

在新项目推出的推动下，11月份的销量猛增

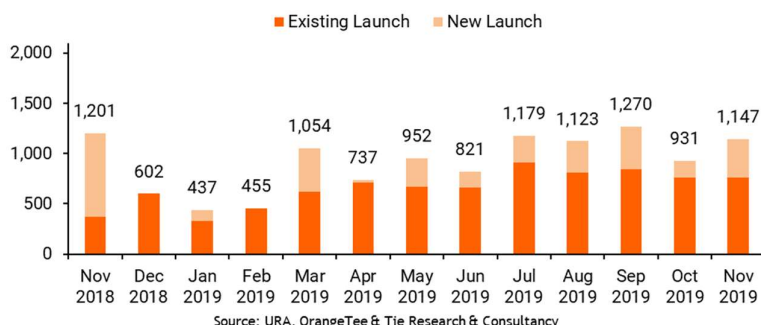
在年底假期之前，发展商借助良好的销售势头进行最后的冲刺，推出新项目。上个月市场上推出了许多新项目，包括 Dairy Farm Residence, One Holland Village Residences, Sengkang Grand Residences, The Iveria 和 Pullman Residences, Newton。11月份总共推出了740套新私宅。相比之下，10月份推出了892个单位。

由于一系列新项目的推出，上个月私宅销售反弹。根据市区重建局的发展商销售调查，上个月售出了1,147套新私宅，比10月份的931套增长了23.2%，但比去年11月的1,201套下降了4.5%。包括执行共管公寓（EC）在内，发展商上个月售出了1,168套公寓，环比增长21.9%。最畅销的项目包括 Sengkang Grand Residences, Parc Esta, One Holland Village, Jadescape 和 Parc Botannia。

预计今年发展商私宅销售额将以强劲势头结束。事实证明，我们年头对私人住宅市场的乐观预测是对的，与去年全年（8,795套）相比，2019年前11个月的销售额已超过了8,795套。根据URA数据的初步估计，今年1月至11月，不包括执行共管公寓，共售出了9,547套新公寓（即第一季度至第三季度售出7,469套，10月售出931套，11月售出1,147套）。考虑到过去六年里，12月份一个月的平均销售量约为380套，并考虑到未完成的交易，我们估计2019年的销量为9,500至10,000套。

美中两国原则上已达成第一阶段贸易协议，这可能有助于缓解贸易紧张局势并增强市场信心。我们预计，随着更多的中国资本向南流动，明年下一波流入的资本可能会继续进入新加坡的房地产市场。此外，世界各地越来越多的投资者正在按地点和项目分散他们的投资组合，新加坡将继续成为最重要的投资目的地之一。抵押贷款利率可能保持较低水平，明年甚至更低，这可能会使住房需求保持在当前水平上。因此，我们估计在2020年，不包括执行共管公寓，将有9,000至9,800套新私宅的交易量。

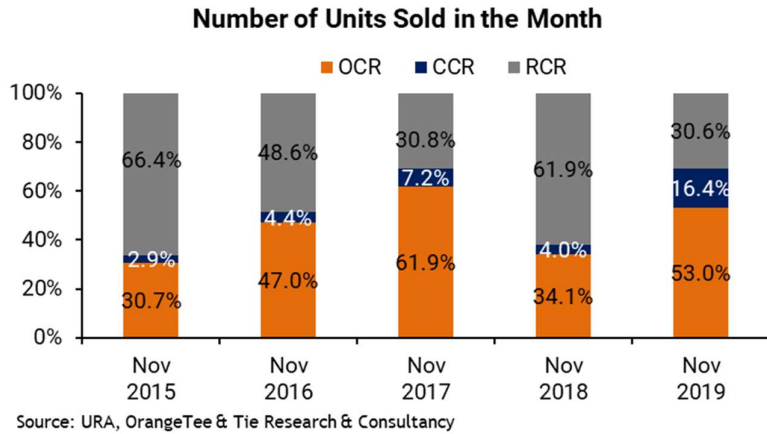
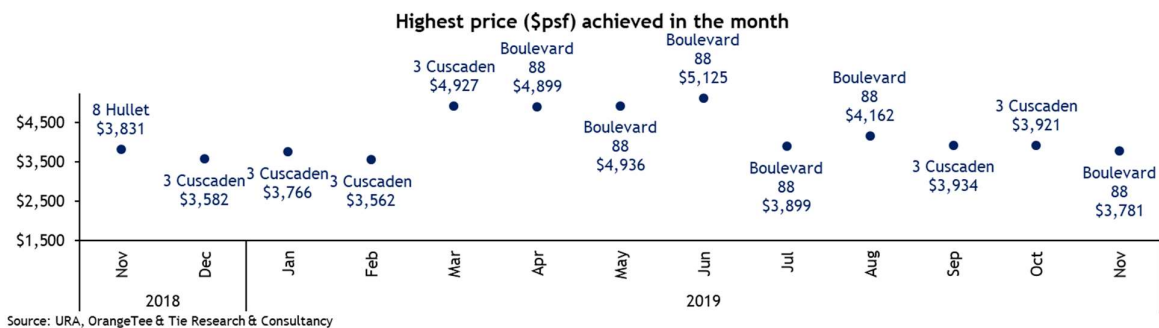
Private Residential Developer Sales (Excl. EC)



Note: New launch refers to units sold in projects that were launched in Mar 2019. Existing launch refers to units sold in projects that had been launched in prior months.

Month	Sales Volume		Launches	
	(Excl. EC)	(Incl. EC)	(Excl. EC)	(Incl. EC)
Nov-18	1,201	1,205	1,342	1,342
Oct-19	931	958	892	892
Nov-19	1,147	1,168	740	740
m-o-m % Change	23.2%	21.9%	-17.0%	-17.0%
y-o-y % Change	-4.5%	-3.1%	-44.9%	-44.9%

Source: URA, OrangeTee & Tie Research & Consultancy



Best Selling Projects in Nov 19

Project Name	Locality	Total No. of Units	Cumulative Units Launched to-date	Cumulative Units Sold to-date	Sold in the month	Median Price (\$psf)	Take up Rate* (%)	Sold out status* (%)
Sengkang Grand Residences	OCR	680	280	235	235	\$1,741	83.9%	34.6%
Parc Esta	RCR	1,399	1,000	971	102	\$1,685	97.1%	69.4%
One Holland Village Residences	CCR	296	126	87	87	\$2,604	69.0%	29.4%
Jadescape	RCR	1,206	600	537	60	\$1,679	89.5%	44.5%
Parc Botannia	OCR	735	735	688	59	\$1,341	93.6%	93.6%
Treasure At Tampines	OCR	2,203	950	852	48	\$1,377	89.7%	38.7%
Parc Clematis	OCR	1,468	665	492	36	\$1,600	74.0%	33.5%
Affinity At Serangoon	OCR	1,052	700	645	35	\$1,498	92.1%	61.3%
Avenue South Residence	RCR	1,074	500	431	35	\$2,000	86.2%	40.1%
Dairy Farm Residences	OCR	460	40	35	35	\$1,564	87.5%	7.6%

*Take up rate is calculated by taking the division of cumulative units sold to date over cumulative units launched to date
 *Sold out status is calculated by taking the division of cumulative units sold to date over total no. of units in project

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