

缺乏大型私宅项目推出，促使三月份销售量下滑

在没有大型新私宅项目推出以及全球2019冠状病毒疾病的影响下，新私宅销售量环比上个月出现了跌幅。市区重建局对于发展商的销售最新统计显示，新私宅销售量从二月份的976个单位下滑到三月份的660单位，和上个月相比，逐月下滑32.4%。尽管逐月对比的下滑，三月份的销售量还是高于一月份的620个单位。包括执行共管公寓（EC）在内，发展商则售出了904个单位。和二月份的1315个单位相比，下滑了31.3%。

在没有大型新私宅项目开盘的情况下，所推出的新单位从二月份的933个单位下调到三月份的578个单位，跌幅为38%（不包括EC）。执行共管公寓OLA是三月份唯一开盘的大型项目（500个单位以上）。位于核心中央区（CCR），拥有378个优质单位的新楼盘，Kopar at Newton，在VIP销售阶段只推出了8套顶层单位。而推出的八套顶层单位里，其中一个单位以788万元售出。期间，也有三个较小型项目推出，分别为Tedge, 77@Lodge及19 Nassim。

在各区销量方面，代表高档私宅的核心中央区（CCR）在上个月份是唯一销量偏低的。代表中档私宅的其他中央区（RCR）在三月份售出了282个新私宅单位。环比二月份的263个新私宅单位，增幅为7.2%。而在代表大众化私宅的中央区以外（OCR）地区，环比二月份的301个新私宅单位，三月份售出了333个新私宅单位，增长了10.6%。新私宅销售量在其他中央区及中央区以外在上个月表现顽强，原因可能包括许多单位在2019冠状病毒疾病蔓延以及在安全距离措施在三月底实施之际已接近完成期限。有些投资者也可能在三月份股市崩跌的情况下为了分散投资购买了房地产。

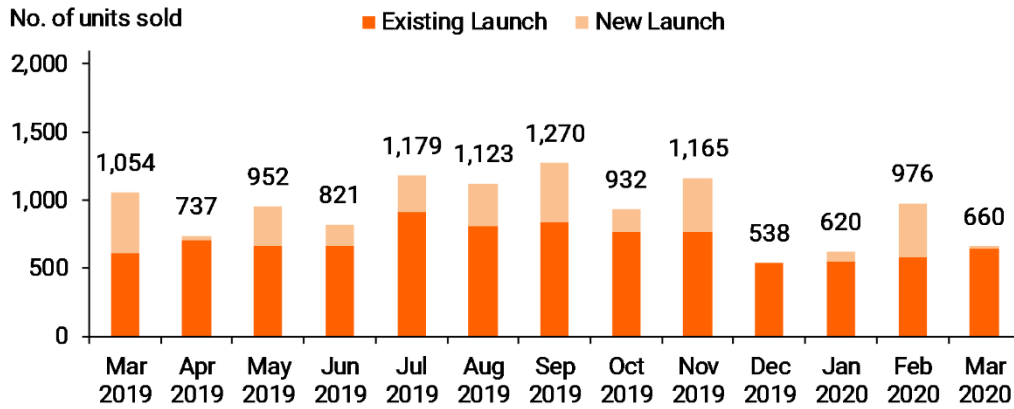
而上个月，遍布全岛已开盘的项目的销售量也出现明显的环比上升。这些项目包括Jadescape, Parc Esta, The Florence Residences, Riverfront Residences, Stirling Residences, The Tapestry, Mayfair Modern, The Woodleigh Residences 和 Daintree Residence。

在代表高档私宅的核心中央区（CCR）方面，豪华单位的销售量从二月份412个单位的高位一路下滑至三月份的45个单位。这强烈的销量环比并不代表购买情绪开始疲弱。二月份的销量高位源于在同个月新推出的项目The M，售出了380个单位。而在三月份则并没有大型新私宅项目在核心中央区开盘。

由于许多国家在上个月开始了更严谨的出入境管制，潜在买家无法出入新加坡来考察新加坡房产，这造成外国买家的数量出现了下滑。非永久居民购买非有地私宅销量滑落至上个月的25个单位，相比12个月的每月总平均51一个单位的均销量明显来的低。以此同时，新加坡人购买非有地私宅百分比则从2009四月份的87.7%高位以来，在2020三月份首次达到86.3%的新高位。

新加坡目前的阻断措施已经影响到多半的经济活动。许多企业也会在这次的疫情后受到一定的影响。由于新楼盘销售处及看房活动因这次的阻断措施而必须关闭及延期，房地产销售市场预计也将受到短时期的萎缩。一旦一切平稳，安全距离措施受到缓解，新楼盘销售处再次开业，看房活动回复正常后，新私宅销售量估计将会明显恢复。在全球经济不确定因素的驱动下，投资者或许会寻求避险资产，而新加坡私宅将会依旧是投资者长期稳固投资的选项之一。

Private Residential Developer Sales (Excl. EC)



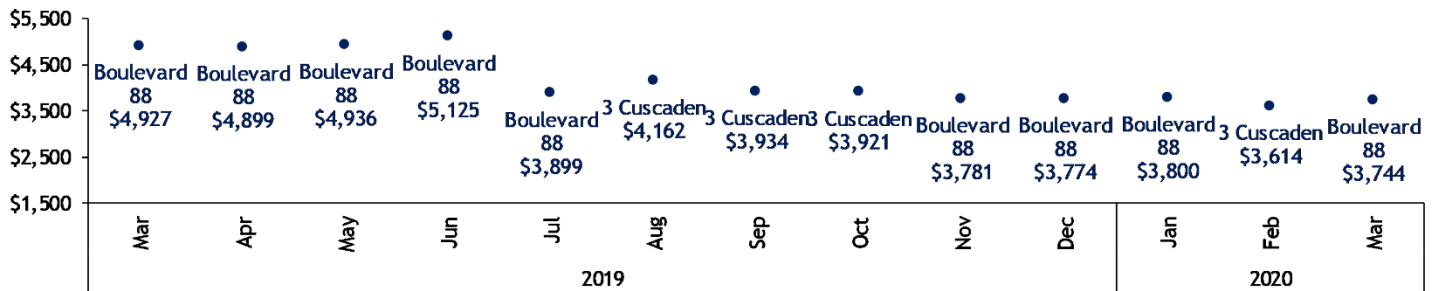
Source: URA, OrangeTee & Tie Research & Consultancy

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.

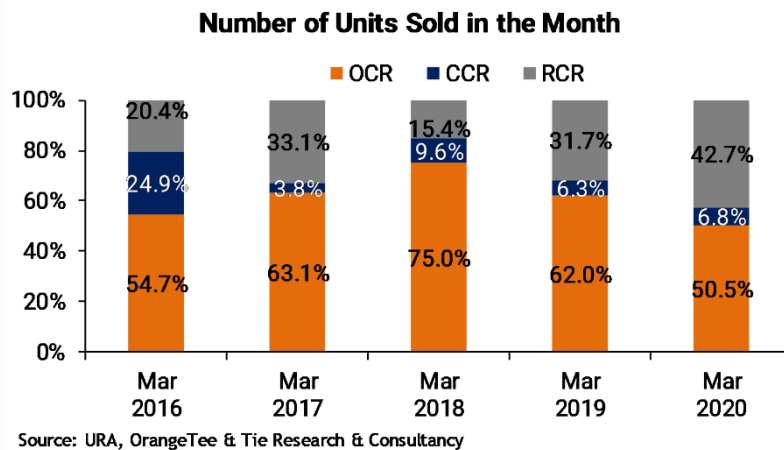
Month	Sales Volume		Launches	
	(Excl. EC)	(Incl. EC)	(Excl. EC)	(Incl. EC)
Sep-19	1,270	1,298	1,714	1,714
Oct-19	932	959	909	909
Nov-19	1,165	1,186	947	947
Dec-19	538	551	370	370
Jan-20	620	640	598	598
Feb-20	976	1,315	933	1,429
Mar-20	660	904	578	1,126
m-o-m % Change	-32.4%	-31.3%	-38.0%	-21.2%
y-o-y % Change	-37.4%	-14.9%	-68.1%	-37.9%

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^ (%)	Sold out status* (%)
OLA	OCR	548	548	170	170	\$1,139	31.0%	31.0%
Jadescape	RCR	1,206	800	740	76	\$1,719	92.5%	61.4%
Treasure At Tampines	OCR	2,203	1,100	1,081	69	\$1,355	98.3%	49.1%
Parc Esta	RCR	1,399	1,175	1,164	63	\$1,657	99.1%	83.2%
Parc Canberra	OCR	496	496	355	43	\$1,102	71.6%	71.6%
The Florence Residences	OCR	1,410	750	609	37	\$1,492	81.2%	43.2%
Riverfront Residences	OCR	1,472	1,380	1,256	29	\$1,365	91.0%	85.3%
Piermont Grand	OCR	820	820	510	28	\$1,108	62.2%	62.2%
Parc Clematis	OCR	1,468	665	615	26	\$1,592	92.5%	41.9%
Stirling Residences	RCR	1,259	980	953	23	\$1,917	97.2%	75.7%

^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

Source: URA, OrangeTee & Tie Research & Consultancy

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