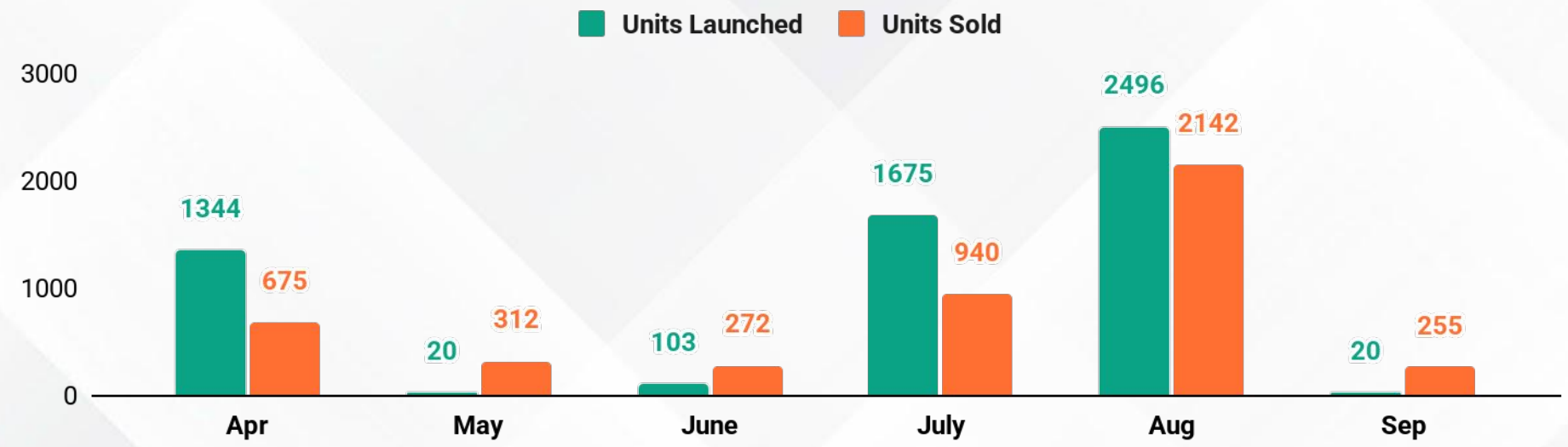
MONTHLY DEVELOPER SALES

SEPTEMBER 2025

OrangeTee
PART OF REALION GROUP

UNITS LAUNCHED & SOLD EACH MONTH (Exclude EC)



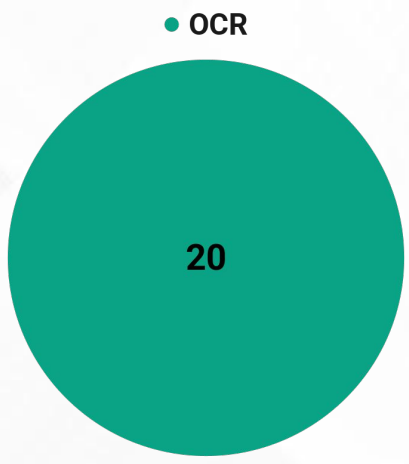
SALES VOLUME (Exclude EC)

255 units

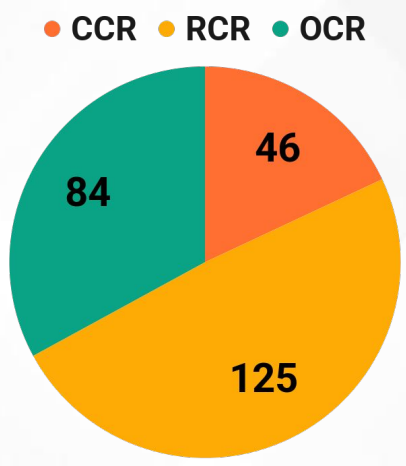
-88.1%
m-o-m

-36.4%
y-o-y

UNITS LAUNCHED (Exclude EC)



UNITS SOLD (Exclude EC)



BEST-SELLING PROJECTS BY MARKET SEGMENT

CCR

1. **River Green**
   16 Units Sold
   $3,201 PSF
2. **The Robertson Opus**
   10 Units Sold
   $3,404 PSF
3. **UpperHouse at Orchard Boulevard**
   6 Units Sold
   $3,323 PSF

RCR

1. **Grand Dunman**
   24 Units Sold
   $2,508 PSF
2. **Tembusu Grand**
   12 Units Sold
   $2,393 PSF
3. **Bloomsbury Residences**
   11 Units Sold
   $2,548 PSF

OCR

1. **Canberra Crescent Residences**
   28 Units Sold
   $2,001 PSF
2. **The Lakegarden Residences**
   9 Units Sold
   $2,146 PSF
3. **Otto Place**
   8 Units Sold
   $1,790 PSF

PROJECTS WITH HIGHEST UNIT PRICE (S$PSF)

CCR — **21 Anderson** $5,347 PSF

RCR — **Promenade Peak** $3,535 PSF

OCR — **ELTA** $2,813 PSF

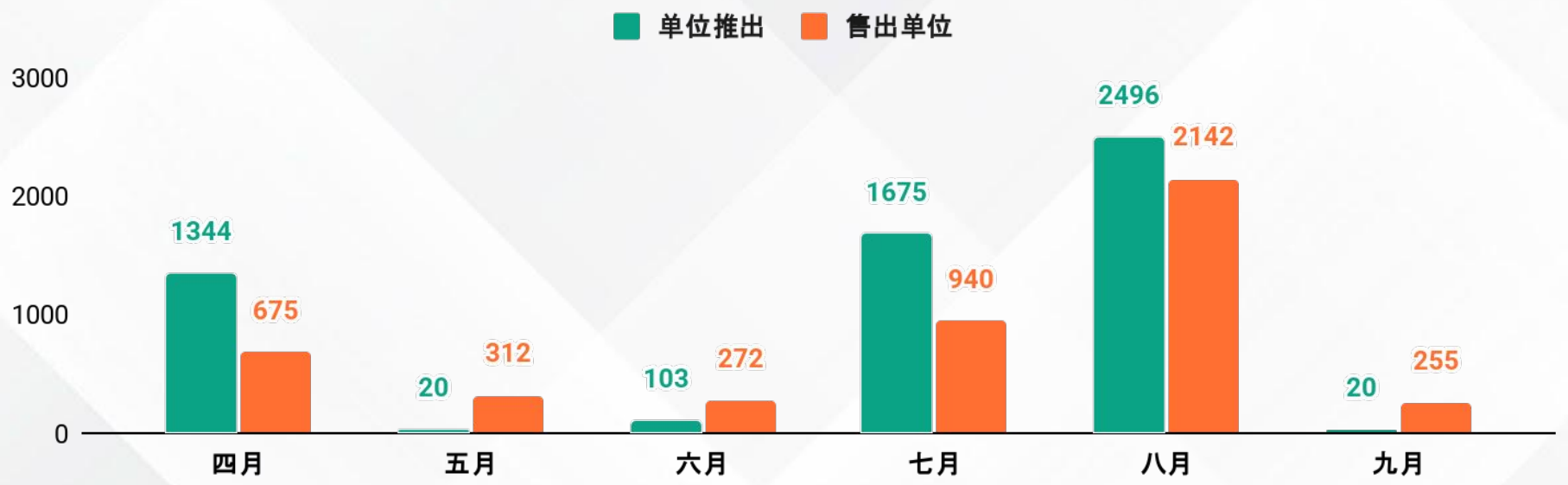
Source: URA, Realion (OrangeTee & ETC) Research

发展商月度销售额

九月 2025年

OrangeTee
PART OF REALION GROUP

每月推出和销售的单位 (不包括执行共管公寓)



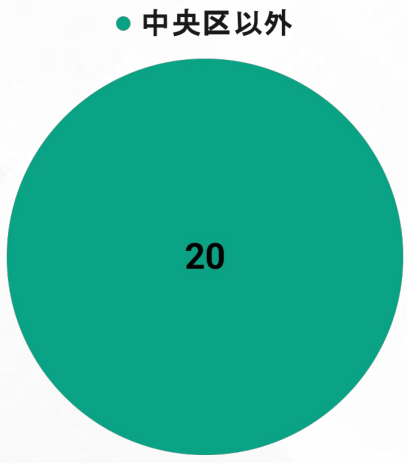
新房销售量
(不包括执行共管公寓)

255 单位

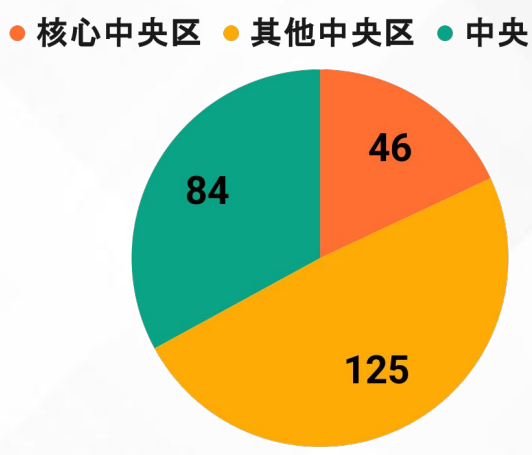
-88.1%
m-o-m

-36.4%
y-o-y

单位推出 (不包括执行共管公寓)



售出单位 (不包括执行共管公寓)



最畅销项目（市场区隔）

核心中央区

1. River Green
   16 单位
   $3,201 每平方英尺
2. The Robertson Opus
   10 单位
   $3,404 每平方英尺
3. UpperHouse at Orchard Boulevard
   6 单位
   $3,323 每平方英尺

其他中央区

1. Grand Dunman
   24 单位
   $2,508 每平方英尺
2. Tembusu Grand
   12 单位
   $2,393 每平方英尺
3. Bloomsbury Residences
   11 单位
   $2,548 每平方英尺

中央区以外

1. Canberra Crescent Residences
   28 单位
   $2,001 每平方英尺
2. The Lakegarden Residences
   9 单位
   $2,146 每平方英尺
3. Otto Place
   8 单位
   $1,790 每平方英尺

售价最高的项目（市场区隔）

核心中央区	21 Anderson	$5,347 每平方英尺
其他中央区	Promenade Peak	$3,535 每平方英尺
中央区以外	ELTA	$2,813 每平方英尺

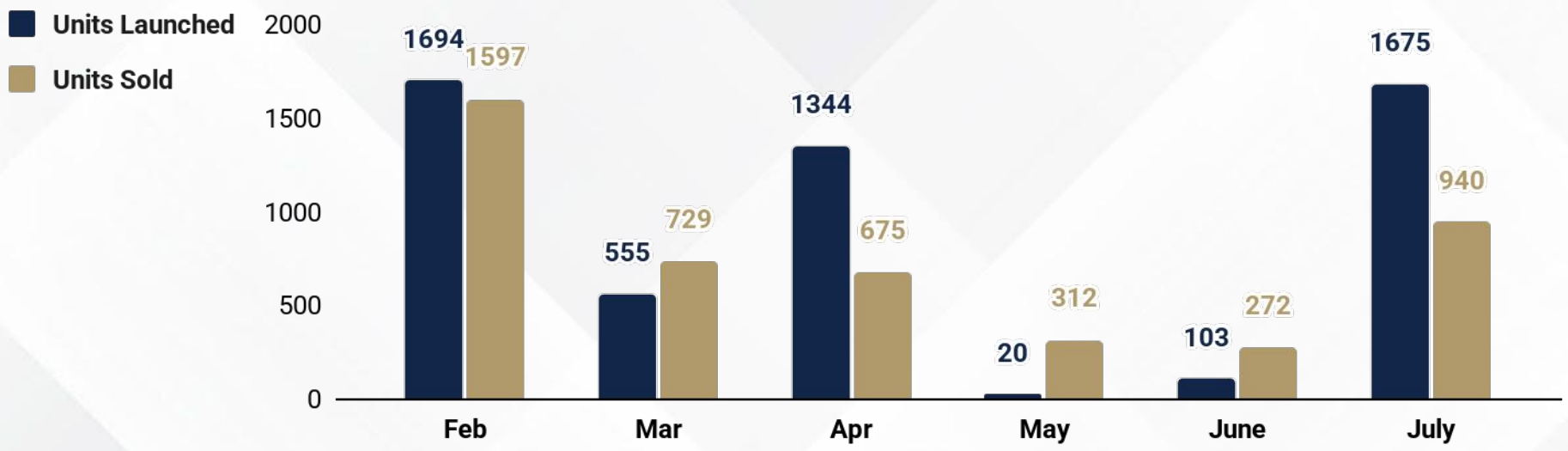
Source: URA, Realion (OrangeTee & ETC) Research

DEVELOPER MONTHLY SALES

JULY 2025

REALION

UNITS LAUNCHED & SOLD EACH MONTH (Exclude EC)



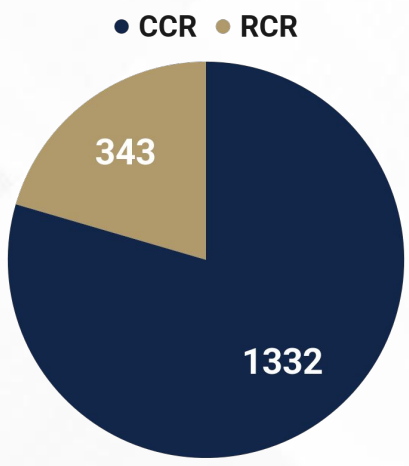
SALES VOLUME (Exclude EC)

940 units

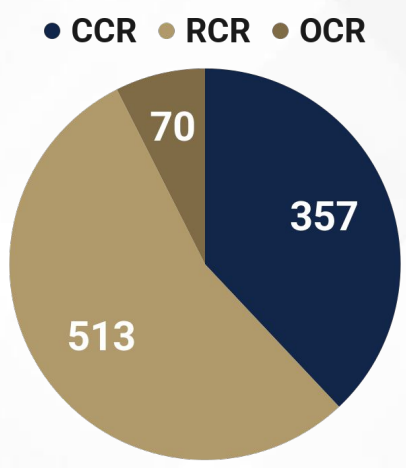
↑245.6% m-o-m

↑ 63.2% y-o-y

UNITS LAUNCHED (Exclude EC)



UNITS SOLD (Exclude EC)



BEST-SELLING PROJECTS BY MARKET SEGMENT

CCR

1. Upperhouse At Orchard Boulevard — 178 Units Sold — $3,259 PSF
2. The Robertson Opus — 149 Units Sold — $3,359 PSF
3. Hill House — 16 Units Sold — $3,011 PSF

RCR

1. Lyndenwoods — 331 Units Sold — $2,463 PSF
2. Grand Dunman — 35 Units Sold — $2,450 PSF
3. Bloomsbury Residences — 32 Units Sold — $2,549 PSF

OCR

1. Otto Place — 358 Units Sold — $1,746 PSF
2. Parktown Residence — 11 Units Sold — $2,321 PSF
3. ELTA — 8 Units Sold — $2,713 PSF

PROJECTS WITH HIGHEST UNIT PRICE (S$PSF)

CCR	21 Anderson	$4,999 PSF
RCR	Union Square Residences	$3,332 PSF
OCR	ELTA	$2,811 PSF

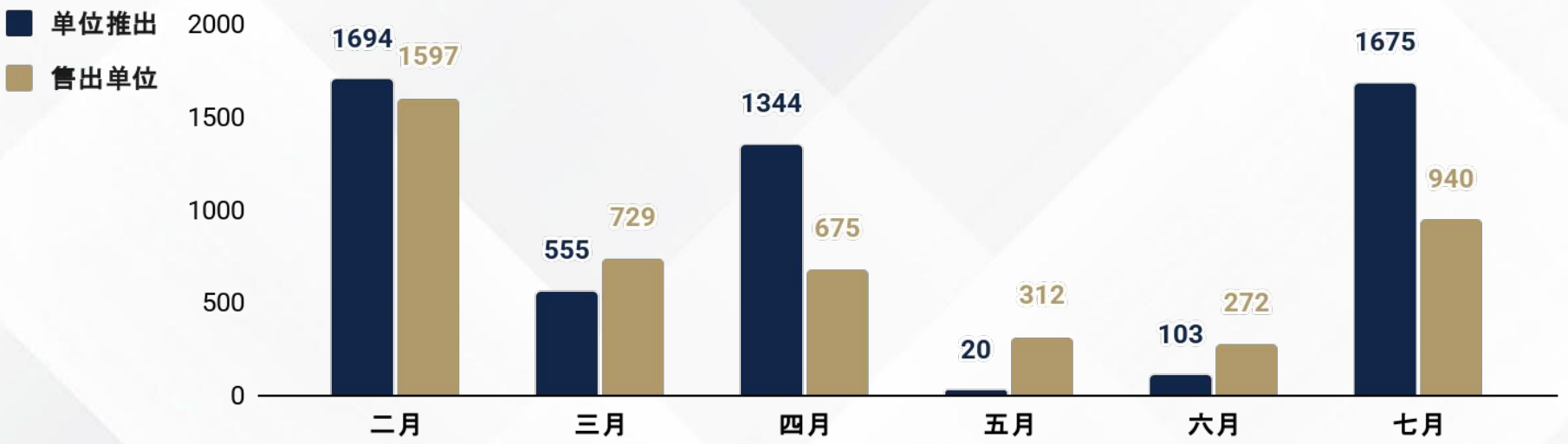
Source: URA, Realion Research

发展商月度销售额

七月 2025年

REALION

每月推出和销售的单位 (不包括执行共管公寓)



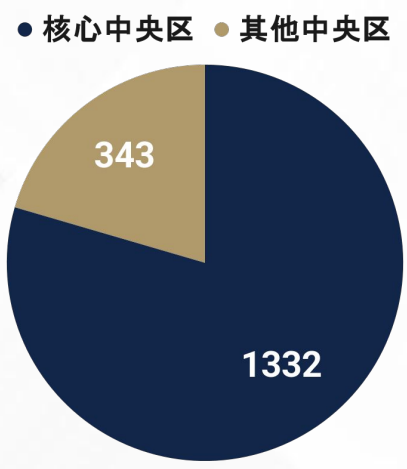
新房销售量
(不包括执行共管公寓)

940 单位

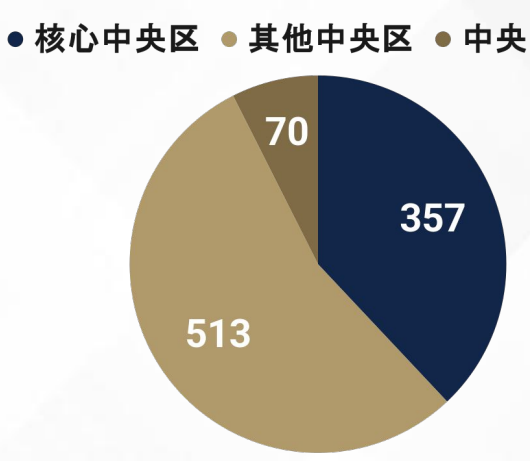
↑245.6%
m-o-m

↑ 63.2%
y-o-y

单位推出 (不包括执行共管公寓)



售出单位 (不包括执行共管公寓)



最畅销项目(市场区隔)

核心中央区

1. Upperhouse At Orchard Boulevard
   178 单位
   $3,259 每平方英尺
2. The Robertson Opus
   149 单位
   $3,359 每平方英尺
3. Hill House
   16 单位
   $3,011 每平方英尺

其他中央区

1. Lyndenwoods
   331 单位
   $2,463 每平方英尺
2. Grand Dunman
   35 单位
   $2,450 每平方英尺
3. Bloomsbury Residences
   32 单位
   $2,549 每平方英尺

中央区以外

1. Otto Place
   358 单位
   $1,746 每平方英尺
2. Parktown Residence
   11 单位
   $2,321 每平方英尺
3. ELTA
   8 单位
   $2,713 每平方英尺

售价最高的项目(市场区隔)

核心中央区
21 Anderson
$4,999 每平方英尺

其他中央区
Union Square Residences
$3,332 每平方英尺

中央区以外
ELTA
$2,811 每平方英尺

Source: URA, Realion Research

PRIVATE RESIDENTIAL & HDB

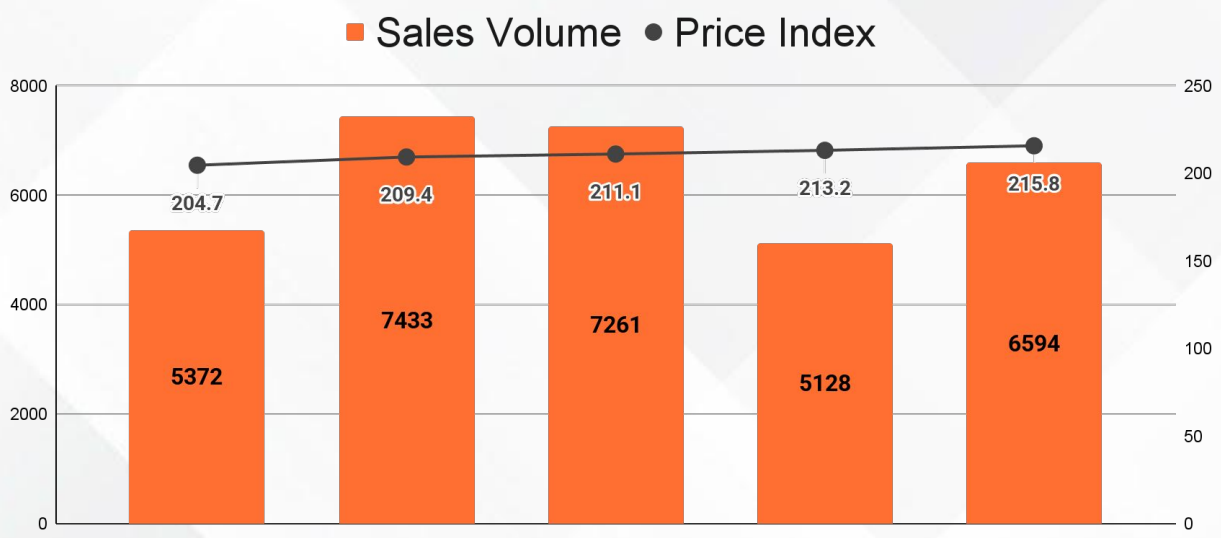
FLASH ESTIMATES

Q3 • 2025

OrangeTee

PART OF REALION GROUP

PRIVATE HOMES PPI & RESALE VOLUME



URA PRICE INDEX

+1.2% q-o-q

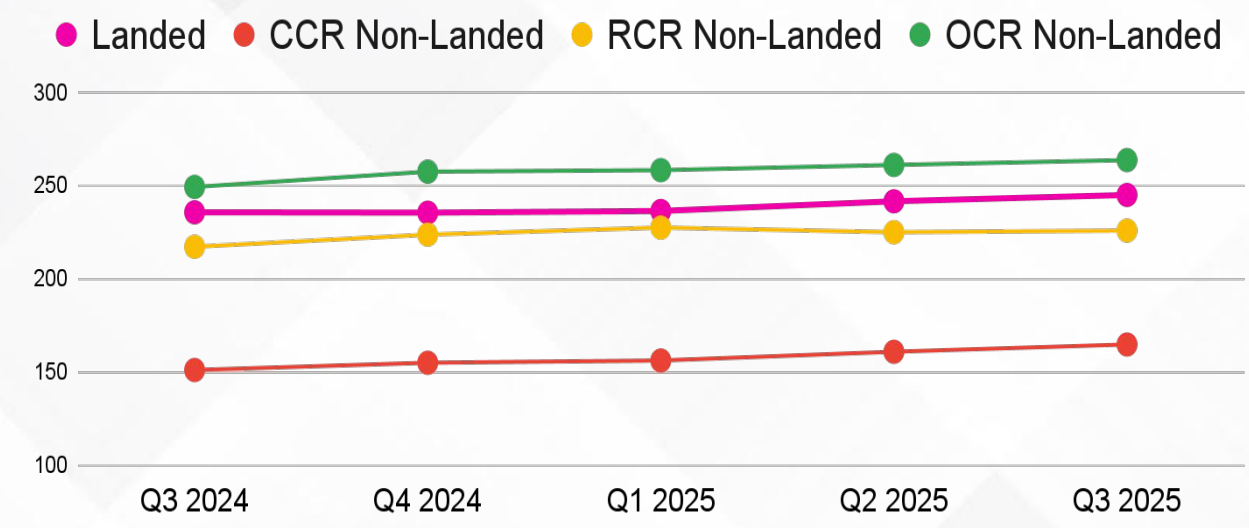
+5.4% y-o-y

URA SALES VOLUME

+28.6% q-o-q

+22.7% y-o-y

PRIVATE HOMES PPI BY PROPERTY TYPE



NON-LANDED PRICE INDEX

+1.1% q-o-q

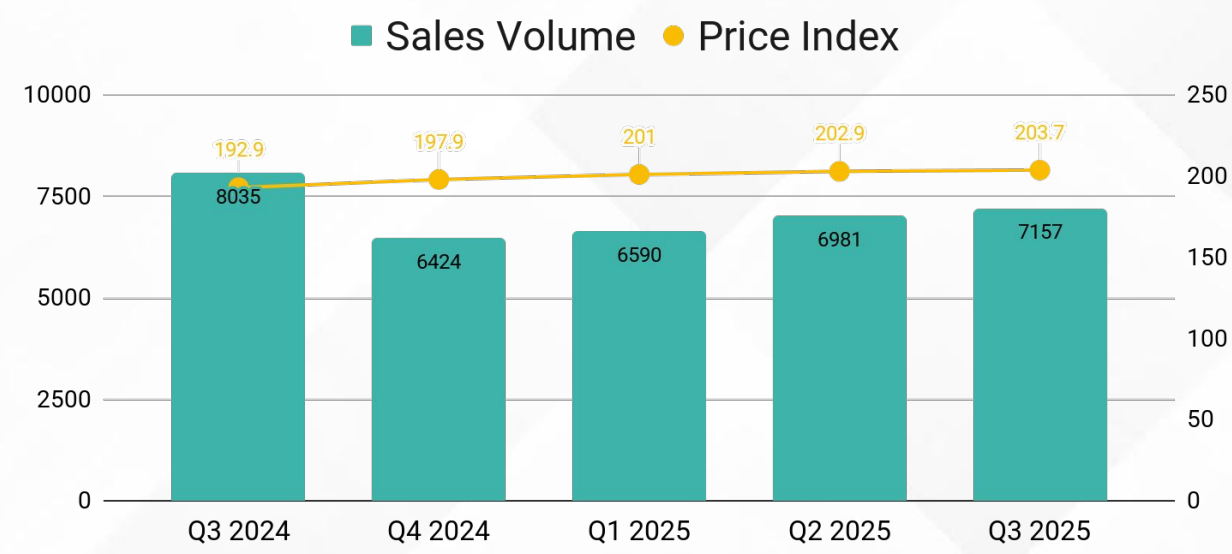
+5.9% y-o-y

LANDED PRICE INDEX

+1.4% q-o-q

+3.9% y-o-y

HDB RESALE PPI & RESALE VOLUME



HDB RESALE PRICE INDEX

+0.4% q-o-q

+5.6% y-o-y

HDB RESALE VOLUME

+2.5% q-o-q

-10.9% y-o-y

Source: URA, HDB, Realion (OrangeTee & ETC) Research

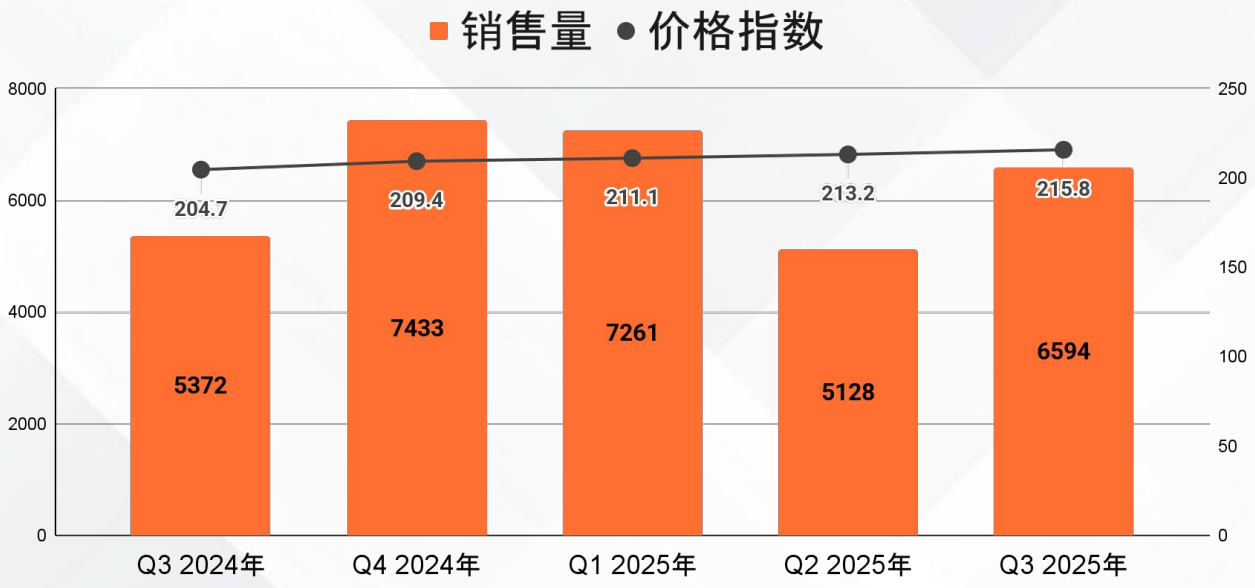
新加坡私人住宅市 场与组屋市场

预估数据

Q3 • 2025年

OrangeTee
PART OF REALION GROUP

私人住宅价格指数与 销售量



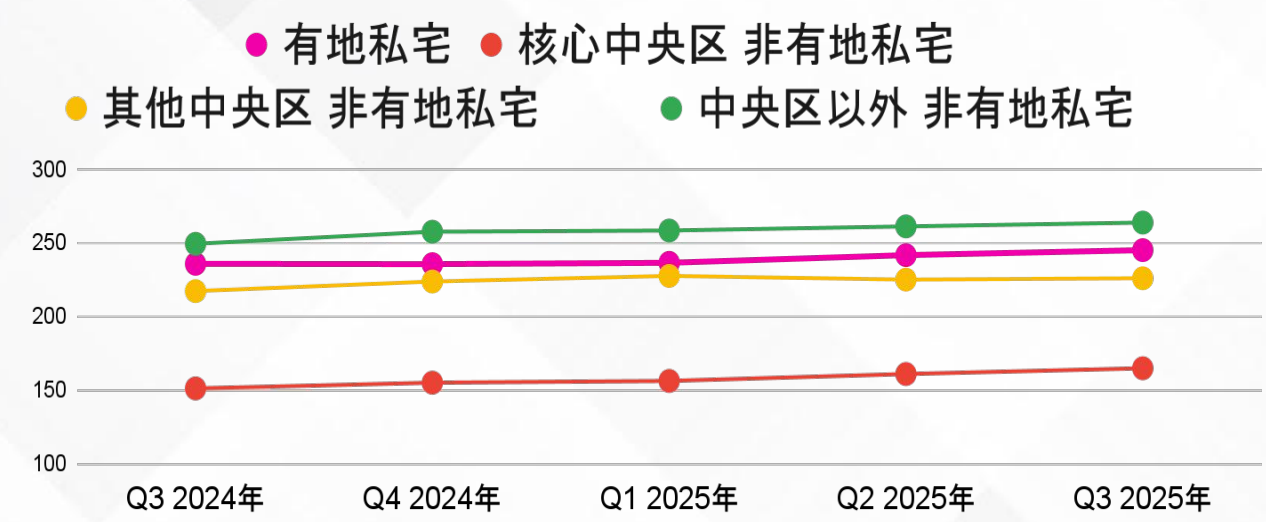
市区重建局 价格指数

+1.2% q-o-q　+5.4% y-o-y

市区重建局 售量销

+28.6% q-o-q　+22.7% y-o-y

私人住宅价格指数 (按市场分类)



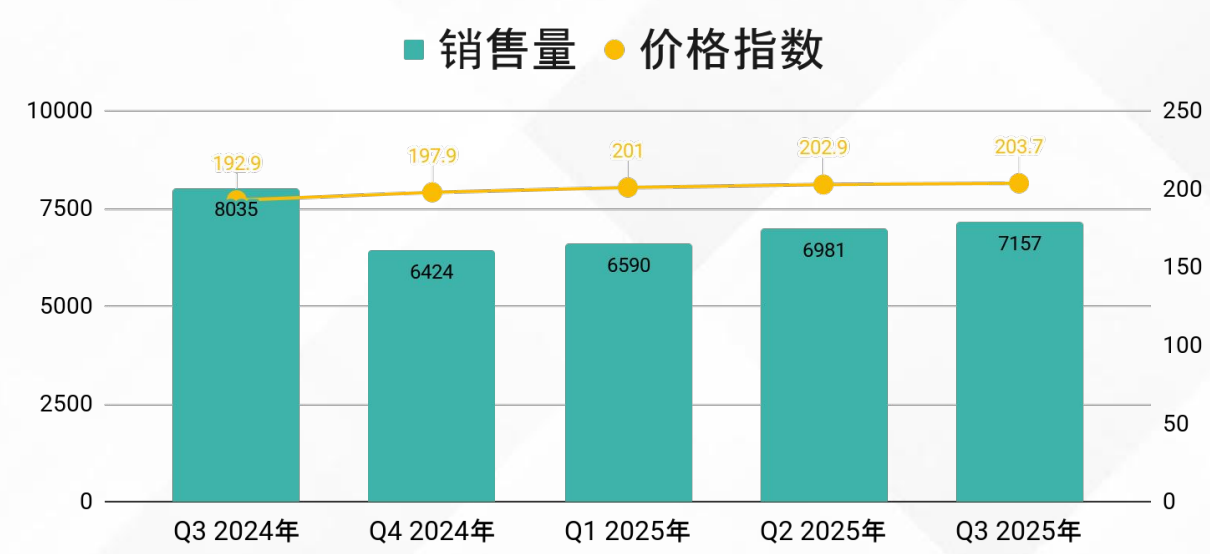
非有地私宅 价格指数

+1.1% q-o-q　+5.9% y-o-y

有地私宅 价格指数

+1.4% q-o-q　+3.9% y-o-y

组屋转售价格指数与 销售量



组屋 转售价格指数

+0.4% q-o-q　+5.6% y-o-y

组屋 转售量

+2.5% q-o-q　-10.9% y-o-y

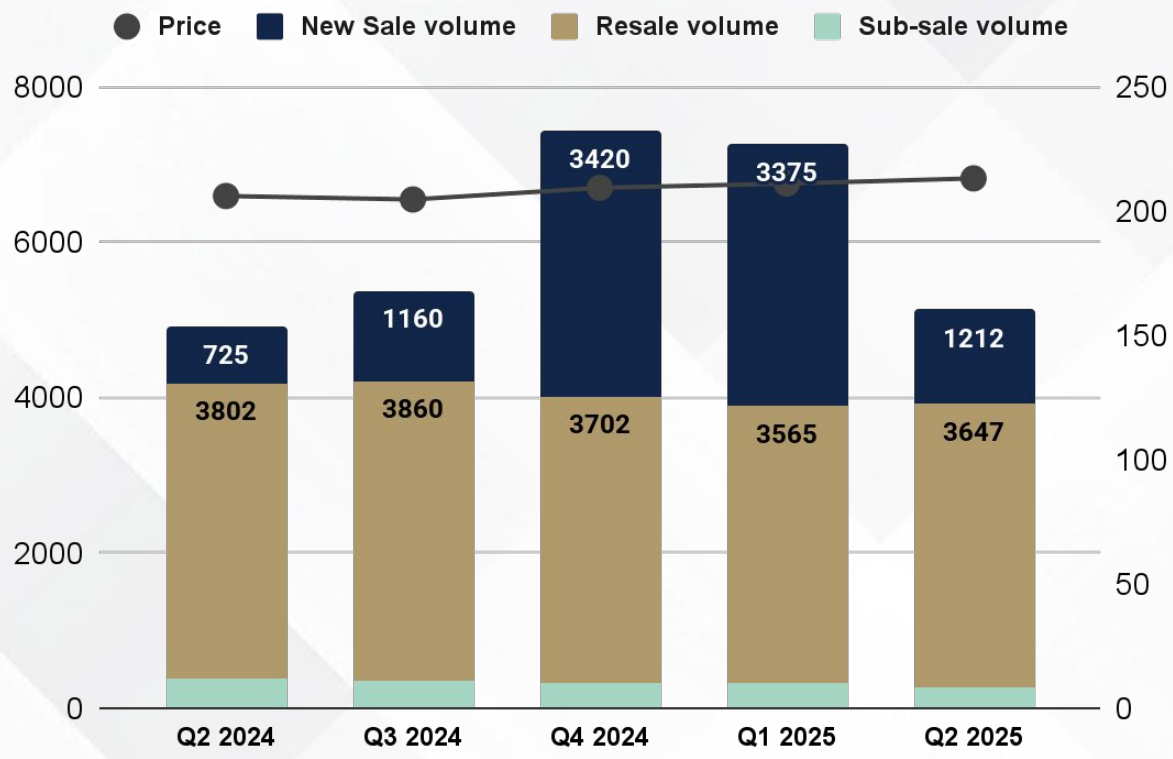
Source: URA, HDB, Realion (OrangeTee & ETC) Research

PRIVATE RESIDENTIAL QUARTERLY DATA

Q2 • 2025

REALION

URA PPI & SALES VOLUME (BY SALES TYPE)



SALES VOLUME (OVERALL)

-29.4% q-o-q

+4.3% y-o-y

SALES VOLUME (NEW SALES)

-64.1% q-o-q

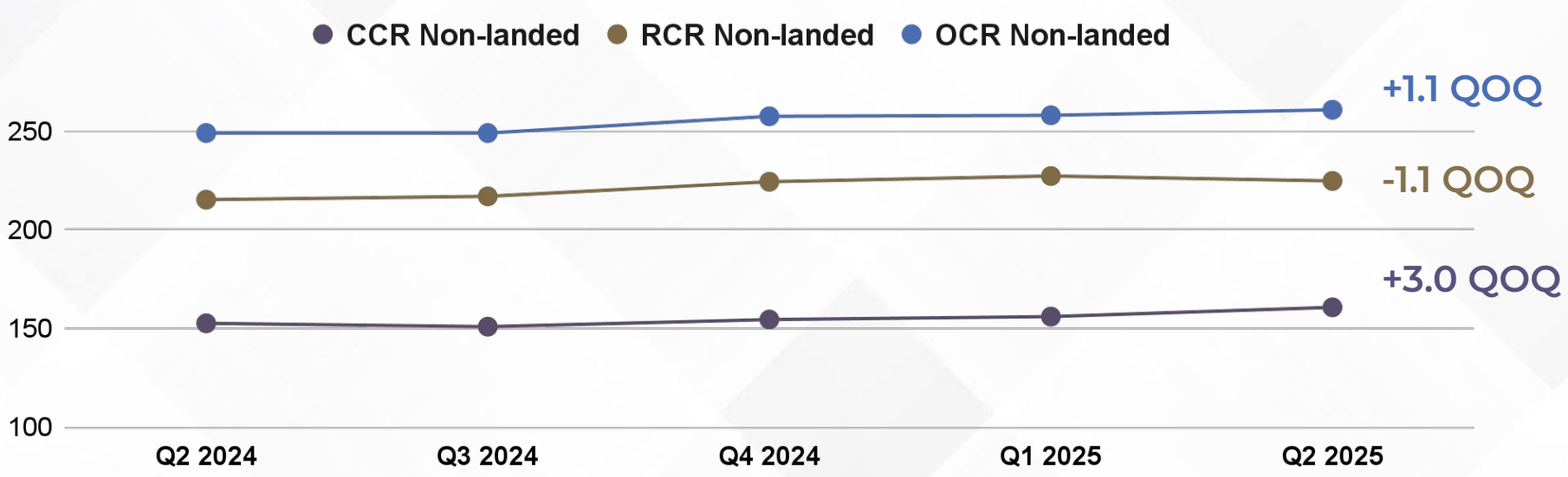
+67.2% y-o-y

SALES VOLUME (RESALES)

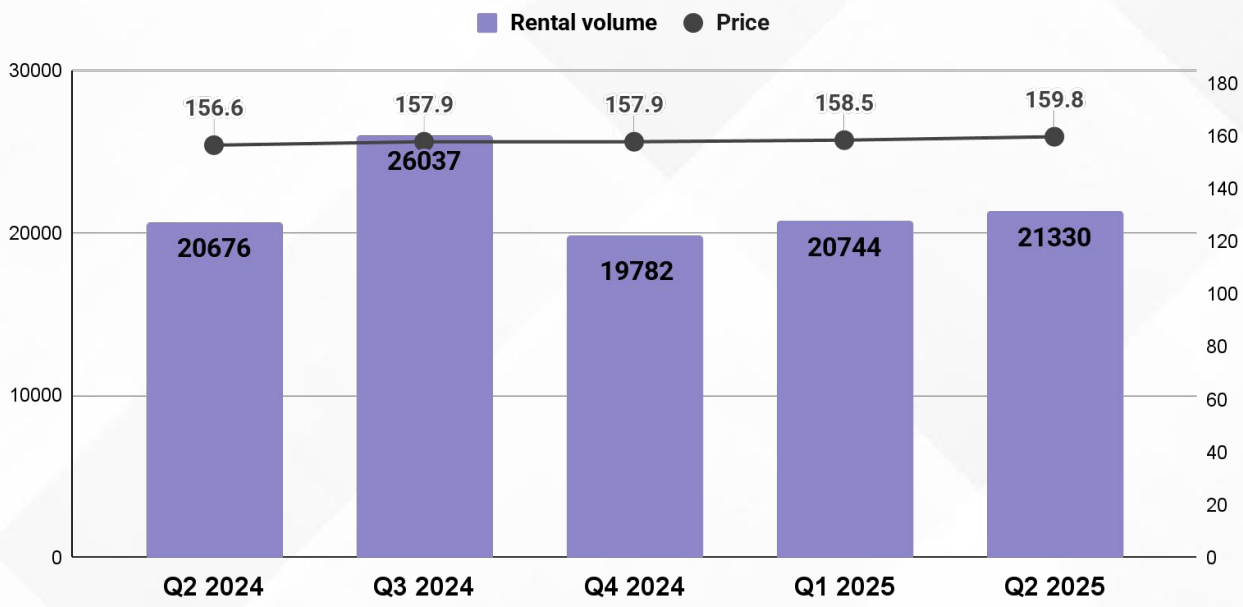
+2.3% q-o-q

-4.1% y-o-y

NON-LANDED PRIVATE HOMES PPI (BY MARKET SEGMENT)



RENTAL INDEX & RENTAL VOLUME



RENTAL INDEX

+0.8% q-o-q

+2.0% y-o-y

RENTAL VOLUME

+2.8% q-o-q

+3.2% y-o-y

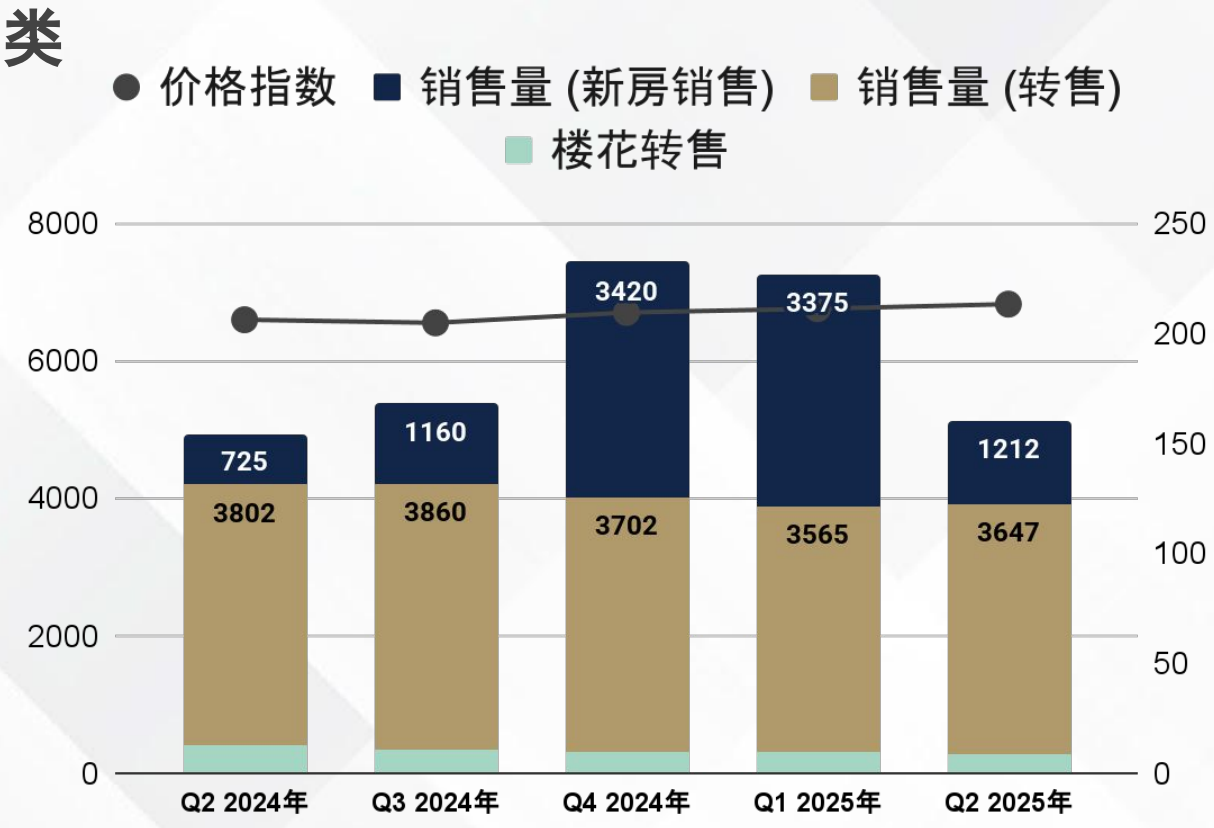
Source: URA, Realion Research

私人住宅季度数据

2季度 • 2025年

REALION

整体URA房产价格指数及 销售量按销售类型分类



销售量 (整体)

-29.4% q-o-q

+4.3% y-o-y

销售量 (新房销售)

-64.1% q-o-q

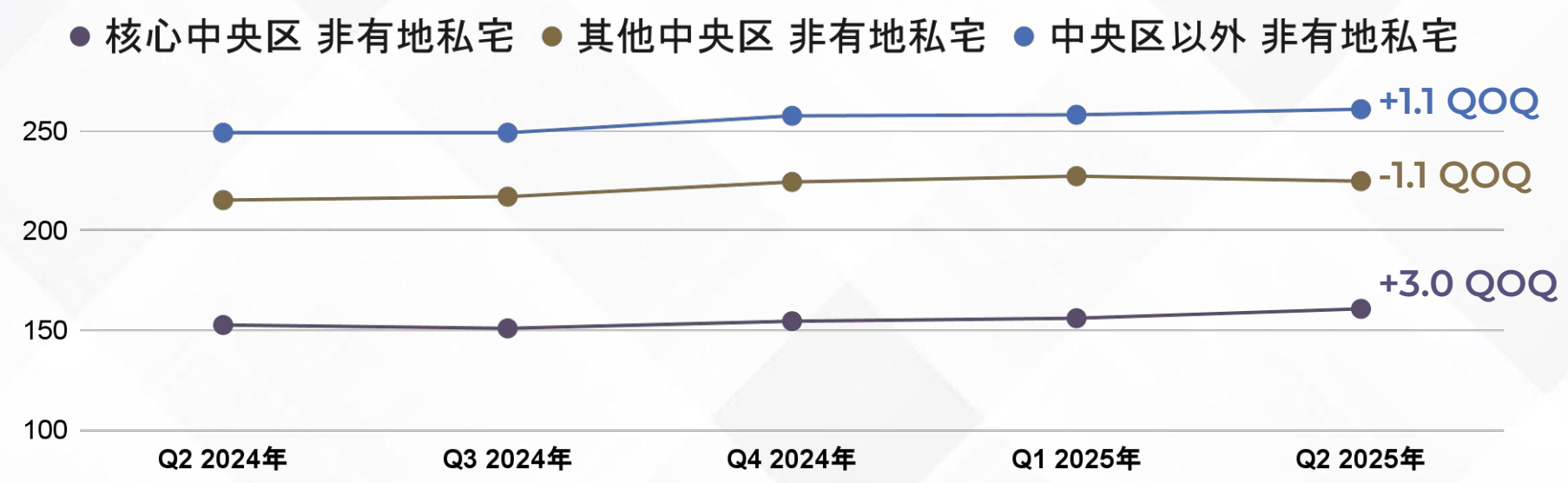
+67.2% y-o-y

销售量 (转售)

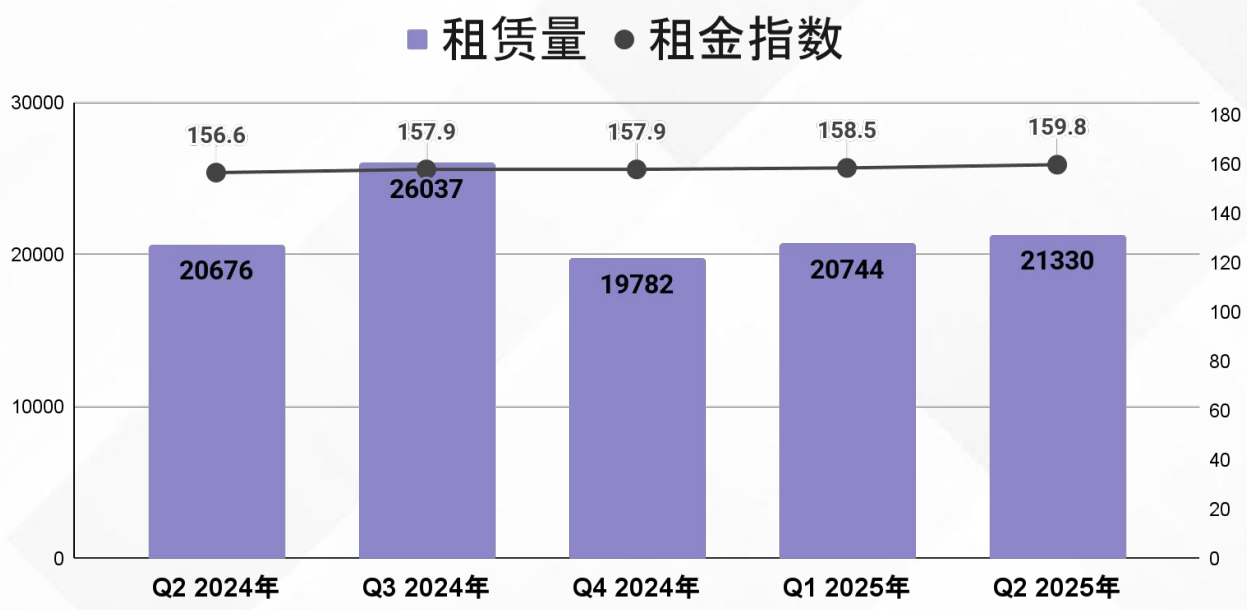
+2.3% q-o-q

-4.1% y-o-y

URA房价指数 (按市场细分)



URA租金指数及租 赁量



租金指数

+0.8% q-o-q

+2.0% y-o-y

租赁量

+2.8% q-o-q

3.2% y-o-y

Source: URA, Realion Research

HDB RESALE QUARTERLY DATA

Q2 • 2025

REALION

MOST POPULAR TOWNS

1 TAMPINES

Units Transacted
554

Median Price
$675,000 (4RM Flats)

2 SENGKANG

Units Transacted
509

Median Price
$650,000 (4RM Flats)

3 YISHUN

Units Transacted
491

Median Price
$569,000 (4RM Flats)

4 WOODLANDS

Units Transacted
482

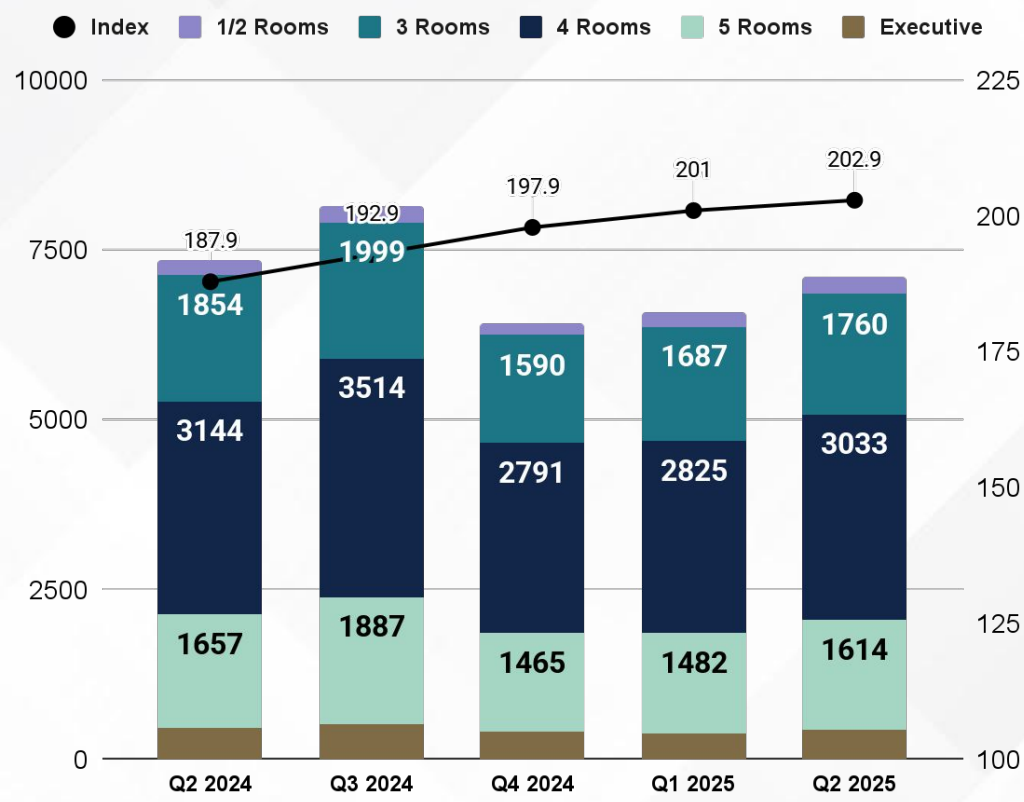
Median Price
$560,000 (4RM Flats)

5 JURONG WEST

Units Transacted
433

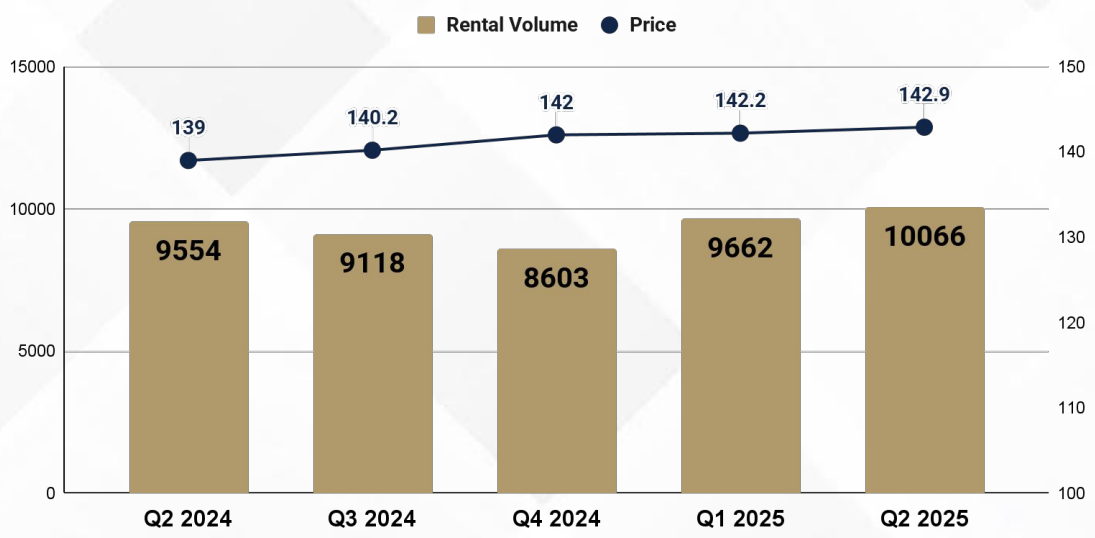
Median Price
$548,000 (4RM Flats)

HDB RESALE PRICE INDEX & SALES VOLUME BY FLAT TYPE



HDB PRICE INDEX	+0.9% q-o-q	+8.0% y-o-y
HDB RESALE VOLUME	+7.8% q-o-q	-3.4% y-o-y

SRX RENTAL INDEX & HDB RENTAL VOLUME



RENTAL INDEX	+0.5% q-o-q	+2.8% y-o-y
RENTAL VOLUME	+4.2% q-o-q	+5.4% y-o-y

Source: HDB, SRX, Realion Research

组屋转售季度数据

2季度 • 2025年

REALION

最受欢迎的市镇

1 **TAMPINES**
成交单位
554
中位价格
$675,000 (四房式)

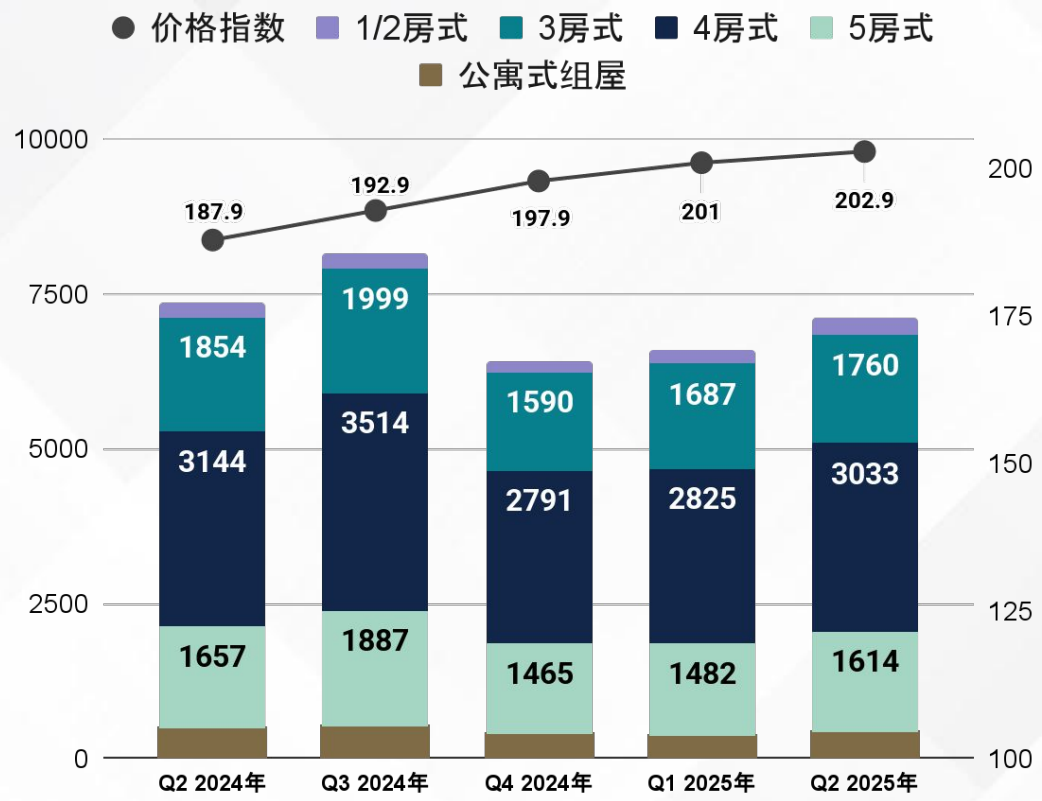
2 **SENGKANG**
成交单位
509
中位价格
$650,000 (四房式)

3 **YISHUN**
成交单位
491
中位价格
$569,000 (四房式)

4 **WOODLANDS**
成交单位
482
中位价格
$560,000 (四房式)

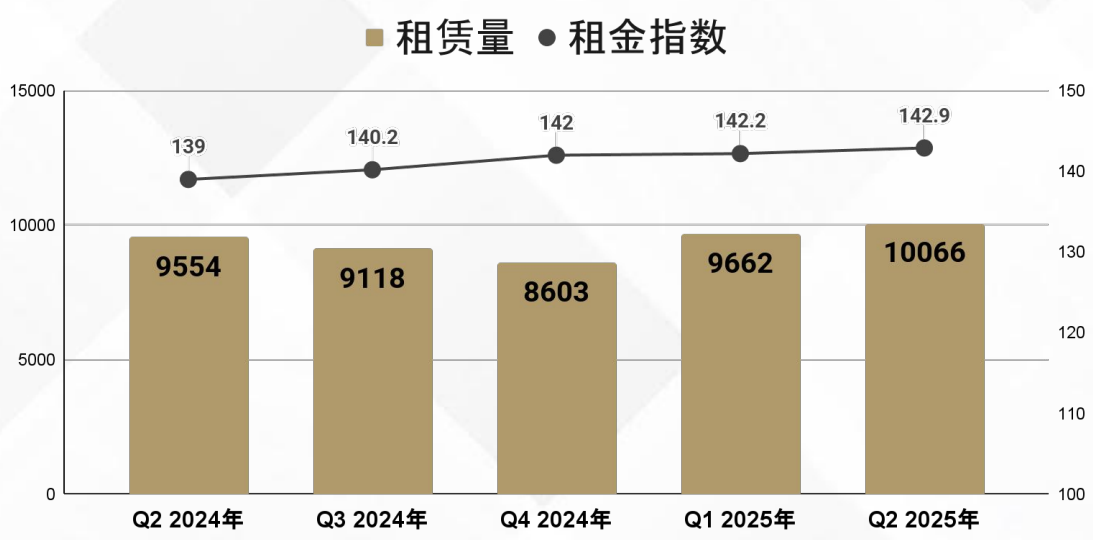
5 **JURONG WEST**
成交单位
433
中位价格
$548,000 (四房式)

组屋转售价格指数和 销售量按户型分类



价格指数	+0.9% q-o-q	+8.0% y-o-y
整体转售量	+7.8% q-o-q	-3.4% y-o-y

SRX租金指数及 HDB租赁量



租金指数	+0.5% q-o-q	+2.8% y-o-y
租赁量	+4.2% q-o-q	+5.4% y-o-y

Source: HDB, SRX, Realion Research