

高档私宅项目在阻断措施期间持续销售

新加坡至4月7日2020年起实行了一连串的阻断措施以防止2019冠状病毒在社区感染蔓延。这些更严格的措施也包括了关闭所有售楼处及示范单位以及暂停所有看房活动。

这种种措施明显的影响了房地产市场，导致四月份新销售数据明显下滑。市区重建局对于发展商的最新销售统计显示，新私宅销售量从三月份的660个单位下滑至四月份的277个单位，和上个月相比，逐月下滑58%。和去年同期相比，销售量则同比下滑了62.4%。

之前最低销量是在2014年十二月份，总销量为230个单位。至市区重建局在2007年六月份开始发布销量数据以来，最低销售量则是为2009年一月份的108个单为。这与全球金融危机时期相吻合，销量连续多个月低于200个单位（见下表）。

The lowest number of private new home sales since June 2007

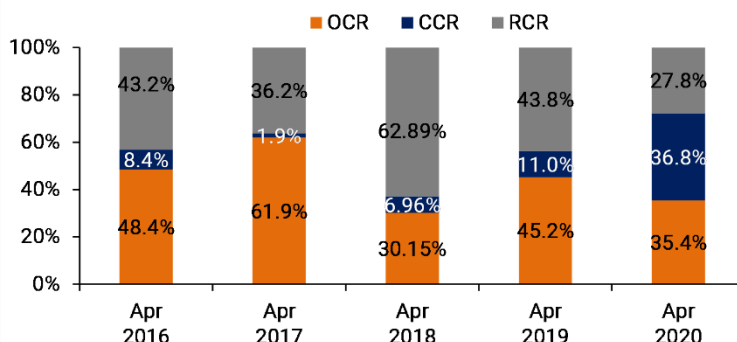
Months	Number of new homes sold excluding EC
Jan-09	108
Oct-08	118
Dec-08	131
Feb-08	174
Nov-08	193
Dec-14	230
Dec-13	259
Apr-20	277
Apr-08	288
Mar-08	301

Source: URA, Orange Tee & Tie Research & Consultancy

包括执行公关公寓（EC），发展商一共售出了293个单位。和三月份售出的904个单为相比，逐月下滑了67.6%。而在这293个单位里，65.5%或192个单位是在阻断措施之前售出的。

稍微多于三分之一（277个单位中的36.8%）或102个新私宅单位销量是来至核心中央区（CCR）。上个月最高价转手的是一套位于15 Holland Hill，超豪华的私宅单位（477平米），以1380万元或尺价2692元的单价在4月2日2020年售出。这是过去12个月内第三高的总价售出的新私宅单位。排名第一和二的则是位于Boulevard 88，在2019年五月份以2800万元及六月份以3100万元所售出。

Number of Units Sold in the Month



Source: URA, OrangeTee & Tie Research & Consultancy

根据市区重建局房地产资讯系统(URA Realis Data)显示, 阻断措施实施后, 高档私宅项目还在持续销售, 这包括了 Boulevard 88, Midtown Bay, Van Holland, Kopar at Newton 以及 Neu at Novena。位于 Boulevard 88 的两套超豪华的单位以 1000 万元以上的总价售出。

这两套单位都在第七楼层 (257 平米和 258 平米), 在 4 月 14 日 2020 年以 1030 万元的总价或尺价 3711 元及 3714 元售出。而位于 Van Holland 的两套高档私宅单位则分别以 320 万元和 510 万元售出。

#### Highest priced non-landed new home sales in CCR for the month of April 2020

Project Name	Address	Area (sqm)	Transacted Price (\$)	Unit Price (\$ psf)	Sale Date	Tenure	Postal District	Planning Area	Market Segment
15 HOLLAND HILL	15 Holland Hill #12-XX	477	\$13,821,000	\$2,692	2/4/2020	Freehold	10	Bukit Timah	CCR
BOULEVARD 88	88 Orchard Boulevard #07-XX	258	\$10,315,200	\$3,714	14/4/2020	Freehold	10	Orchard	CCR
BOULEVARD 88	88 Orchard Boulevard #07-XX	257	\$10,264,800	\$3,711	14/4/2020	Freehold	10	Orchard	CCR
LEEDON GREEN	26 Leedon Heights #01-XX	249	\$6,543,000	\$2,441	6/4/2020	Freehold	10	Bukit Timah	CCR
VAN HOLLAND	190 Holland Road #04-XX	185	\$5,118,000	\$2,570	30/4/2020	Freehold	10	Bukit Timah	CCR
VAN HOLLAND	188 Holland Road #03-XX	98	\$3,218,000	\$3,051	30/4/2020	Freehold	10	Bukit Timah	CCR
KOPAR AT NEWTON	8 Makeway Avenue #07-XX	102	\$2,473,000	\$2,252	4/4/2020	99 Years Leasehold	9	Novena	CCR
KOPAR AT NEWTON	8 Makeway Avenue #06-XX	102	\$2,458,000	\$2,239	4/4/2020	99 Years Leasehold	9	Novena	CCR
KOPAR AT NEWTON	8 Makeway Avenue #05-XX	102	\$2,443,000	\$2,225	4/4/2020	99 Years Leasehold	9	Novena	CCR
KOPAR AT NEWTON	6 Makeway Avenue #08-XX	98	\$2,338,000	\$2,216	4/4/2020	99 Years Leasehold	9	Novena	CCR

Source: URA Realis, Orange Tee & Tie Research & Consultancy

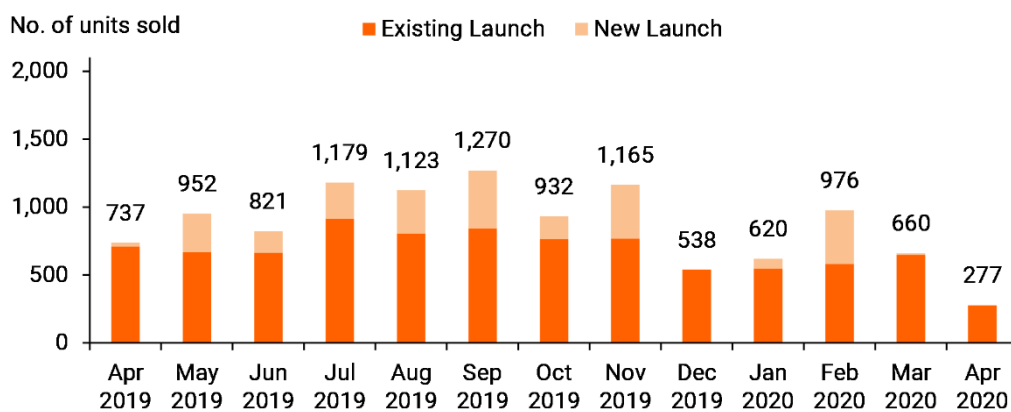
以目前行动限制以及经济展望不确定的前提下, 超豪华及高档新私宅在阻断措施期间的销售是个非常可观的消息。这也许意味, 在全球疫情蔓延期间, 许多富裕及高净值人士依旧视新加坡为具有吸引力的投资地点以及他们存放财富的避风港。

以此同时, 目前有许多互相矛盾的叙述影响着房地产市场。有些经济学家预计, 全球经济增长将在未来几个月急剧放缓, 随后当目前严格的隔离措施被取消后出现同样急剧的 V 型复苏。而其他学家则预计经济增长会更加拖延, 复苏乏力。

而对于新加坡房地产市场走势, 一旦阻断措施放松, 看房活动恢复后, 某些地段的购买活动有可能出现明显反弹。地理位置优越, 具有潜质和价格诱人的新私宅项目将持续吸引买家。

至于本月, 在主断措施当儿, 我们预计新私宅销售量会持续平稳或稍微下滑。而全年新私宅价格预计在 -5%至 -3%之间趋势, 新私宅销量则估计在 6,500 至 7,500 个单位。

#### Private Residential Developer Sales (Excl. EC)



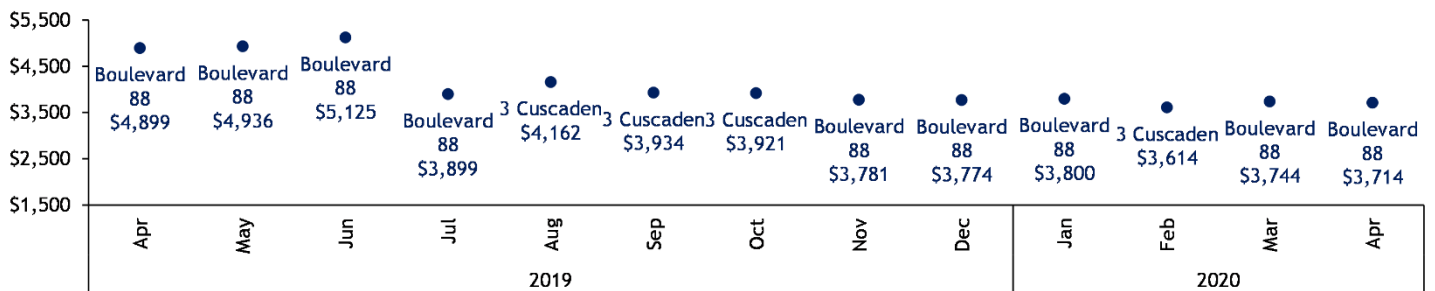
Source: URA, OrangeTee & Tie Research & Consultancy

Note: New launch refers to units sold in projects that were launched in that month.  
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)
Apr-19	737	746	444	444
Nov-19	1,165	1,186	947	947
Dec-19	538	551	370	370
Jan-20	620	640	598	598
Feb-20	976	1,315	933	1,429
Mar-20	660	904	578	1,126
Apr-20	277	293	640	640
m-o-m % Change	-58.0%	-67.6%	10.7%	-43.2%
y-o-y % Change	-62.4%	-60.7%	44.1%	44.1%

Source: URA, OrangeTee & Tie Research & Consultancy

### Highest price (\$psf) achieved in the month



Source: URA, OrangeTee & Tie Research & Consultancy

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 <sup>^</sup> (%)	Sold out status* (%)
Kopar At Newton	CCR	378	378	84	83	\$2,241	22.2%	22.2%
Treasure At Tampines	OCR	2,203	1,300	1,109	28	\$1,372	85.3%	50.3%
Riverfront Residences	OCR	1,472	1,380	1,271	17	\$1,208	92.1%	86.3%
Jadescape	RCR	1,206	800	751	12	\$1,735	93.9%	62.3%
The Florence Residences	OCR	1,410	750	615	11	\$1,489	82.0%	43.6%
Stirling Residences	RCR	1,259	980	961	10	\$1,901	98.1%	76.3%
Parc Esta	RCR	1,399	1,175	1,173	10	\$1,682	99.8%	83.8%
Parc Clematis	OCR	1,468	665	623	9	\$1,609	93.7%	42.4%
The Tapestry	OCR	861	750	742	9	\$1,449	98.9%	86.2%
OLA	OCR	548	548	176	8	\$1,059	32.1%	32.1%

<sup>^</sup>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

### Please contact us for research enquiries

OrangeTee & Tie Research and Consultancy



Christine Sun  
Head  
Research and Consultancy  
+65 6303 2662  
christine.sun@orangetee.com



Timothy Eng  
Research Analyst  
Research and Consultancy  
+65 6303 2662  
timothy.eng@orangetee.com



Daniel Chiang  
Data Analyst  
Research and Consultancy  
+65 6303 2662  
daniel.chiang@orangetee.com

Terms of Use: The reproduction or distribution of this publication without the express consent of the author is prohibited. This publication is provided for general information only and should not be treated as an invitation or recommendation to buy or sell any specific property or as sales material. Users of this report should consider this publication as one of the many factors in making their investment decision and should seek specific investment advice. OrangeTee.com Pte Ltd and the authors of this publication shall not accept and hereby disclaim all responsibilities and liability to all persons and entities for consequences arising out of any use of this publication.

源自于 <https://blog.orangetee.com/market-analysis-news/real-estate-datatrend-developer-monthly-sales-analysis-for-april-2020/>

翻译: Alvin Khoo Senior Associate District Director/Project IC (Daintree Residence)