



Orangetee
PART OF REALION GROUP

Artist's Impression of Zyon Grand



August 2025

Monthly Developer Sales

August new home sales jump to a historic high on wave of new launches

A product by Realion Research

August New Home Sales Jump To A Historic High On Wave Of New Launches

Overview

- New home sales more than doubled in August, marking a second consecutive monthly increase. The strong sales were driven by five new project launches. This is the highest monthly sales recorded for 2025 and the strongest August sales since 2007, when Monthly Developer Sales data first became available.
- According to data from the Urban Redevelopment Authority (URA), new home sales (excluding ECs) jumped 127.9 per cent from 940 units in July this year to 2,142 units in August. Including ECs, new home sales similarly increased by 78.3 per cent from 1,311 units in July to 2,338 units in August 2025.
- Year-on-year, new home transactions (excluding ECs) skyrocketed by 915.2 per cent from 211 units in August 2024.

Month	Sales Volume		Launches	
	(Excl. EC)	(Incl. EC)	(Excl. EC)	(Incl. EC)
Aug-24	211	247	272	272
Mar-25	729	1,510	555	1,315
Apr-25	675	771	1,344	1,344
May-25	312	336	20	20
Jun-25	272	305	103	103
Jul-25	940	1,311	1,675	2,275
Aug-25	2,142	2,338	2,496	2,496
M-o-M % Change	127.9%	78.3%	49.0%	9.7%
Y-o-Y % Change	915.2%	846.6%	817.6%	817.6%

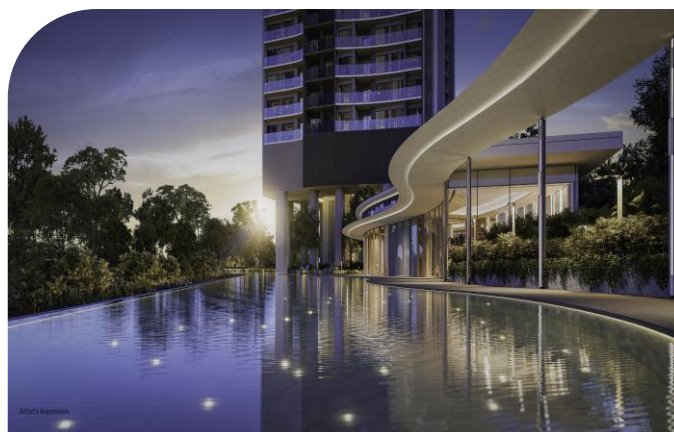
Source: URA, Realion Research

New Launches

- More projects were launched last month ahead of the lunar seventh month, which is often deemed an inauspicious period for making a property purchase. Five new projects were released, namely the 941-unit Springleaf Residence, the 524-unit River Green, the 596-unit Promenade Peak, the 376-unit Canberra Crescent Residences and the 34-unit Artisan 8.
- Springleaf Residence was the best-selling project, moving 93.9 per cent or 884 of 941 units. The project was popular due to its attractive entry price and lush greenery, which enticed many HDB upgraders seeking a tranquil living environment. The project is also highly convenient being next to the Springleaf MRT station on the Thomson-East Coast (TEL) line.
- River Green was another highly sought-after project, having sold 86.1 per cent of the entire project within the launch month. This is the top selling project in the prime Core Central Region (CCR). Buyers were attracted by its competitive launch price and proximity to Orchard Road shopping district, Central Business District, Great World MRT on the TEL line.
- The other best-selling projects include Promenade Peak, Canberra Crescent Residences, Otto Place, and Bloomsbury Residences.



Artist's Impression of Springleaf Residence



Artist's Impression of River Green

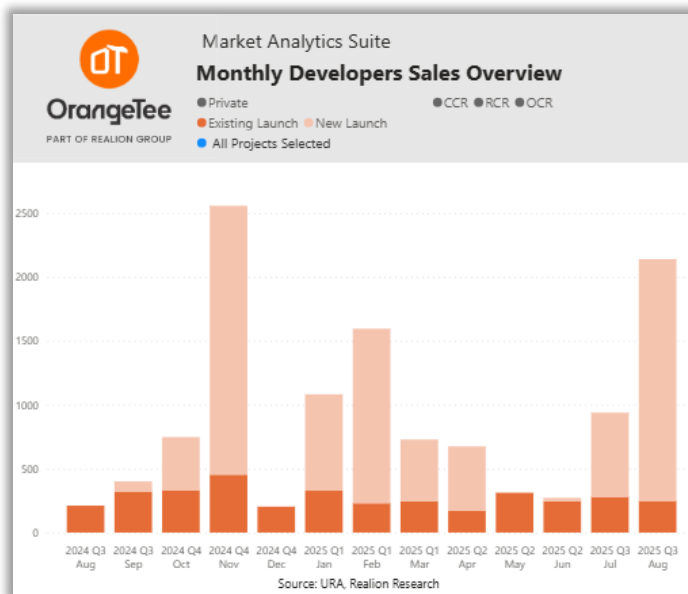
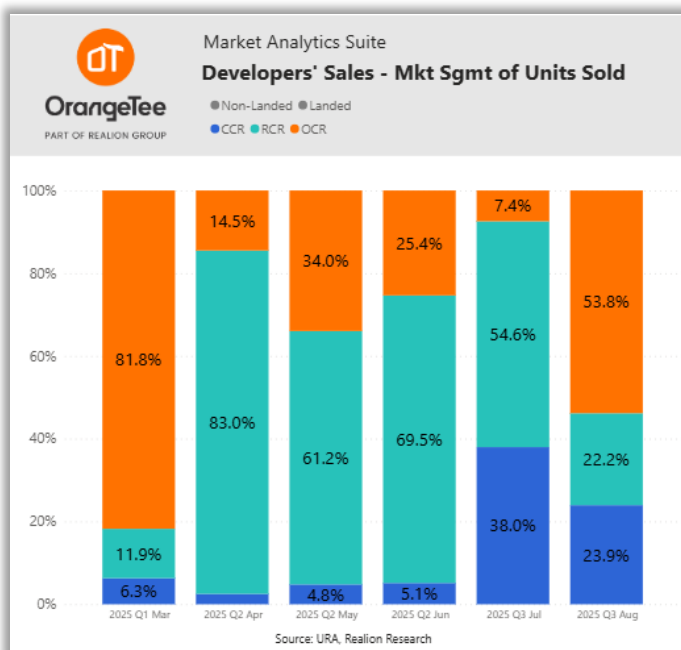
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By Market Segment

- 53.8 per cent or 1,153 units of the total 2,142 transactions (excluding ECs) in August 2025 were in the suburbs or the Outside Central Region (OCR), followed by prime areas or CCR at 23.9 per cent or 513 units, and the city fringe or Rest of Central Region (RCR) at 22.2 per cent or 476 units.

Luxury Market

- 22 new non-landed homes of between S\$5 million and S\$10 million were sold in August 2025, above the monthly average registered in the first six months of this year at seven units. However, on a month-on-month basis, last month's sales were slightly lower than the 28 units sold in July 2025.
- Last month's transactions were from Promenade Peak, CanningHill Piers, Amber House, One Marina Gardens, Terra Hill, and UpperHouse at Orchard Boulevard.
- Demand for ultra-luxury condos of at least S\$10 million held steady with two non-landed private homes transacted last month, which was the same as the number of units sold in the preceding month. Both transactions were from 21 Anderson; with the priciest being a 10,452-sqft unit sold for S\$52.3 million, and the other a 4,489-sqft unit sold for S\$21.1 million.



Artist's Impression of Promenade Peak, The Robertson Opus, Arina East Residences and Aurelle of Tampines



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Market Outlook

- Prospective buyers can expect more housing options, as several medium to large-sized developments are slated for launch after the lunar seventh month.
- On the macroeconomic front, uncertainties driven by US tariffs are stabilising, which means that hesitant homebuyers may not wait any further.
- Demand is expected to be strong as many of these projects are situated in highly sought-after locations. Moreover, there has been a hiatus of new projects released in certain regions, leading to pent-up demand.
- Interest rates are expected to drop further in the upcoming months. As mortgage loans become more affordable, buyers who have been waiting on the sidelines may be encouraged to make a purchase.
- Upcoming project launches include Penrith, The Sen, Zyon Grand and Faber Residence.

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 ^A (%)	Sold out status [*] (%)
Springleaf Residence	OCR	941	941	884	884	\$2,166	93.9%	93.9%
River Green	CCR	524	524	451	451	\$3,111	86.1%	86.1%
Promenade Peak	RCR	596	596	333	333	\$2,919	55.9%	55.9%
Canberra Crescent Residences	OCR	376	376	211	211	\$1,991	56.1%	56.1%
Bloomsbury Residences	RCR	358	358	207	25	\$2,565	57.8%	57.8%
UpperHouse At Orchard Boulevard	CCR	301	301	199	22	\$3,353	66.1%	66.1%
The Robertson Opus	CCR	348	348	162	15	\$3,308	46.6%	46.6%
Artisan 8	RCR	34	34	15	15	\$2,386	44.1%	44.1%
One Marina Gardens	RCR	937	937	514	13	\$2,909	54.9%	54.9%
Lentoria	OCR	267	267	223	12	\$2,291	83.5%	83.5%

^ATake 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, Realion Research

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