

房地产市场如雨后春笋般的活跃起来

新加坡房地产市场在上个月份如雨后春笋般的活跃起来，而新私宅销售量出现了出人意料的反弹，和上个月相比，逐月上升了超过 70%。根据市区重建局对于发展商的最新销售统计显示，新私宅销售量从四月份的 277 个单位攀升至五月份的 486 个单位，和上个月相比，逐月上扬了 75.5%。包括执行共管公寓（EC）在内，销售量则从 293 个单位攀升至 509 个单位，逐月增长了 73.7%。但和去年同期的 952 个售出单位同比，销售量则还是偏低的。

鉴于前所未有的经济不确定因素及主断措施还在实行当下，上个月的回购需求远远超出了市场预测。这突如其来的活跃销售量令业内人士感到欣慰。在阻断措施实施后，房地产市场遭受到明显的冲击及影响，而新私宅销售在四月份也出现明显的跌幅。新盘售楼处也因为阻断措施而关闭，潜在买家只能通过虚拟看房来做出购屋抉择。

五月份蓬勃的销售量主要推动因素似乎来至本地买家及投资者。本地买家购买的非有地私宅比例从四月份的 84.1% 逐月上升至五月份的 84.8%。从总数来看，本地买家购买的非有地私宅从四月份的 222 个单位增长至 402 个单位，逐月涨幅为 81.1%。外国买家购买比例也有所增加。永久居民及非永久居民购买非有地私宅的数量从四月份的 42 个单位上升到五月份的 72 个单为，逐月涨幅为 71.4%。

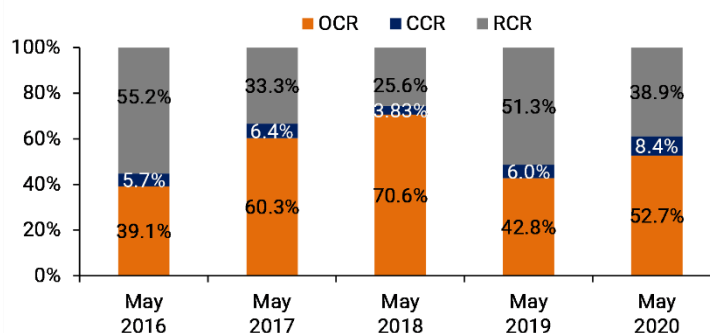
Number of non-landed home sales by residential status

2020	Singaporean	Foreigner (PR+NPR)	Total
April	222	42	264
May	402	72	474
m-o-m % change	81.1%	71.4%	79.5%
2020	Singaporean	Foreigner (PR+NPR)	Total
April	84.1%	15.9%	100.0%
May	84.8%	15.2%	100.0%

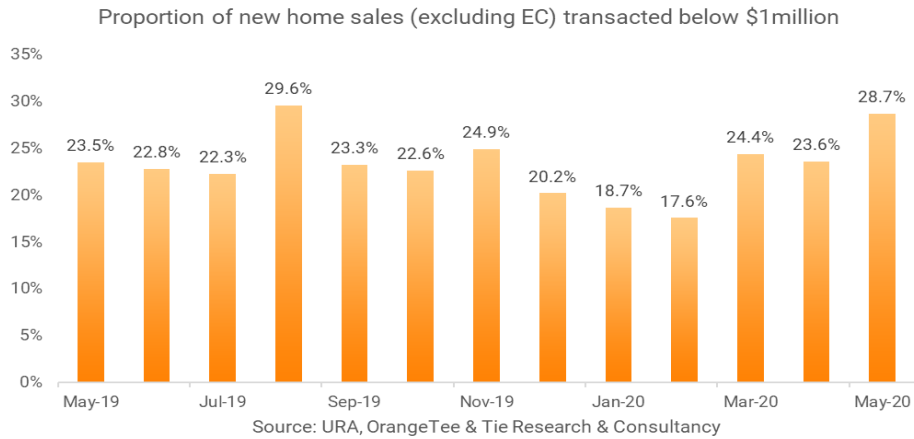
Source: URA, Orange Tee & Tie Research & Consultancy

投资者在上个月似乎有明显增加的趋势，导致小型新私宅单位销量飙升。较小或价格较低价格的私宅单位较受投资者青睐，因为这类型的单位相对比较容易出租，需付的现金也比较低，但潜在的投资收益却比较高。800 平方英尺以下的单位在上个月逐月增长了 70.0%，从四月份的 188 个单位飙升至五月份的 319 个单位。同样的，低于新币 100 万的私宅单位销售比例也从四月份的 28.7% 攀升至五月份的 29.6%。这也是自 2019 年 8 月以来最高的比例。

Number of Units Sold in the Month



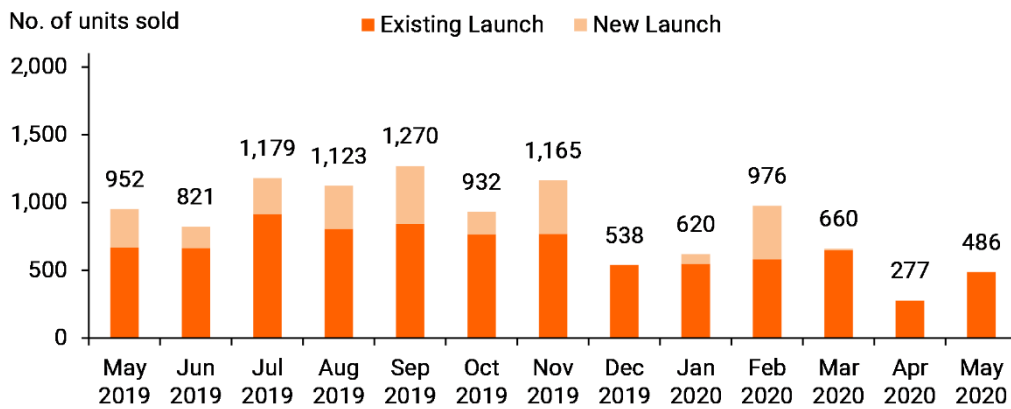
Source: URA, OrangeTee & Tie Research & Consultancy



近期报道称富裕的买家在新加坡购置超豪华私宅单位，这些报道有可能促使许多投资者感到乐观，觉得市场开始明朗化。有些投资者或许抱着“担心错失先机”的态度而进场，因为担心私宅价格会随着新冠病毒爆发的减弱及主要经济体的复苏而开始回升。发展商在其定价策略中也采取了审慎的态度，以具吸引力的价格来吸引潜在买家。

本月新私宅销售量的迹象令人感到鼓舞。根据市区重建局房地产咨询系统(URA Realis Data)的数据显示，在六月份的前七天，不包括执行共管公寓 (EC)，已经售出了 155 个新私宅单位，这已经超越了四月份的总体售出的 277 个新私宅单位的一半。尽管如此，我们还是应该观察市场多一段时间以更加确认房地产市场是否确实正在复苏。

Private Residential Developer Sales (Excl. EC)

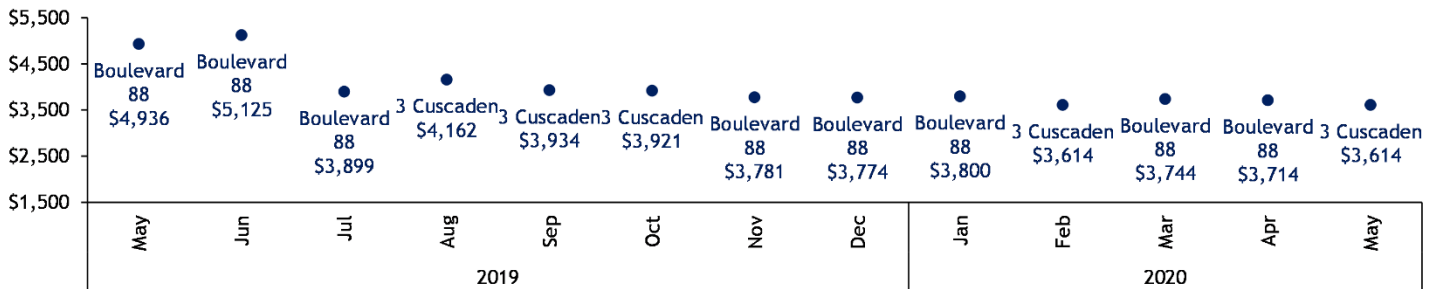


Existing launch refers to units sold in projects that had been launched in prior months.

Month	Sales Volume		Launches	
	(Excl. EC)	(Incl. EC)	(Excl. EC)	(Incl. EC)
May-19	952	952	1,394	1,394
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
May-20	486	509	615	615
m-o-m % Change	75.5%	73.7%	-3.9%	-3.9%
y-o-y % Change	-48.9%	-46.5%	-55.9%	-55.9%

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* (%)
Treasure At Tampines	OCR	2,203	1,300	1,165	56	\$1,360	89.6%	52.9%
Parc Clematis	OCR	1,468	1,000	673	55	\$1,599	67.3%	45.8%
The Florence Residences	OCR	1,410	750	664	54	\$1,513	88.5%	47.1%
Parc Esta	RCR	1,399	1,225	1,214	45	\$1,680	99.1%	86.8%
Jadescape	RCR	1,206	1,000	778	27	\$1,733	77.8%	64.5%
The Tapestry	OCR	861	780	761	23	\$1,325	97.6%	88.4%
Stirling Residences	RCR	1,259	980	980	22	\$1,910	100.0%	77.8%
Affinity At Serangoon	OCR	1,052	800	718	21	\$1,565	89.8%	68.3%
Piermont Grand	OCR	820	820	526	17	\$1,128	64.1%	64.1%
Kopar At Newton	CCR	378	378	98	16	\$2,307	25.9%	25.9%

Source: URA, OrangeTee & Tie Research & Consultancy

^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 further enquiries

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