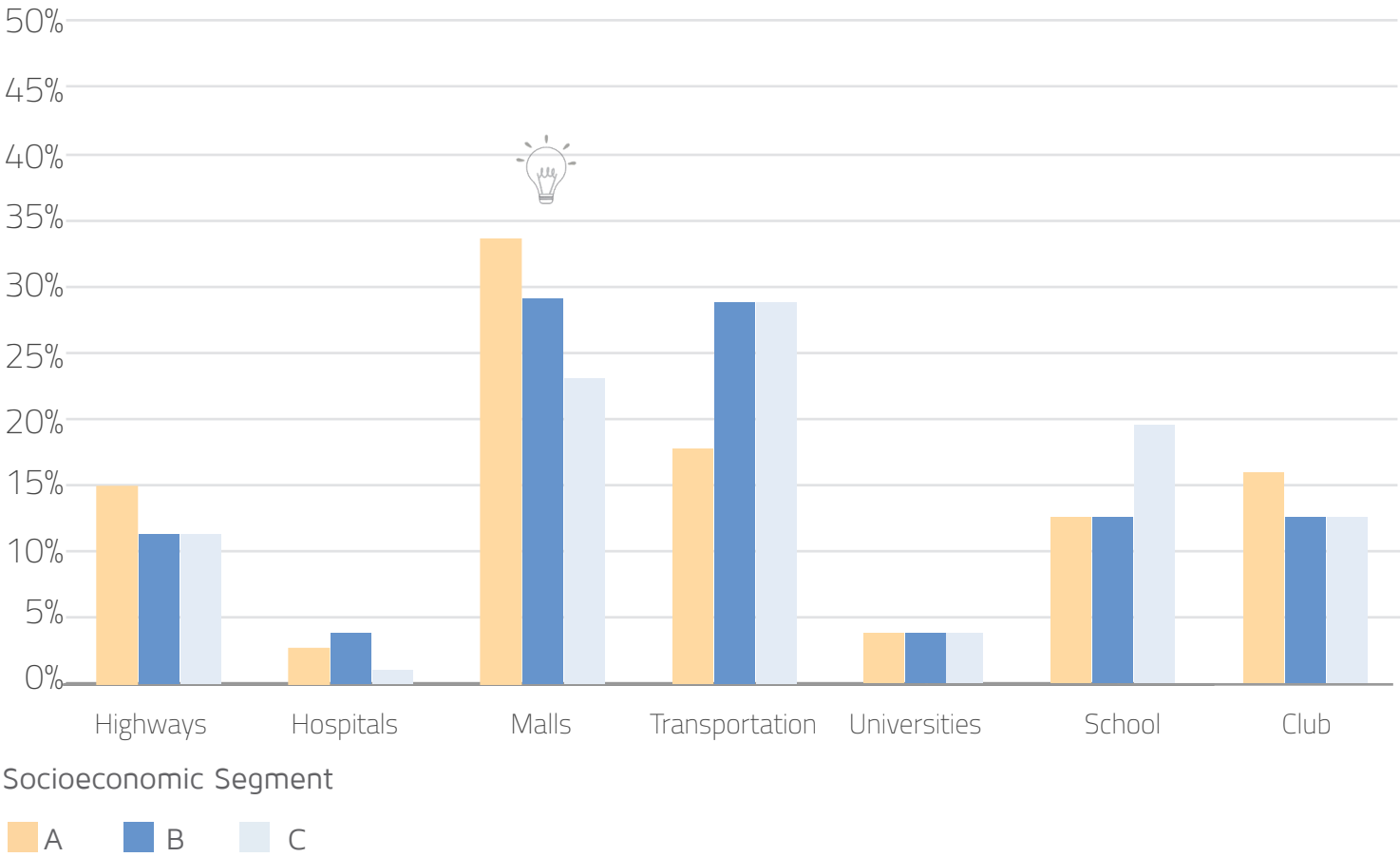


Socioeconomic Segment

A B C

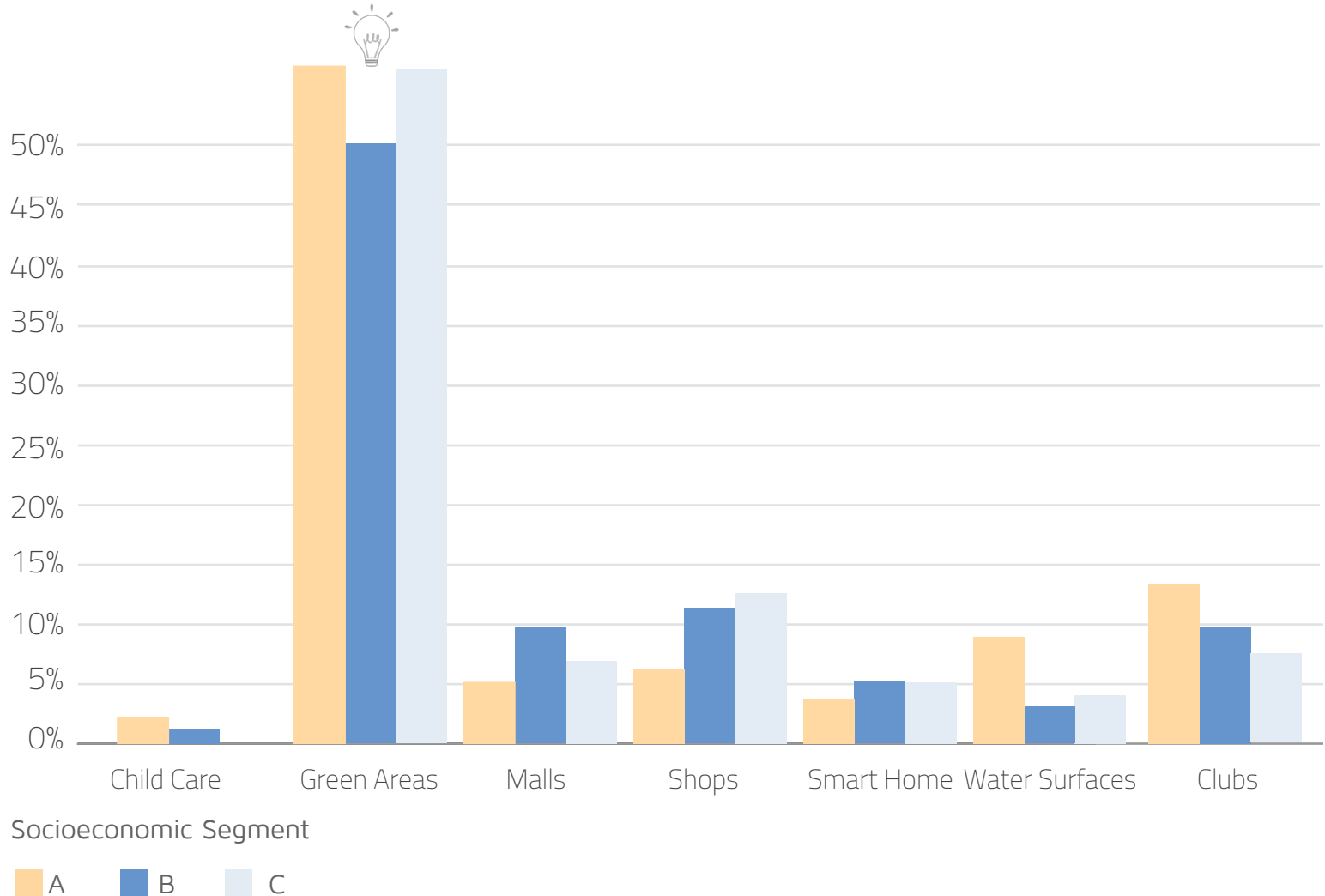


What is the most important service that needs to be near your compound?



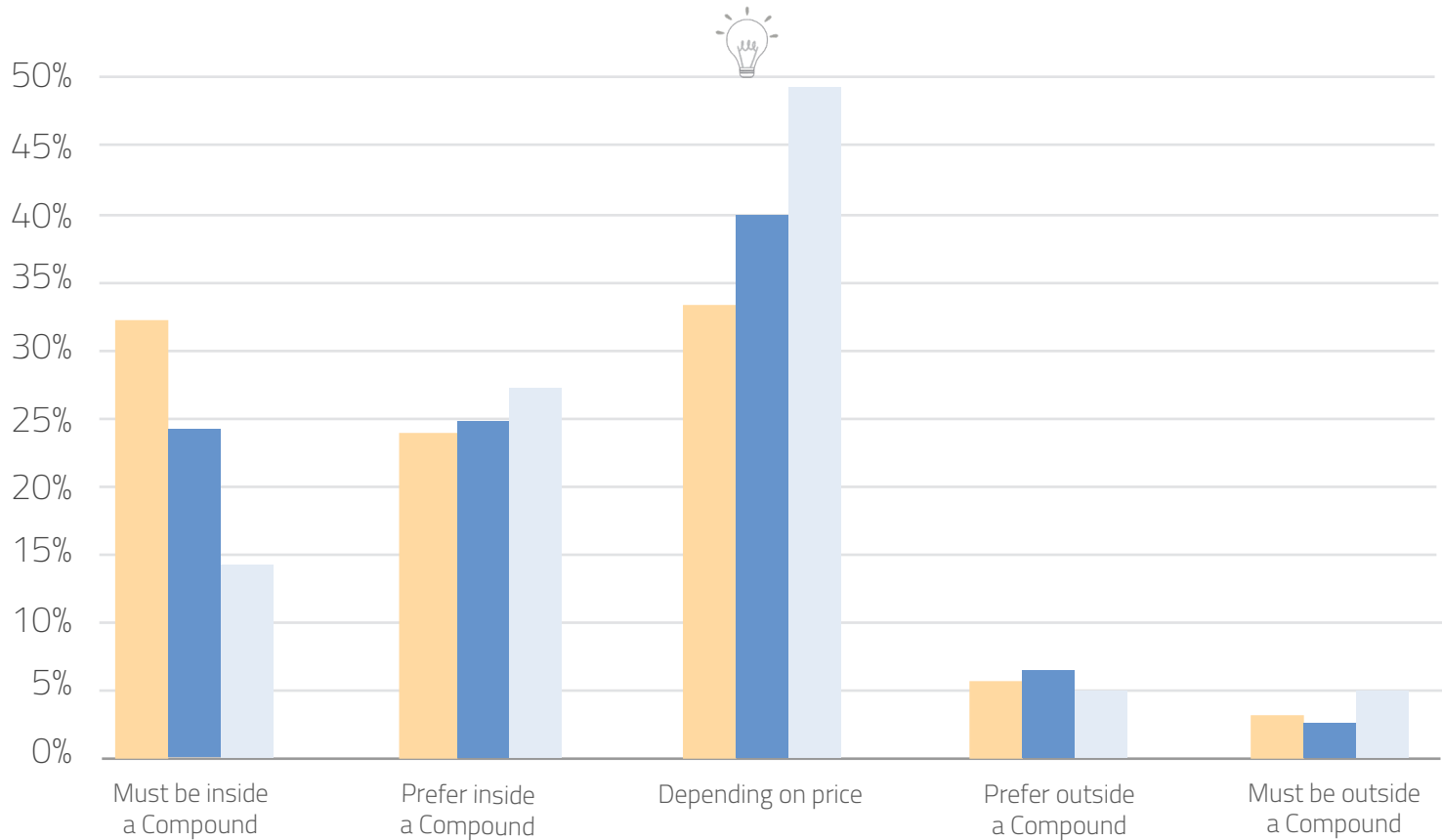


What is the most important amenity that needs to be inside your compound?





Where do you prefer to live?

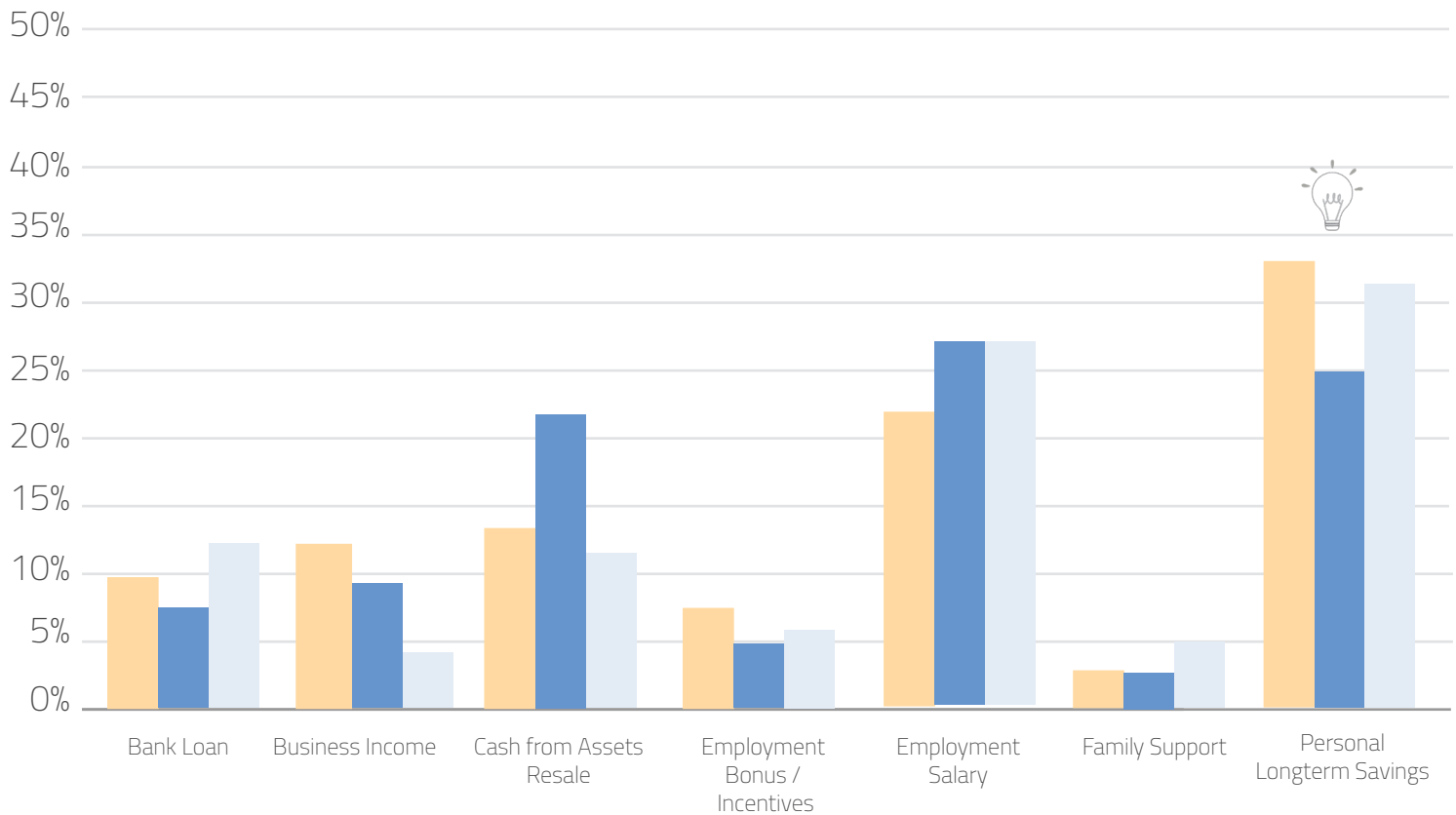


Socioeconomic Segment

A B C



How do you finance your home purchase?

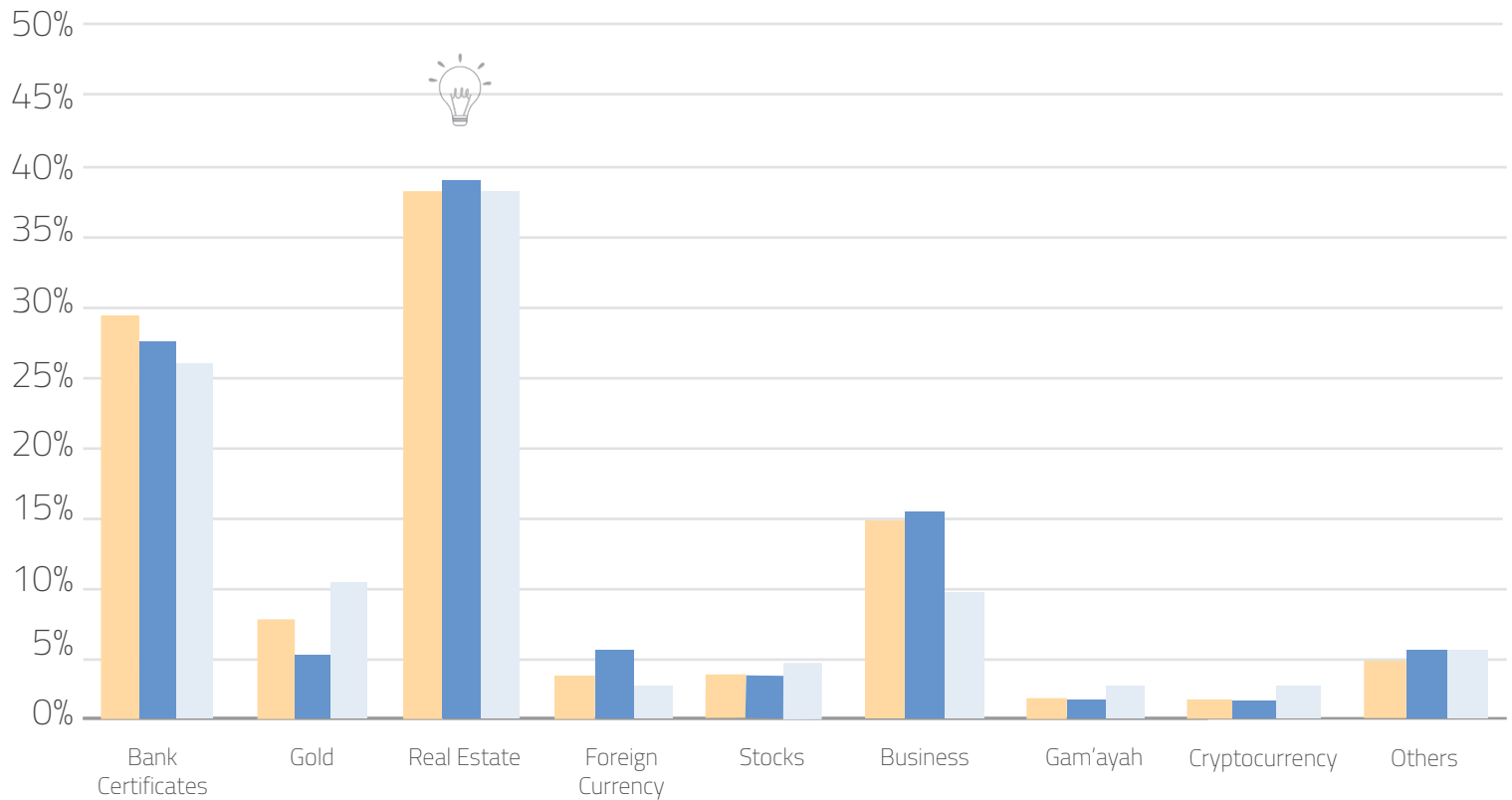


Socioeconomic Segment

A B C



How do you prefer to invest your savings?

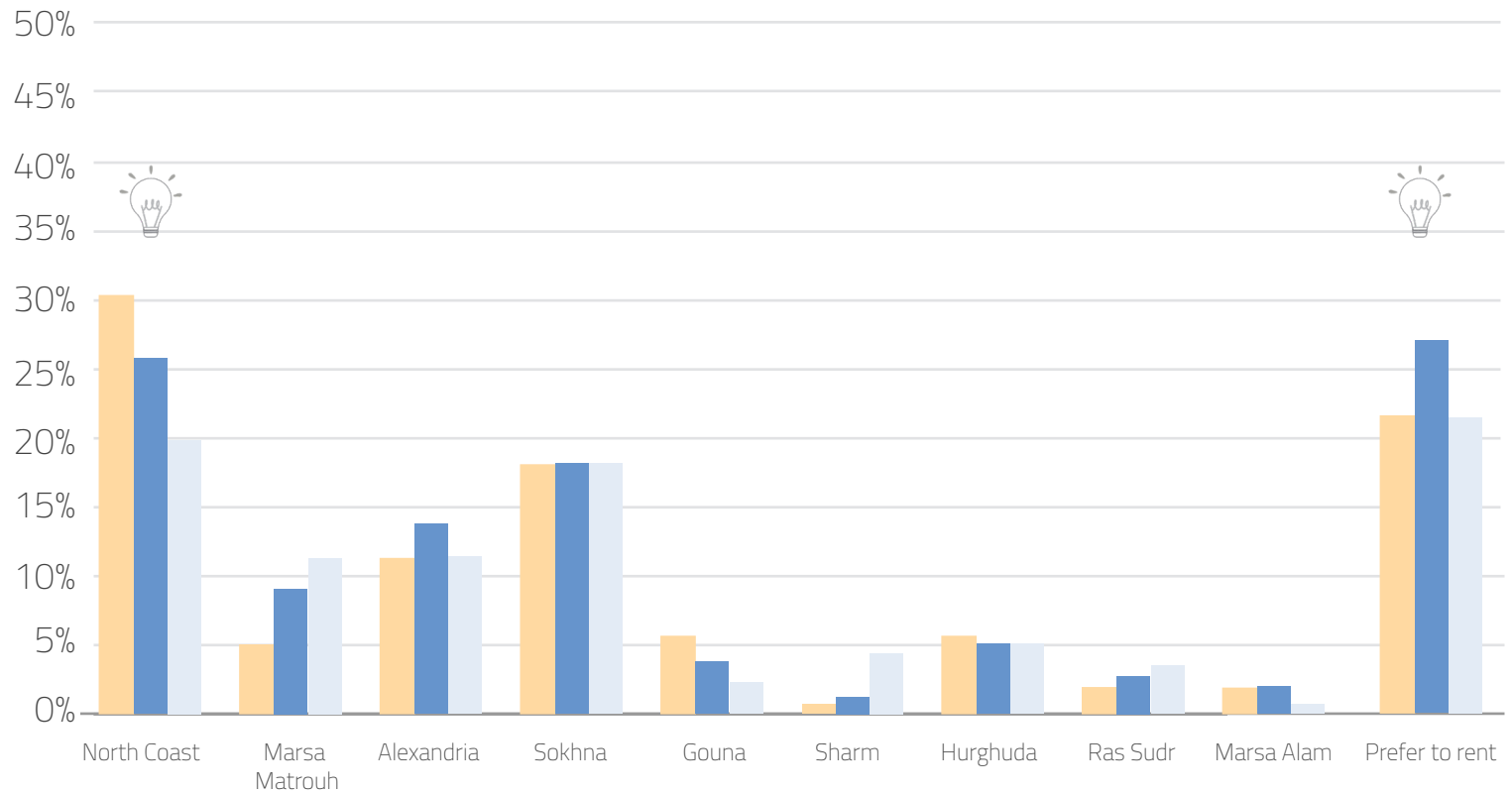


Socioeconomic Segment

A B C



Where do you prefer to have your vacation home?

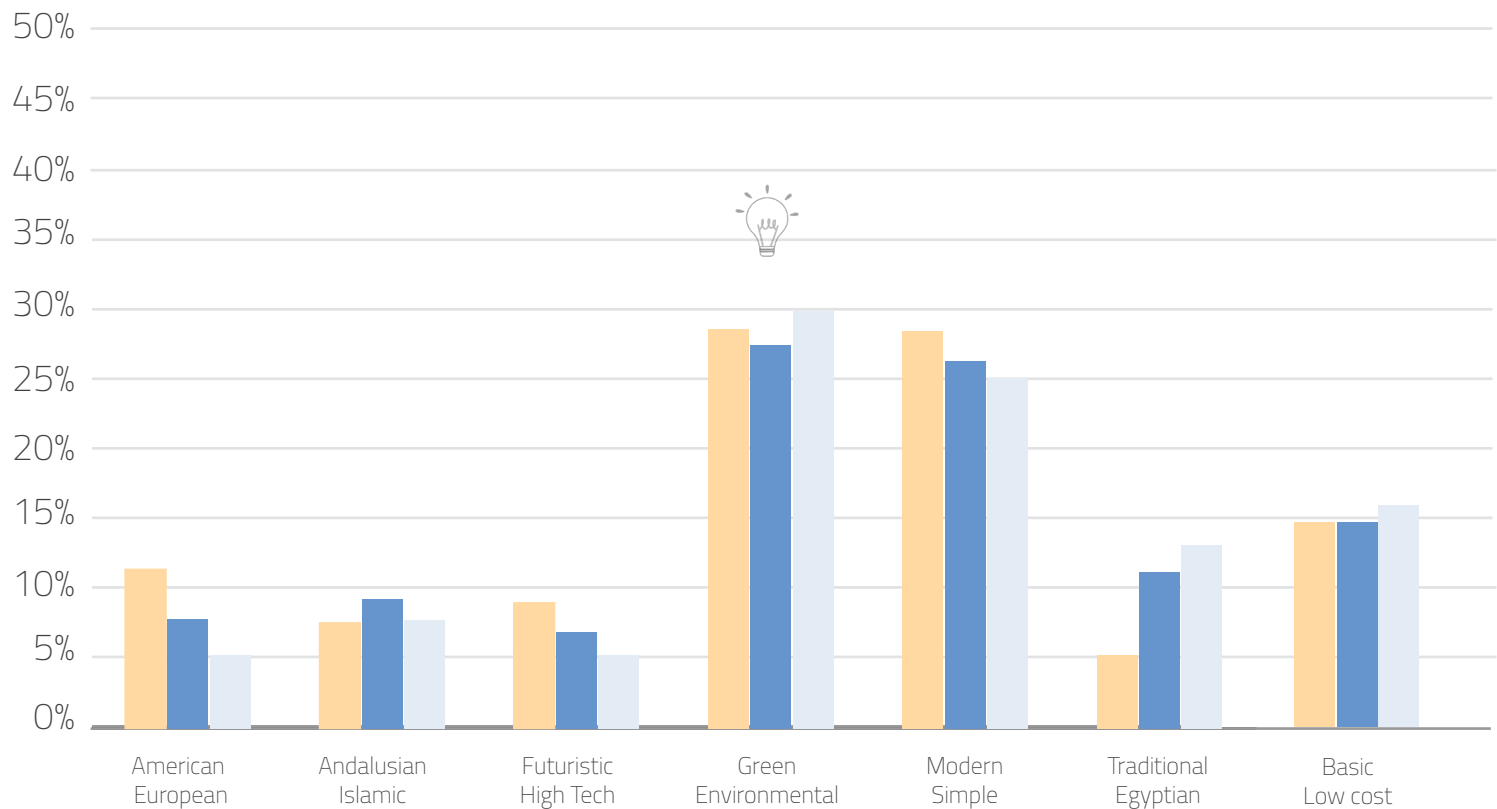


Socioeconomic Segment

A B C



What is your preferred architecture Style?

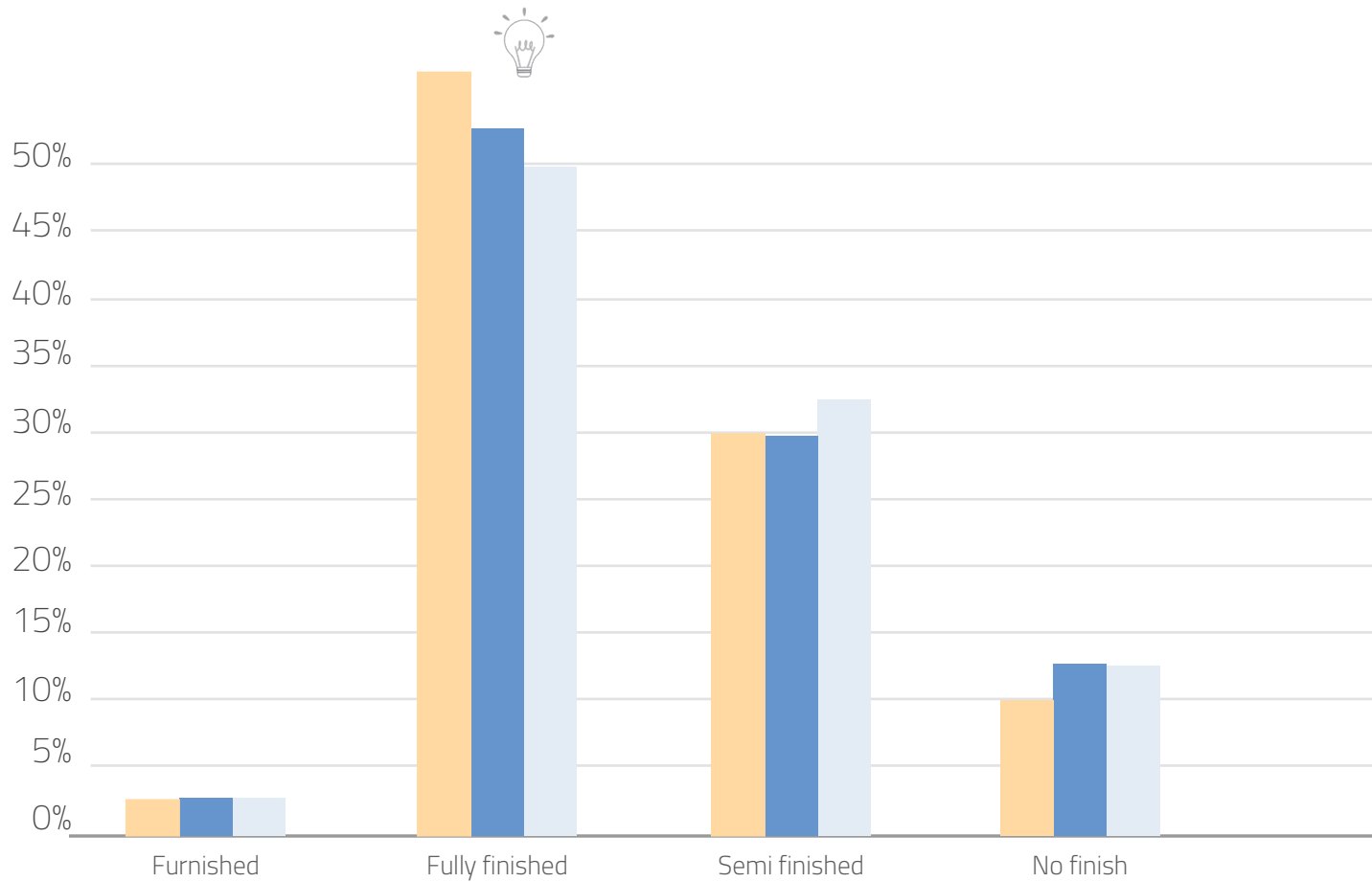


Socioeconomic Segment

A B C



What is your finishing preferences?

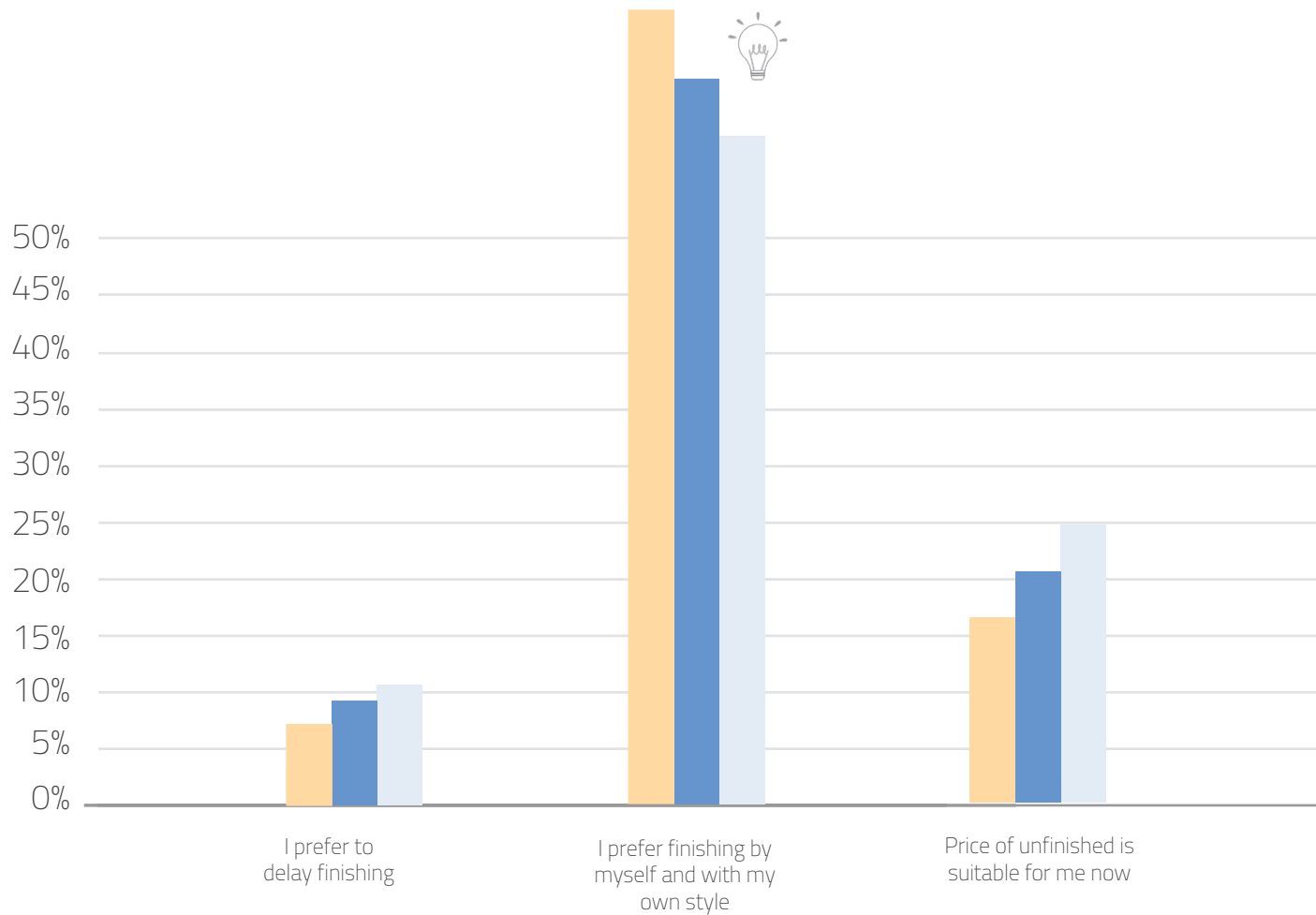


Socioeconomic Segment

A B C



Why do you prefer unfinished properties?

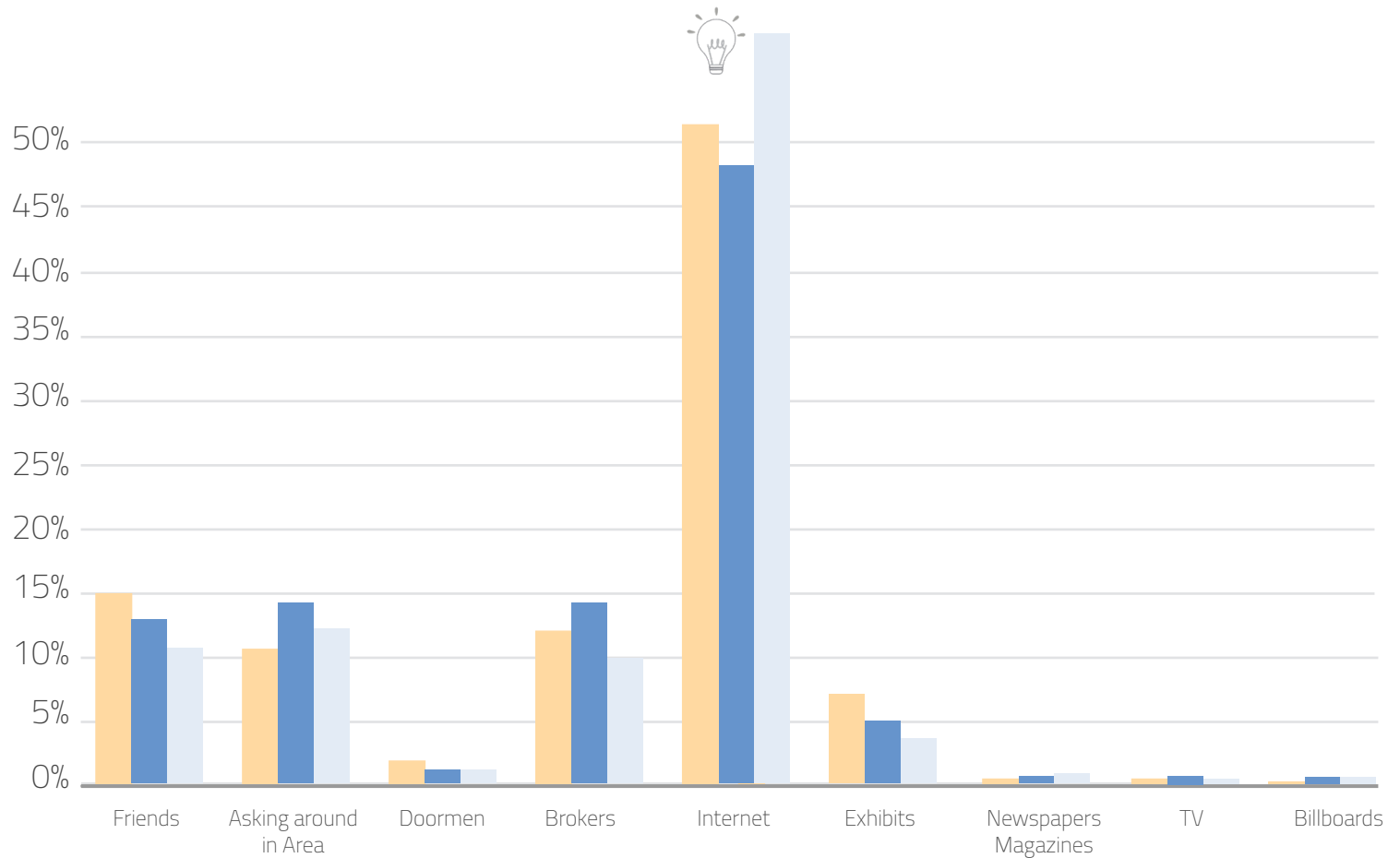


Socioeconomic Segment

A B C



How do you search for Real Estate?

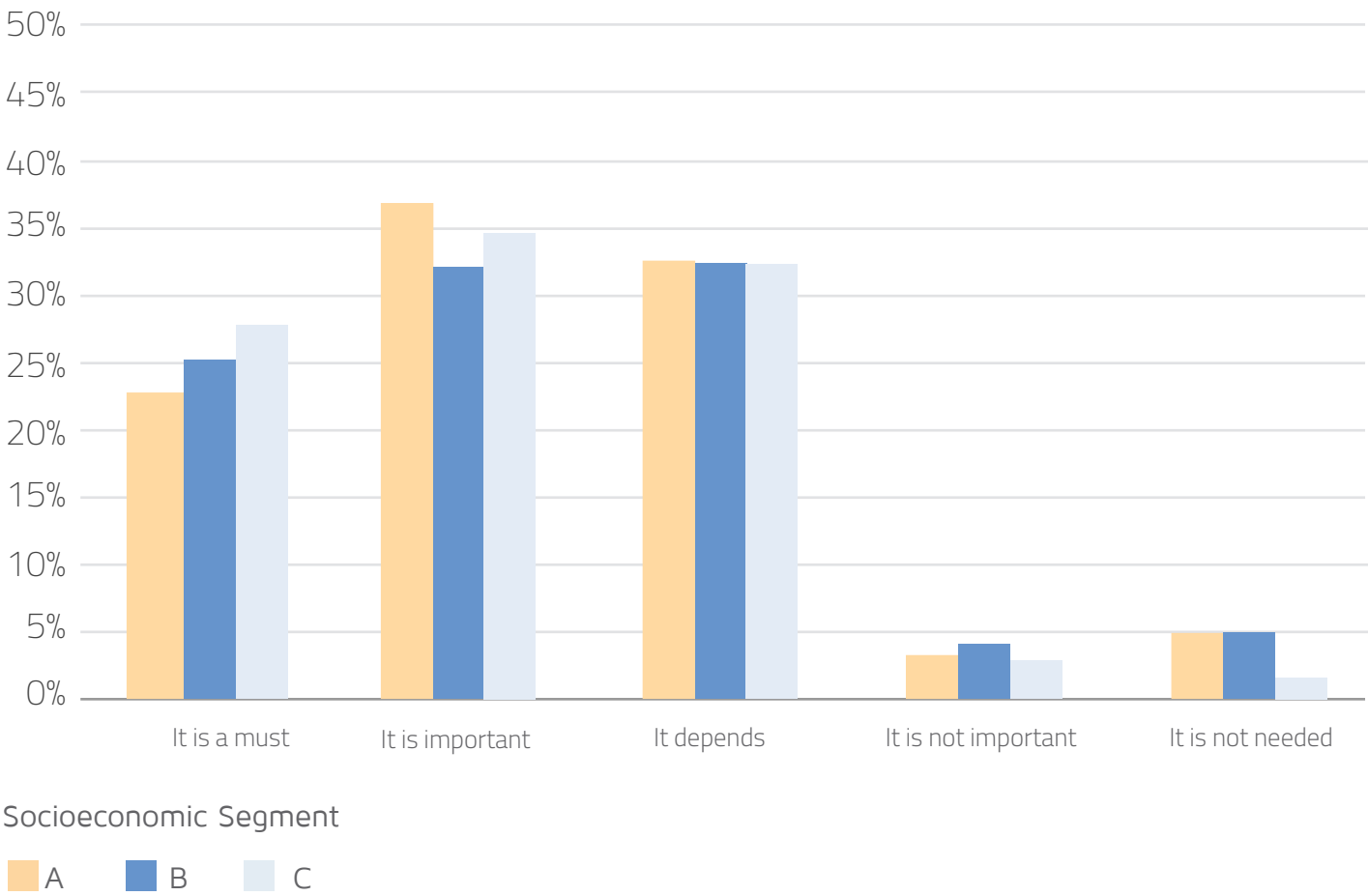


Socioeconomic Segment

A B C

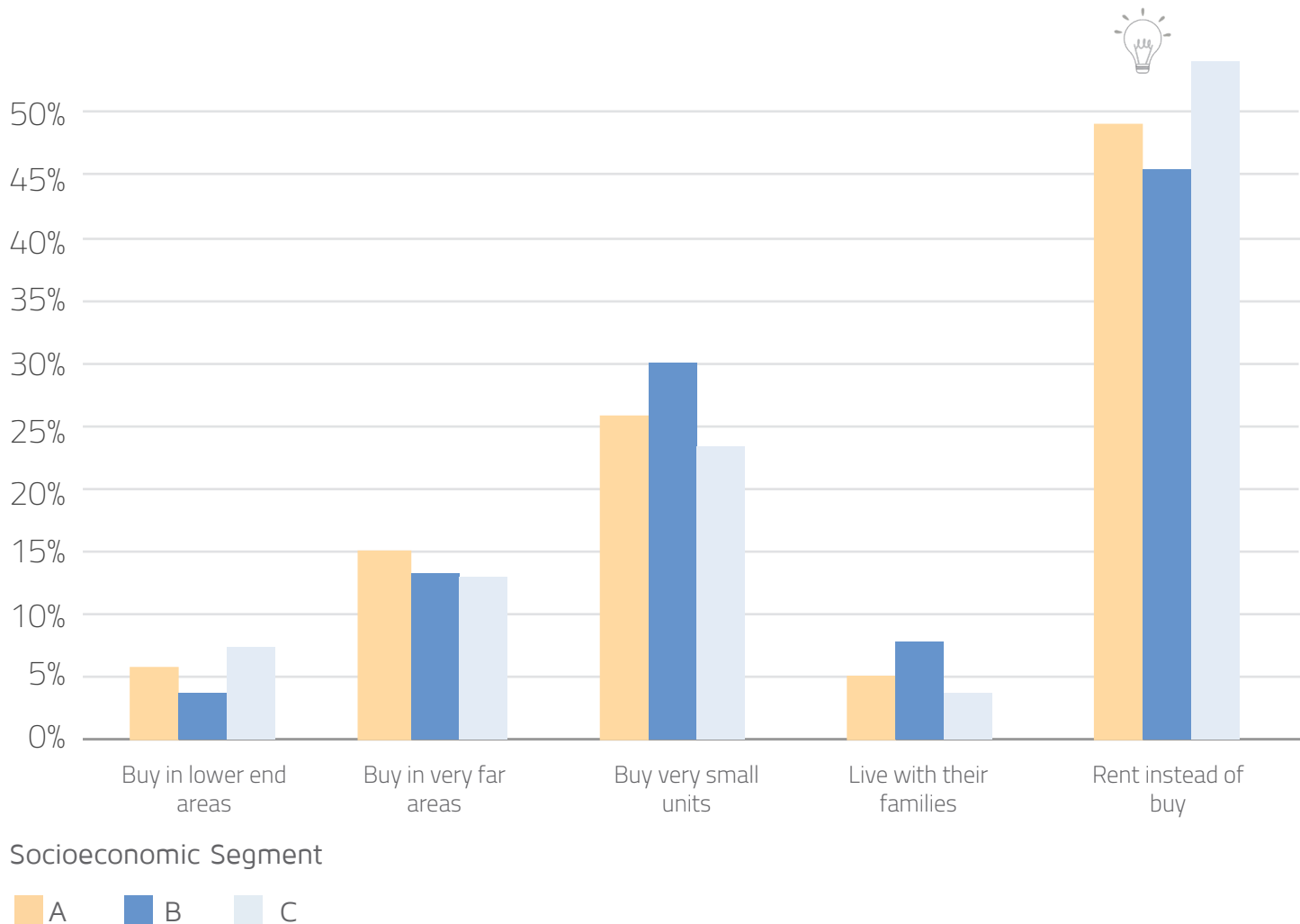


How important is owning an apartment to get married?





What is the ideal option for people who cannot buy their desired property?



Sales Growth Solutions

In addition to providing market insights, Aqarmap has a comprehensive set of solutions that can help you grow your organizations sales:

Qualified Leads

Increase your sales and reach high-net-worth expat qualified leads.

Targeted Branding

Showcase your brand value proposition at the right timing and to the right audience.

Media Buying

Get best-in-class management for your media buying activities across different advertising channels.

Email Marketing

Reach eligible customers with engaging messages through our targeted email marketing.

To launch your first campaign, contact sales@aqarmap.com

aqarmap

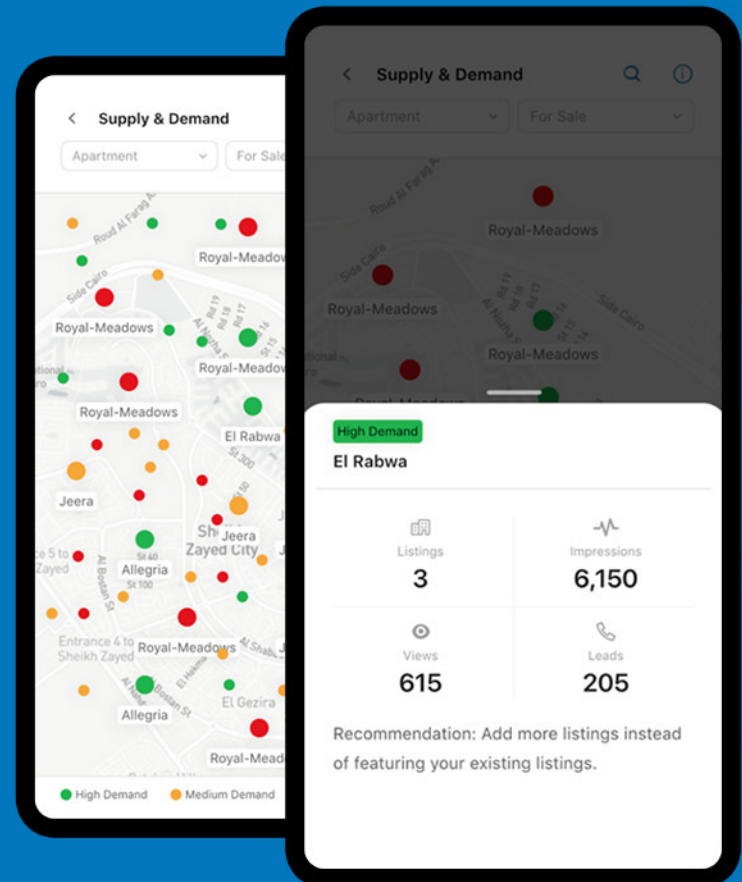
Supply & Demand

Knowledge can help us take better decisions, and we are committed to provide meaningful insights for all players in the real estate industry.

Get access to our highly anticipated supply and demand application, which allows you to instantly explore the live levels of supply and demand in every neighborhood, compound, and street.

To get access to Supply and Demand app,
Contact: insights@aqarmap.com

aqarmap





Aqarmap Consumer Demand Index

Since 2012, Aqarmap has been publishing a monthly index that measures consumer demand for real estate in Egypt. This index is the most reliable and most referenced indicator in the market, and it is being followed closely by real estate investors, real estate companies, stock market analysts, government officials, and international organizations. It has been quoted in multiple international and local publications such as: Oxford Group, Global Property Guide, Arab African Bank Securities, UN Habitat, American Chamber, Reuters, Bloomberg, and numerous economic publications. The index has reliably measured the demand during monumental political and economical inflection points in 2013, 2016, 2020 and 2022.

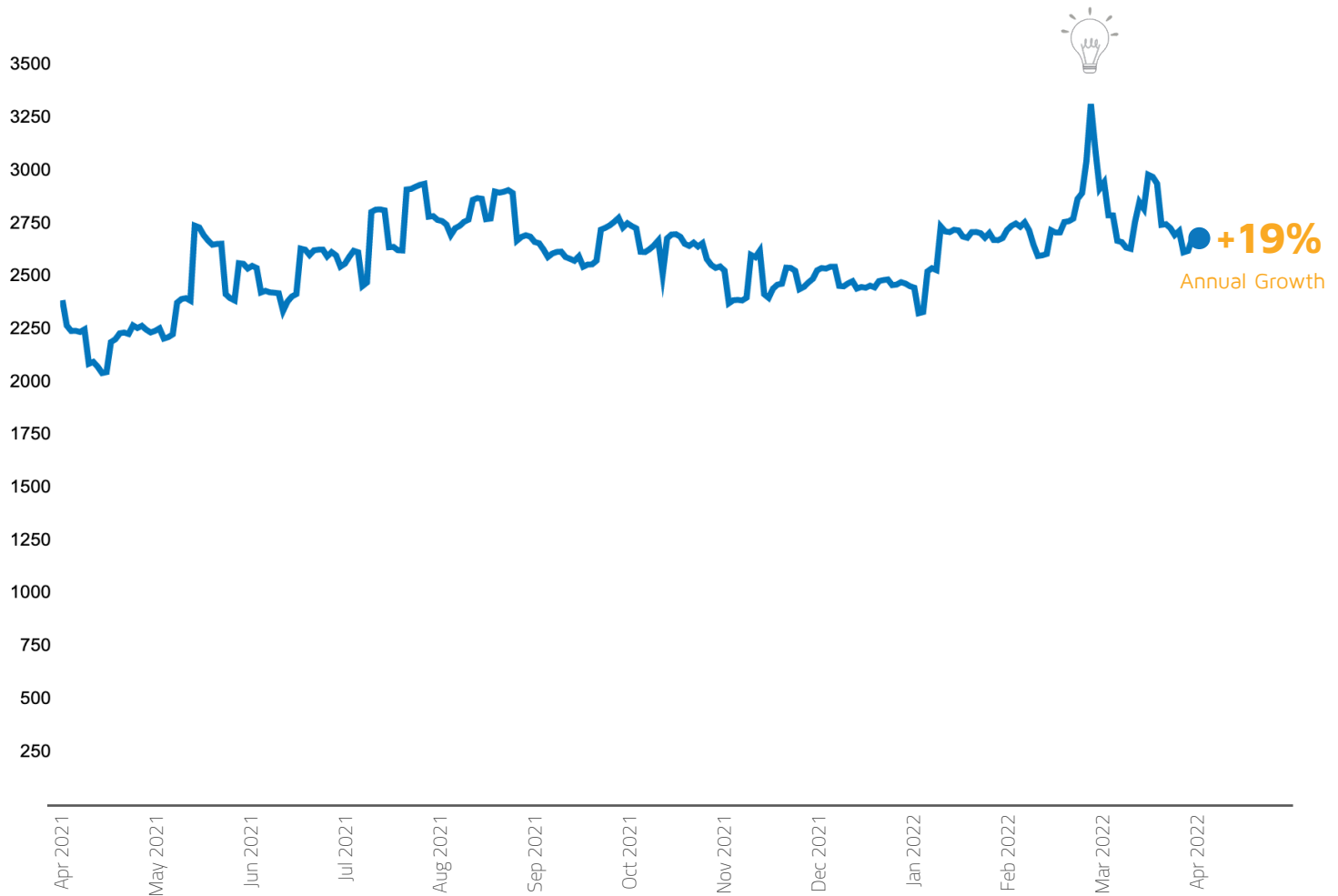
The index computational algorithm is proprietary and it utilizes a combination of data points from Aqarmap, online search engines, macro economic indicators, and publicly listed developers financials and KPIs. The index does not measure the fluctuation of prices, but rather the dynamics of consumer demand. Having direct access to the behavior of 2,000,000 buyers monthly combined with the ability to evaluate the dynamics of more than 250,000 properties listed by developers, brokers and private individuals gives Aqarmap an exclusive market visibility.

In April 2022, the demand index expanded by 19% when compared year-over-year with April 2021, this growth was fueled by a continuous recovery from the COVID crisis, but more importantly by the sudden influx in demand during March 2022 which was triggered by the recent currency devaluation.

To learn more about Aqarmap Index, visit: index.aqarmap.com

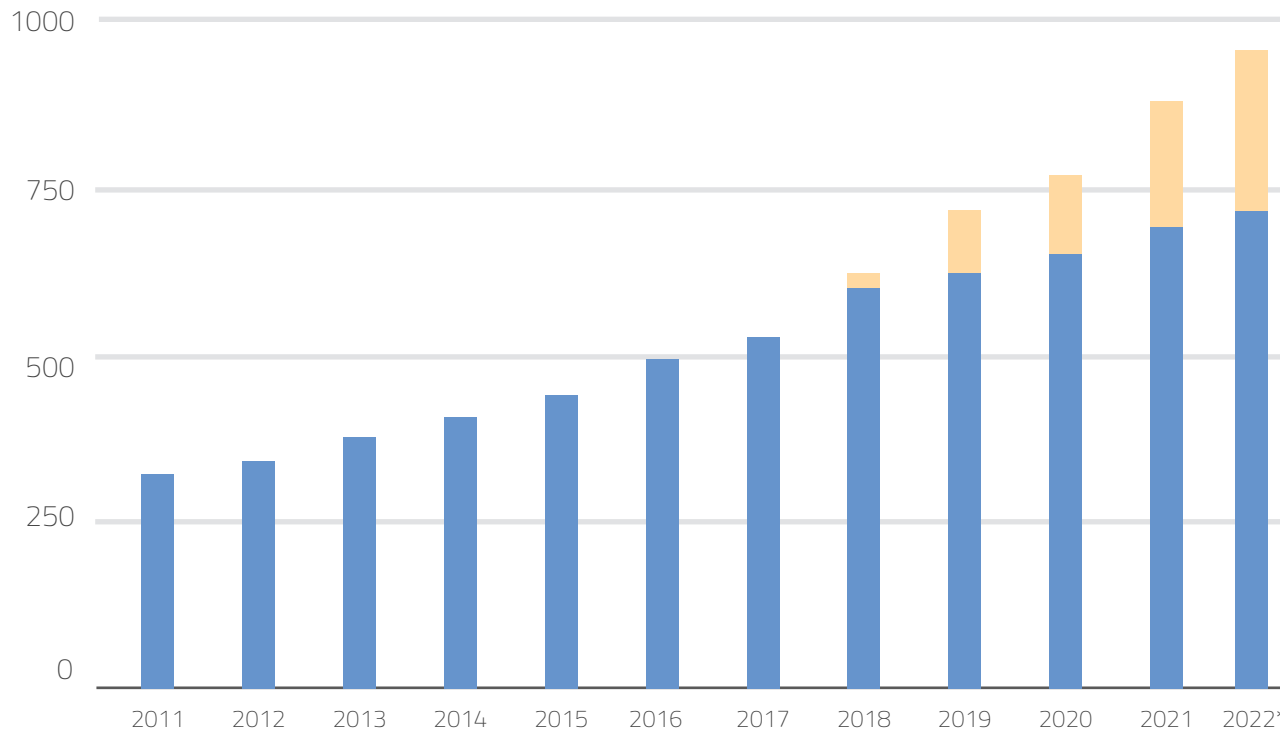


Demand Evolution in Past 12 Months





of Developers of Branded Projects

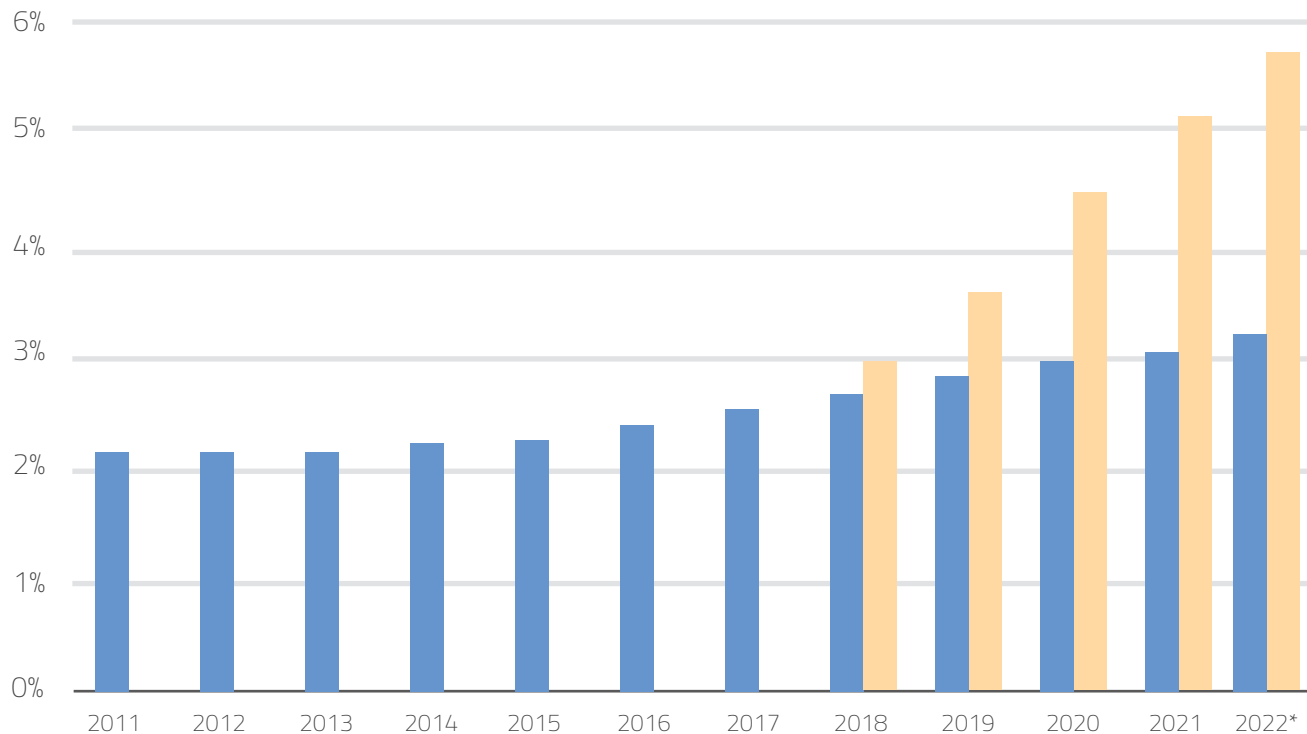


Across the years, competition between developers of branded projects has been increasing gradually, and lately the influx of new entrants in New Capital has reshaped the competitive landscape significantly. Inside New Capital are developers who have projects inside New Capital only. Developers who have projects inside and outside New Capital are considered Outside New Capital developers. We count here developers who build branded projects, which can be residential, 2nd homes, or commercial. A branded project is a project that has a logo and a brand identity. Separate buildings are excluded.

Inside New Capital Outside New Capital



New Capital Impact on Broker Commissions

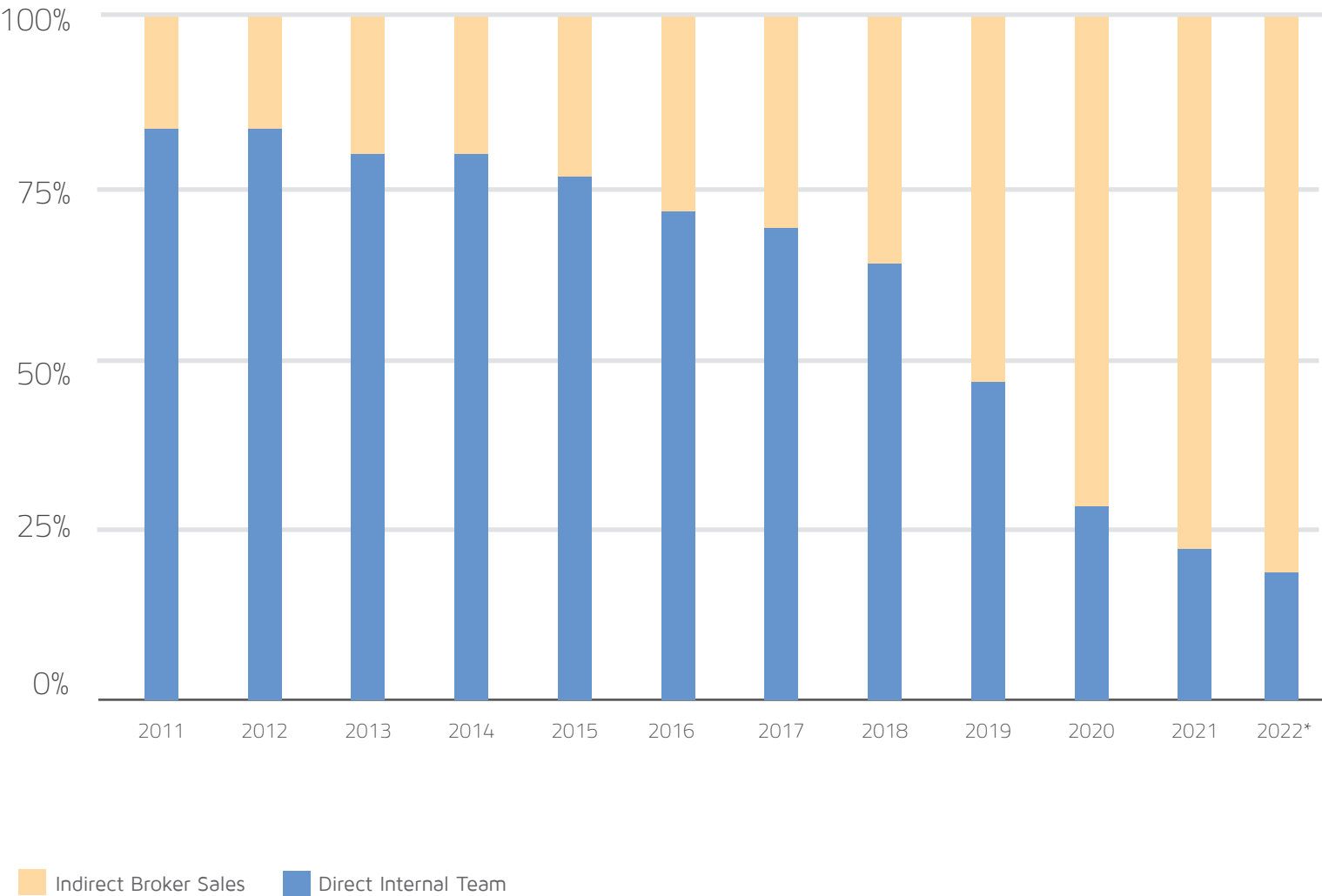


Commissions shown are averages of residential, 2nd home, and commercial projects. In New Capital, commercial projects tend to have higher commissions up to 9%. All averages do not include bonuses and incentives for broker agents and team leaders, in New Capital, an average of 0.7% incentive is paid on top of the broker commission

Inside New Capital Outside New Capital

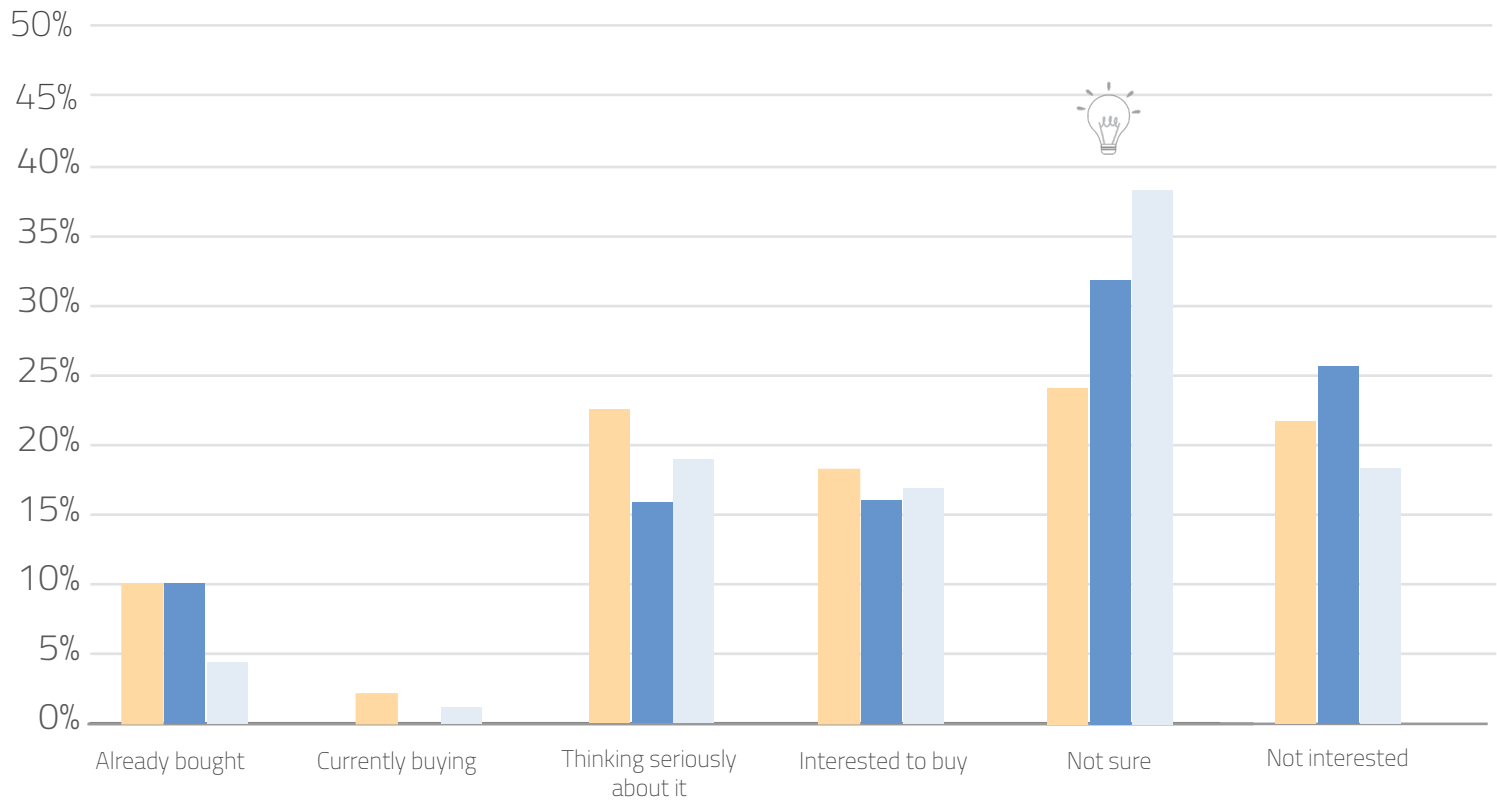


Developer Sales Channel Distribution





Will you buy in New Capital?

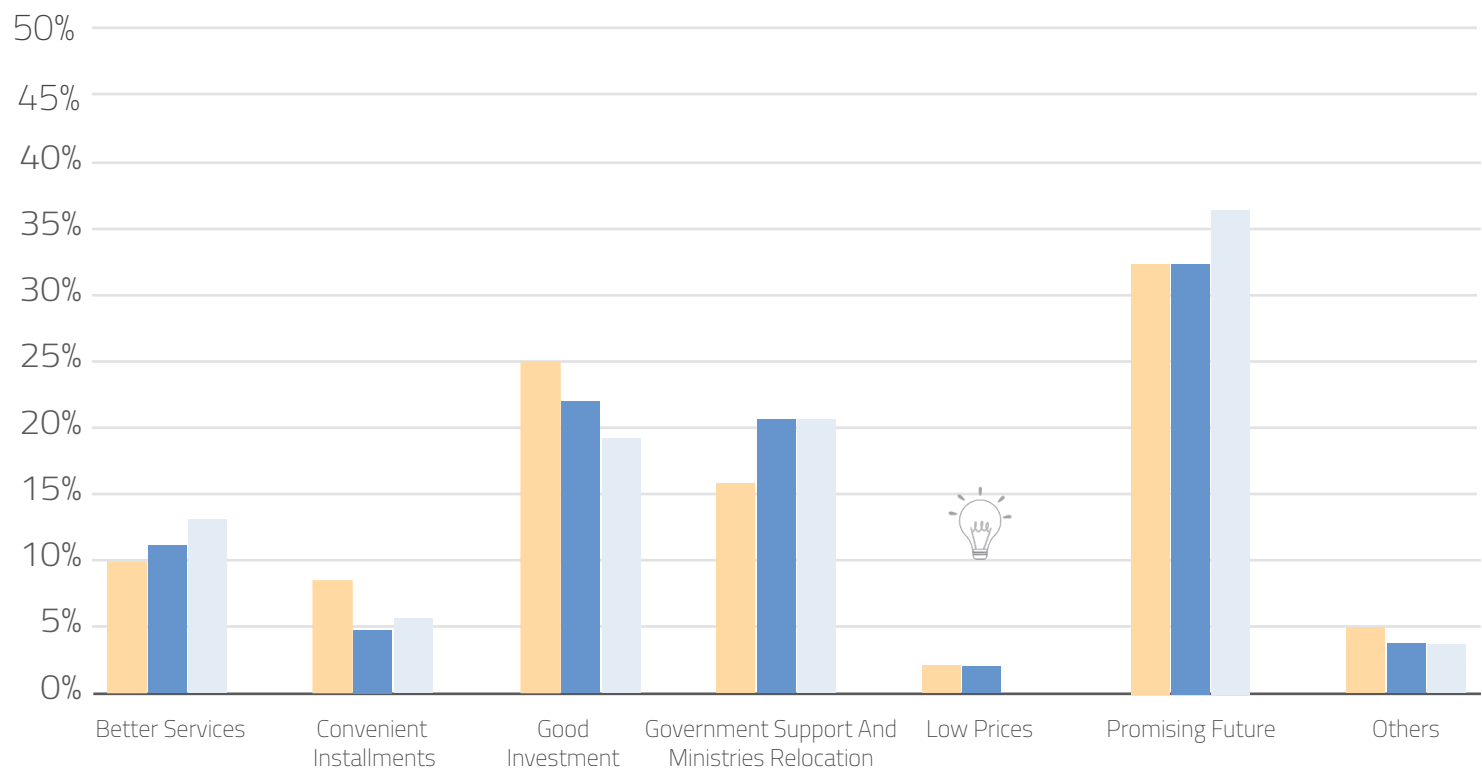


Socioeconomic Segment

A B C



Why are you interested in New Capital?

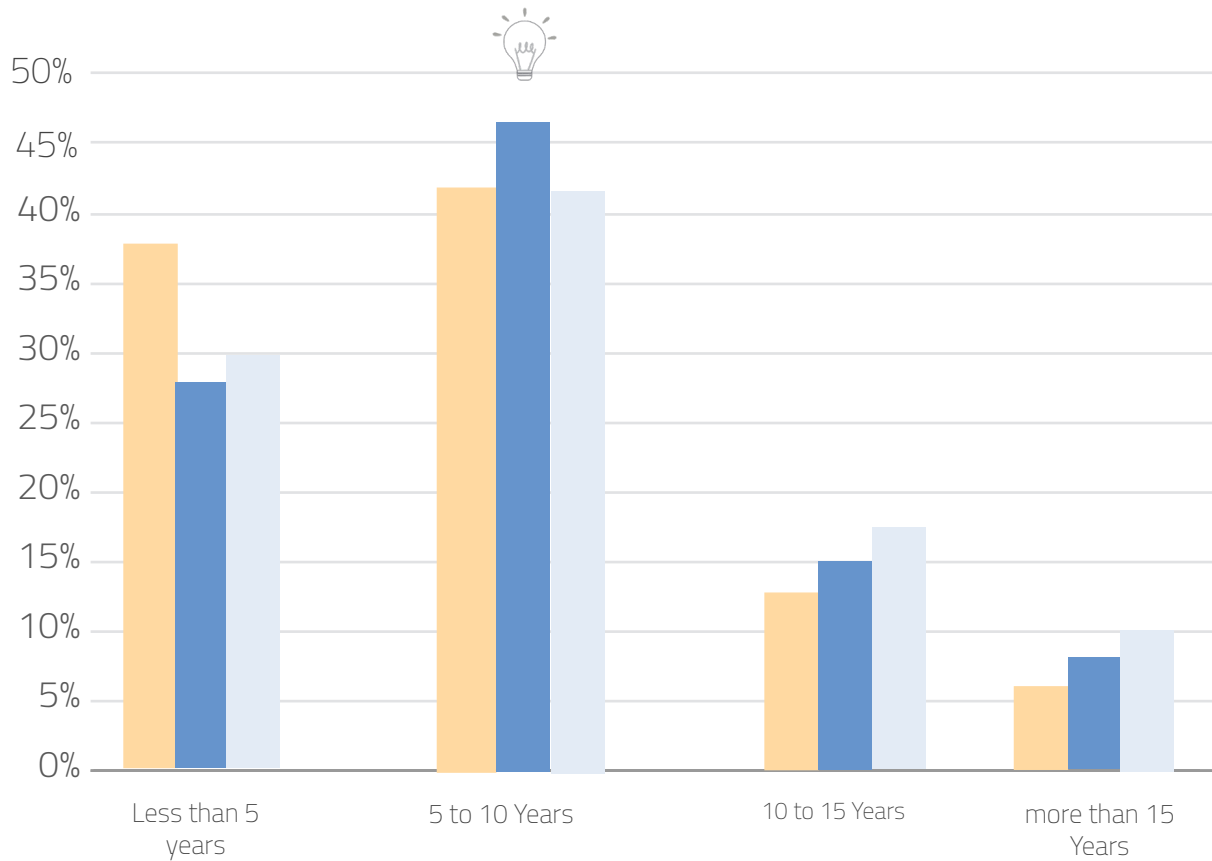


Socioeconomic Segment

A B C



When do you expect the New Capital to be liveable?

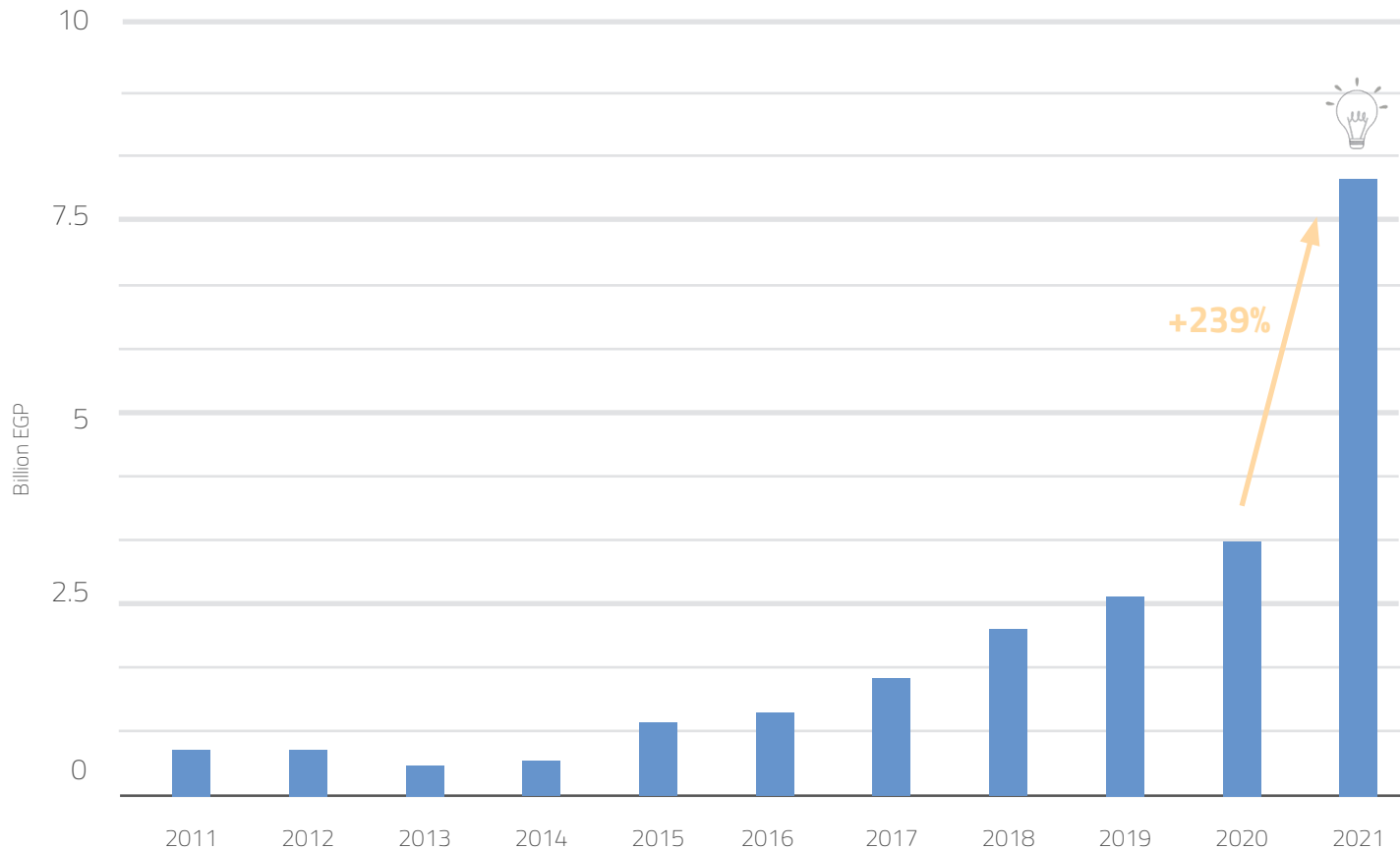


Socioeconomic Segment

A B C



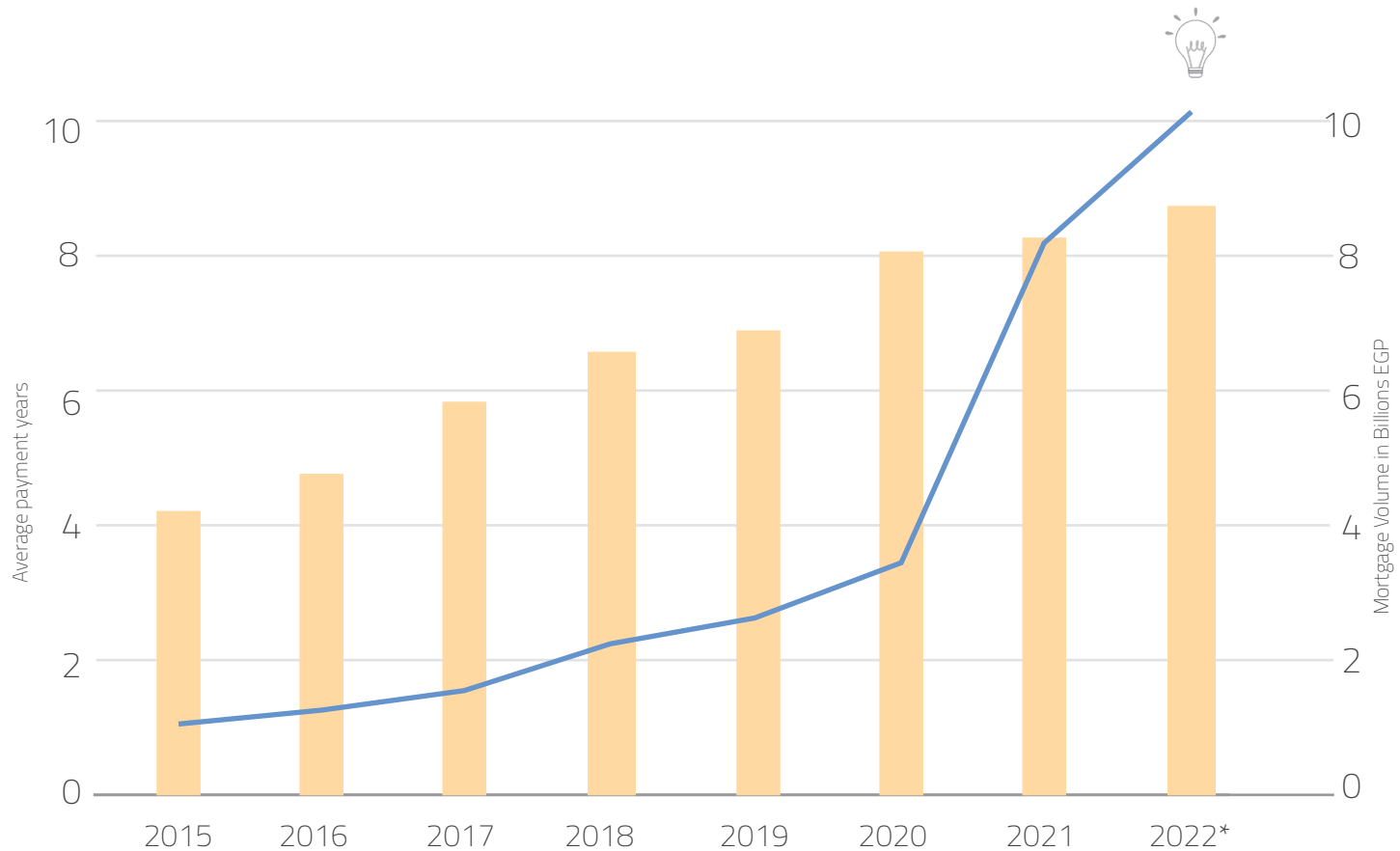
Accelerating Growth in Mortgage Industry



Source: Egyptian Financial Regulatory Authority



Extended Payment Plans & The arrival of Mortgage

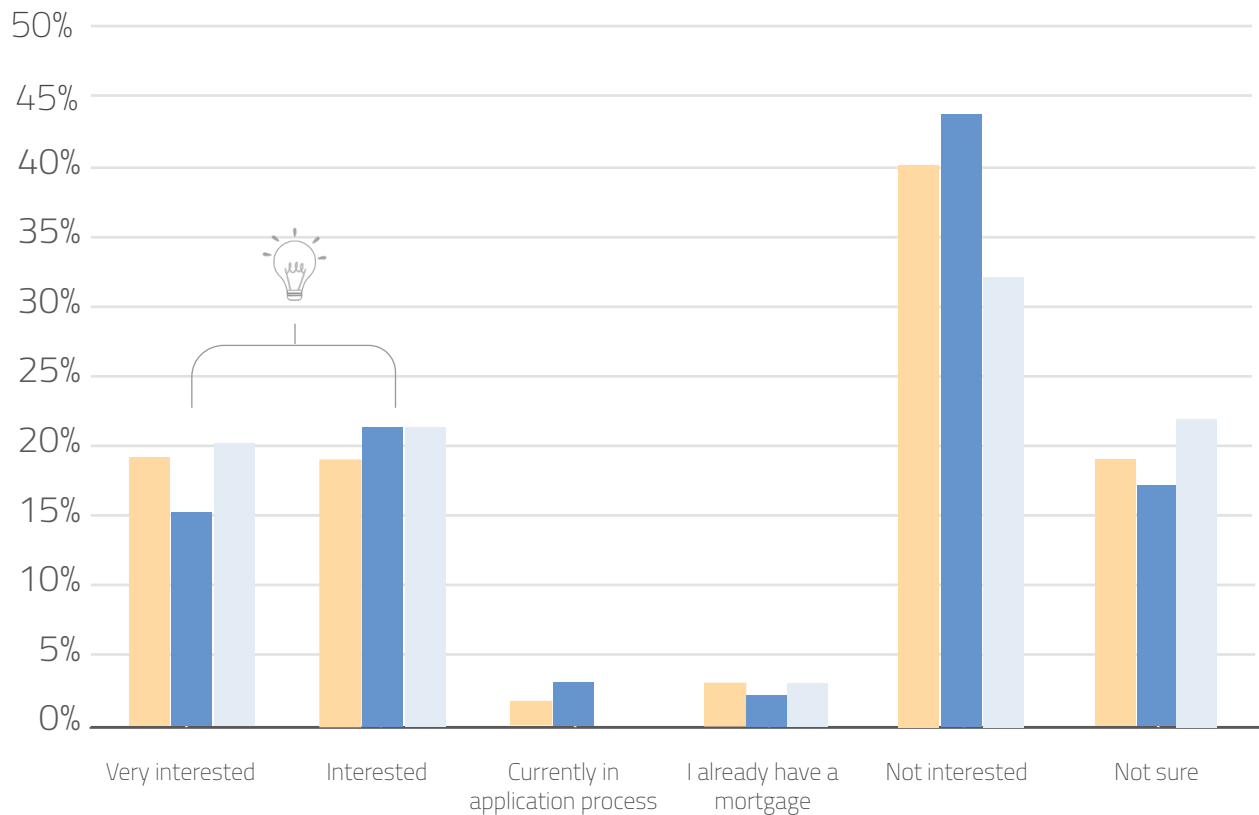


Orange bar: Average Payment Plan Blue line: Mortgage Sales in Billions*

Sources:
- Average payment plans: Aqarmap proprietary market database
- Mortgage Industry Sales: Egyptian Financial regulatory authority



Are you interested in mortgage financing?

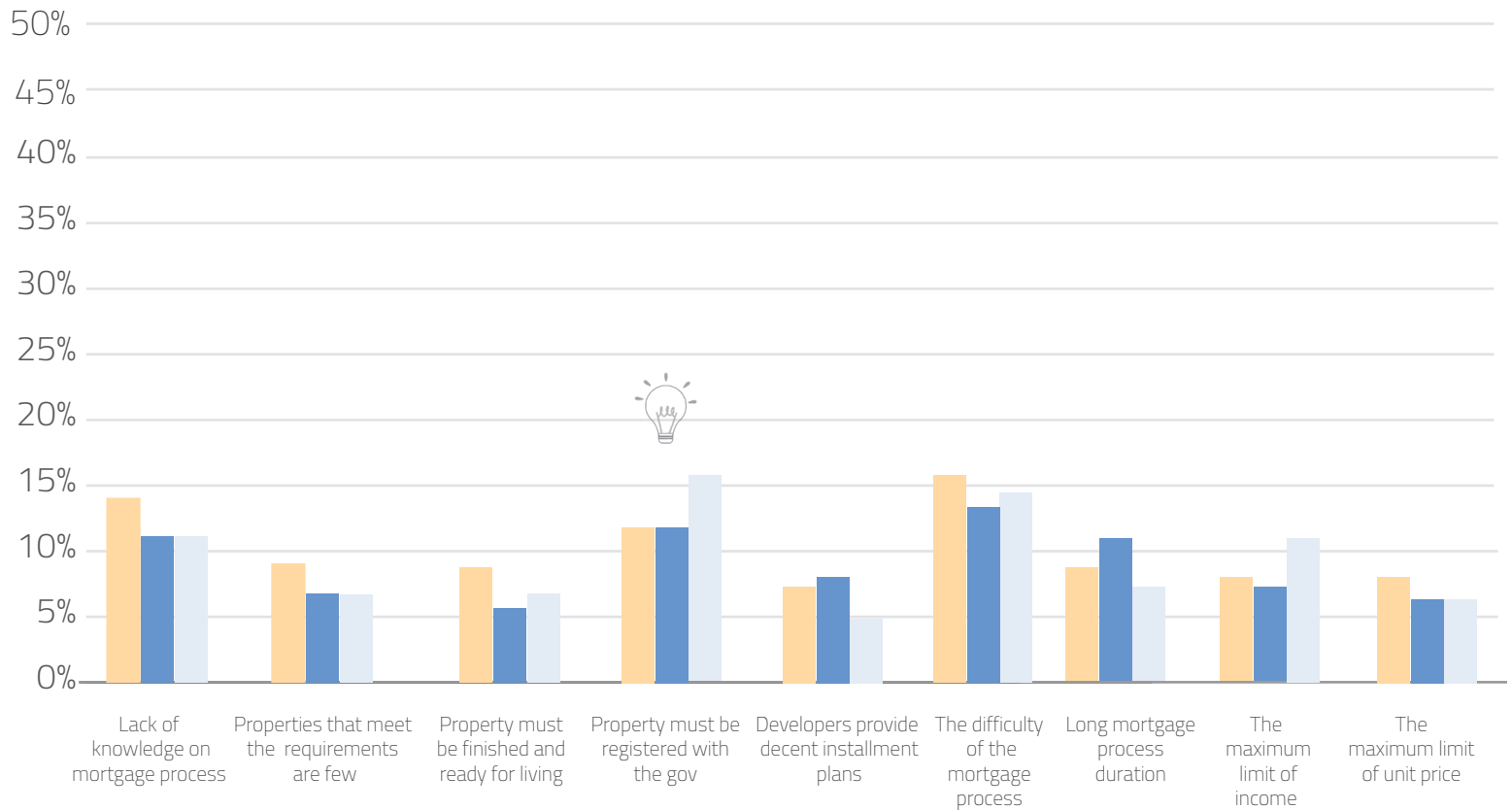


Socioeconomic Segment

A B C



Why are you not interested in getting a mortgage?

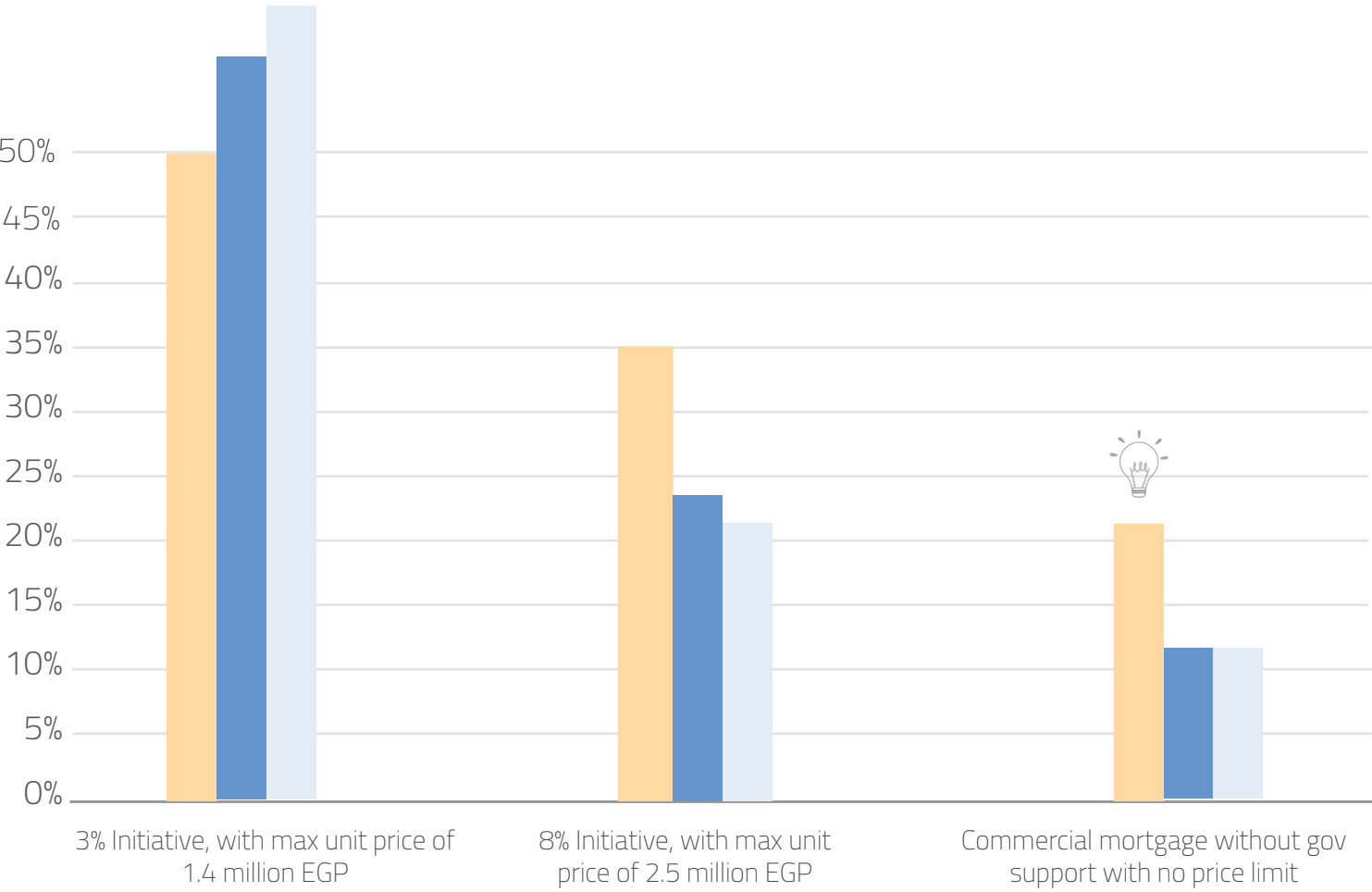


Socioeconomic Segment

A B C



What is the type of mortgage you are interested in?

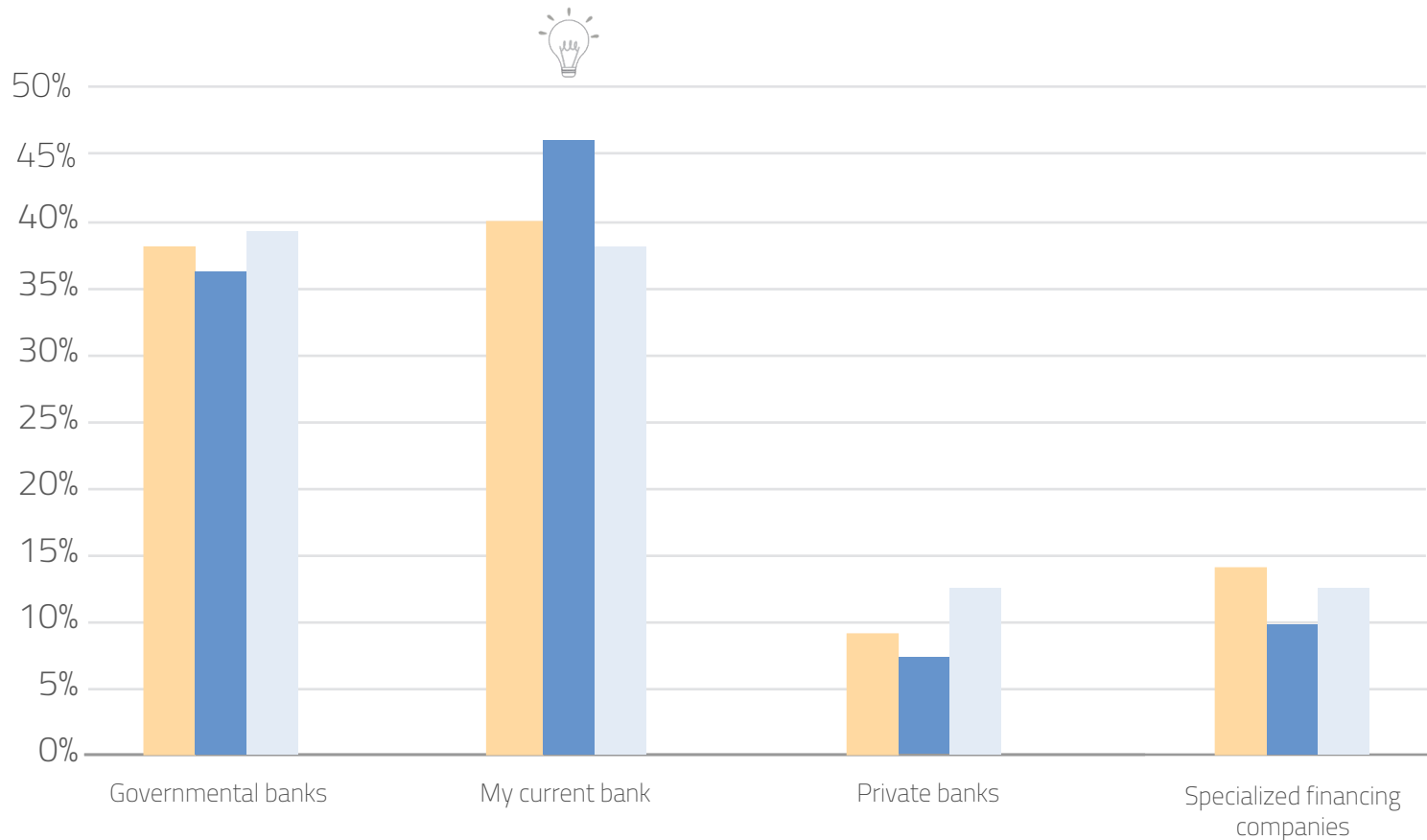


Socioeconomic Segment

A B C



Which entity do you prefer to get a mortgage from?

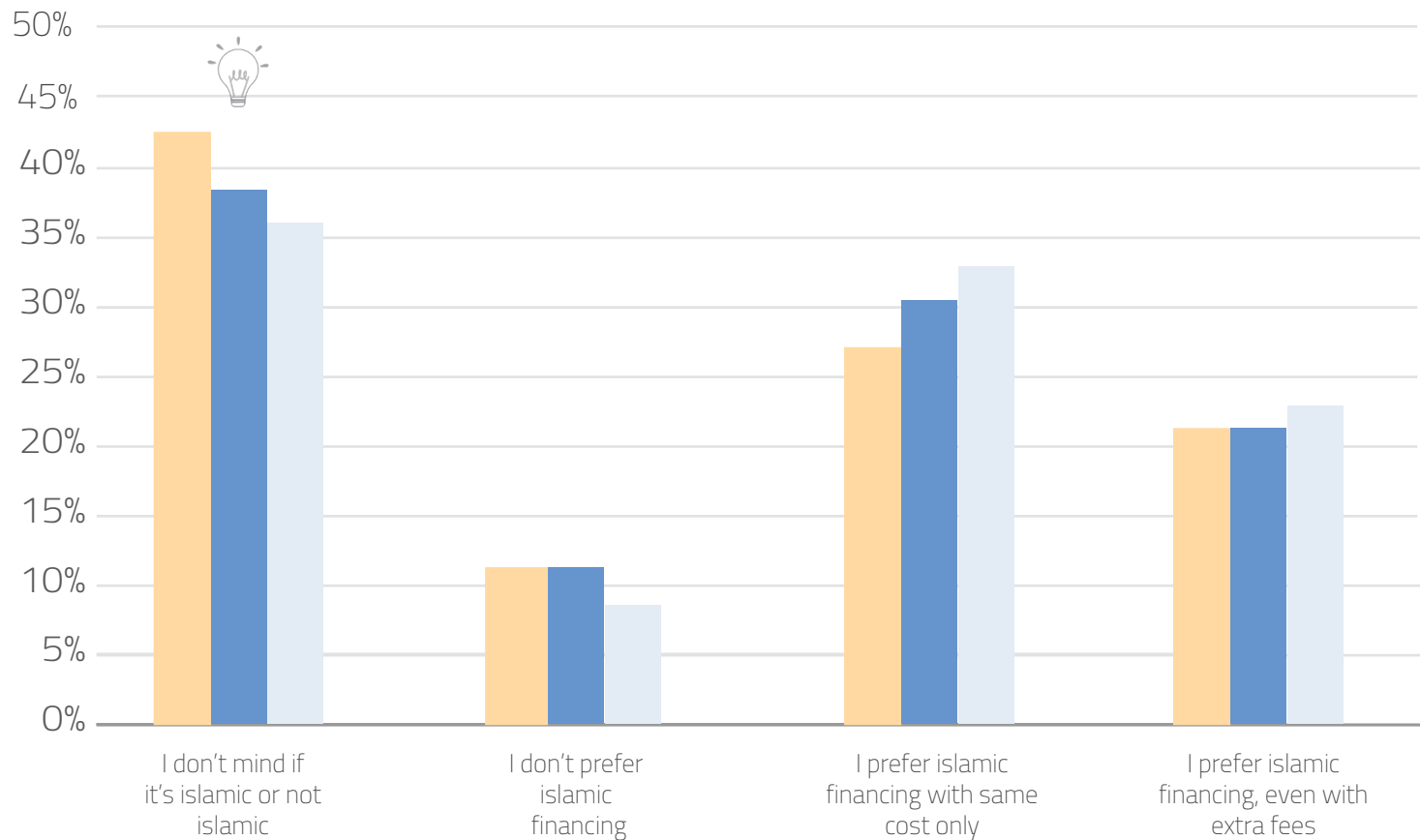


Socioeconomic Segment

A B C



Interested in islamic mortgage with an extra cost?

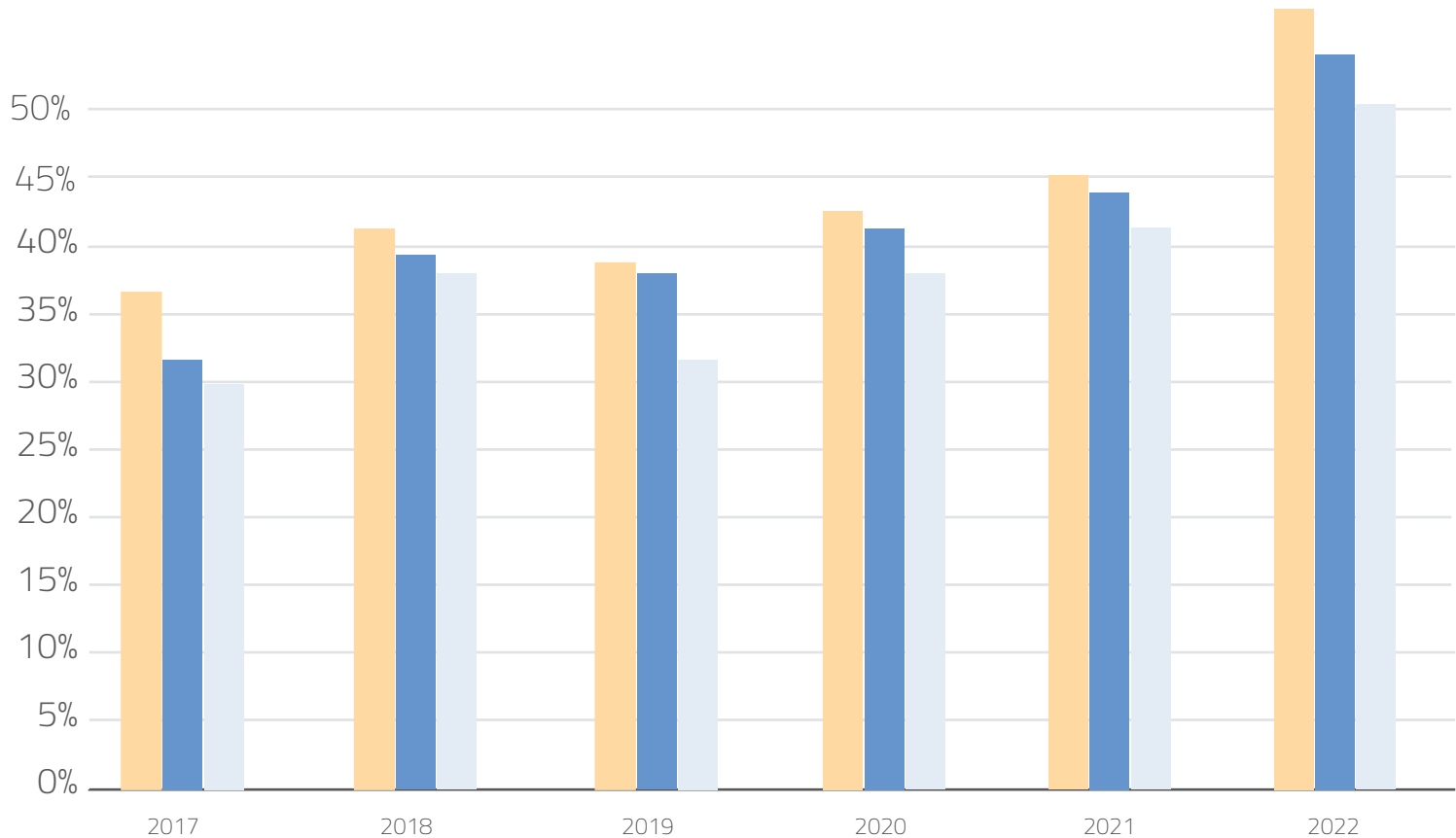


Socioeconomic Segment

A B C



Growth of Fully-Finished preference across years



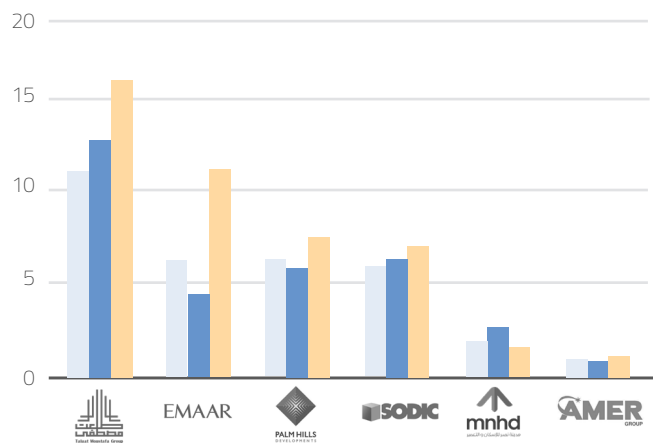
Socioeconomic Segment

A B C



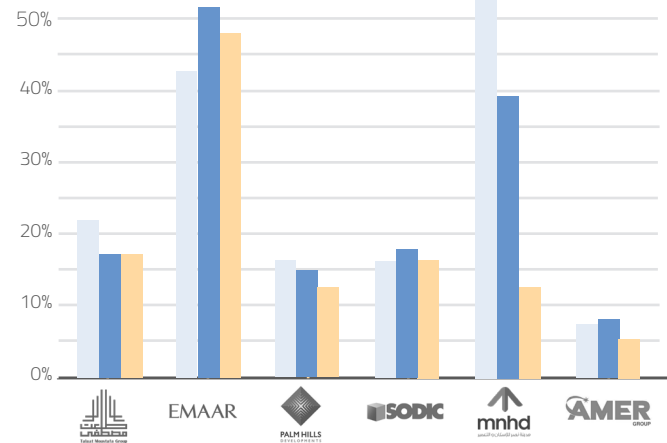
Publicly Listed Developers Revenue & Profitability

Revenue (Billions EGP)



TMG is top listed developer based on Revenue

Profitability %



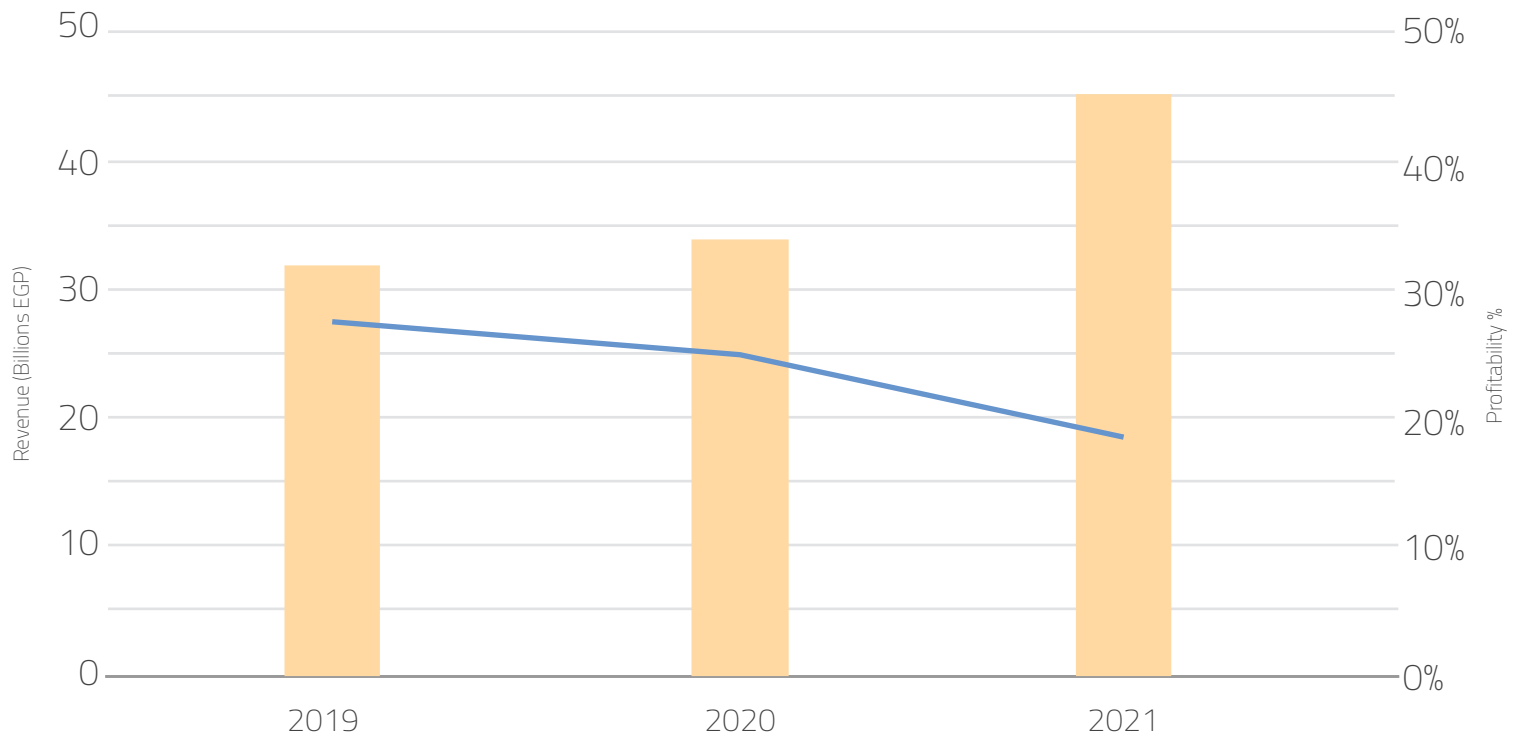
Emaar is top listed developer based on Profitability

2019 2020 2021

Source: Reuters



Publicly Listed Developers Revenue & Profitability



Total revenue of selected developers is increasing, while average profitability is decreasing

Revenue (Billions EGP) Profitability

Source: Reuters

Case Study

In our journey to empower the real estate industry with actionable insights, we always get tapped by our customers to provide them with customized market research insights that maximize their projects success. This section explores one of our most recent market research engagements.



Market Research “Case Study”

Brief & Objective:

Aldawlia approached Aqarmap for data insights to maximize the chances of the success of their newest project 'Address Capital' which is expected to be launched soon in New Capital banking district.

The scope of the project was mainly focused on getting access to data and insights about demand and competition; however it was expanded to include a full fledged data-driven strategic positioning exercise for Address Capital, including a high level assessment of the corporate brand “Aldawlia” and a refinement of its current position.

Client Profile:

- Established in 2005
- Developed +13 Projects
- Developed +2.5 millions square meters

Sample Size: 591 participants

(Employees - Existing and potential customers - Brokers - Developers)

Project Duration: 38 days

Output (254 pages):

- Competitive Analysis
- Demand Forecasting
- Strategic Plan
- Project Technical Recommendations
- Marketing & Sales Recommendations
- Launch Recommendations

Testimonials:

“Aqarmap gave us the full picture of the market as they have the biggest database for real estate supply and demand”

Tarek Fahmy
General Manager
ALDAWLIA Developments

“From day one, aqarmap started to dig very deep, converted everything to numbers, and provided a list of practical recommendations and KPIs”

Mohamed Osman
Business Development Head
ALDAWLIA Developments





Data-Driven Methodology

By converting every aspect of the research into simplified numerical values, and by leveraging Aqarmap's signature pentagon framework which is used to analyse supply & demand trends in order to find the gaps and opportunities, we were able to deliver an actionable data-driven plan for the client.

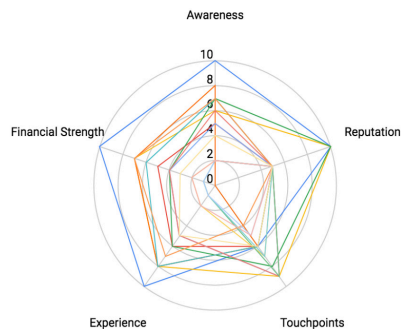
Challenges & Solutions:

- Surveys were primarily numeric & standardized to maximize clarity
- Research methodology was numericized to standardize output
- Everything was simplified to numbers & plotted on the Pentagon Model

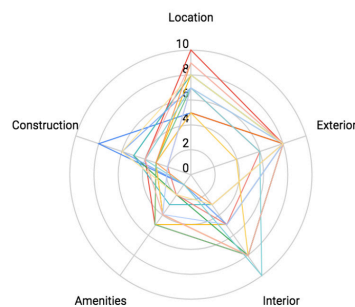
Timeline



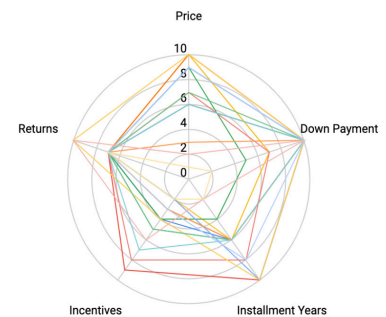
Competitive Analysis



Developer



Project



Commercial

Data-Driven Market Research

Being the leading real estate portal in Egypt, we continue to receive vital insights and trends from the daily behaviour of thousands of buyers on our platform. This has enabled to create data-driven studies for our customers with a focus on: supply and demand analysis, competitive analysis, commercial advisory, and brand positioning

We have proudly served the market research needs of the following leading developers:



Let us know if you are seeking specific datasets and we will do our best to fulfill your needs:

research@aqarmap.com

aqarmap

AQARMAP Online EXPO

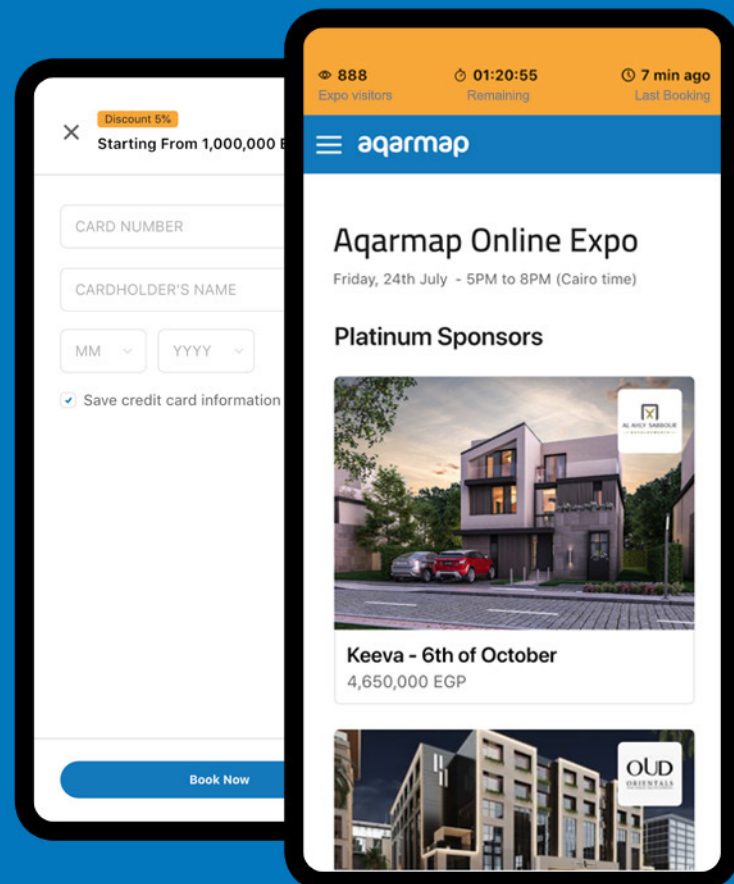
Aqarmap Online EXPO is an innovative event that helps developers sell to Egyptians abroad using credit cards.

The expo promotion starts 1 week in advance targeting Egyptians abroad, and the expo itself is 3 hours long featuring different projects and discounts.

Consumers who want to benefit from the discounts can pay a small refundable "expression of interest" booking fee using their credit card.

Contact us to learn more:
expo@aqarmap.com

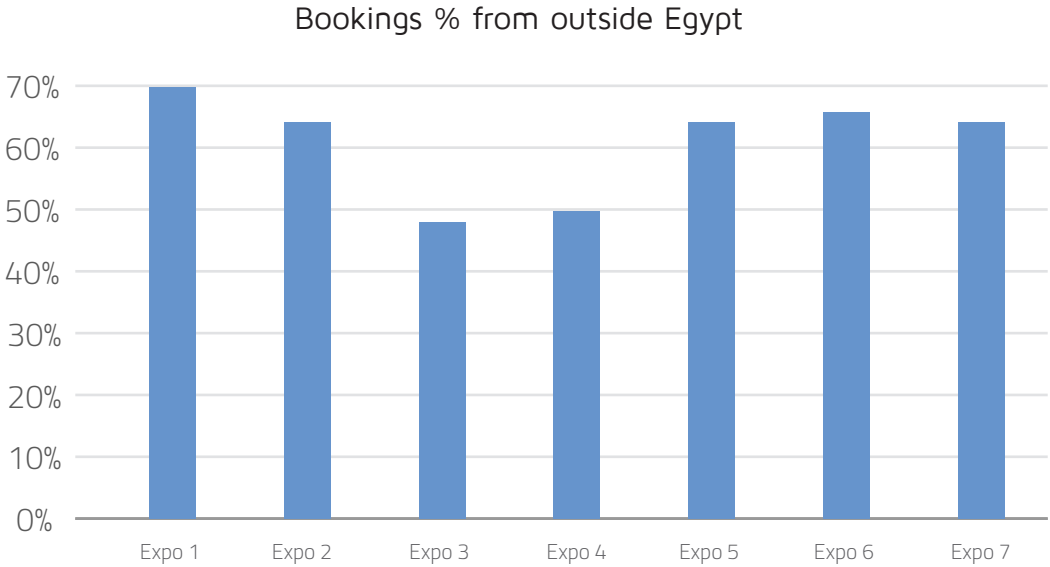
aqarmap



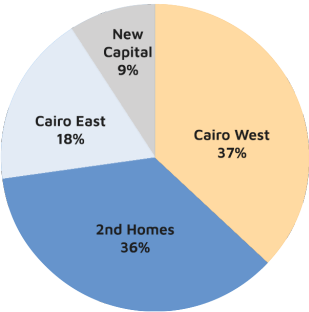


Aqarmap Online Expo Highlights

	Expo 1	Expo 2	BLACK FRIDAY	Expo 4	Expo 5	Expo 6	BLACK FRIDAY	Expo 7
Registered Buyers	8,223	9,162	27,408	16,862	23,167	11,360		15,092



Top Booking Destinations





Aqarmap Online Expo Highlights

Participating Developers



Price Trends

This section offers price trends, heatmaps, and ratings of selected neighborhoods to help you understand the dynamics of each area. There is also a table that offers granular pricing data at the sub-neighborhood level, and this data was extracted from our system in May 2022.

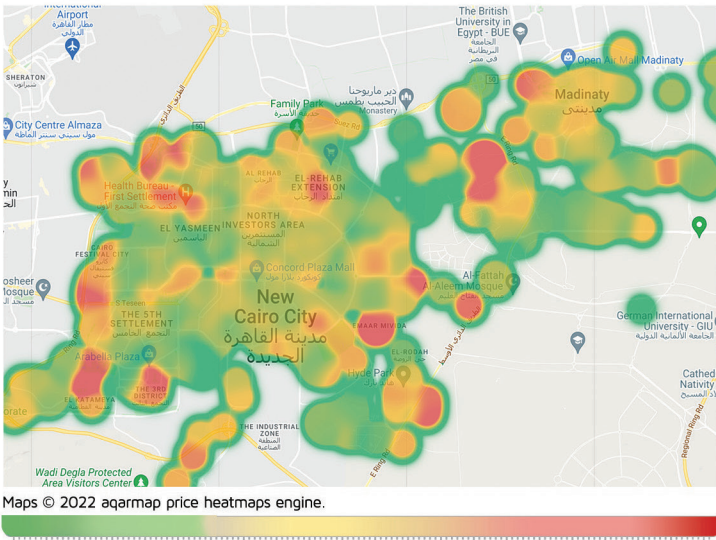
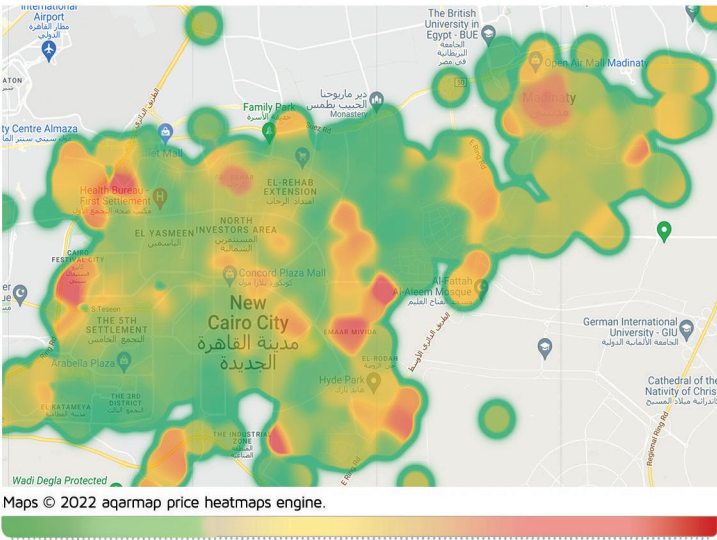
To get up-to-date prices please visit aqarmap.com/prices



New Cairo

Apartment prices	
Avg. price inside compound (EGP)	19,700
Avg. price outside compound (EGP)	13,000
Rental price per meter (EGP)	50
Annual rental yield	4.7%

Villa prices	
Avg. price inside compound (EGP)	25,300
Avg. price outside compound (EGP)	23,200
Rental price per meter (EGP)	102
Annual rental yield	5.3%



■ Most affordable areas ■ Moderate areas ■ Most expensive areas

New Cairo



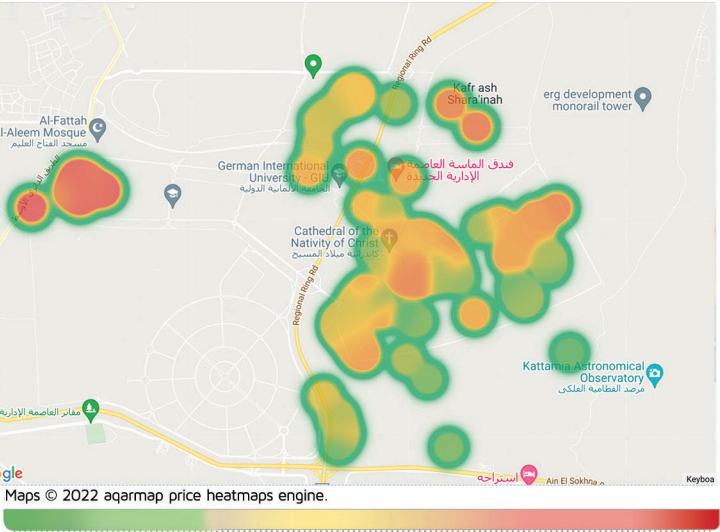
Neighborhoods price/meter					
Neighborhood	Apartments	Villas	Neighborhood	Apartments	Villas
Golden Square	20,250	24,600	East of Academy	11,750	16,500
Gharb El Golf	18,400	19,800	Northern Investors	11,650	23,250
Rehab	17,450	26,850	El Banafsag	11,650	18,650
Suez Rd	16,350	-	South of Academy	11,550	23,050
Madinaty	15,900	27,100	Kattameya	11,100	17,850
Down Town	15,800	-	Behind Mirage City	10,750	19,950
El Mostakbal City	15,650	20,750	Southern Investors	10,450	21,600
El Choueifat	14,900	21,900	New Narges	10,250	-
90th Street	14,850	20,500	Imtidad El Narges	10,200	-
New Cairo Extension	13,900	23,700	El Tamer Hena	10,100	10,250
Arabella	13,600	-	New Lotus	10,000	-
Diplomats	12,350	-	Lotus	10,000	-
American University Housing District	12,350	-	First Settlement	9,700	21,600
El Ahyaa	12,300	19,300	El Kornfol	9,550	9,850
Gharb Arabella	12,100	-	Dar Misr	9,350	-
Ard El Zohoor	12,100	-	Takseam El Andlos	8,850	19,700
El Narges	12,000	23,250	Third Settlement	7,750	18,450
El Yasmeen	11,850	18,100	Bait El Watan	7,650	7,000

Prices in Compounds			
Units	Economic	Mid Range	Luxury
Apartments	14,000	20,000	29,000
Villas	18,000	26,000	32,000

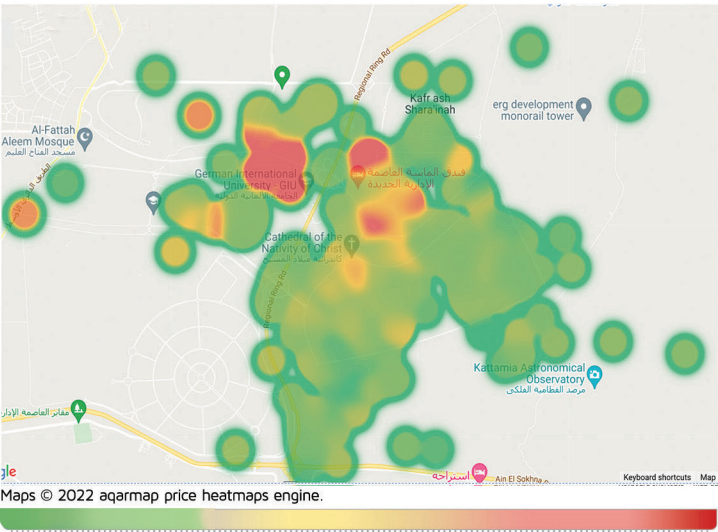
New Capital



Residential prices



Commercial prices



Most affordable areas Moderate areas Most expensive areas

New Capital



Residential price/meter		
Neighborhood	Apartments	Villas
Investors Area	16,250	30,450
R7	15,100	21,700
R8	12,600	27,600
Al Asema Gardens	6,700	-

Commercial price/meter		
Neighborhood	Admin/ Medical	Commercial
Downtown	20,800	66,200
CBD	38,300	100,800
MU23	35,100	72,800
Banks District	46,200	88,000
R7 & R8	26,900	56,000

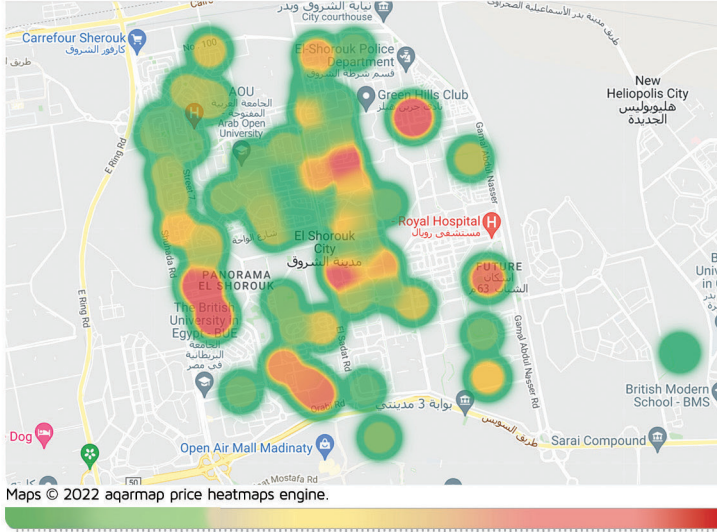
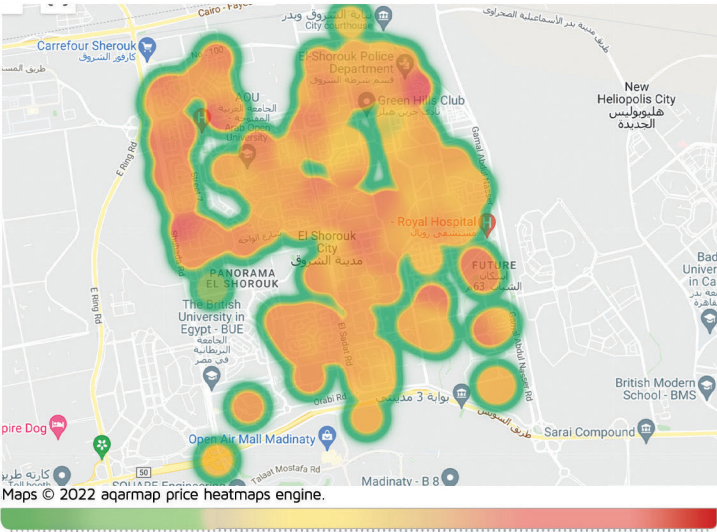
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Shorouk City



Apartment prices	
Avg. price inside compound (EGP)	13,300
Avg. price outside compound (EGP)	8,900
Rental price per meter (EGP)	31
Annual rental yield	4.3%

Villa prices	
Avg. price inside compound (EGP)	19,000
Avg. price outside compound (EGP)	17,500
Rental price per meter (EGP)	82
Annual rental yield	5.7%



Most affordable areas

Moderate areas

Most expensive areas

Shorouk City



Neighborhoods price/meter					
Neighborhood	Apartments	Villas	Neighborhood	Apartments	Villas
Mostakbal Housing	8,350	-	Investment Housing	6,350	-
Ninth Neighborhood	8,250	11,550	Eighth Zone	6,350	-
El Nady District	8,050	13,400	First Zone	6,250	-
First Neighborhood West	7,500	10,000	Third Zone	6,200	-
First Neighborhood East	7,350	8,300	Fourth Zone	6,150	-
Seventh Neighborhood	7,350	11,550	Sixth Neighborhood	6,150	-
West Elshorouk Square	7,300	-	Seventh Zone	5,950	11,250
Eighth Neighborhood	7,200	10,700	Fifth Neighborhood	5,900	26,200
Third Neighborhood East	7,050	10,950	Fifth Zone	5,800	-
Fourth Neighborhood	7,000	10,300	Al Shabab Rd	5,800	-
Second Neighborhood East	6,950	8,350	Youth Housing 63m	5,800	-
Third Neighborhood West	6,750	6,500	Second Zone	5,700	-
Ninth Zone	6,550	-	Youth Housing 100m	5,700	-
Second Neighborhood West	6,400	9,200	Sixth Zone	5,550	-
Family Housing	6,400	-	Youth Housing 70m	5,450	-

Prices in Compounds			
Units	Economic	Mid Range	Luxury
Apartments	10,000	13,150	16,850
Villas	-	16,000	22,000

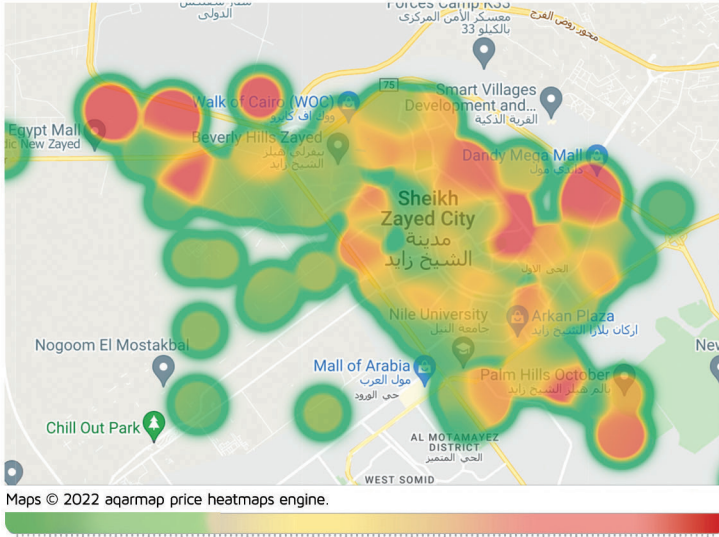
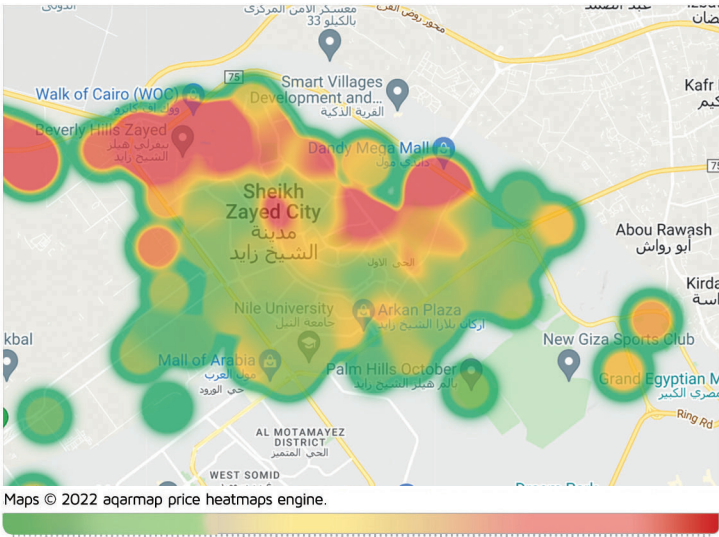
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Sheikh Zayed

Apartment prices	
Avg. price inside compound (EGP)	19,800
Avg. price outside compound (EGP)	12,350
Rental price per meter (EGP)	55
Annual rental yield	5.4%

Villa prices	
Avg. price inside compound (EGP)	24,300
Avg. price outside compound (EGP)	22,400
Rental price per meter (EGP)	91
Annual rental yield	4.9%



Most affordable areas Moderate areas Most expensive areas



Sheikh Zayed

Neighborhoods price/meter		
Neighborhood	Apartments	Villas
Sixth Neighborhood	15,250	-
Second Neighborhood	13,550	-
Twelfth Neighborhood	12,350	-
Yasmine Neighborhood	11,800	16,650
Fourth Neighborhood	11,450	15,900
Bait El Watan	10,550	11,900
First Neighborhood	10,200	29,400
Thirteenth Neighborhood	9,900	13,550
Green Revolution	9,700	23,550
Seventh Neighborhood	9,650	10,500
Tenth Neighborhood	9,600	-
El-Bostan St	9,600	-
Fifth Neighbourhood	9,500	9,050
Sixteenth Neighborhood	9,300	23,300
Ninth Neighborhood	9,250	11,900
Eighth Neighborhood	9,150	9,250
Third Neighborhood	8,900	-
Eleventh Neighborhood	8,300	-
Eleventh Neighborhood	7,000	-

Prices in Compounds			
Units	Economic	Mid Range	Luxury
Apartments	12,500	18,000	29,000
Villas	18,000	24,000	31,000

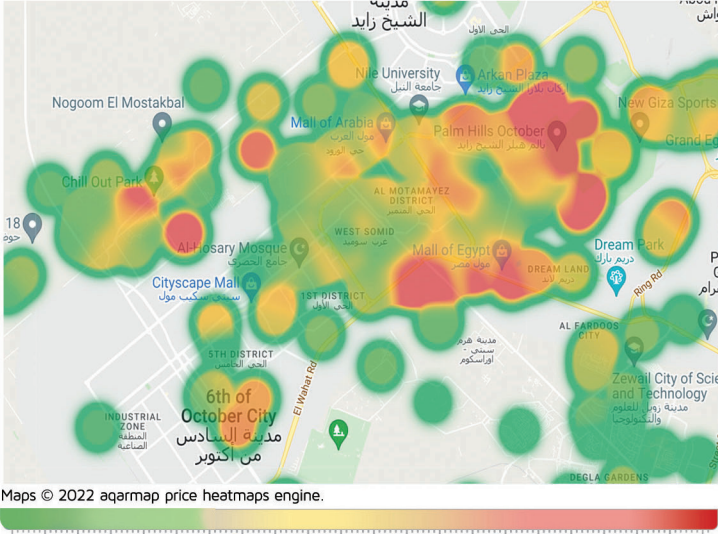
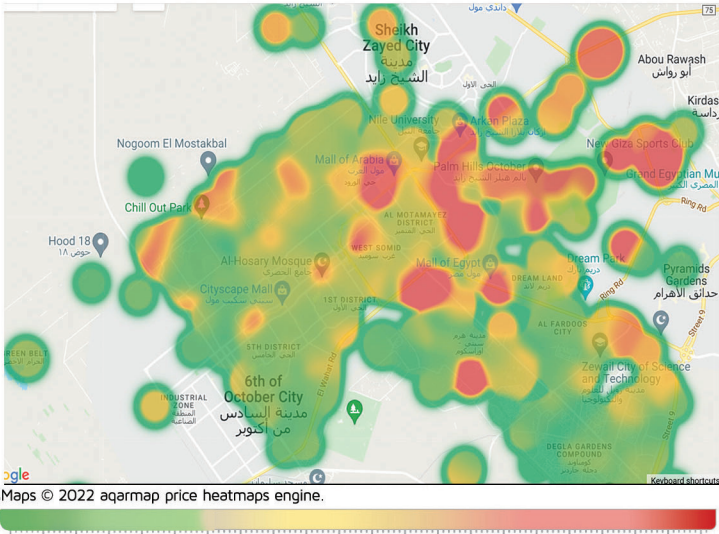
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6th of October



Apartment prices	
Avg. price inside compound (EGP)	14,000
Avg. price outside compound (EGP)	9,000
Rental price per meter (EGP)	30
Annual rental yield	4.1%

Villa prices	
Avg. price inside compound (EGP)	22,000
Avg. price outside compound (EGP)	20,950
Rental price per meter (EGP)	104
Annual rental yield	6.0%



Most affordable areas Moderate areas Most expensive areas

6th of October



Neighborhoods price/meter		
Neighborhood	Apartments	Villas
New October	14,450	29,250
Dream Land St	10,450	-
West Somid	9,400	15,350
Featured Neighborhood	9,200	18,650
Waslet Dahshur Rd	9,000	17,950
Bait El Watan Ninth Neighborhood	8,850	-
Northern Tourist Expansions	8,750	12,500
Eastern Expansions	8,650	12,050
El Hosary	8,600	-
Bait El Watan	8,100	-
El Ahyaa	8,000	17,500
2020	7,600	-
Small Investor	7,300	-
El Eskan El Momyaz	7,150	-
Ganob El Ahyaa	6,950	-
October Gardens	6,850	10,900
Boulevard Axis	6,300	16,800
Wahet October	6,100	-
South Wahat	5,850	-
Northern Expansions	5,600	16,550
Investors Association	5,000	-

Prices in Compounds			
Units	Economic	Mid Range	Luxury
Apartments	8,000	12,000	22,000
Villas	12,000	18,000	30,000

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Sokhna

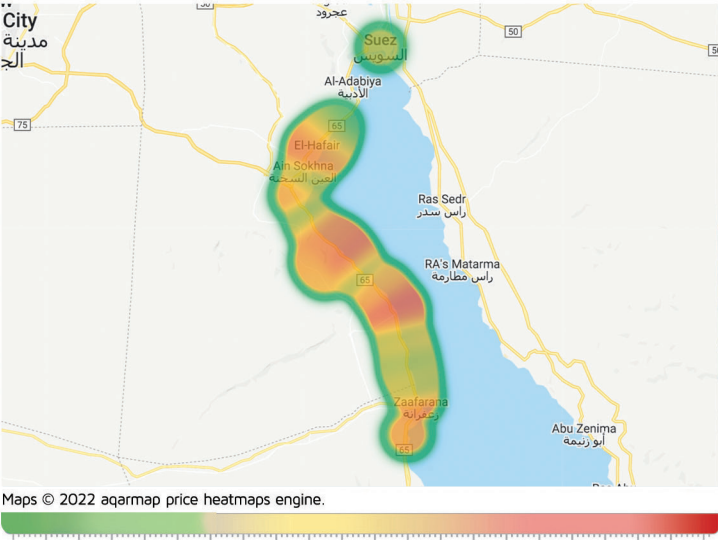
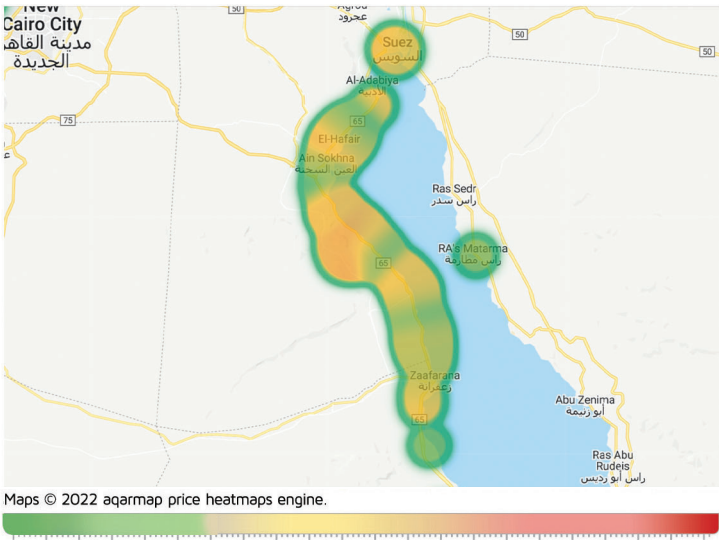


Chalet prices

Avg. price inside resort (EGP)	20,000
Avg. price outside resort (EGP)	17,000

Villa prices

Avg. price inside resort (EGP)	27,000
Avg. price outside resort (EGP)	25,650



Most affordable areas Moderate areas Most expensive areas

Prices in Resorts			
Units	Economic	Mid Range	Luxury
Chalets	11,000	16,000	24,000
Villas	14,000	26,000	35,000

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North Coast

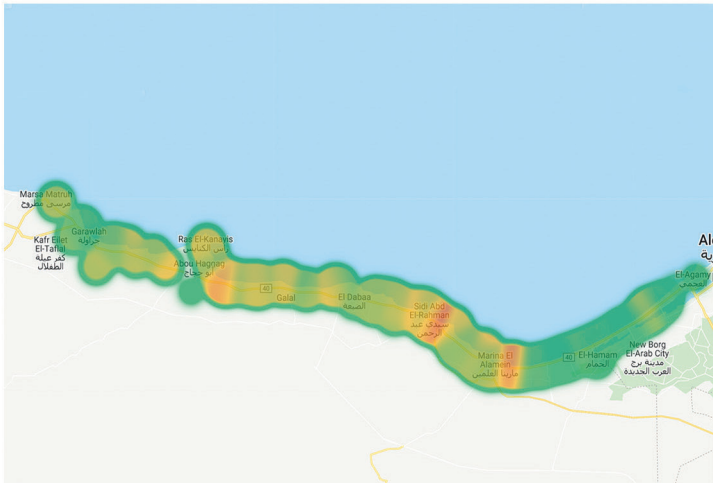


Chalet prices

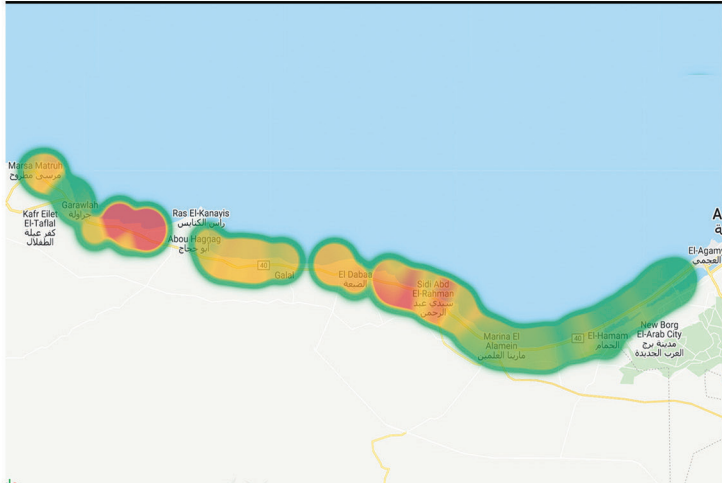
Avg. price inside resort (EGP)	22,300
Avg. price outside resort (EGP)	19,950

Villa prices

Avg. price inside resort (EGP)	25,300
Avg. price outside resort (EGP)	22,650



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Most affordable areas Moderate areas Most expensive areas

Prices in Resorts			
Units	Economic	Mid Range	Luxury
Chalets	15,000	21,000	31,000
Villas	19,000	22,000	35,000

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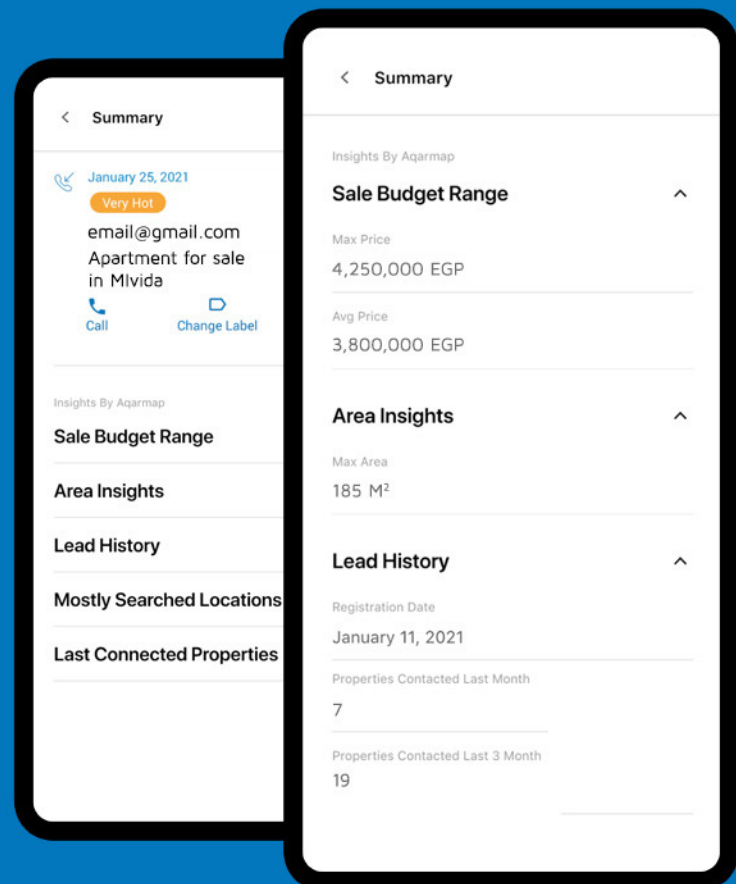
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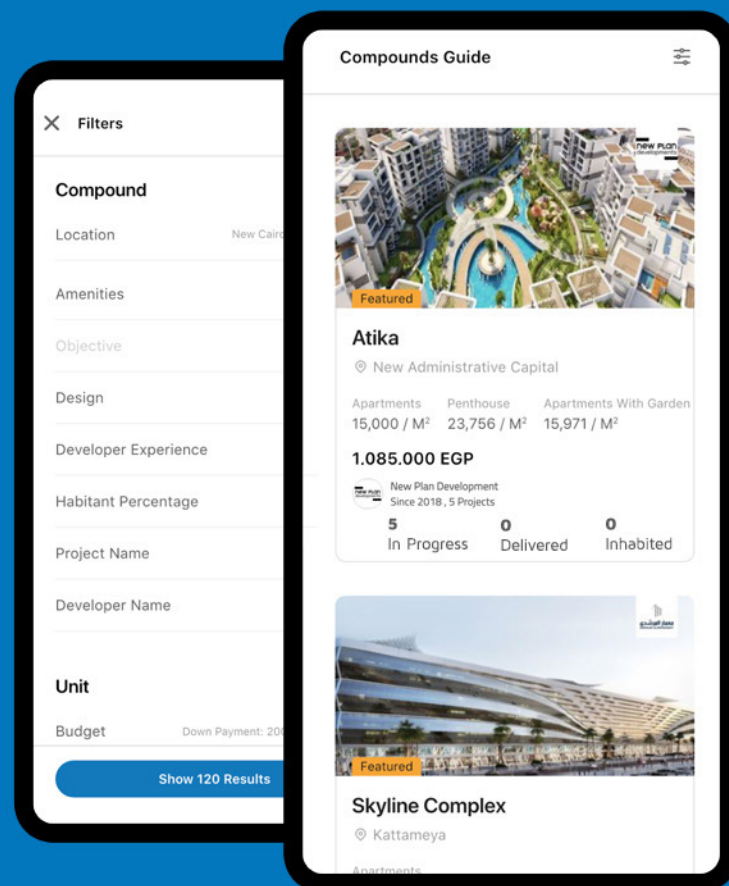
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