

### 2019 年的销售业绩好于预期

新加坡蓬勃发展的经济和不断增长的住房需求继续为我们的私人住宅市场注入活力。根据市区重建局（URA）的发展商销售调查和 URA 季度房地产统计数据，2019 年售出了约 10,100 套新房。当市建局在本月底发布 2019 年第四季度房地产统计报告中调整最终数字后，这个数字可能会更低。即使调整后，去年的新私宅销售量仍有望超过 2018 年的 8,795 笔交易。

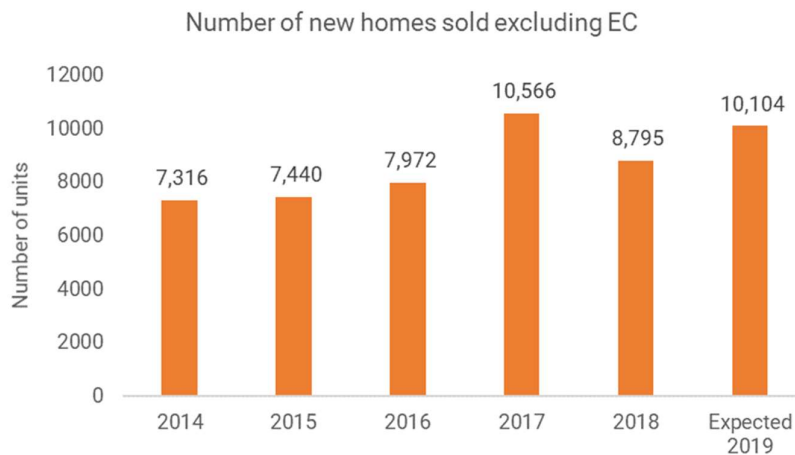
2019 年的销售表现好于预期，表明在宏观经济挑战（例如中美贸易战，全球增长前景不佳以及某些地区的地缘政治紧张局势）的影响下，市场仍然具有韧性。良好的销售势头表明，新加坡的经济基本面为房地产市场提供了良好的支援，其中包括收入的正增长和强劲的就业机会。

市场活动的健康水平可以为消费者提供保证，即今年需求可能保持弹性，并且不太可能进行价格调整。毕竟，房地产市场的整体健康状况主要取决于供求关系。尽管在过去的一年中推出了大量新房，但是新推出的私宅，快速被售出，买气仍然很强劲，并且在过去的两个月，已推出但未售出的私宅数量开始下降。由于大型公寓数量将减少，特别是在中央区以外（OCR），今年推出但未售出的单位可能会继续减少。

上个月，由于缺少新项目的推出和年末假期，私宅销量环比下降。2019 年 12 月仅推出了 370 个新单位。许多发展商延迟推出他们的新项目，因为他们预计买气会重新出现，这种情况通常发生在年初，买家在年末假期后开始回流。今年上半年，已经有大约 30 个新项目准备推出，其中约 50% 位于核心中央区（CCR），其余的平均分布在其余的中区（RCR）和中央区以外（OCR）之间。

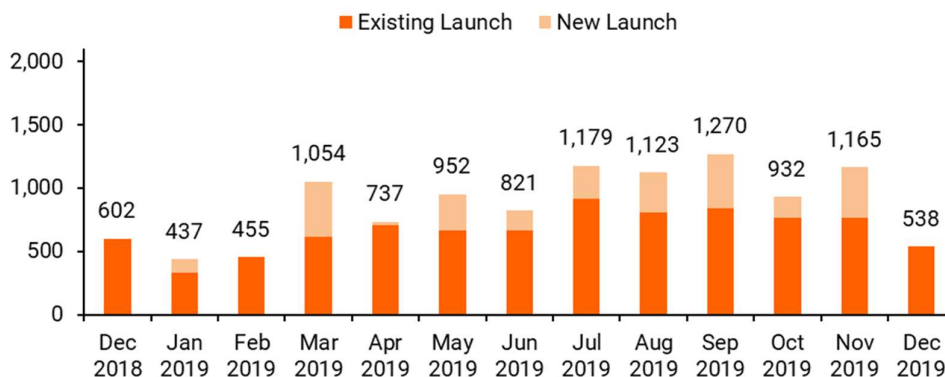
2019 年 12 月售出了 538 套新私宅，比去年同期的 602 套下降了 10.6%。包括执行共管公寓（EC）在内，发展商上个月售出了 551 套新房，相对 2018 年售出 605 套，同比减少了 8.9%。最畅销的项目是 Parc Botannia, Parc Esta, Parc Clematis, Jadescape 和 One Holland Village Residences。

国内生产总值(GDP)、收入增长、宏观经济表现和就业率等经济基本面今年将继续影响私人住宅市场。由于多数经济学家认为最坏的经济风暴可能已经过去，全球经济将反弹，因此买家的买气有望保持乐观。我们预计，对新房的需求可能会保持强劲，新房销售量可能会在 2020 年全年徘徊在 9,000 到 9,800 套之间。今年新房的价格可能会继续上涨 2-4%。



Source: URA, OrangeTee & Tie Research & Consultancy

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



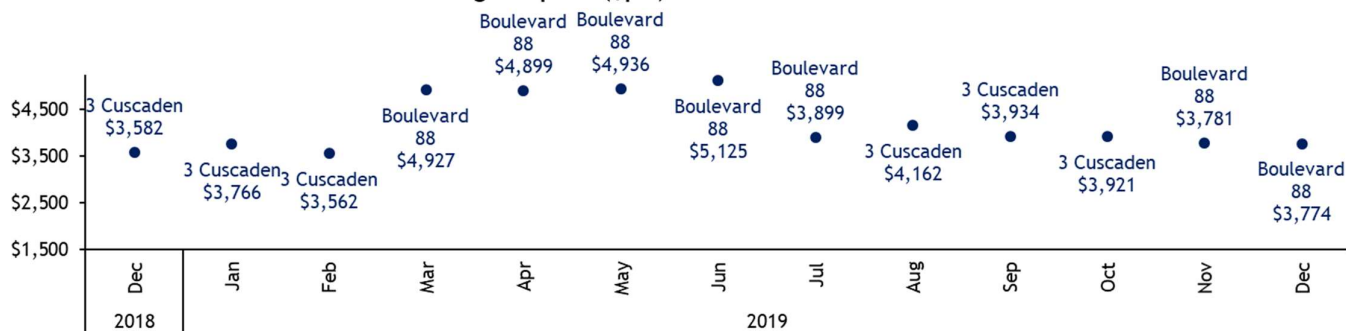
Source: URA, OrangeTee & Tie Research & Consultancy

Note: New launch refers to units sold in projects that were launched in Dec 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)
Dec-18	602	605	101	101
Nov-19	1,165	1,186	947	947
Dec-19	538	551	370	370
m-o-m % Change	-53.8%	-53.5%	-60.9%	-60.9%
y-o-y % Change	-10.6%	-8.9%	266.3%	266.3%

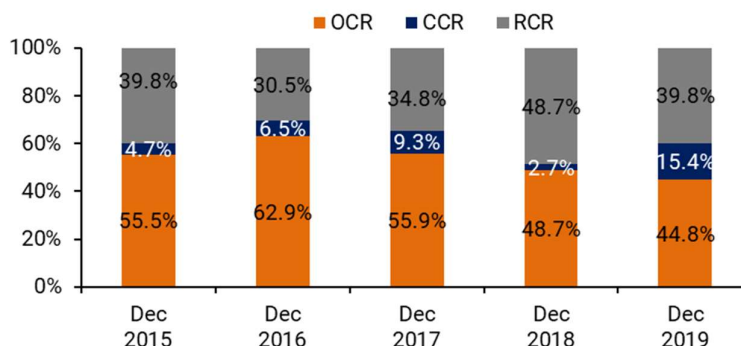
Source: URA, OrangeTee & Tie Research & Consultancy

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



Source: URA, OrangeTee & Tie Research & Consultancy

### Number of Units Sold 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>a</sup> (%)	Sold out status* (%)
Parc Botannia	OCR	735	735	696	49	\$1,345	94.7%	94.7%
Parc Esta	RCR	1,399	1,050	1,015	45	\$1,666	96.7%	72.6%
Parc Clematis	OCR	1,468	665	528	40	\$1,638	79.4%	36.0%
Jadescape	RCR	1,206	600	571	37	\$1,715	95.2%	47.3%
One Holland Village Residences	CCR	296	156	118	35	\$2,768	75.6%	39.9%
Treasure At Tampines	OCR	2,203	950	874	30	\$1,378	92.0%	39.7%
Stirling Residences	RCR	1,259	980	913	22	\$1,897	93.2%	72.5%
The Florence Residences	OCR	1,410	650	561	18	\$1,500	86.3%	39.8%
Avenue South Residence	RCR	1,074	500	446	17	\$2,006	89.2%	41.5%
The Tre Ver	RCR	729	650	649	16	\$1,638	99.8%	89.0%

Source: URA, OrangeTee & Tie Research & Consultancy

<sup>a</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 further enquiries

OrangeTee & Tie Research and Consultancy



**Steven Tan**  
 Managing Director  
 Executive Office  
 +65 6303 2999  
 steven.tan@orangetee.com



**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

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翻译 : Cassia Leong 梁郡夏

+65 96264993 [cassia.leong@orangetee.com](mailto:cassia.leong@orangetee.com)