KEMENTERIAN KEWANGAN
MALAYSIA

LAPORAN STATUS PASARAN HARTA TANAH
Property Market Status Report

H1 2024

Sambutan Jubli Perak
PUSAT MAKLUMAT HARTA TANAH NEGARA NAPIC

JABATAN PENILAIAN DAN PERKHIDMATAN HARTA
VALUATION AND PROPERTY SERVICES DEPARTMENT
KEMENTERIAN KEWANGAN MALAYSIA
MINISTRY OF FINANCE MALAYSIA

PENDAHULUAN

Laporan Status Pasaran Harta Tanah menyebarkan empat jenis maklumat jualan iaitu:

i. Prestasi jualan skim perumahan yang baru dilancarkan pada H1 2024.

ii. Maklumat harta tanah yang siap dibina tidak terjual bagi kediaman, kedai dan industri. Mulai 1 Januari 2003, 'harta tanah siap dibina tidak terjual' telah didefinisikan sebagai unit kediaman, kedai dan industri yang telah siap dibina dan telah mendapat Sijil Perakuan Siap dan Pematuhan (CCC) tetapi kekal tidak terjual melebihi sembilan bulan selepas ianya dilancarkan untuk dijual pada atau selepas 1 Januari 1997.

iii. Maklumat harta tanah dalam pembinaan yang kekal belum terjual dan telah berada di pasaran melebihi sembilan bulan selepas ianya dilancarkan untuk dijual selepas 1 Januari 1997, dan

iv. Maklumat harta tanah yang belum dibina yang kekal belum terjual dan telah berada di pasaran melebihi sembilan bulan selepas ianya dilancarkan untuk dijual selepas 1 Januari 1997.

Kami ingin merakamkan penghargaan kepada semua yang telah menjayakan penerbitan ini, khususnya, kepada pemaju harta tanah yang telah terlibat dalam memberi maklumat yang berharga, dalam menjayakan kajian ini. Tanpa sokongan mereka, kami tidak mungkin dapat menerbitkan laporan ini.

Seperti yang telah diketahui, pasaran harta tanah yang sihat dan stabil tidak sahaja penting kepada individu tetapi juga kepada ekonomi negara pada keseluruhannya. Adalah menjadi harapan kami untuk menyediakan pembaca dengan maklumat yang berkualiti tinggi dan menepati masa. Kami amat mengalu-alukan maklum balas, komen serta cadangan daripada semua untuk memperbaiki lagi laporan ini. Kami boleh dihubungi melalui telefon atau faksimili kepada:

Pengarah
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FOREWORD

The Property Market Status Report disseminates four types of sales information namely:

i. *Sales performance of newly launched housing schemes as at H1 2024.*

ii. *Information on property overhang for residential overhang, retail shops overhang and industrial overhang. With effect from 1 January 2003, “property overhang” has been defined to include residential units, retail shops and industrial units, which were completed and issued with Certificate of Compliance and Completion (CCC) but remained unsold for more than nine months after it was launched for sale on or after 1 January 1997.*

iii. *Information on under construction property that remained unsold in the market for more than nine months after launching for sale after 1January 1997, and*

iv. *Information on not constructed property that remained unsold in the market for more than nine months after launching for sale after 1 January 1997.*

We would like to express our gratitude to all those who had made this publication a success, specifically, property developers who had participated and given their valuable inputs to make this survey a success. Without your support, we will not be able to publish this report.

It is a known fact that a healthy and stable property market is crucial to not only the individuals, but also to the country’s economy as a whole. It is our utmost wish to provide readers with high quality information in a timely manner. We welcome feedback, comments and suggestions from our readers to further improve this report. We can be contacted through telephone or fax to:

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Laporan Status Pasaran Harta Tanah H1 2024
Property Market Status Report H1 2024

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Residential Property

State	New Launches	Overhang		Unsold			
				Under Construction		Not Constructed	
	Units	Units	Value (RM Mil)	Units	Value (RM Mil)	Units	Value (RM Mil)
WP Kuala Lumpur	2605	3,051	3,062.93	5,905	3,803.16	3,932	2,235.68
WP Putrajaya	0	302	343.20	411	166.64	0	0.00
WP Labuan	0	41	13.41	95	66.60	0	0.00
Selangor	3847	2,328	1,849.49	7,106	4,508.94	1,428	1,039.22
Johor	5376	3,219	2,802.24	6,305	3,646.28	257	230.62
Pulau Pinang	1232	2,400	2,022.86	4,288	1,982.80	1,480	702.19
Perak	2636	4,161	1,144.72	10,922	2,854.25	454	127.81
Negeri Sembilan	1116	1,475	531.07	2,362	851.57	621	126.44
Melaka	1808	514	210.14	3,061	910.70	550	150.96
Kedah	523	353	143.55	2,758	961.96	454	156.94
Pahang	1617	879	343.91	2,510	746.08	222	86.80
Terengganu	107	250	95.69	542	163.95	0	0.00
Kelantan	128	373	108.03	3,407	1,030.15	29	8.89
Perlis	173	6	2.16	259	86.86	0	0.00
Sabah	207	1,728	800.01	4,260	2,691.42	310	145.32
Sarawak	1452	1,562	767.29	3,743	1,704.24	273	114.75
MALAYSIA	**22,827**	**22,642**	**14,240.69**	**57,934**	**26,175.60**	**10,010**	**5,125.62**

Commercial Property

State	Shop					
	Overhang		Unsold			
			Under Construction		Not Constructed	
	Units	Value (RM Mil)	Units	Value (RM Mil)	Units	Value (RM Mil)
WP Kuala Lumpur	13	4.55	0	0	0	0
WP Putrajaya	9	34.33	0	0	0	0
WP Labuan	0	0	0	0	0	0
Selangor	355	434.18	623	674.50	105	104.80
Johor	1,311	1,306.36	909	988.66	44	38.55
Pulau Pinang	77	45.68	14	21.00	36	32.94
Perak	552	248.16	123	107.20	92	51.54
Negeri Sembilan	394	258.83	120	163.66	0	0
Melaka	175	152.50	24	13.22	16	8.61
Kedah	340	235.31	125	80.48	0	0
Pahang	371	237.15	215	159.83	182	153.41
Terengganu	91	85.11	21	13.02	0	0
Kelantan	348	228.39	63	46.22	34	31.72
Perlis	28	20.48	72	49.72	0	0
Sabah	704	475.88	525	533.50	54	60.76
Sarawak	1133	1,261.15	297	305.08	24	6.00
MALAYSIA	**5,901**	**5,028.05**	**3,131**	**3,156.07**	**587**	**488.33**

State	Serviced Apartment					
	Overhang		Unsold			
			Under Construction		Not Constructed	
	Units	Value (RM Mil)	Units	Value (RM Mil)	Units	Value (RM Mil)
WP Kuala Lumpur	4,505	4,307.39	9,072	8,407.17	5,343	3,425.32
WP Putrajaya	84	31.62	0	0	0	0
WP Labuan	0	0	0	0	0	0
Selangor	2,177	1,344.31	9,287	4,150.77	700	352.91
Johor	12,618	10,830.08	3,519	2,149.07	587	307.22
Pulau Pinang	270	367.74	381	228.38	934	864.70
Perak	125	64.53	0	0	0	0
Negeri Sembilan	874	360.11	569	228.32	0	0
Melaka	43	19.82	298	91.43	0	0
Kedah	0	0	0	0	0	0
Pahang	76	34.41	1,533	1,285.16	2,247	987.27
Terengganu	92	39.80	0	0	0	0
Kelantan	225	42.30	0	0	733	299.65
Perlis	0	0	0	0	0	0
Sabah	0	0	0	0	0	0
Sarawak	69	26.22	787	345.46	311	127.19
MALAYSIA	**21,158**	**17,468.33**	**25,446**	**16,885.75**	**10,855**	**6,364.25**

State	SOHO					
	Overhang		Unsold			
			Under Construction		Not Constructed	
	Units	Value (RM Mil)	Units	Value (RM Mil)	Units	Value (RM Mil)
WP Kuala Lumpur	699	620.81	975	410.98	0	0
WP Putrajaya	0	0	0	0	0	0
WP Labuan	0	0	0	0	0	0
Selangor	413	194.82	3,190	986.78	2,551	863.08
Johor	345	206.40	146	60.30	0	0
Pulau Pinang	18	11.57	985	403.36	0	0
Perak	10	1.33	0	0	0	0
Negeri Sembilan	0	0	0	0	0	0
Melaka	0	0	0	0	0	0
Kedah	0	0	0	0	0	0
Pahang	0	0	0	0	0	0
Terengganu	0	0	0	0	0	0
Kelantan	0	0	0	0	0	0
Perlis	0	0	0	0	0	0
Sabah	0	0	0	0	0	0
Sarawak	138	44.01	71	29.62	0	0
MALAYSIA	**1,623**	**1,078.95**	**5,367**	**1,891.04**	**2,551**	**863.08**

Industrial Property

State	Overhang		Unsold			
			Under Construction		Not Constructed	
	Units	Value (RM Mil)	Units	Value (RM Mil)	Units	Value (RM Mil)
WP Kuala Lumpur	0	0	0	0	0	0
WP Putrajaya	0	0	0	0	0	0
WP Labuan	0	0	0	0	0	0
Selangor	45	105.81	213	1093.64	0	0
Johor	117	163.72	130	706.13	0	0
Pulau Pinang	7	22.40	25	75.47	0	0
Perak	78	59.63	12	6.34	0	0
Negeri Sembilan	40	22.23	121	199.26	0	0
Melaka	9	8.72	0	0	0	0
Kedah	20	9.98	10	6.28	0	0
Pahang	50	38.38	0	0	0	0
Terengganu	14	4.95	0	0	0	0
Kelantan	0	0	26	18.93	0	0
Perlis	0	0	12	18.00	0	0
Sabah	47	128.67	0	0	0	0
Sarawak	319	215.56	72	139.14	0	0
MALAYSIA	**746**	**780.05**	**621**	**2,263.18**	**0**	**0.00**

PROPERTY MARKET STATUS REPORT H1 2024

1.0 HARTA TANAH KEDIAMAN

1.1 Pelancaran Baru Skim Perumahan

Pelancaran baru kediaman pada separuh pertama 2024 agak perlahan berbanding tempoh yang sama tahun sebelumnya di mana berkurangan 34.2% kepada 22,827 unit (34,697 unit, H1 2023).

Walau bagaimanapun, prestasi jualan meningkat 26.2% lebih tinggi berbanding tahun 2023.

Harta tanah bertanah membentuk 65.9% (15,048 unit) daripada jumlah pelancaran baru, manakala harta tanah strata merekodkan 34.1% (7,779 unit).

Trend pelancaran baru kediaman bagi H1 2021 hingga H1 2024 seperti **Carta 1**.

1.0 RESIDENTIAL PROPERTY

1.1 Newly Launched Housing Scheme

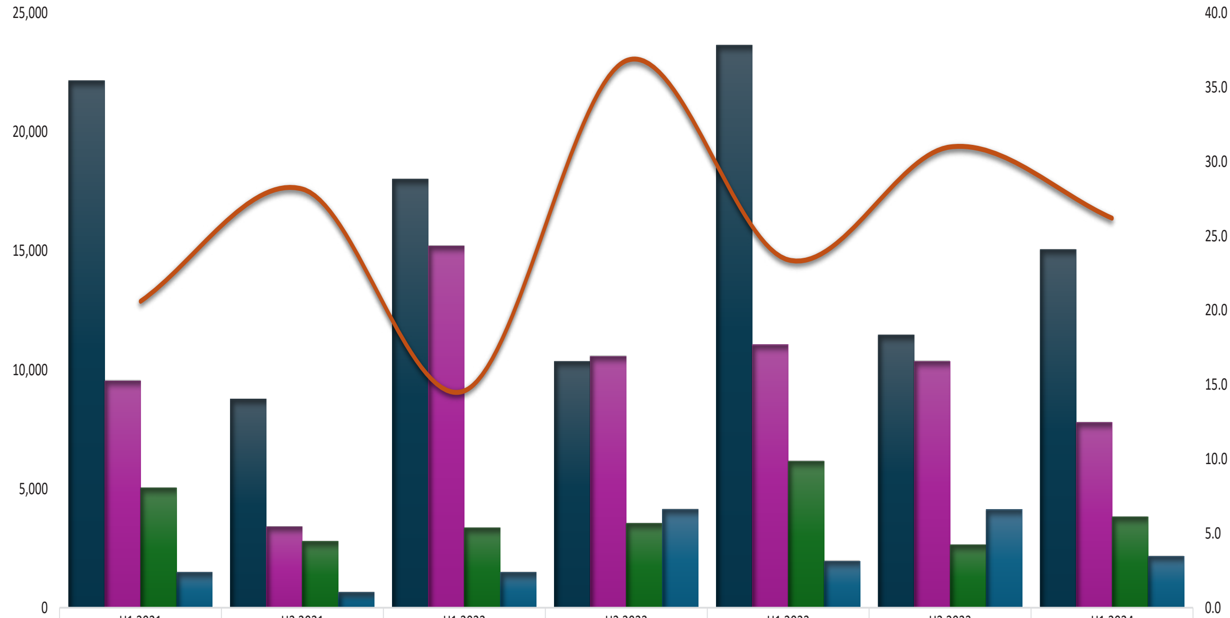
Newly launched housing scheme in the first half of 2024 has been relatively slow compared to the same period last year, experiencing a decrease of 34.2% to 22,827 units (down from 34,697 units in H1 2023).

However, sales performance has seen an increase by 26.2% as compared to 2023.

Landed properties account for 65.9% (15,048 units) of the total new launches, while stratified properties represent 34.1% (7,779 units).

*The trend of new residential launches from H1 2021 to H1 2024 is illustrated in **Chart 1**.*

Chart 1: Trend of Newly Launched Residential H1 2021 – H1 2024

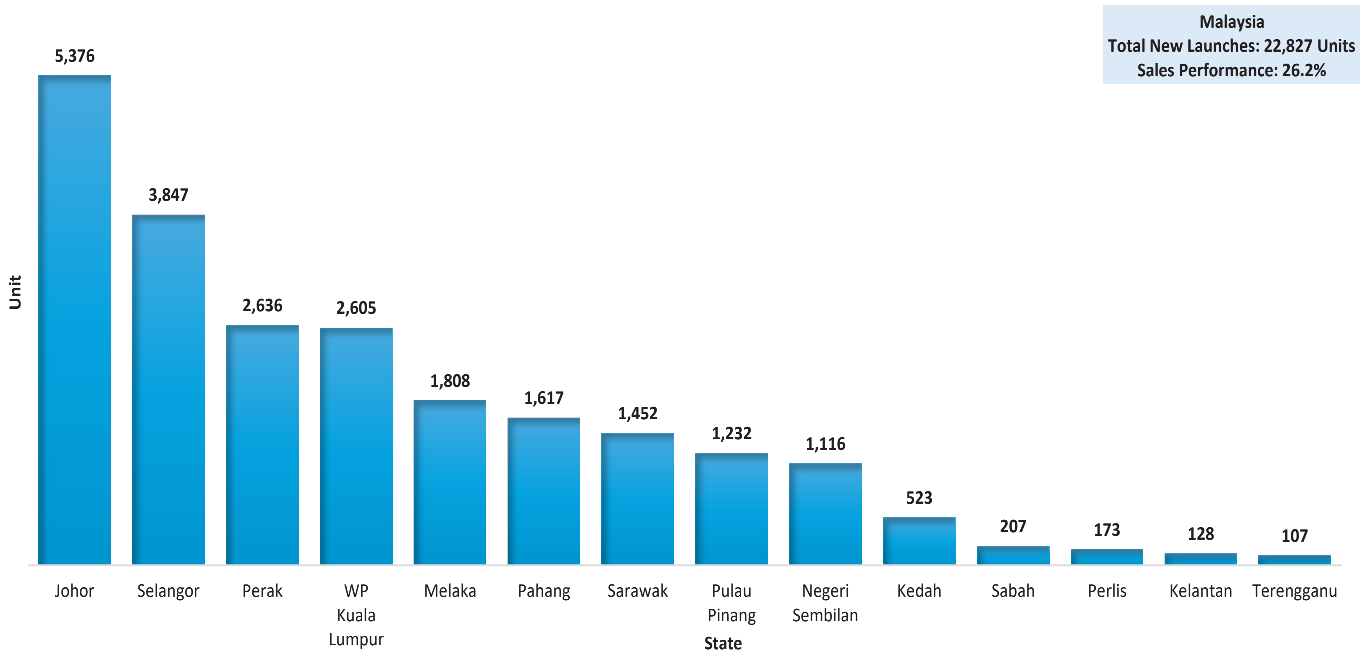


	H1 2021	H2 2021	H1 2022	H2 2022	H1 2023	H2 2023	H1 2024
Unit Launched - Landed	22,150	8,766	18,009	10,348	23,643	11,471	15,048
Unit Launched - Stratified	9,537	3,407	15,196	10,565	11,054	10,358	7,779
Unit Sold - Landed	5,034	2,781	3,360	3,547	6,157	2,638	3,817
Unit Sold - Stratified	1,493	645	1,481	4,144	1,957	4,124	2,161
Sales Performance (%)	20.6	28.1	14.6	36.8	23.4	31.0	26.2

Pada separuh pertama 2024, bilangan pelancaran baru paling tinggi dicatatkan di Johor iaitu sebanyak 5,376 unit, diikuti Selangor dan Perak masing-masing sebanyak 3,847 unit dan 2,636 unit.

In the first half of 2024, the highest number of new launches was recorded in Johor, totaling 5,376 units, followed by Selangor and Perak with 3,847 units and 2,636 units, respectively.

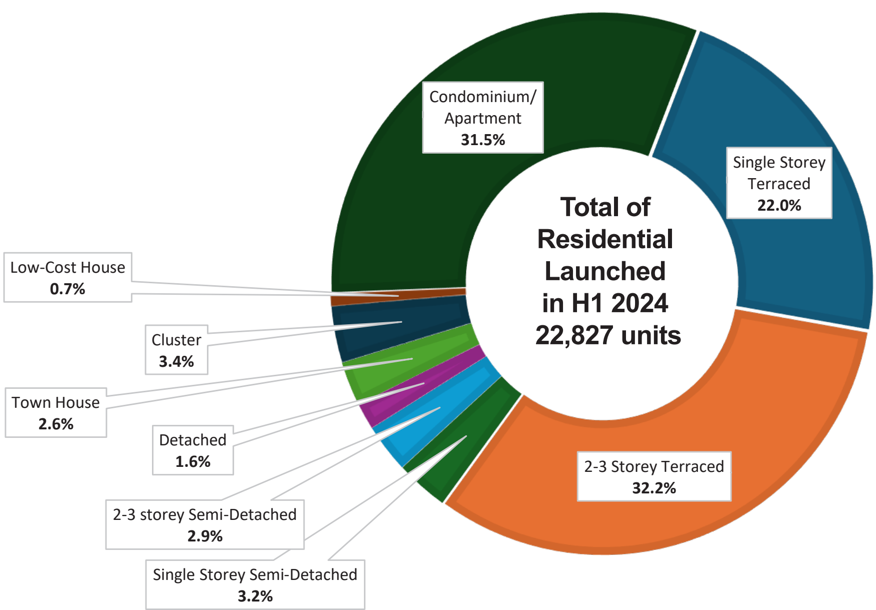
Chart 2: Newly Launched Residential – Volume by State 2023



Jenis kediaman rumah teres 2 hingga 3 tingkat mendominasi bilangan pelancaran baru bagi separuh pertama 2024 sebanyak 32.2%. Manakala jenis kondominium/ pangsapuri dan rumah teres satu tingkat masing-masing sebanyak 31.5% dan 22.0%.

Property type of 2 to 3 storey terrace house dominates the number of new launches for the first half of 2024, accounting for 32.2% of the total new launches. Meanwhile, condominium/ apartment and single storey terraces house make up 31.5% and 22.0% respectively.

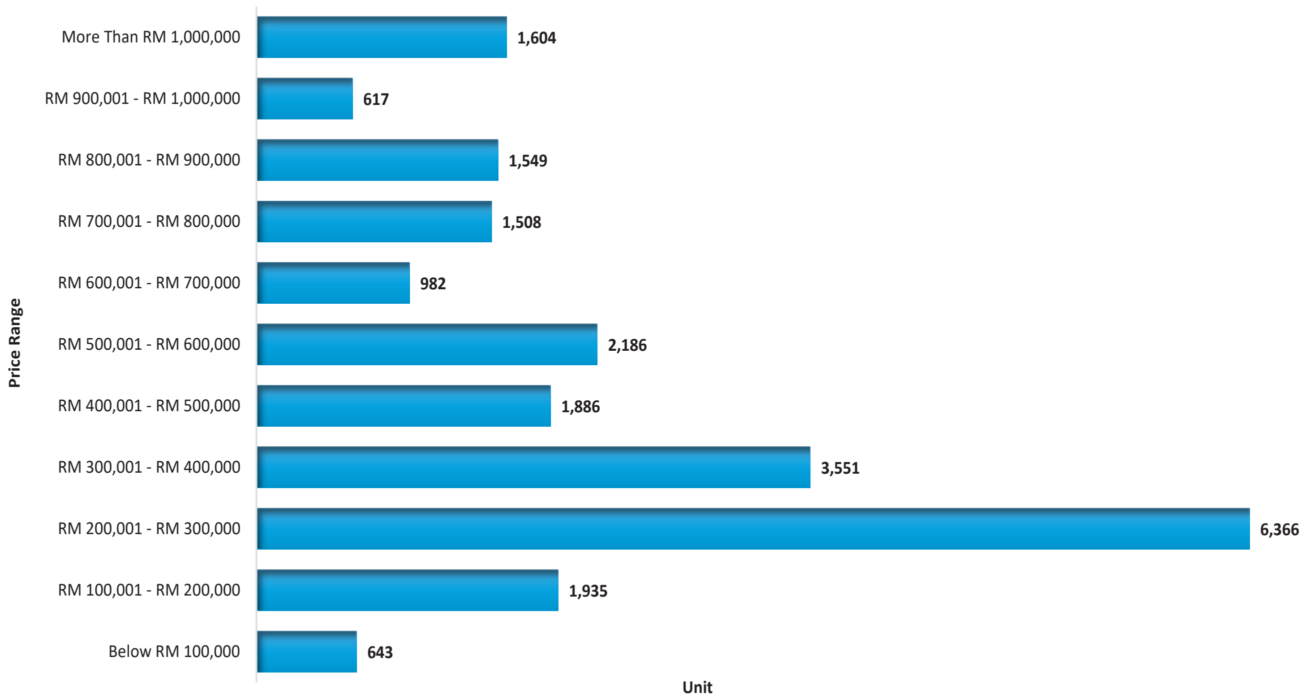
Chart 3: New Residential Units Launched by Property Type



Kediaman berharga RM300,000 dan ke bawah menerajui syer pasaran baru dilancar sebanyak 39.2% (8,944 unit), diikuti 30.0% kediaman berharga RM500,001 hingga RM1,000,000 (6,842 unit) dan 23.8% berharga RM300,001 hingga RM500,000 (5,437 unit).

Residential properties priced RM300,000 and below dominates the newly launched market share at 39.2% (8,944 units), followed by 30.0% of those priced between RM500,001 and RM1,000,000 (6,842 units), and 23.8% for properties priced between RM300,001 and RM500,000 (5,437 units).

Chart 4: Newly Launched Residential by Price Range H1 2024



1.2 Kediaman Siap Dibina Tidak Terjual

Sejumlah 22,642 unit siap dibina tidak terjual bernilai RM14.2 bilion direkodkan pada separuh pertama 2024, menurun 13.9% dari segi bilangan dan 22.2% dari segi nilai berbanding tempoh yang sama 2023.

1.2 Residential Property Overhang

A total of 22,642 unsold units, valued at RM14.2 billion, were recorded in the first half of 2024, representing a decrease of 13.9% in volume and 22.2% in value compared to the same period in 2023.

Chart 5: Volume of Residential Overhang H1 2021 – H1 2024

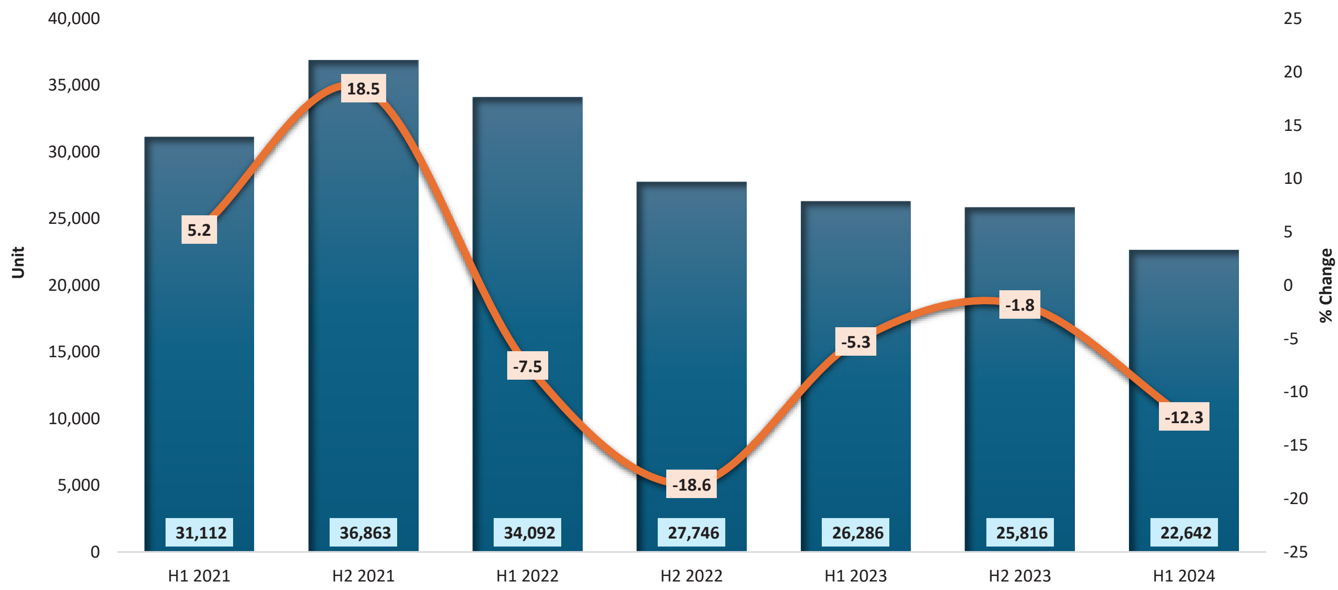
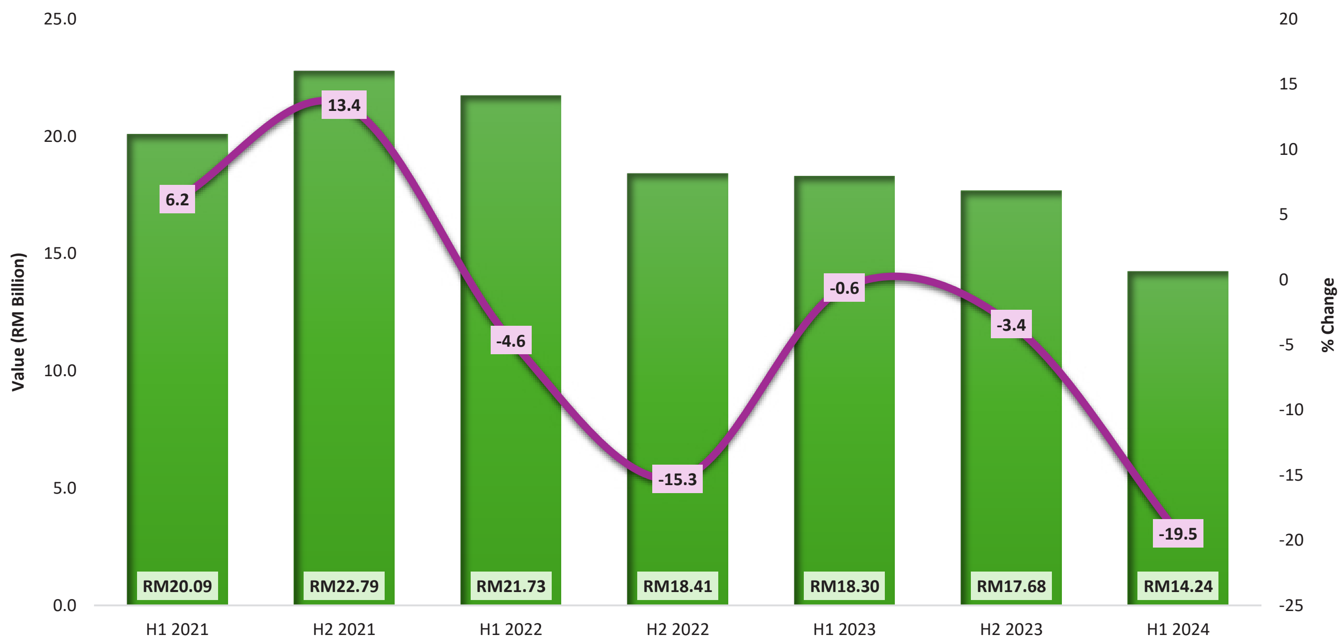


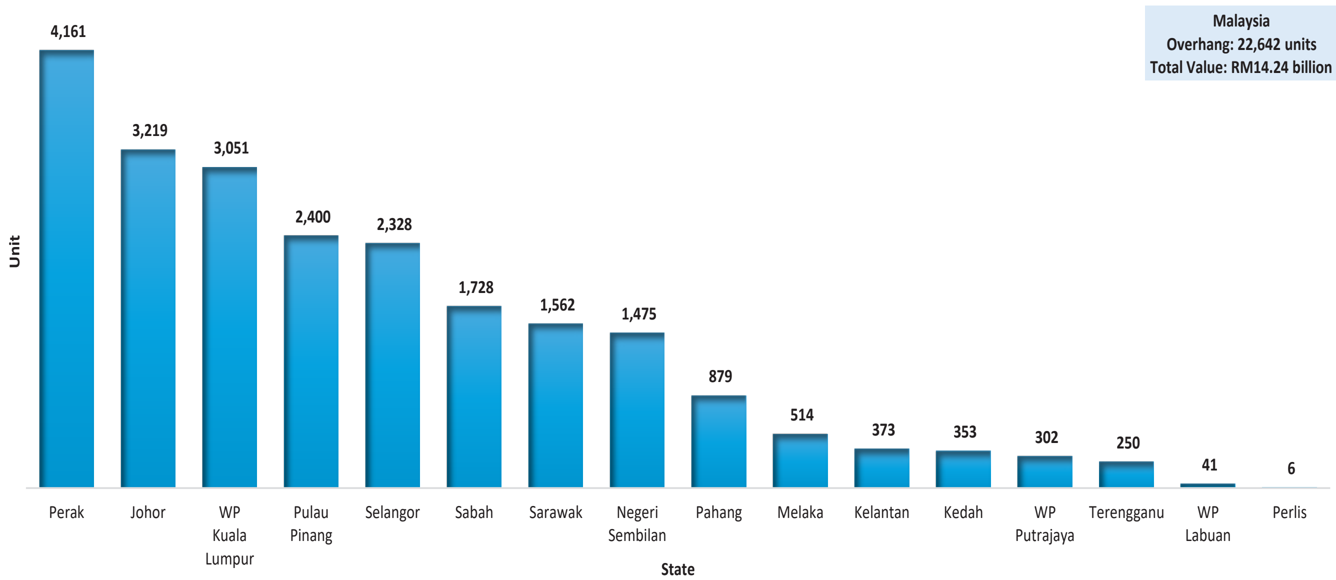
Chart 6: Value of Residential Overhang H1 2021 – H1 2024



Perak merekodkan siap dibina tidak terjual tertinggi, merangkumi 4,161 unit (18.4%). Johor berada di kedudukan kedua dengan 3,219 unit (14.2%), diikuti oleh WP Kuala Lumpur dengan 3,05 unit (13.5%).

Perak recorded the highest overhang in the accounting for 4,161 units (18.4%). Johor ranked second with 3,219 units (14.2%) followed by WP Kuala Lumpur with 3,051 units (13.5%).

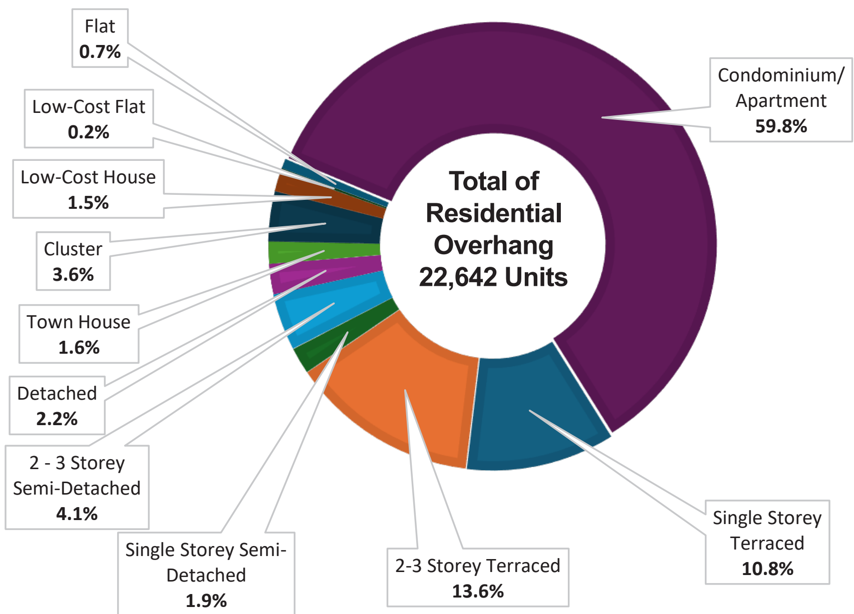
Chart 7: Residential Overhang by State H1 2024



Kondominium/ apartment mendominasi unit siap dibina tidak terjual sebanyak 59.8% (13,535 unit). Kediaman jenis teres mewakili 24.4% (5,524 unit), gabungan rumah berkembar dan sesebuah mewakili 8.2% (1,867 unit) dan selebihnya 7.6% merupakan lain-lain jenis kediaman. Unit kediaman siap tidak terjual mengikut jenis ditunjukkan di **Carta 8**.

*Condominiums/ apartments account for a significant 59.8% (13,535 units) of overhang. Terrace houses represent 24.4% (5,524 units), while both semi-detached and detached houses make up 8.2% (1,867 units). The remaining 7.6% consists of other types of houses. The distribution of unsold residential units by type is illustrated in **Chart 8**.*

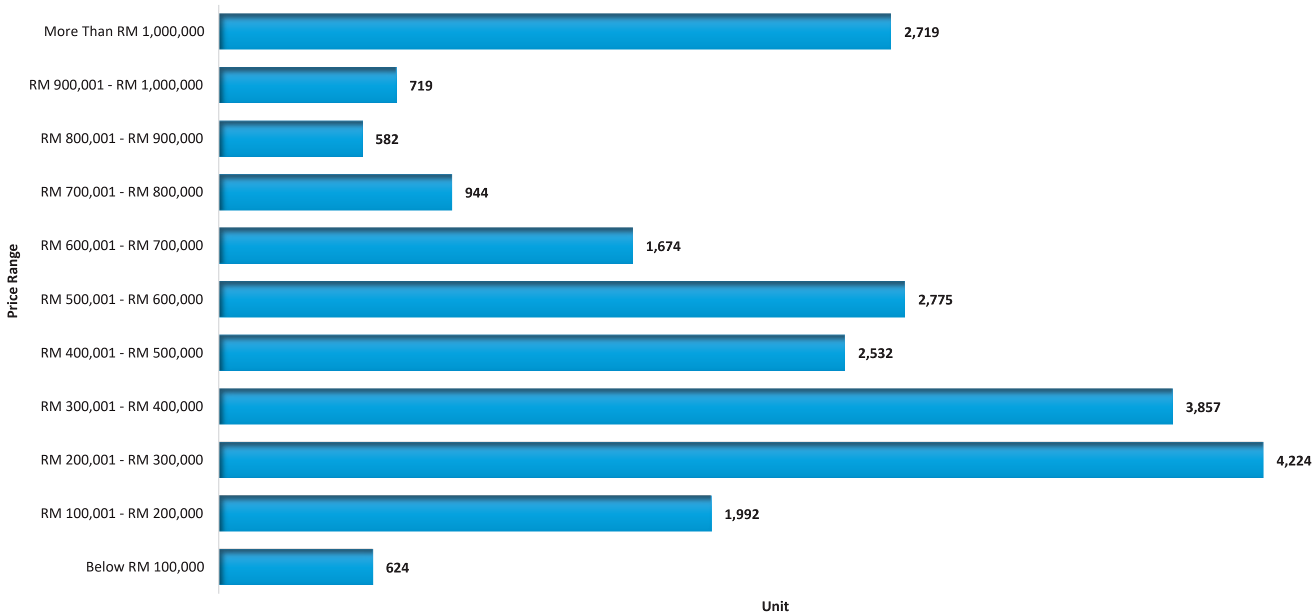
Chart 8: Residential Overhang by Type H1 2024



Unit siap dibina tidak terjual di segmen mewah pada harga melebihi RM500,000 mendominasi syer pasaran terbesar sebanyak 41.6% (9,413 unit). Manakala selebihnya adalah kediaman yang berharga di antara RM300,000 dan ke bawah serta RM300,001 hingga RM500,000 masing-masing 30.2% (6,840 unit) dan 28.2% (6,389 unit).

Overhang units in the high-end segment priced above RM500,000 took up the largest market share at 41.6% (9,413 units). In contrast, the remaining properties are priced at RM300,000 and below, as well as between RM300,001 and RM500,000, representing 30.2% (6,840 units) and 28.2% (6,389 units) respectively.

Chart 9: Residential Overhang by Price Range H1 2024



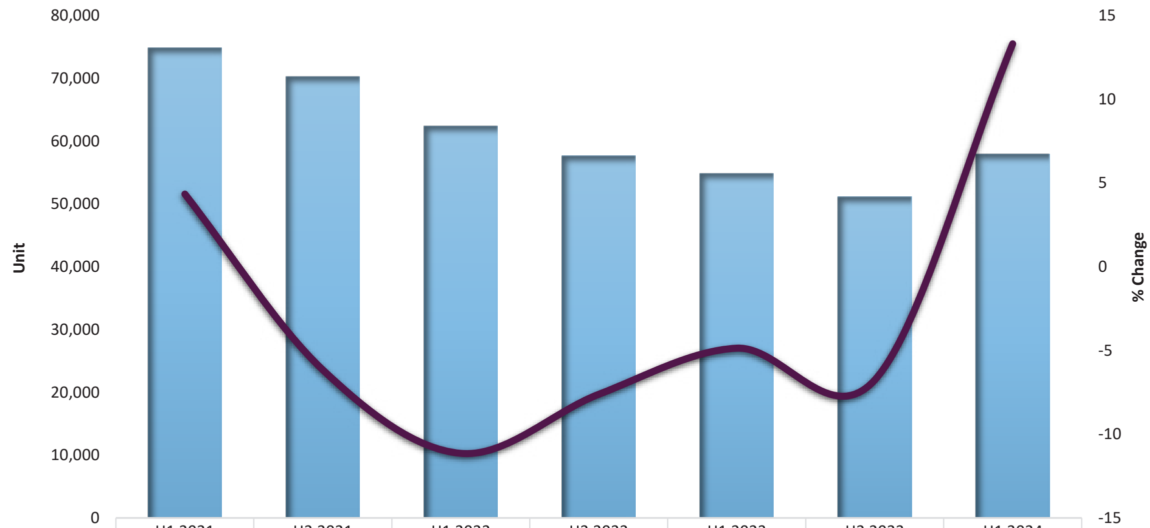
1.3 Dalam Pembinaan Belum Terjual

Unit kediaman dalam pembinaan belum terjual menunjukkan peningkatan sebanyak 5.6% kepada 57,934 unit berbanding separuh pertama 2023.

1.3 Unsold Under Construction

The number of residential units under construction has increased by 5.6%, reaching a total of 57,934 units compared to the first half of 2023.

Chart 10: Trend of Unsold Under Construction Residential H1 2021 – H1 2024



	H1 2021	H2 2021	H1 2022	H2 2022	H1 2023	H2 2023	H1 2024
Residential (Unit)	74,844	70,231	62,404	57,649	54,844	51,132	57,934
Residential (% Change)	4.3	-6.2	-11.1	-7.6	-4.9	-6.8	13.3

Perak mendahului segmen dalam pembinaan belum terjual dengan syer pasaran sebanyak 18.9% diikuti oleh Selangor 12.3% dan Johor 10.9%. Kondominium/ pangsapuri mendominasi unit tidak terjual dengan 39.9% (23,089 unit) daripada jumlah keseluruhan.

Perak leads the segment of unsold under construction with a market share of 18.9%, followed by Selangor at 12.3% and Johor (10.9%). Condominiums/ apartments account for the majority of unsold units, representing 39.9% (23,089 units) of the total.

Chart 11: Unsold Under Construction Residential by State H1 2024

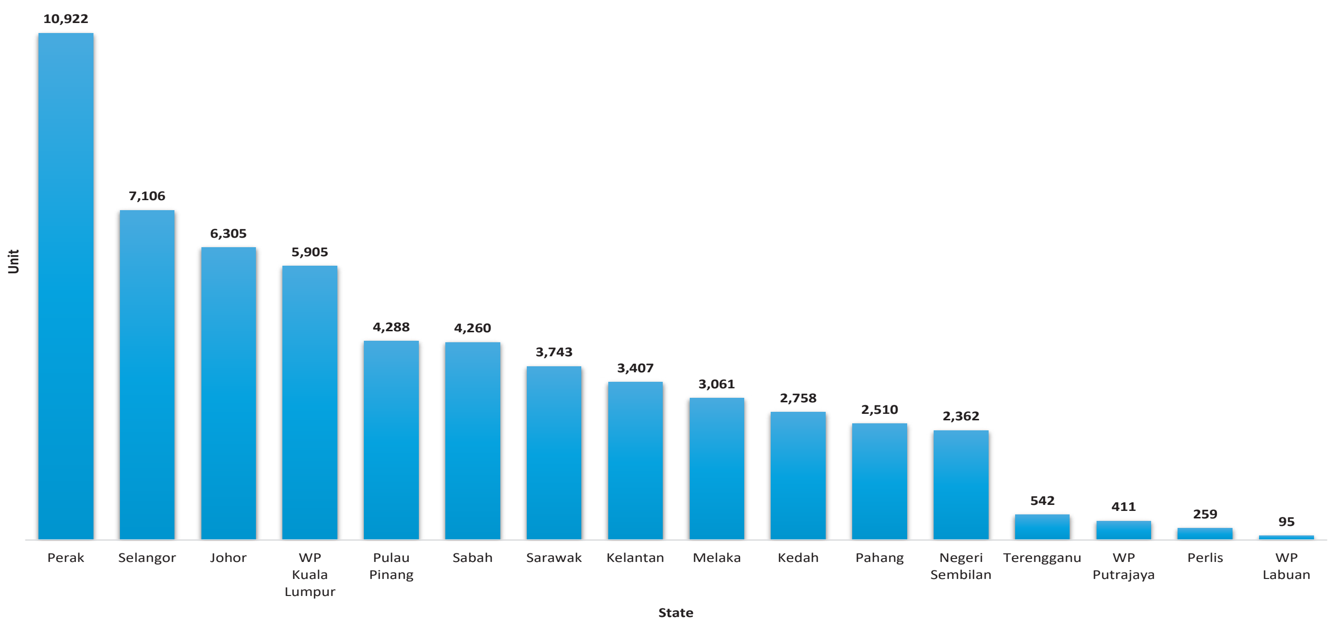
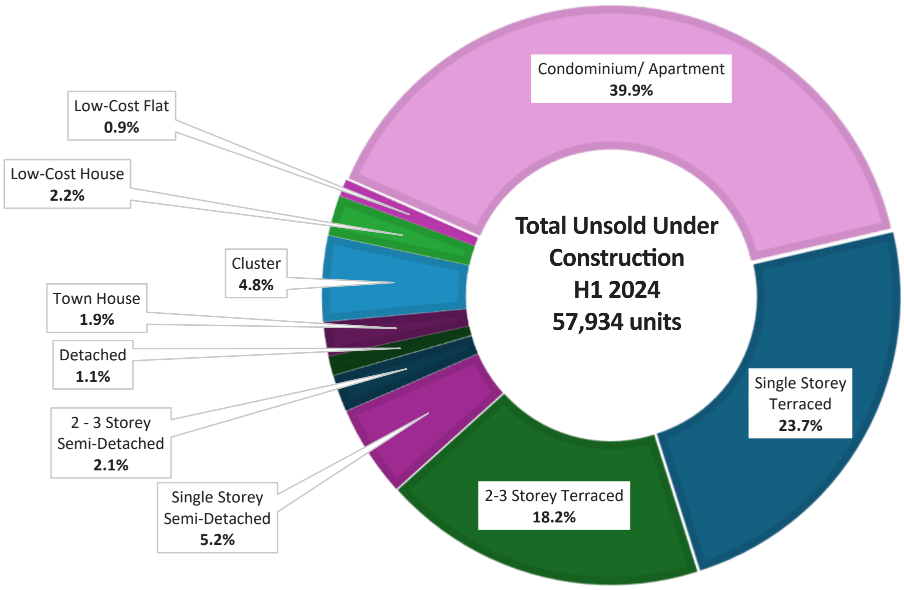


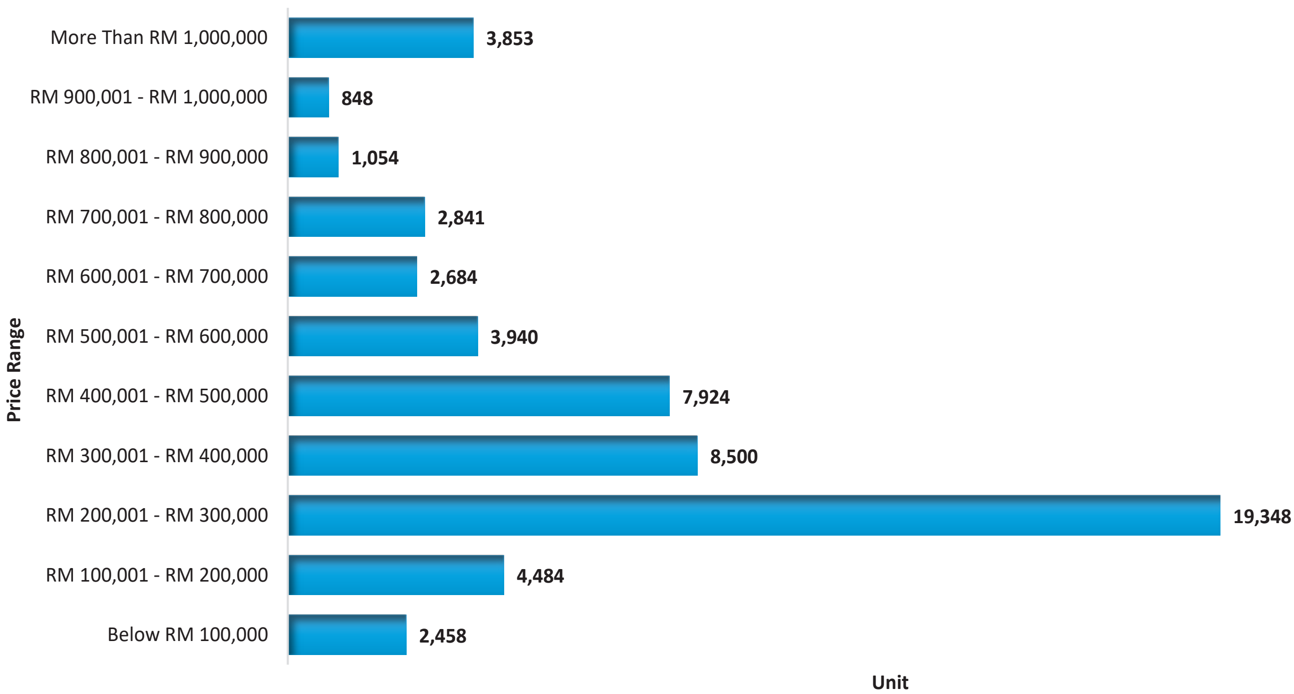
Chart 12: Residential Unsold Under Construction by Type H1 2024



Unit dalam pembinaan belum terjual dalam segmen mampu milik berharga RM300,000 dan ke bawah menerajui jumlah keseluruhan, merangkumi 45.4% (26,290 unit), diikuti oleh 28.4% (16,424 unit) berharga RM300,001 hingga RM500,000 dan 26.3% (15,220 unit) berharga melebihi RM500,000.

The units unsold under construction in the affordable segment priced at RM300,000 and below lead the overall total, accounting for 45.4% (26,290 units). This is followed by 28.4% (16,424 units) priced between RM300,001 and RM500,000, and 26.3% (15,220 units) priced above RM500,000.

Chart 13: Unsold Under Construction by Price Range H1 2024



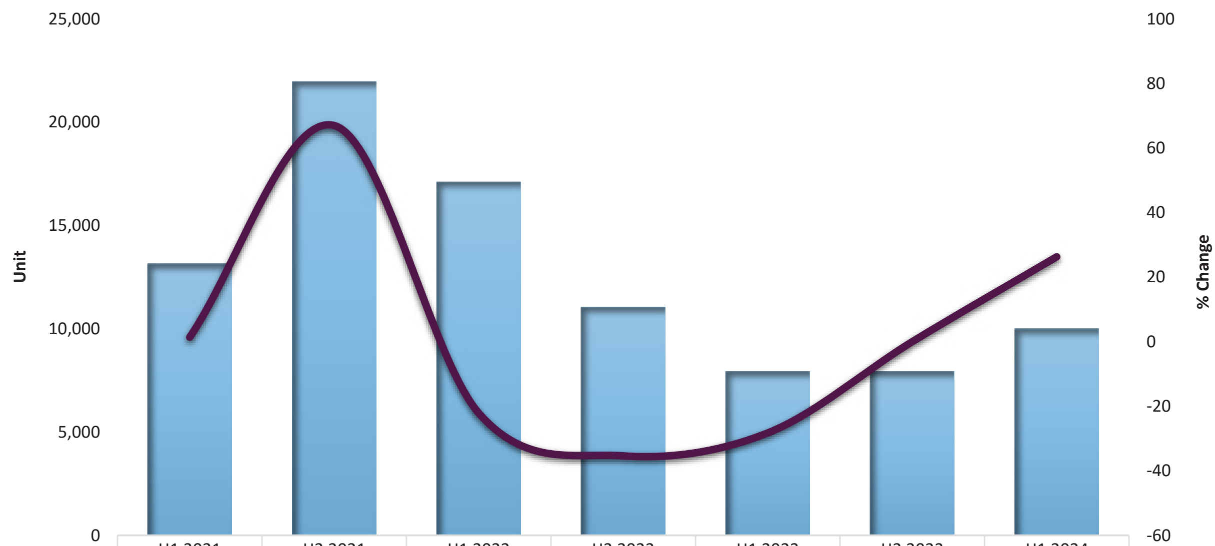
1.4 Belum Dibina Belum Terjual

Unit kediaman belum dibina belum terjual menunjukkan peningkatan sebanyak 26.3% (10,010 unit) berbanding separuh pertama 2023.

1.4 Unsold Not Constructed

The number of unsold not constructed residential unit has increased by 26.3% (10,010 units) compared to the first half of 2023.

Chart 14: Trend of Unsold Not Constructed Residential H1 2021 – H1 2024



	H1 2021	H2 2021	H1 2022	H2 2022	H1 2023	H2 2023	H1 2024
Residential (Unit)	13,153	21,960	17,103	11,053	7,927	7,926	10,010
Residential (% Change)	1.4	67.0	-22.1	-35.4	-28.3	0.0	26.3

WP Kuala Lumpur merekodkan syer pasaran kediaman belum dibina belum terjual tertinggi sebanyak 39.3%, diikuti Pulau Pinang (14.8%). Unit kondominium/ pangsapuri menyumbang kepada majoriti dalam segmen ini sebanyak 61.0% (6,105 unit). Unit kediaman belum dibina belum terjual mengikut jenis ditunjukkan di **Carta 16**.

WP Kuala Lumpur recorded the highest market share for residential unsold not constructed at 39.3%, followed by Pulau Pinang (14.8%). Condominium/ apartment contributed the majority in this segment at 61.0% (6,105 units). The residential unsold not constructed categorized by type as illustrated in ***Chart 16****.*

Chart 15: Unsold Not Constructed by State H1 2024

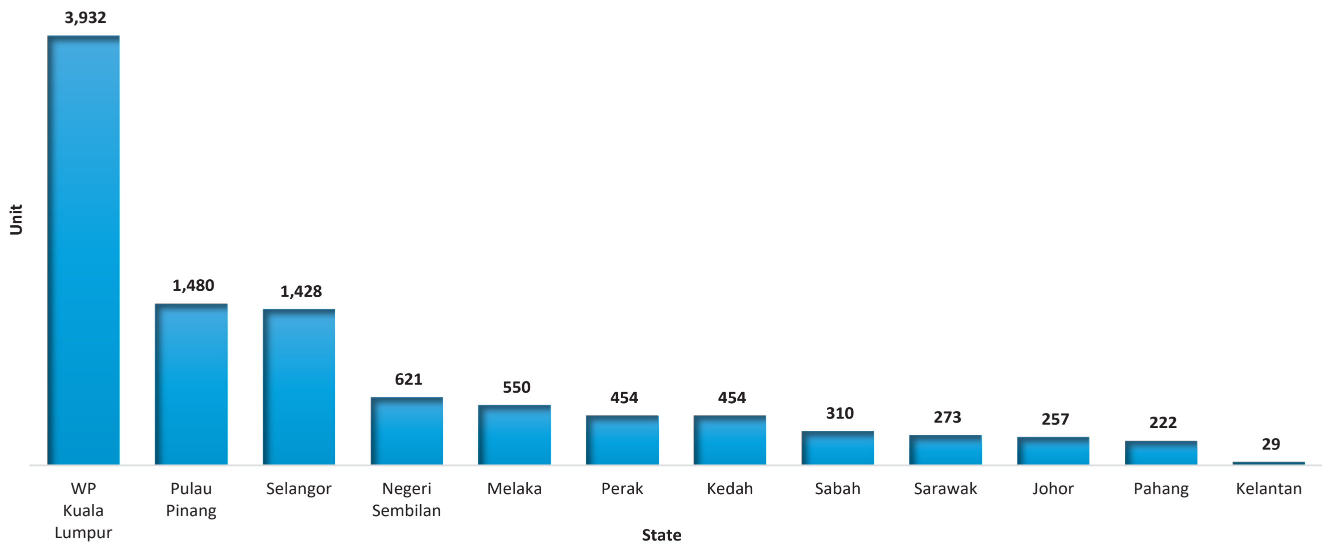
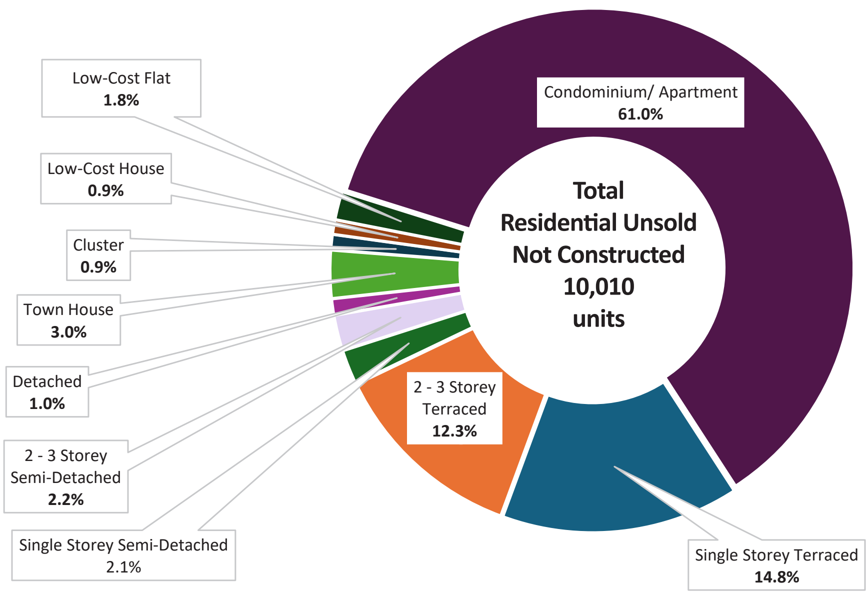


Chart 16: Residential Unsold Not Constructed by Type H1 2024



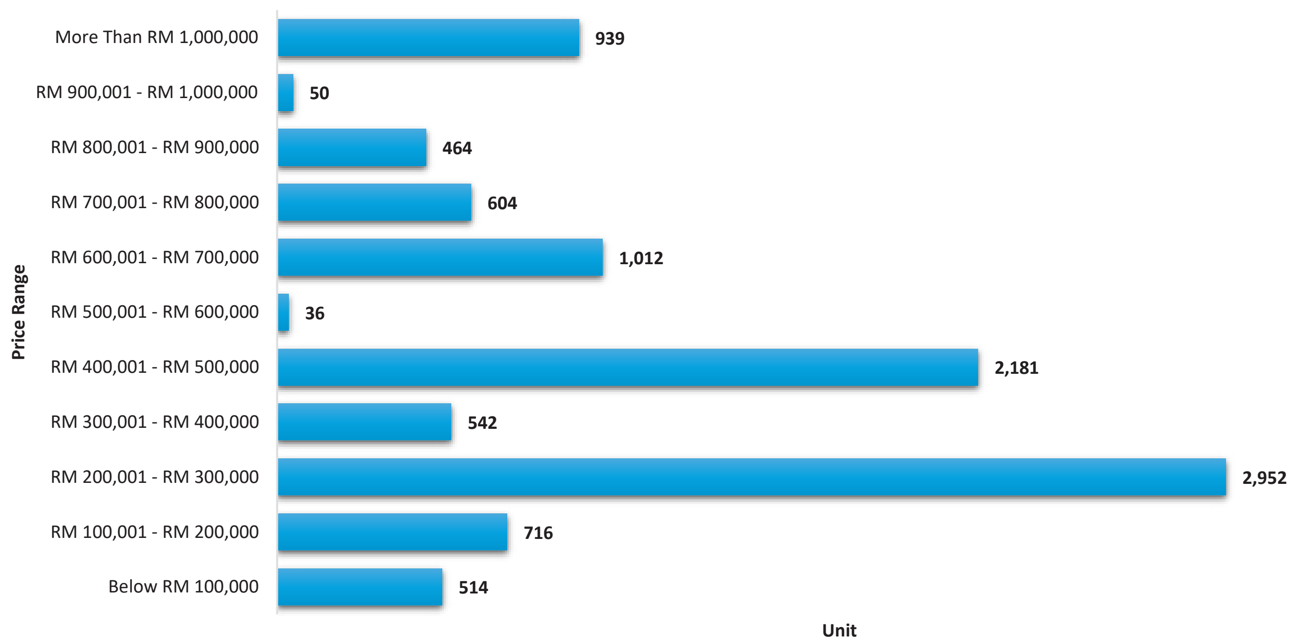
Unit belum dibina belum terjual dalam julat harga mampu milik di bawah RM300,000, merekodkan hampir separuh daripada jumlah keseluruhan (4,182 unit) diikuti kediaman berharga melebihi RM500,000 sebanyak 31.0% (3,105 unit).

Unit kediaman belum dibina belum terjual mengikut harga ditunjukkan di **Carta 17**.

The units unsold not constructed which fall within the affordable price range of below RM300,000, accounting for nearly half of the total number (4,182 units), followed by residential units priced above RM500,000, which represent 31.0% (3,105 units).

The residential unsold not constructed according to the prices indicated in **Chart 17**.

Chart 17: Unsold Not Constructed by Price Range H1 2024



2.0 HARTA TANAH KOMERSIAL

2.1 Harta Tanah Siap Dibina Tidak Terjual

Bilangan subsektor perdagangan bagi separuh pertama 2024 merekodkan 28,682 unit siap dibina tidak terjual bernilai RM23.58 bilion, berkurang 8.1% dari segi jumlah manakala 10.0% dari segi nilai berbanding separuh pertama 2023.

2.0 COMMERCIAL PROPERTY

2.1 Property Overhang

The number of overhang commercial subsector for the first half of 2024 is recorded at 28,682, with a total value of RM23.58 billion. This represents a decrease of 8.1% in volume and 10.0% in value compared to the first half of 2023.

Chart 18: Volume of Commercial Property Overhang H1 2021 - H1 2024

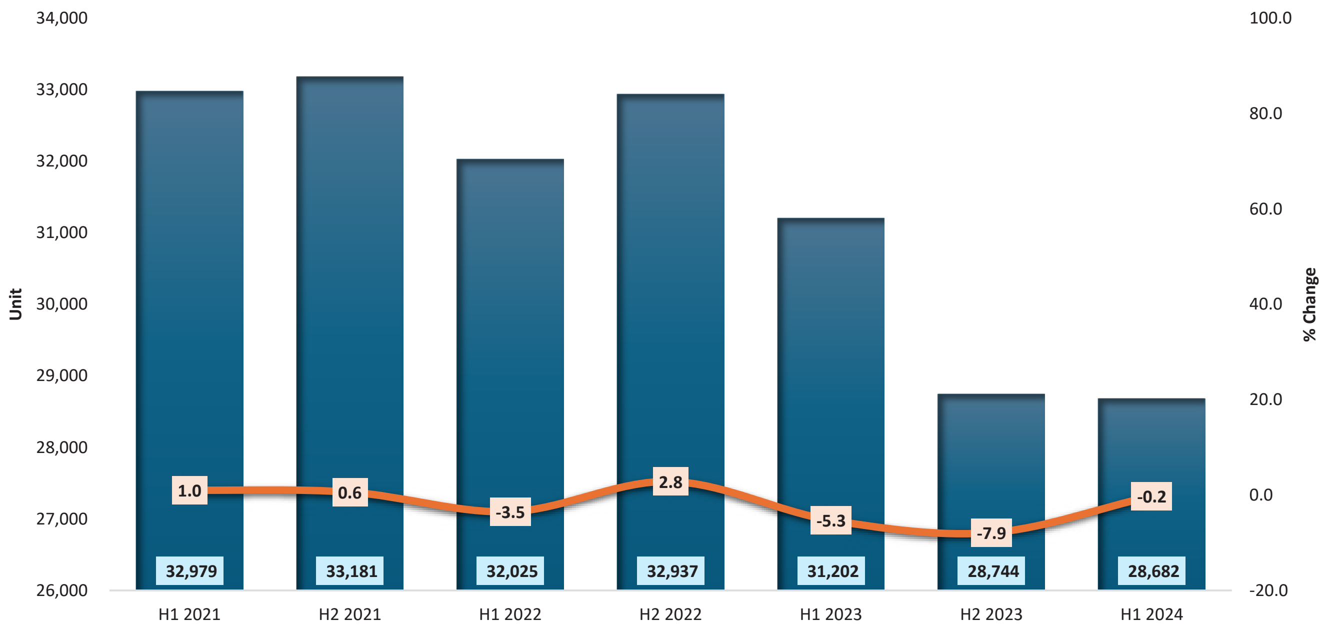
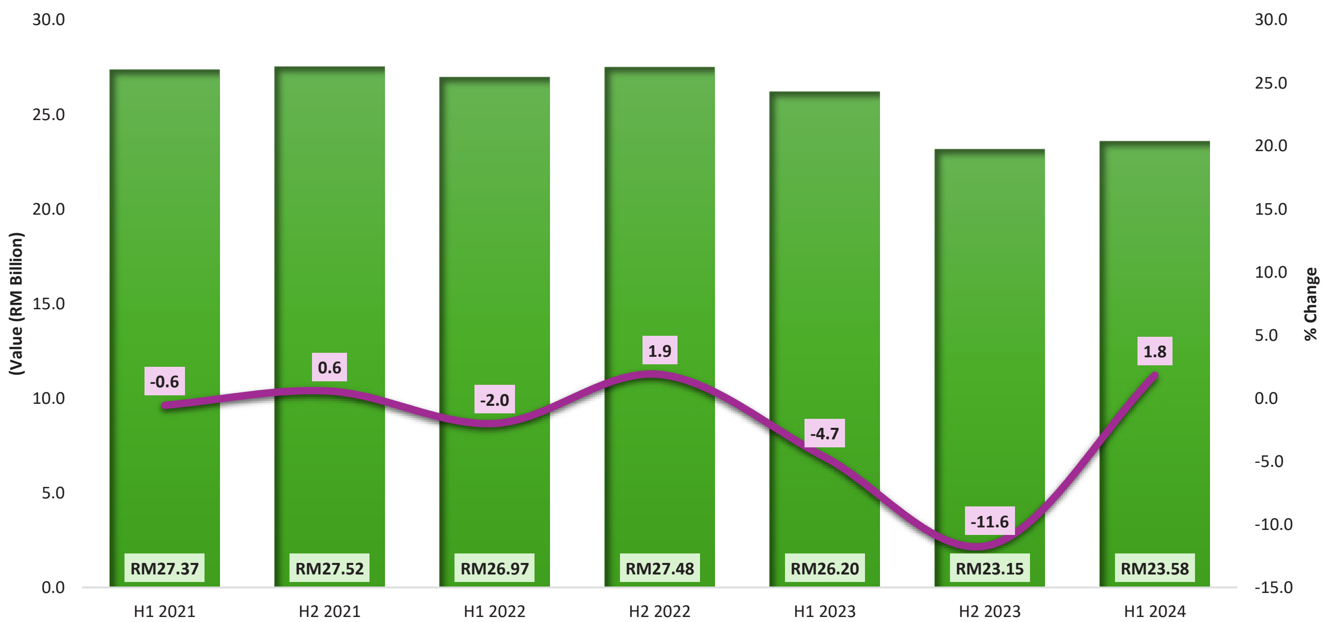


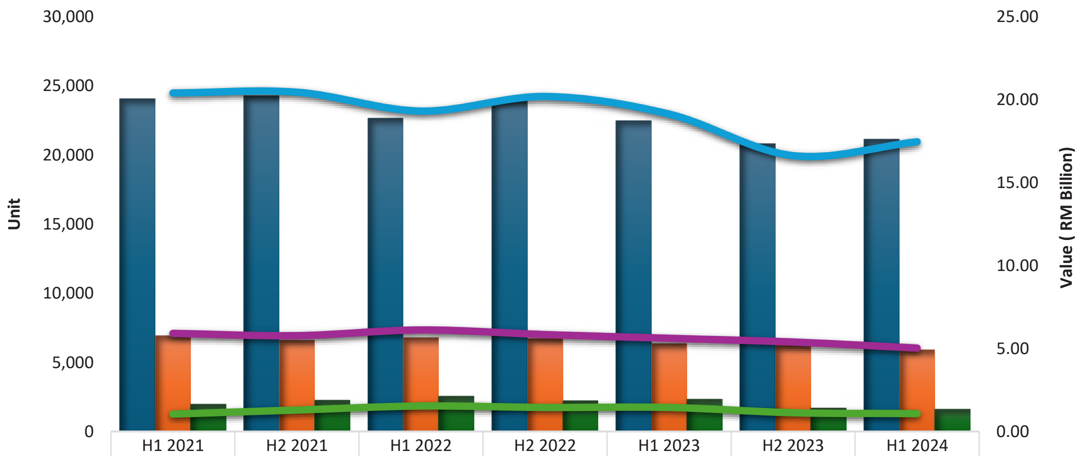
Chart 19: Value of Commercial Property Overhang H1 202 - H1 2024



Pangsapuri khidmat menyumbang bilangan unit perdagangan siap dibina tidak te rjual tertinggi sebanyak 21,158 unit (73.8%) bernilai RM17.47 bilion. Manakala kedai dan SOHO masing-masing sebanyak 5,901 unit (20.6%) dan 1,623 unit (5.7%).

Serviced apartments contributed the highest number of overhang commercial units at 21,158 units (73.8%) valued at RM17.47 billion. In contrast, the figures for retail shops and SOHO stand at 5,901 units (20.6%) and 1,623 units (5.7%), respectively.

Chart 20 Volume and Value of Commercial Property Overhang H1 2021 – H1 2024



	H1 2021	H2 2021	H1 2022	H2 2022	H1 2023	H2 2023	H1 2024
Serviced Apartment (Unit)	24,064	24,295	22,674	23,978	22,497	20,825	21,158
Shops (Unit)	6,937	6,612	6,796	6,720	6,362	6,233	5,901
SOHO (Unit)	1,978	2,274	2,555	2,239	2,343	1,686	1,623
Serviced Apartment Value (RM Billion)	20.41	20.45	19.32	20.19	19.13	16.63	17.47
Shops Value (RM Billion)	5.91	5.78	6.12	5.84	5.62	5.39	5.03
SOHO Value (RM Billion)	1.05	1.29	1.54	1.45	1.45	1.13	1.08

Johor mencatatkan syer pasaran terbesar harta tanah perdagangan siap dibina tidak terjual sebanyak 14,274 unit (49.8%), diikuti oleh WP Kuala Lumpur 5,217 unit (18.2%) dan Selangor 2,945 unit (10.3%).

Johor hold the largest market share of commercial overhang properties with 14,274 units (49.8%), followed by WP Kuala Lumpur with 5,217 units (18.2%) and Selangor 2,945 unit (10.3%).

Chart 21: Commercial Property Overhang by State H1 2024

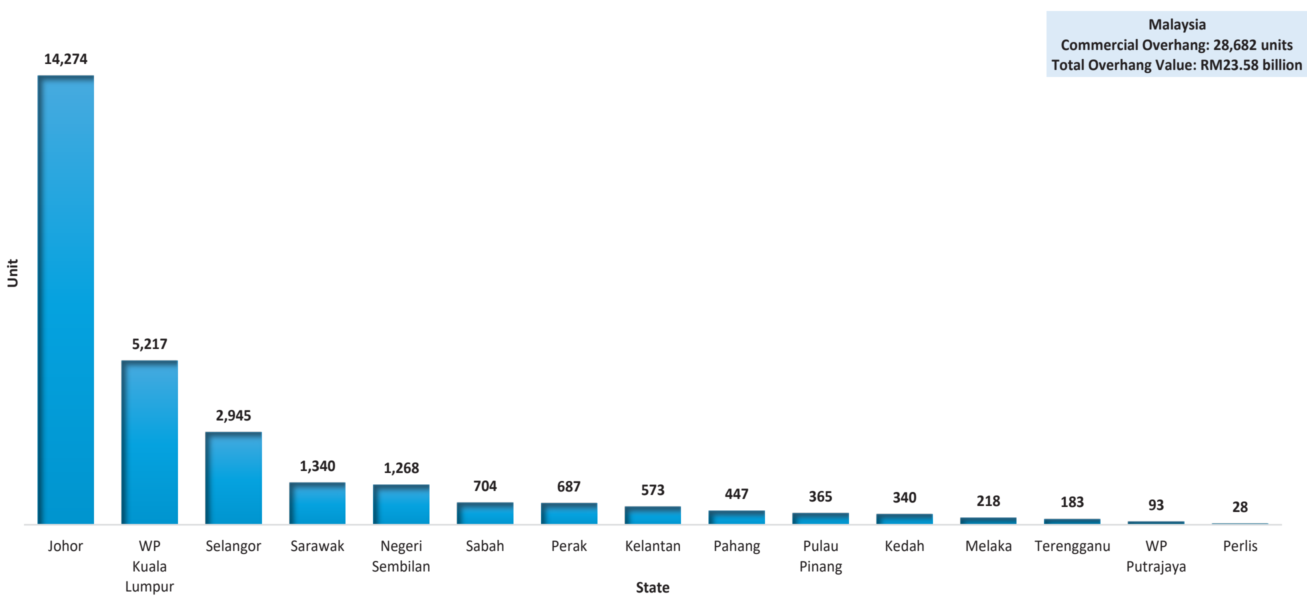
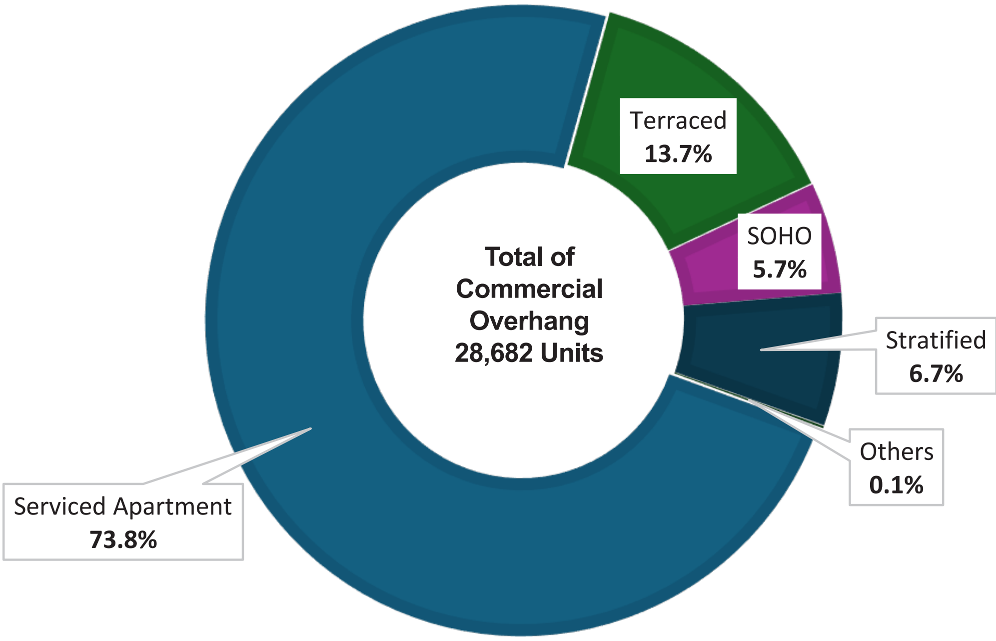


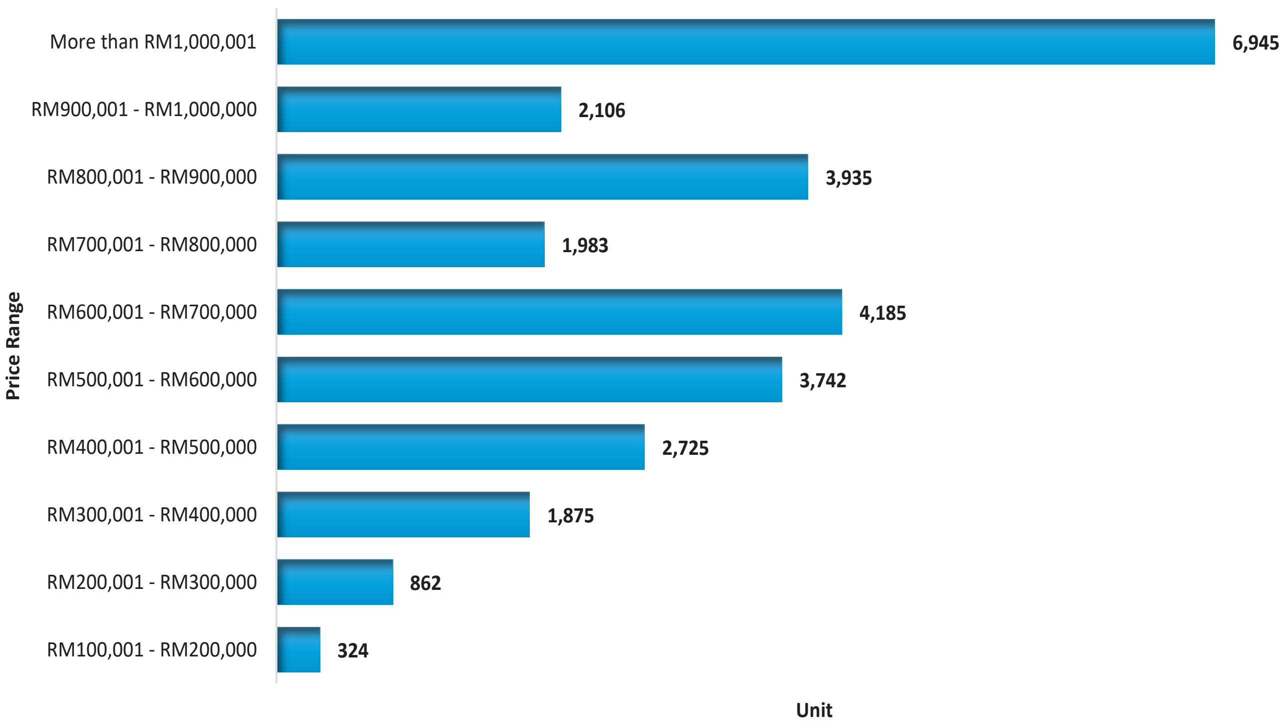
Chart 22: Commercial Overhang by Type H1 2024



Perdagangan siap dibina tidak terjual berharga melebihi RM500,000 memegang jumlah majoriti paling tinggi sebanyak 79.8%, diikuti oleh unit berharga di antara RM300,001 hingga RM500,000 sebanyak 16.0%.

Commercial overhang properties priced above RM500,000 account the highest majority at 79.8%, followed by units priced between RM300,001 and RM500,000, which represent 16.0%.

Chart 23: Commercial Property Overhang by Price Range H1 2024



2.1.1 Kedai

Pada separuh pertama 2024, kedai siap dibina tidak terjual merekodkan 5,901 unit bernilai RM5.03 bilion, menurun sebanyak 7.3% dari segi bilangan dan 10.5% dari segi nilai berbanding separuh tahun pertama 2023.

2.1.1 Shop

In the first half of 2024, overhang shop recorded 5,901 units worth RM5.03 billion, marking a decrease of 7.3% in volume and 10.52% in value compared to the first half 2023.

Chart 24: Volume of Shop Overhang H1 2021 - H1 2024

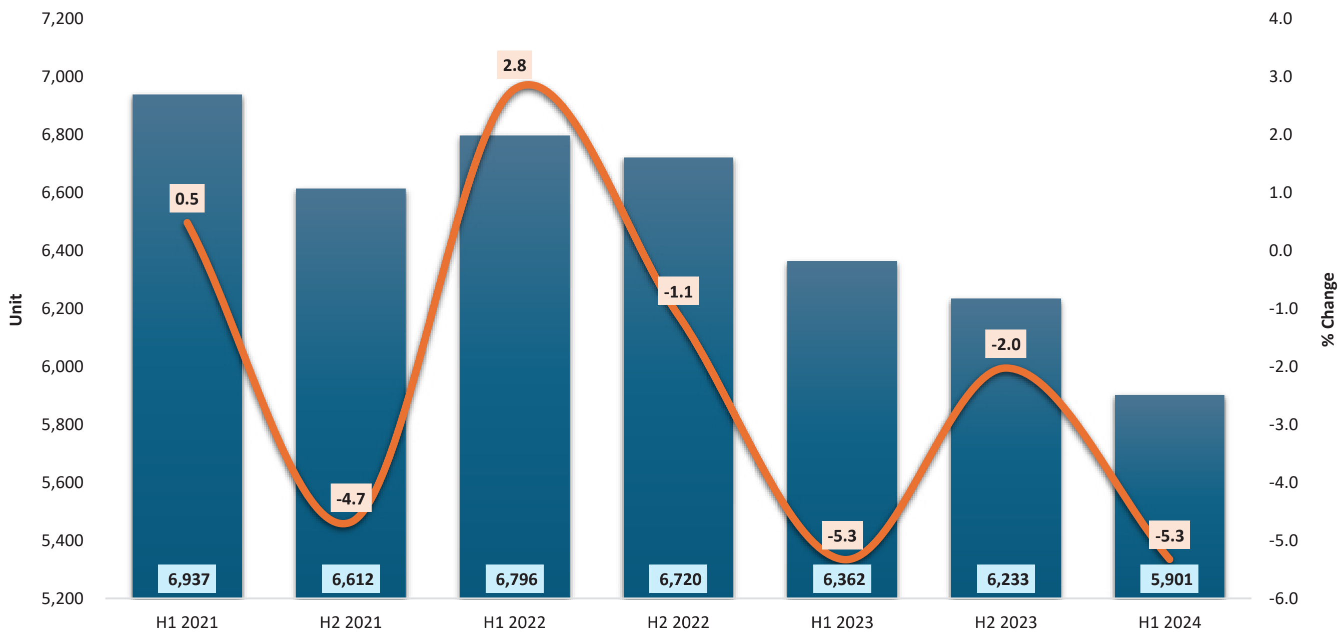
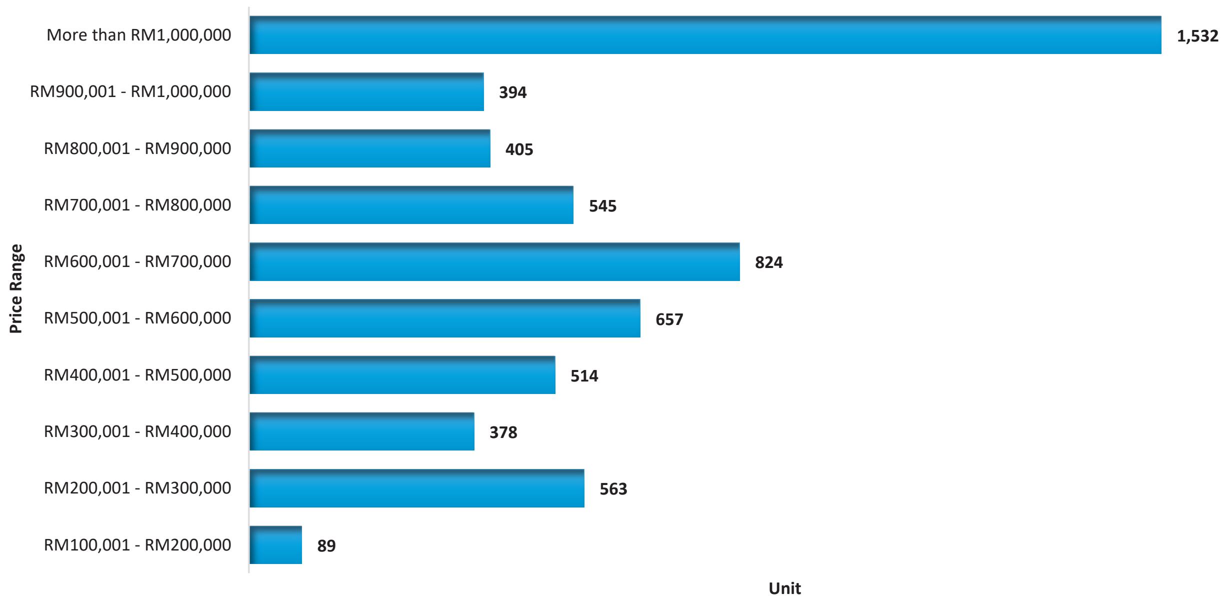


Chart 25: Value of Shop Overhang H1 2021 - H1 2024

Kedai siap dibina tidak terjual berharga melebihi RM500,000 memegang jumlah majoriti paling tinggi sebanyak 73.8%, diikuti oleh unit berharga di antara RM300,001 hingga RM500,000 sebanyak 15.1%.

Overhang shop priced above RM500,000 hold the highest majority at 73.8%, followed by units priced between RM300,001 and RM500,000 at 15.1%.

Chart 26: Shop Overhang by Price Range H1 2024



2.1.2 Pangsapuri Khidmat

Sejumlah 21,158 unit siap dibina tidak terjual bagi pangsapuri khidmat direkodkan bernilai RM17.47 bilion, menunjukkan penurunan sebanyak 6.0% dari segi bilangan dan 8.7% dari segi nilai pada separuh pertama 2024 berbanding separuh tahun sebelumnya.

2.1.2 Serviced Apartment

A total of 21,158 serviced apartments overhang has been recorded, amounting to RM17.47 billion. This reflects a decrease of 6.0% in terms of quantity and 8.7% in value during the first half of 2024 compared to the same period in the previous year.

Chart 27: Volume of Serviced Apartment Overhang H1 2021 – H1 2024

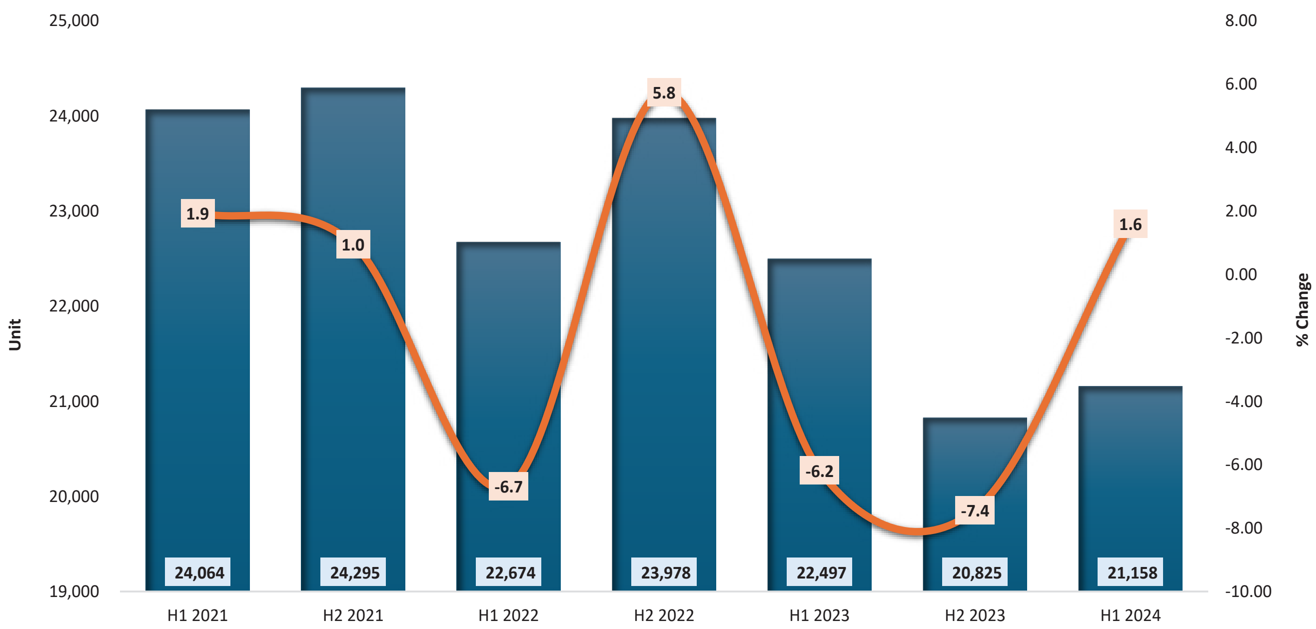
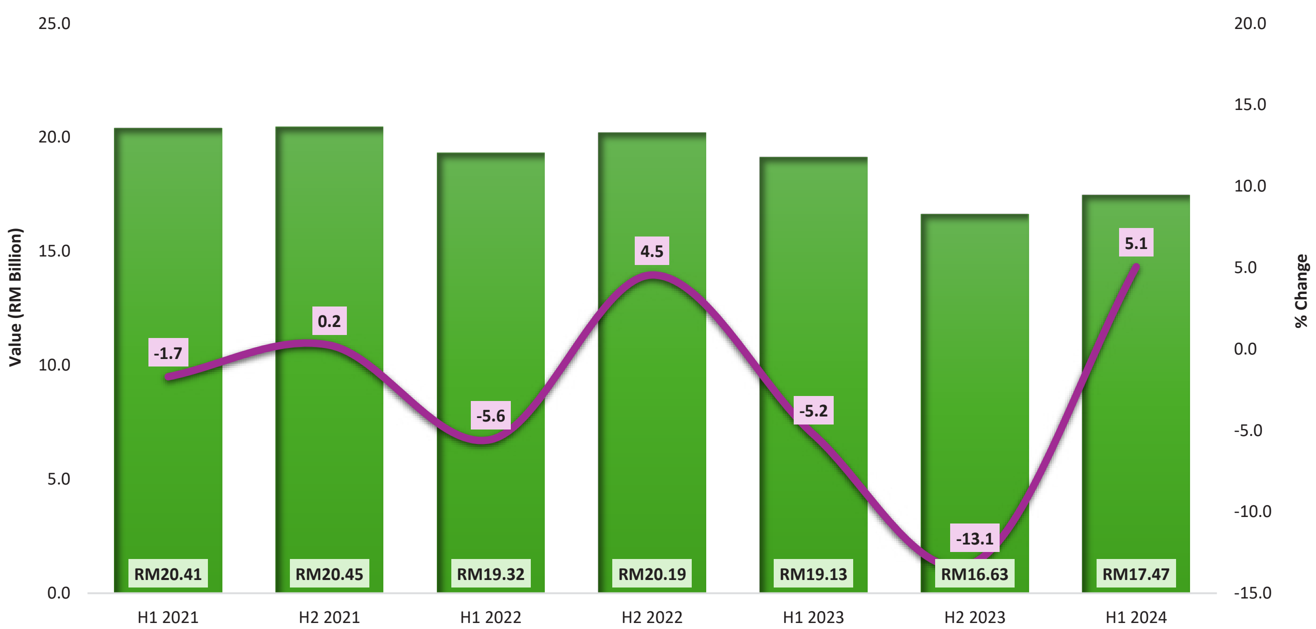


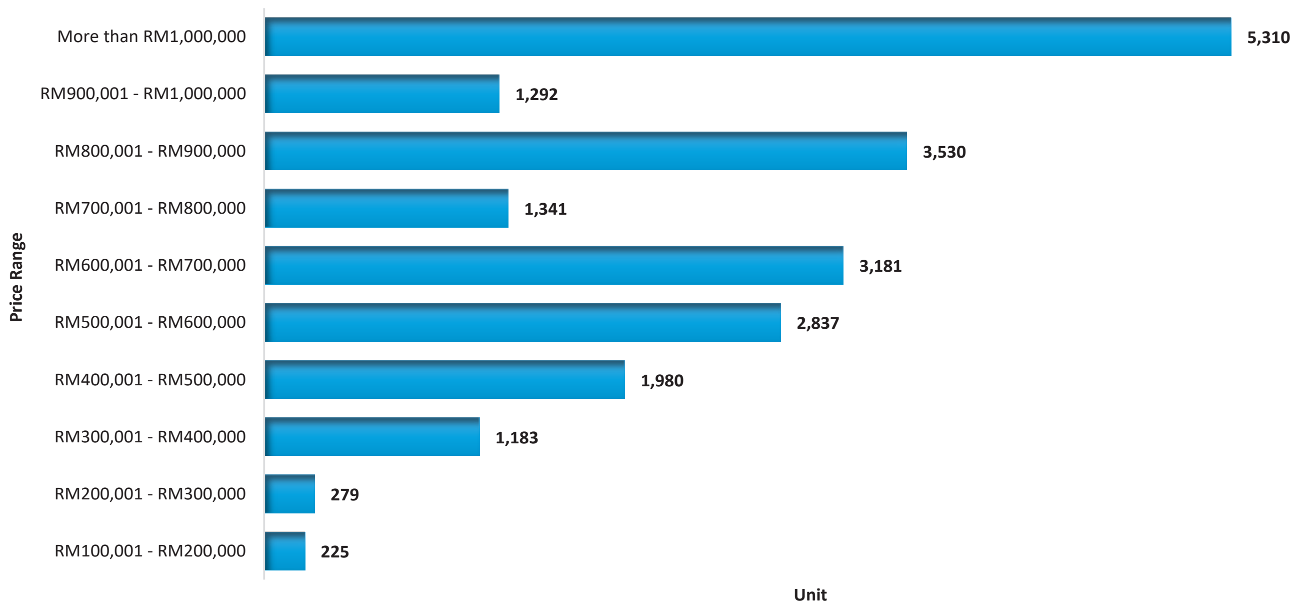
Chart 28: Value of Serviced Apartment Overhang H1 2021 – H1 2024



Harga melebihi RM500,000 dan ke atas menerajui jumlah majoriti paling tinggi pangsapuri khidmat siap dibina tidak terjual sebanyak 82.7%, diikuti oleh unit berharga di antara RM300,001 hingga RM500,000 sebanyak 14.9%.

Priced above RM500,000 lead with the highest majority overhang serviced apartment at 82.7%, followed by units priced between RM300,001 to RM500,000 at 14.9%.

Chart 29: Serviced Apartment Overhang by Price Range H1 2024



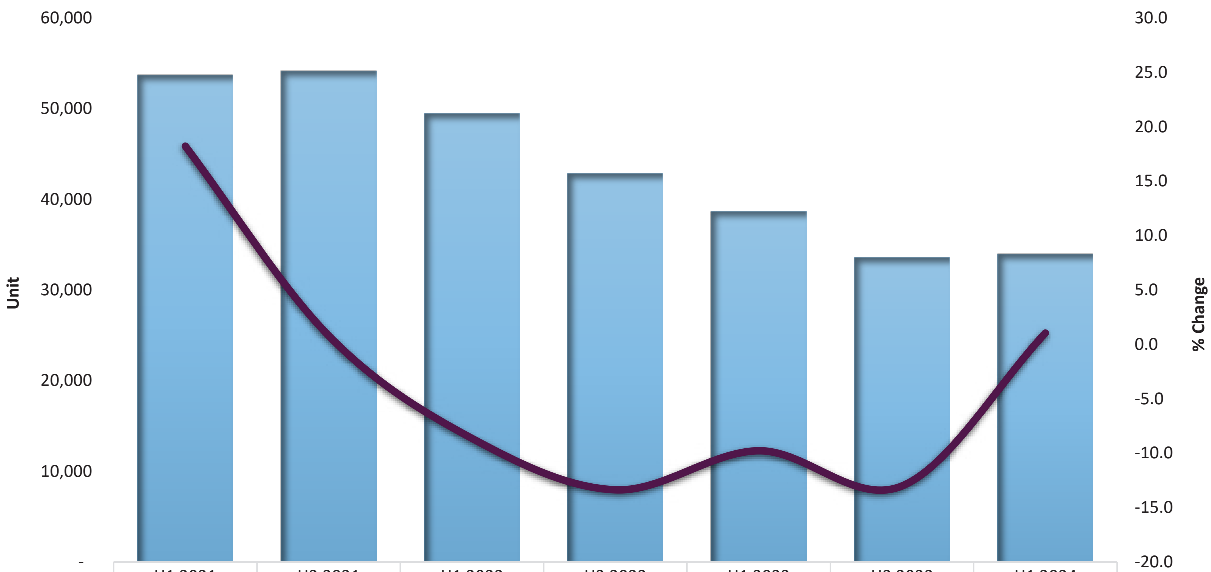
2.2 Dalam Pembinaan Belum Terjual

Trend harta tanah perdagangan dalam pembinaan belum terjual menunjukkan penurunan 12.2% kepada 33,944 unit pada separuh pertama 2024 berbanding tempoh yang sama tahun sebelumnya.

2.2 Unsold Under Construction

The trend of unsold commercial property under construction has shown a decline of 12.2%, resulting in a total of 33,944 units during the first half of 2024 compared to the same period in the previous year.

Chart 30: Trend of Unsold Under Construction Commercial Property

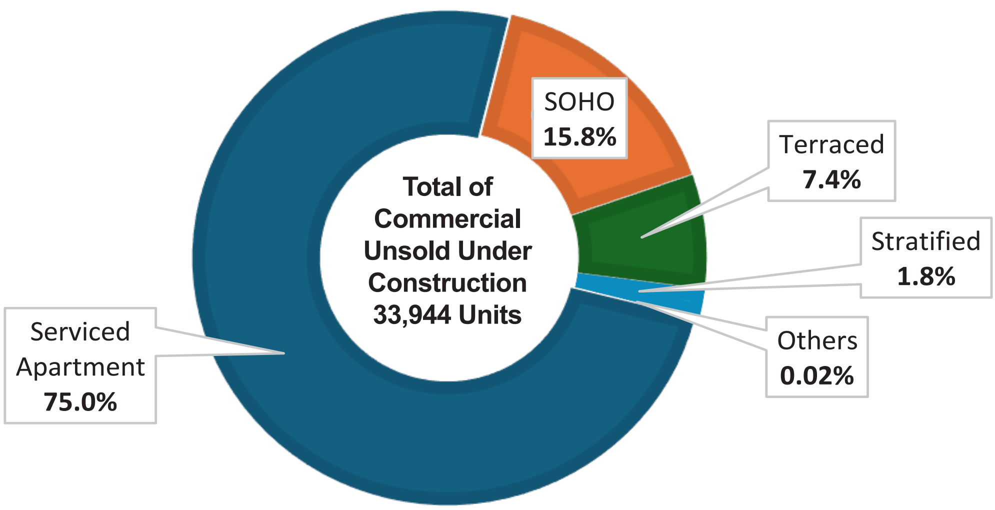


	H1 2021	H2 2021	H1 2022	H2 2022	H1 2023	H2 2023	H1 2024
Commercial (Unit)	53,730	54,154	49,467	42,848	38,652	33,617	33,964
Commercial (% change)	18.2	0.8	-8.7	-13.4	-9.8	-13.0	1.0

Pangsapuri khidmat memegang rekod tertinggi daripada jumlah keseluruhan harta tanah perdagangan dalam pembinaan tidak terjual iaitu sebanyak 25,446 unit (75.0%)

The service apartments hold the highest record of unsold under construction commercial, totalling 25,446 units, which accounts for 75.0% of the overall figure.

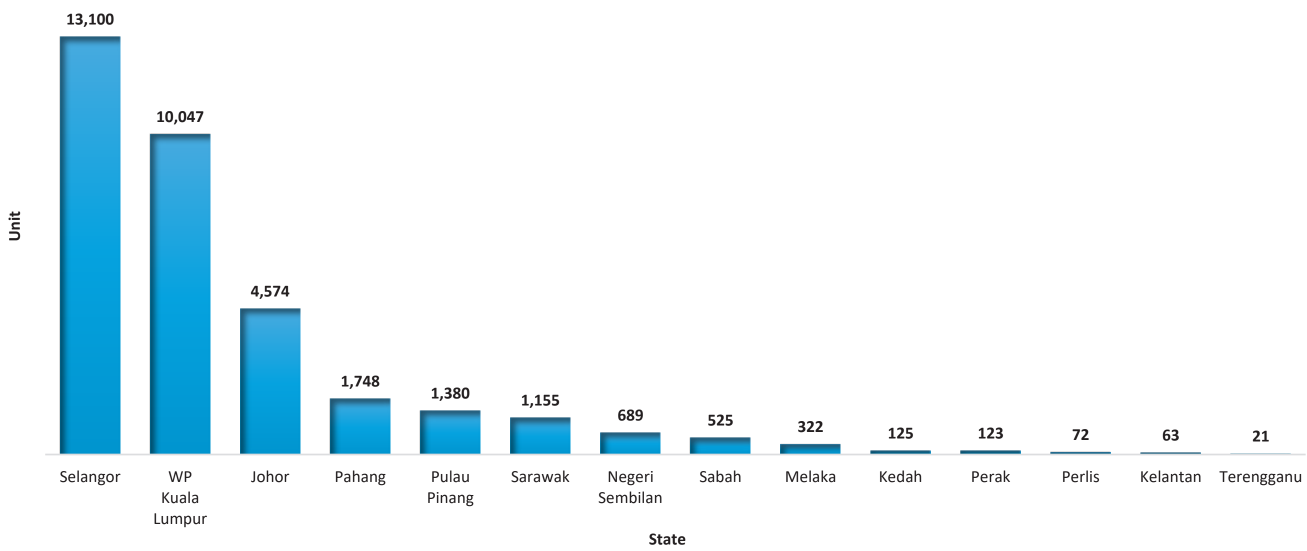
Chart 31: Commercial Unsold Under Construction by Type H1 2024



Selangor mendominasi dengan syer pasaran 38.6% (13,100 unit) diikuti oleh WP Kuala Lumpur (29.6% atau 10,047 unit) dan Johor (13.5% atau 4,574 unit).

Selangor holds a dominant market share of 38.6% (13,100 units), followed by WP Kuala Lumpur (29.6% or 10,047 units) and Johor (13.5% or 4,574 units).

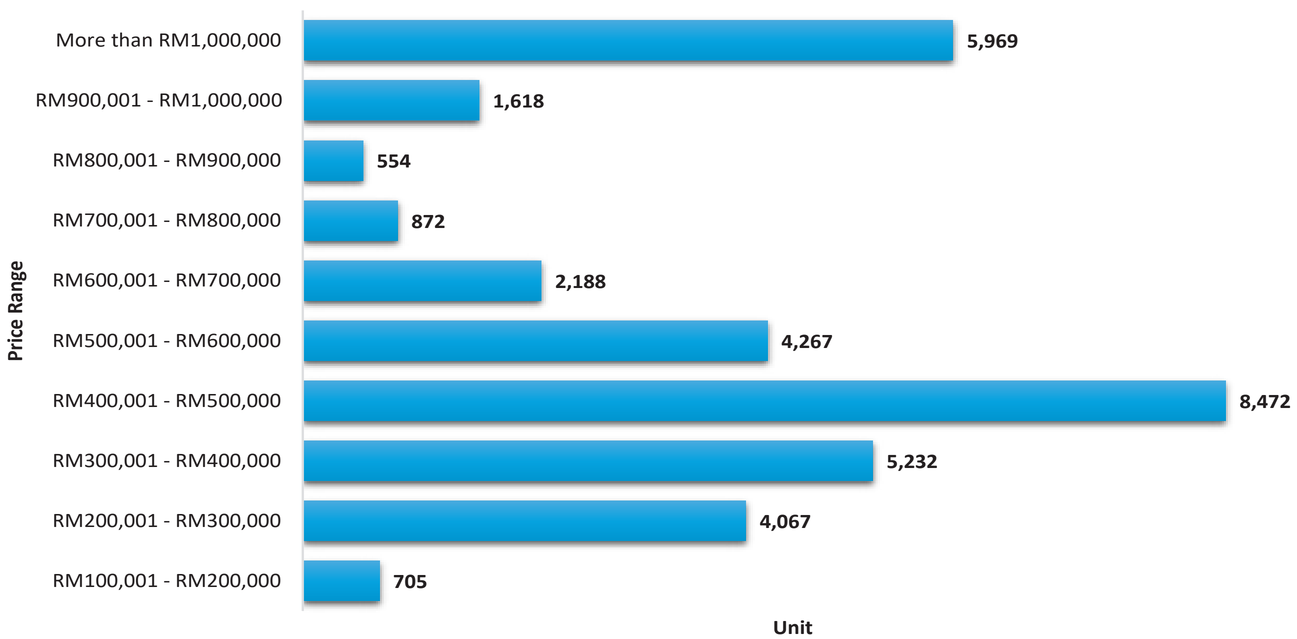
Chart 32: Unsold Under Construction Commercial Property by State H1 2024



Majoriti perdagangan dalam pembinaan belum terjual berharga melebihi RM500,000 (45.6%), diikuti oleh unit berharga di antara RM300,001 hingga RM500,000 (40.4%).

Majority of unsold under construction commercial was in the price range above RM500,000 (45.6%), followed by unit priced between RM300,001 to RM500,000 (40.4%).

Chart 33: Unsold Under Construction Commercial by Price Range H1 2024



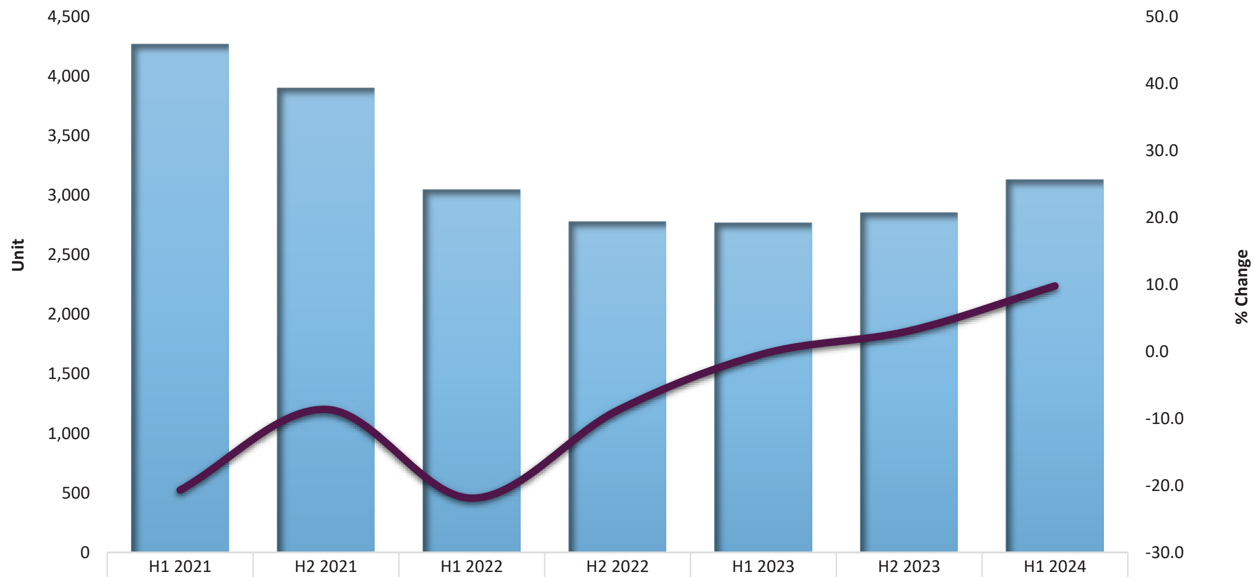
2.2.1 Kedai

Kedai dalam pembinaan belum terjual meningkat sebanyak 13.2% kepada 3,131 unit pada separuh pertama 2024 berbanding separuh pertama tahun sebelumnya.

2.2.1 Shop

The number of unsold under construction increased by 13.2% to 3,131 units in the first half of 2024 compared to the same period in the previous year.

Chart 34: Trend of Unsold Under Construction Shops H1 2021 – H1 2024



	H1 2021	H2 2021	H1 2022	H2 2022	H1 2023	H2 2023	H1 2024
Shops (unit)	4,268	3,899	3,045	2,777	2,767	2,852	3,131
Shops (% change)	-20.7	-8.6	-21.9	-8.8	-0.4	3.1	9.8

Chart 35: Shop Unsold Under Construction by Type H1 2024

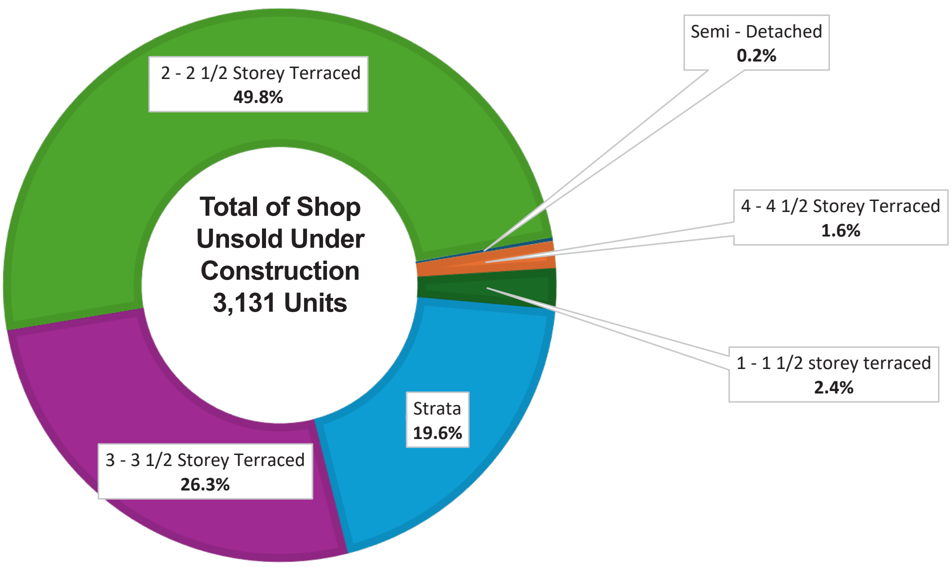
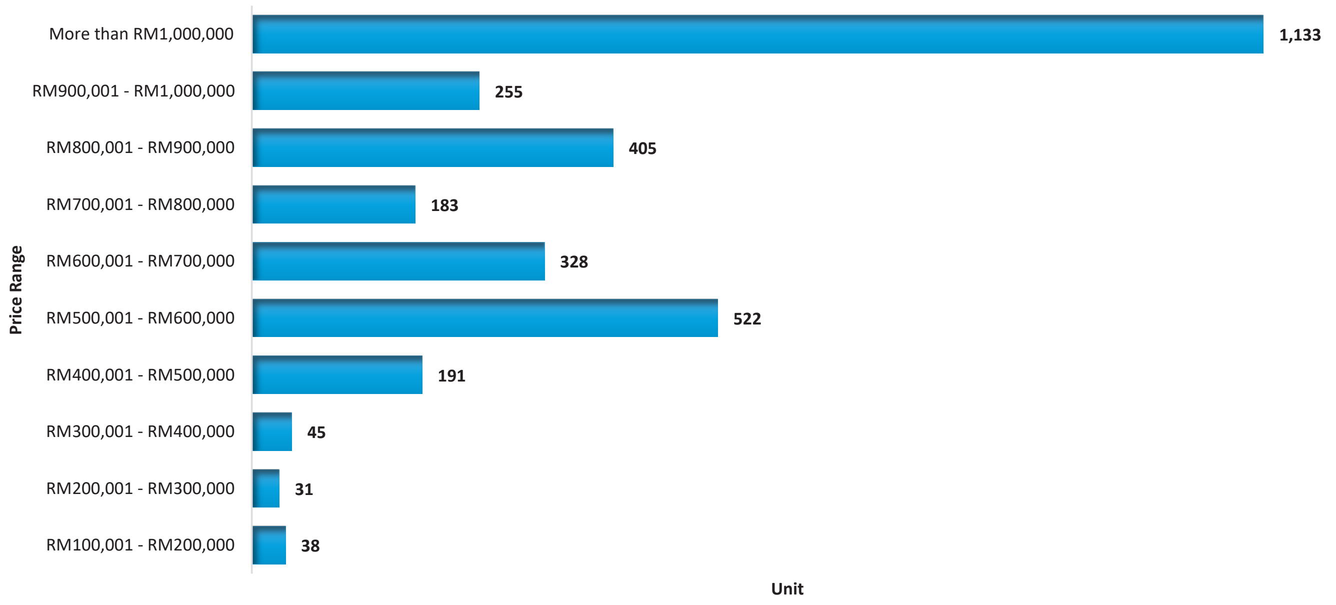


Chart 36: Unsold Under Construction Shops by Price Range H1 2024



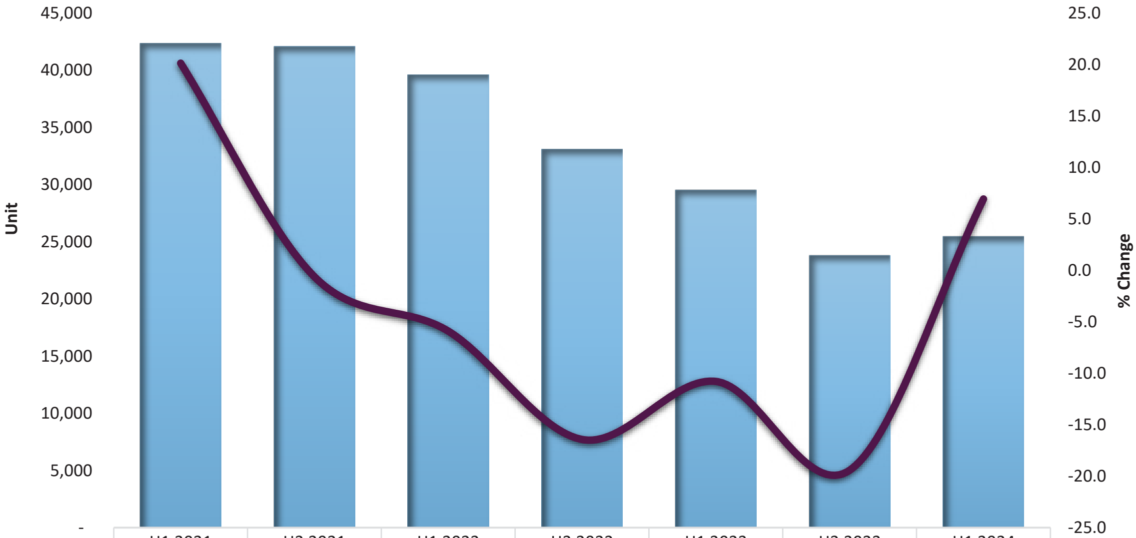
2.2.2 Pangsapuri Khidmat

Unit dalam pembinaan belum terjual bagi pangsapuri khidmat meningkat sebanyak 6.9% kepada 25,446 unit berbanding separuh tahun sebelumnya (23,795 unit, H2 2023). Walau bagaimanapun, berbanding tempoh yang sama pada tahun 2023, bilangan menurun sebanyak 13.8% (29,528 unit, H1 2023).

2.2.2 Serviced Apartment

The number of unsold under construction for serviced apartments has increased by 7.0% to 25,466 units compared to the previous half-year (23,795 units, H2 2023). However, comparing to the same period in 2023, this figure represents a decline of 13.8% (29,528 units, H1 2023).

Chart 37: Trend of Unsold Under Construction Serviced Apartment H1 2021 – H1 2024

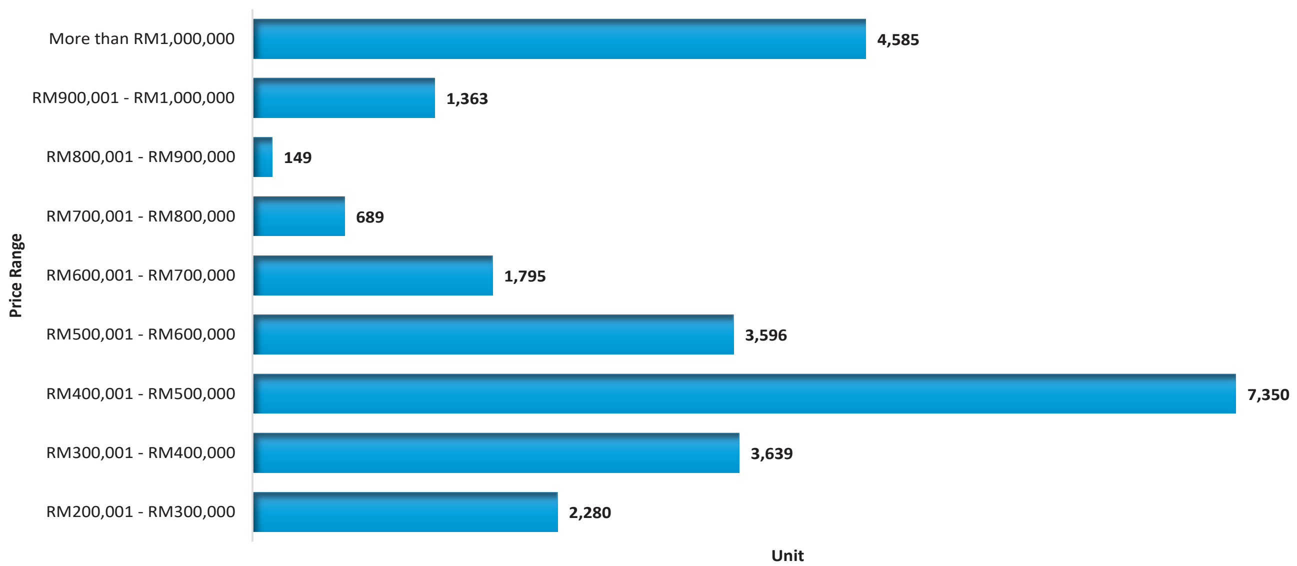


	H1 2021	H2 2021	H1 2022	H2 2022	H1 2023	H2 2023	H1 2024
Serviced Apartment (unit)	42,358	42,094	39,609	33,101	29,528	23,795	25,446
Serviced Apartment (% change)	20.1	-0.6	-5.9	-16.4	-10.8	-19.4	6.9

Kebanyakan unit dalam pembinaan belum terjual berharga antara RM500,001 dan ke atas, merangkumi 47.9% (12,177 unit), diikuti oleh unit berharga dari RM300,001 hingga RM500,000 sebanyak 43.2% (10,989 unit).

Most of the unsold units under construction with prices starting from RM500,001 and above, accounting for 47.9% (12,177 units). This is followed by units priced between RM300,001 and RM500,000, which represent 43.2% (10,989 units)

Chart 38: Unsold Under Construction Serviced Apartment by Price Range H1 2024



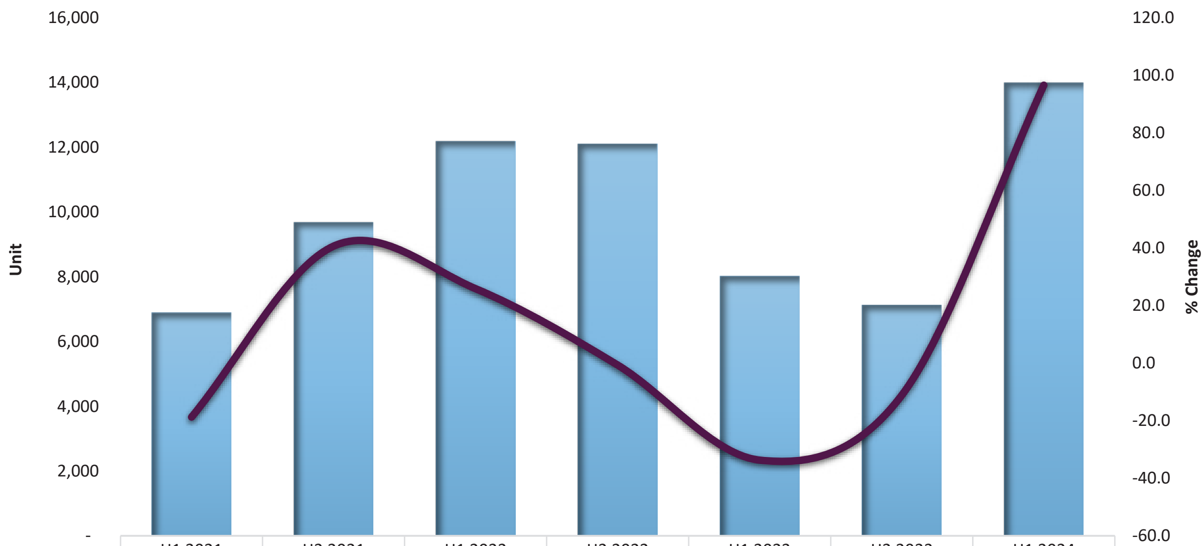
2.3 Belum Dibina Belum Terjual

Harta tanah perdagangan belum dibina belum terjual menunjukkan peningkatan yang sangat ketara iaitu sebanyak 74.5% (13,993 unit) berbanding separuh pertama 2023 dan 96.5% berbanding separuh tahun sebelumnya (7,121 unit, H2 2023).

2.3 Unsold Not Constructed

Unsold not constructed commercial property has shown a significant increase of 74.5% (13,993 units) compared to the first half of 2023, and a remarkable rise of 96.5% compared to the previous half year (7,121 units, H2 2023).

Chart 39: Trend of Unsold Not Constructed Commercial Property H1 2021 – H1 2024



	H1 2021	H2 2021	H1 2022	H2 2022	H1 2023	H2 2023	H1 2024
Commercial (Unit)	6,886	9,682	12,182	12,097	8,018	7,121	13,993
Commercial (% change)	-18.8	40.6	25.8	-0.7	-33.7	-11.2	96.5

WP Kuala Lumpur mendominasi dengan syer pasaran 38.2% (5,343 unit) diikuti oleh Selangor dan Pahang masing-masing memegang syer 23.9% (3,356 unit) dan 17.4% (2,429 unit).

Harta tanah perdagangan jenis pangsapuri khidmat mempunyai jumlah keseluruhan belum dibina belum terjual paling tinggi iaitu sebanyak 77.6% (10,855 unit) manakala SOHO sebanyak 18.2% (2,551 unit) pada separuh pertama 2024.

WP Kuala Lumpur dominates with a market share of 38.2% (5,343 units), followed by Selangor and Pahang, which hold shares of 23.9% (3,356 units) and 17.4% (2,429 units), respectively.

Commercial properties of the serviced apartment type have the highest total unsold not constructed, accounting for 77.6% (10,855 units, while SOHO account for 18.2% (2,551 units) in the first half of 2024).

Chart 40: Unsold Not Constructed Commercial Property by State H1 2024

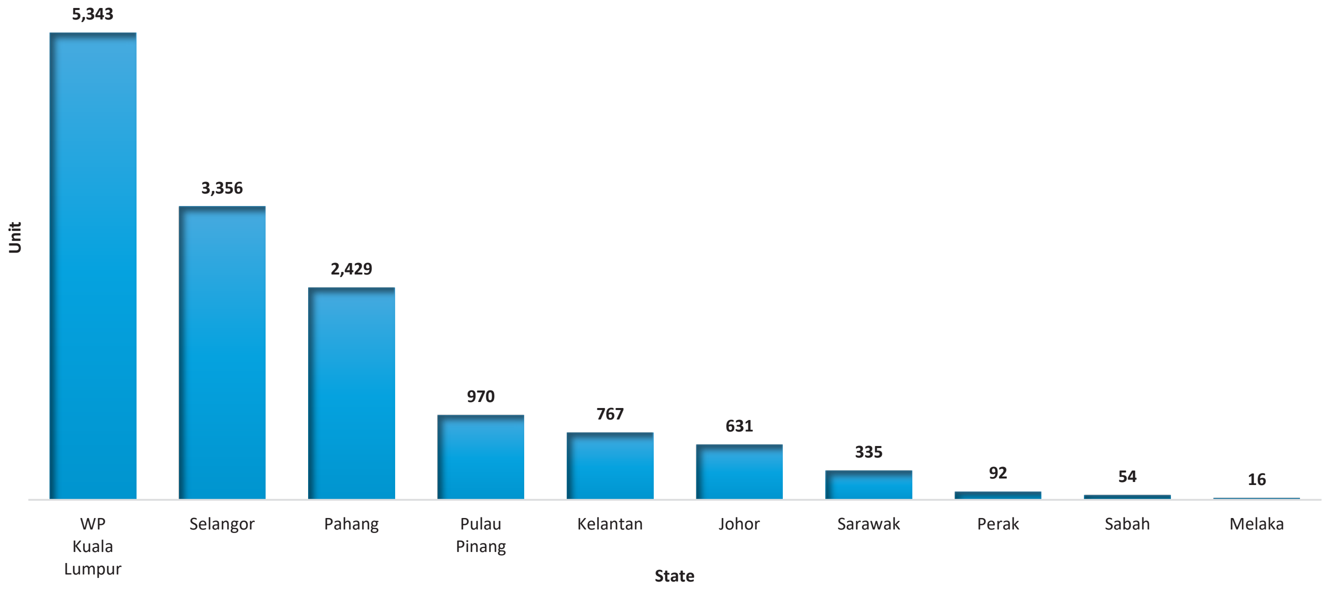
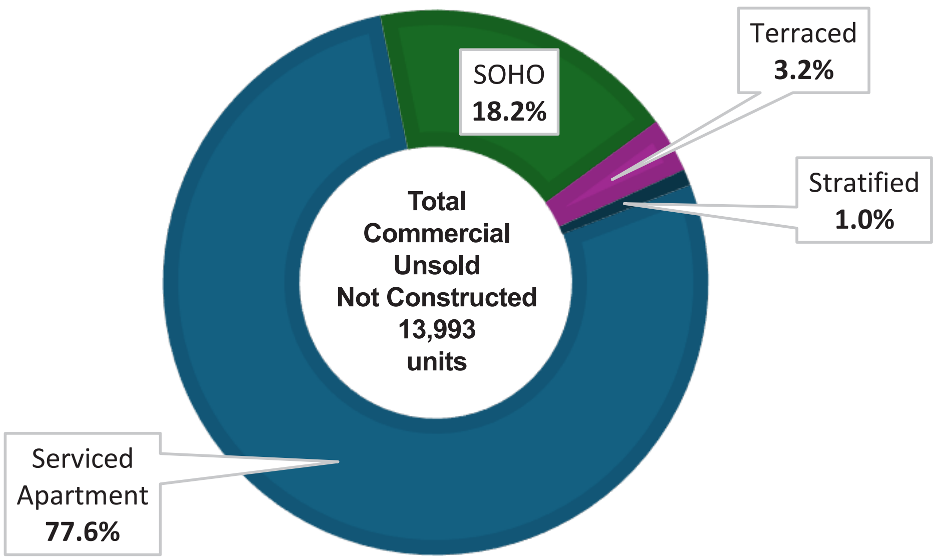


Chart 41: Commercial Unsold Not Constructed by Type H1 2024



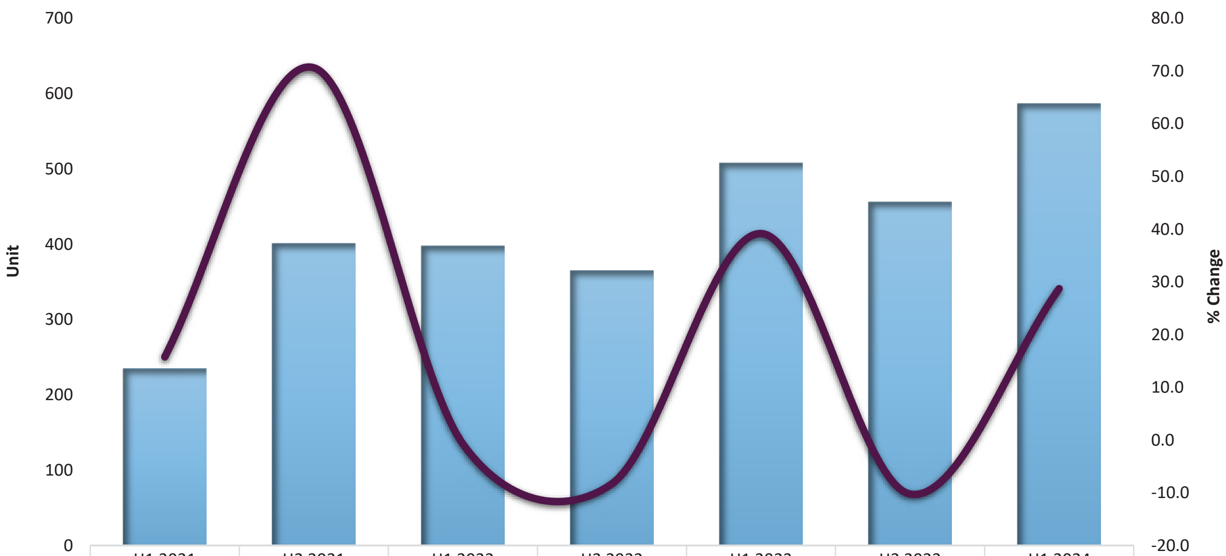
2.3.1 Kedai

Sejumlah 587 unit kedai belum dibina belum terjual direkodkan pada separuh pertama 2024, meningkat berbanding separuh tahun sebelumnya dan separuh pertama 2023 masing-masing 28.7% (456 unit, H2 2023) dan 15.6% (508 unit, H1 2023).

2.3.1 Shop

A total of 587 unsold not constructed for shops were recorded in the first half of 2024, representing an increase of 28.7% compared to the second half of 2023 and 15.6% compared to the first half of 2023, which had 456 units and 508 units, respectively.

Chart 42: Trend of Unsold Not Constructed Shops H1 2021 – H1 2024

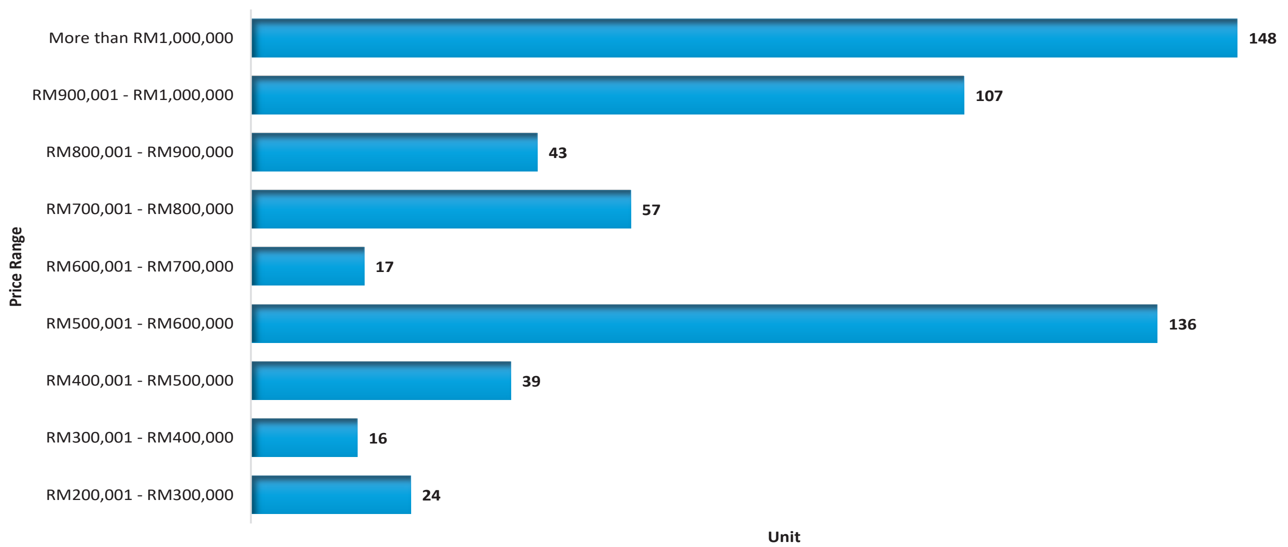


	H1 2021	H2 2021	H1 2022	H2 2022	H1 2023	H2 2023	H1 2024
Shops (unit)	235	401	398	365	508	456	587
Shops (% change)	15.8	70.6	-0.7	-8.3	39.2	-10.2	28.7

Kedai pada harga melebihi RM500,000 menerajui jumlah paling tinggi bagi unit belum dibina belum terjual pada separuh pertama 2024 iaitu 508 unit (86.5%) mengatasi harga selainnya.

Shop priced above RM500,000 lead in the highest number of unsold not constructed in the first half of 2024, totaling 508 units (86.5%), surpassing other price categories.

Chart 43: Unsold Not Constructed Shops by Price Range H1 2024



2.3.2 Pangsapuri Khidmat

Pangsapri khidmat belum dibina belum terjual menunjukkan peningkatan yang agak tinggi iaitu 64.4% (10,855 unit) berbanding separuh tahun sebelumnya (6,604 unit, H2 2023). Peningkatan yang ketara 55.3% juga dilihat dalam tempoh yang sama pada tahun 2023 (6,991 unit, H1 2023).

Unit berharga RM300,001 hingga RM500,000 mendominasi unit belum dibina belum terjual jenis sebanyak 53.5% (5,807 unit).

Unit belum dibina belum terjual bagi pangsapuri khidmat mengikut lingkungan harga seperti di **Carta 45**.

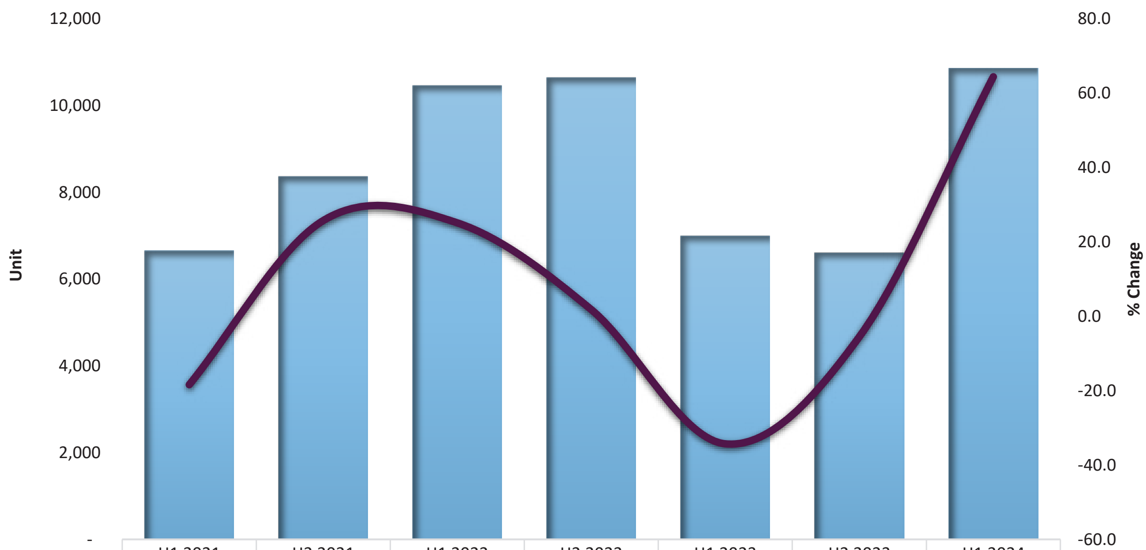
2.3.2 Serviced Apartment

The unsold not unconstructed of serviced apartment experienced a significant increase of 64.4%, totaling 10,855 units, compared to the previous half-year period of 6,604 units (H2 2023). A notable rise of 55.3% was also observed during the same timeframe in 2023, with 6,991 units recorded in H1 2023.

The priced between RM300,001 and RM500,000 accounts for the majority of unsold not constructed units, representing 53.5% (5,807 units).

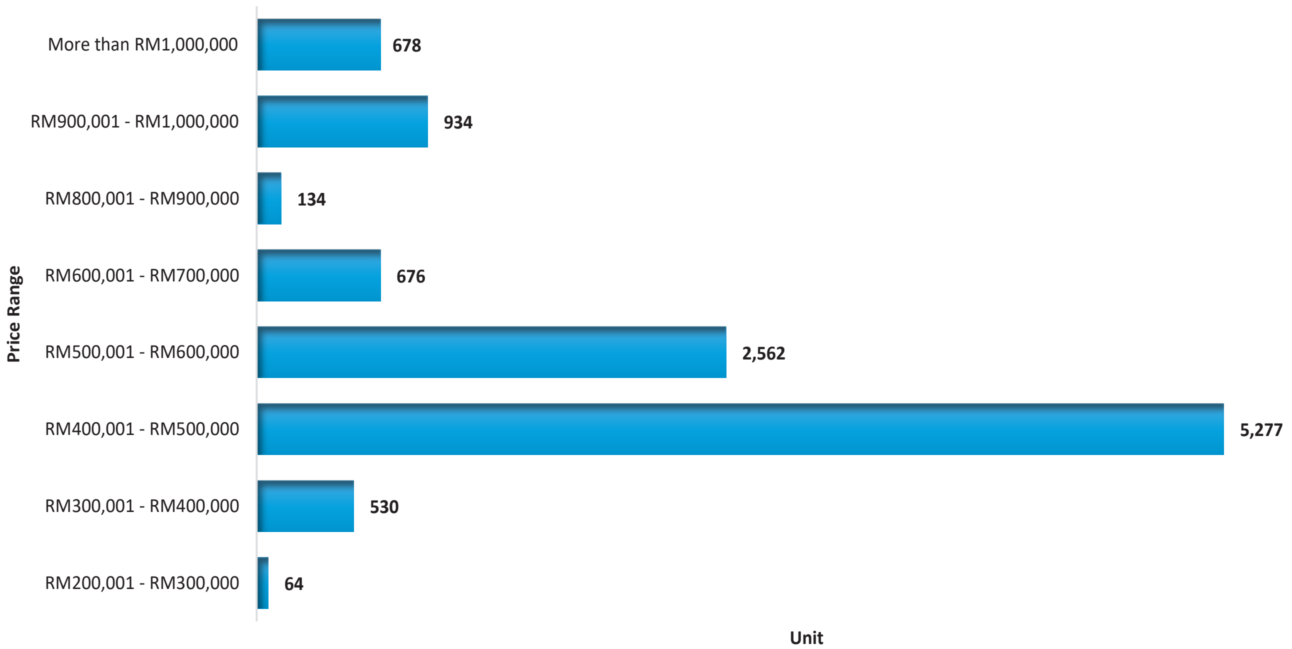
*The unsold not constructed of serviced apartments by price ranges as illustrated in **Chart 45**.*

Chart 44: Trend of Unsold Not Constructed Serviced Apartments H1 2021 – H1 2024



	H1 2021	H2 2021	H1 2022	H2 2022	H1 2023	H2 2023	H1 2024
Serviced Apartment (unit)	6,651	8,361	10,459	10,644	6,991	6,604	10,855
Serviced Apartment (% change)	-18.4	25.7	25.1	1.8	-34.3	-5.5	64.4

Chart 45: Unsold Not Constructed Serviced Apartments by Price Range H1 2024



3.0 HARTA TANAH INDUSTRI

3.1 Harta Tanah Siap Dibina Tidak Terjual

Situasi harta tanah industri siap dibina tidak terjual terus bertambah baik pada separuh pertama 2024. Sebanyak 746 unit siap dibina tidak terjual bernilai RM0.78 bilion direkodkan, turun 7.7% dari segi bilangan dan 20.8% dari segi nilai berbanding separuh tahun sebelumnya. Penurunan sebanyak 8.9% juga dilihat dalam tempoh yang sama pada tahun 2023 (819 unit, H1 2023).

Sarawak menguasai bilangan harta tanah industri tidak terjual dengan 319 unit (42.8%) bernilai RM215.6 juta diikuti Johor dengan 117 unit bernilai RM163.7 juta.

3.0 INDUSTRIAL PROPERTY

3.1 Property Overhang

The overhang situation for the industrial subsector continued to improve in the first half of 2024. A total of 746 overhang units, valued at RM0.78 billion, was recorded, reflecting a decrease of 7.7% in terms of quantity and 20.8% in terms of value compared to the previous half-year. A decrease of 8.9% was also observed during the same period in 2023, amounting to 819 units in the first half of 2023.

Sarawak holds the highest number of overhang of industrial properties, totalling 319 units (42.8%) valued at RM215.6 million, followed by Johor with 117 units valued at RM163.7 million.

Chart 46: Volume of Industrial Overhang H1 2021 – H1 2024

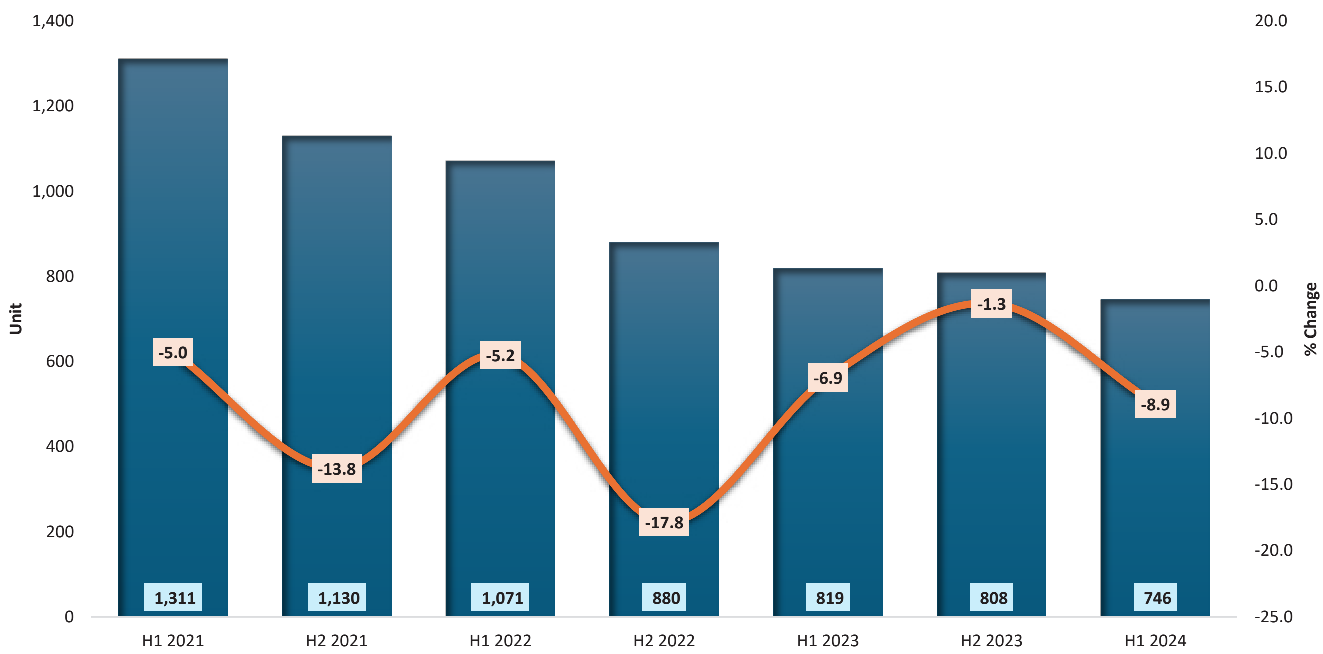
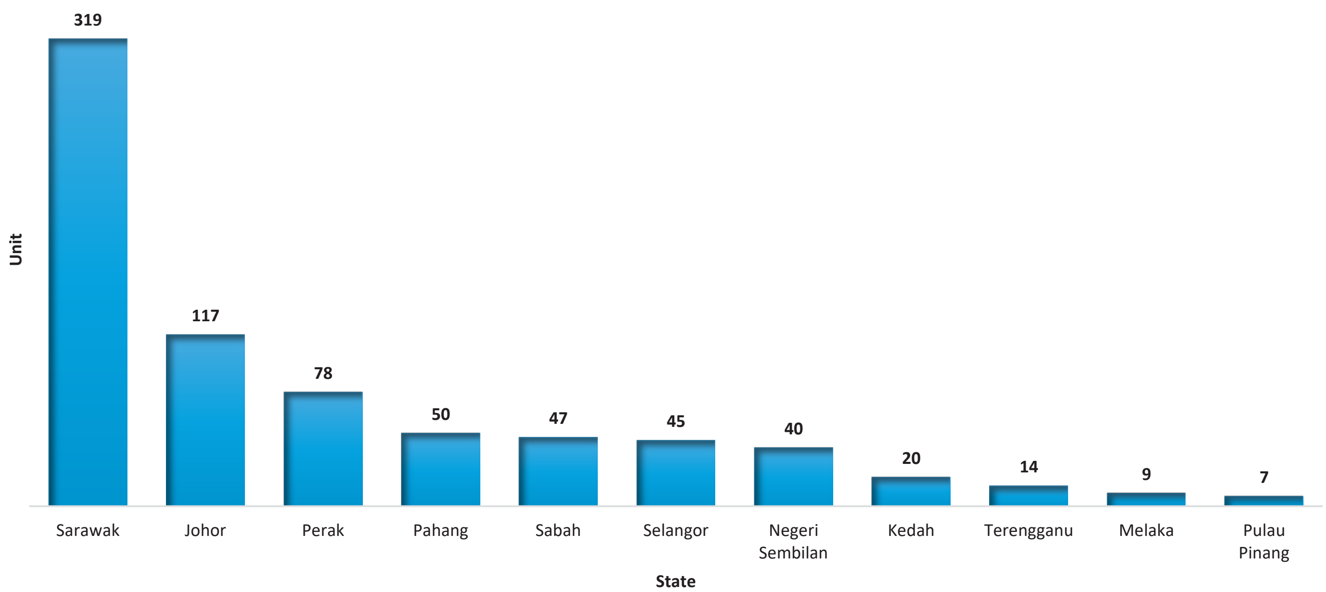


Chart 47: Value of Industrial Overhang H1 2021 – H1 2024

Chart 48: Industrial Overhang by State H1 2024



Lebih separuh unit industri jenis teres mendominasi rekod siap dibina tidak terjual sebanyak 60.5% (451 unit). Kebanyakan unit industri siap dibina tidak terjual melibatkan unit berharga melebihi RM1 juta iaitu 36.9% (275 unit).

More than half of the terrace-type industrial units dominate the record of overhang, accounting for 60.5% (451 units). The majority of the overhang industrial units consist of those priced above RM1 million, which represents 36.9% (275 units).

Chart 49: Industrial Overhang by Type H1 2024

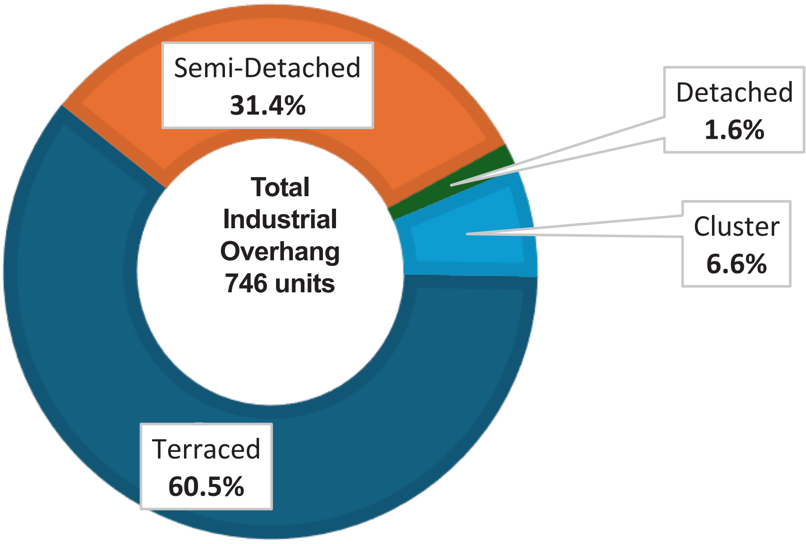
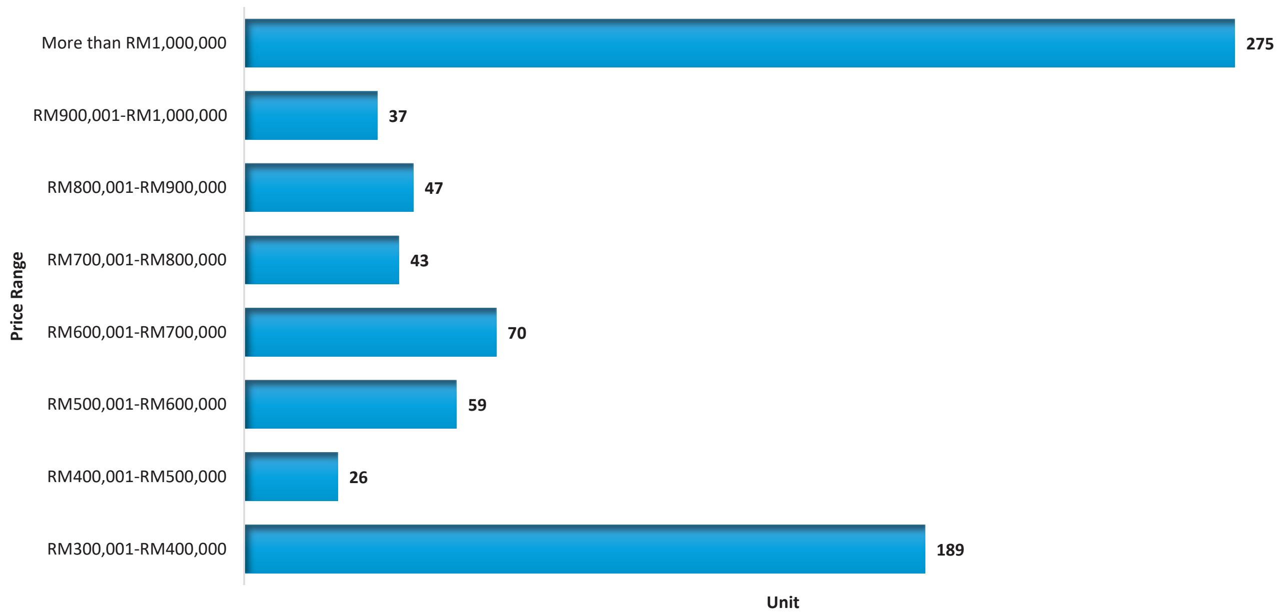


Chart 50: Industrial Overhang Units by Price Range H1 2024



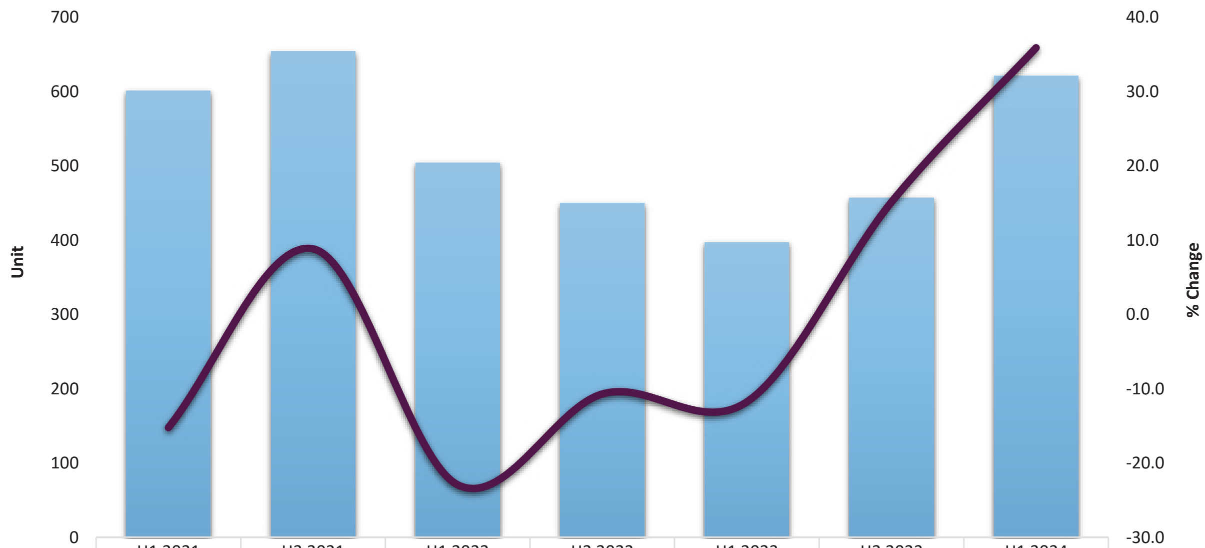
3.2 Dalam Pembinaan Belum Terjual

Harta tanah industri dalam pembinaan belum terjual menurun pada separuh pertama 2024. Tempoh kajian merekodkan 621 unit industri belum terjual, meningkat 35.9% berbanding tempoh sebelumnya. Bilangan ini juga dilihat meningkat dengan ketara sebanyak 56.4% dilihat dalam tempoh yang sama pada tahun 2023 (397 unit, H1 2023).

3.2 Unsold Under Construction

The unsold under construction for industrial properties decreased in the first half of 2024. During this period, a total of 621 industrial units remained unsold, reflecting a 35.9% increase compared to the previous period. This figure also shows a significant rise of 56.4% when compared to the same period in 2023, which recorded 397 units in the first half of that year.

Chart 51: Trend of Unsold Under Construction Industrial Property H1 2021 – H1 2024



	H1 2021	H2 2021	H1 2022	H2 2022	H1 2023	H2 2023	H1 2024
Industrial (Unit)	601	654	504	450	397	457	621
Industrial (% Change)	-15.2	8.8	-22.9	-10.7	-11.8	15.1	35.9

Selangor merekodkan jumlah unit industri dalam pembinaan belum terjual tertinggi sebanyak 34.3% (213 unit), diikuti oleh Johor 20.9% (130 unit) dan Negeri Sembilan 19.5% (121 unit).

Rumah berkembar dan teres masing-masing menyumbang 49.9% (310 unit) dan 34.3% (213 unit) daripada jumlah industri dalam pembinaan belum terjual.

Selangor has recorded the highest percentage of unsold under construction at 34.3% (213 units), followed by Johor at 20.9% (130 units) and Negeri Sembilan at 19.5% (121 units).

Semi-detached and terraced units respectively account for 49.9% (310 units) and 34.3% (213 units) of the total unsold under construction.

Chart 52: Industrial Unsold Under Construction by State H1 2024

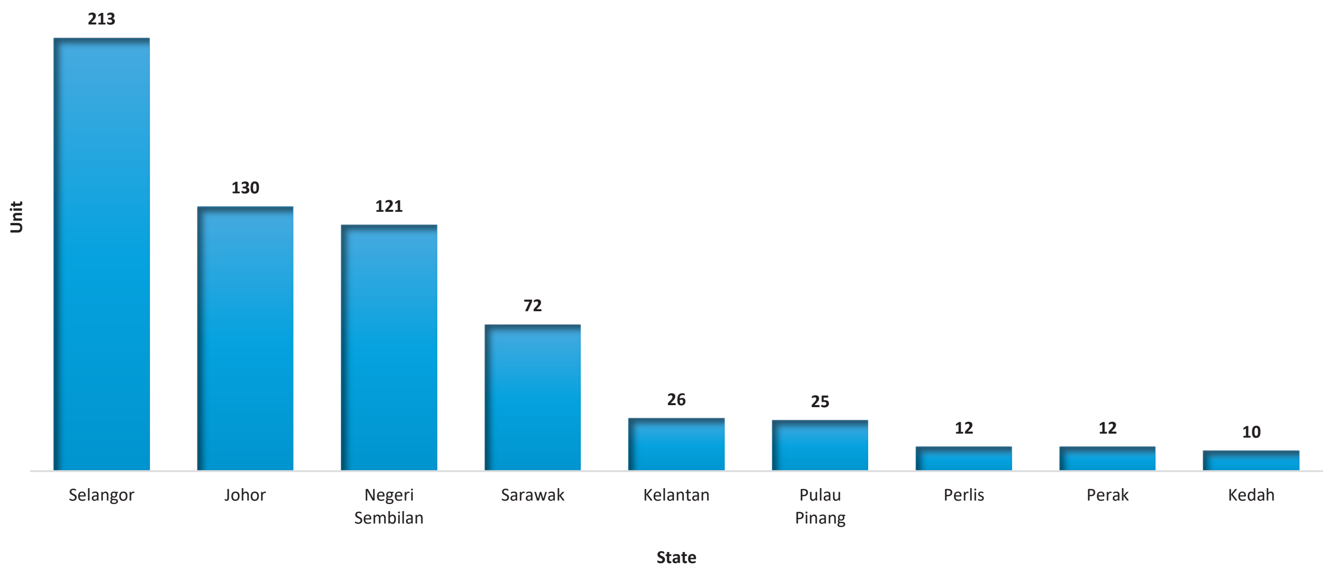
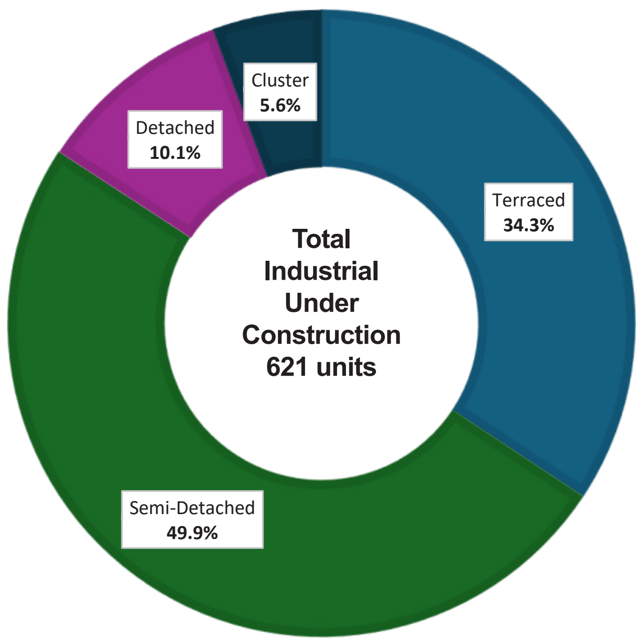


Chart 53: Industrial Unsold Under Construction by Type 2024



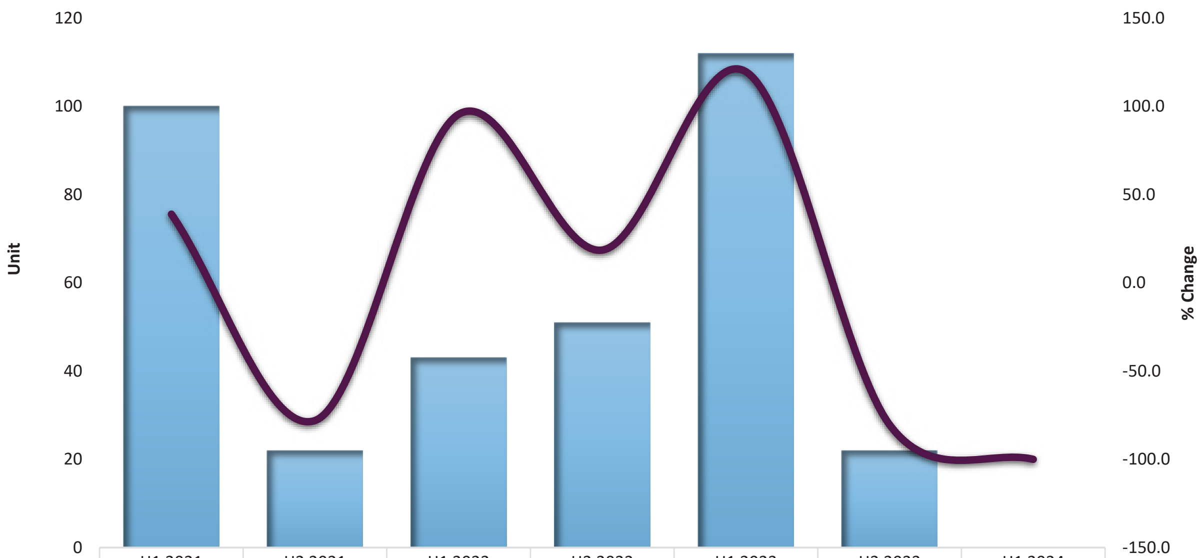
3.3 Belum Dibina Belum Terjual

Tiada unit belum dibina belum terjual bagi harta tanah industri direkodkan pada separuh pertama 2024, berbanding 112 unit direkodkan pada separuh tahun pertama 2023.

3.3 Unsold Not Constructed

No unsold not constructed units for industrial property recorded in the first half of 2024, compared to 112 units recorded in the first half of 2023.

Chart 54: Trend of Unsold Not Constructed Industrial Property H1 2021 – H1 2024



	H1 2021	H2 2021	H1 2022	H2 2022	H1 2023	H2 2023	H1 2024
Industrial (Unit)	100	22	43	51	112	22	0
Industrial (% Change)	38.9	-78.0	95.5	18.6	119.6	-80.4	-100.0

Catatan Teknikal

Technical Notes

CATATAN TEKNIKAL

1. Tempoh kajian laporan ini adalah meliputi separuh tahun 2024 berakhir pada 30 Jun 2024.

2. Liputan kajian ini hanya merangkumi unit kediaman, komersial dan industri.

3. **Pelancaran Jualan Harta Tanah** adalah aktiviti untuk memulakan pemasaran unit harta tanah dalam sesuatu projek secara rasmi oleh pemaju. Pelancaran boleh dilakukan selepas mendapat permit iklan dan jualan daripada Kementerian Perumahan dan Kerajaan Tempatan.

   Sekiranya satu skim dilancarkan semula, tarikh baru pelancaran diambilkira. Pelancaran tidak rasmi (soft Launch) adalah peristiwa pemasaran bagi membekalkan maklumat mengenai projek sebelum kelulusan permit iklan dan jualan diperolehi. Tarikh tidak rasmi tidak diambilkira dalam pengumpulan data. Oleh itu, Tarikh pelancaran rasmi akan diambilkira sebagai Tarikh pelancaran.

4. **Pelancaran baru** mengandungi harta tanah dalam skim perumahan yang telah dilancarkan pada separuh tahun pertama 2021.

   Prestasi jualan merujuk kepada peratusan bilangan unit yang telah dijual atas jumlah unit yang dilancarkan bagi sesuatu jenis harta tanah dalam tempoh kajian. Dua jenis prestasi jualan telah dikira di dalam laporan ini iaitu prestasi jualan suku tahunan dan prestasi jualan terkumpul.

5. Mulai 1 Januari 2003, “harta tanah siap dibina tidak terjual” telah didefinasikan sebagai unit kediaman, komersial dan industri yang telah siap dibina dan telah mendapat Sijil Penyiapan dan Pematuhan/ Sijl Layak Menduduki Sementara tetapi kekal tidak terjual melebihi tempoh sembilan bulan selepas ianya dilancarkan untuk jualan pada atau selepas 1 Januari 1997.

6. **Harta tanah siap dibina tidak terjual** merangkumi unit kediaman, komersial dan industri yang telah siap dibina dan mendapat Sijil Layak Menduduki/ Sijil Layak Menduduki Sementara/ Sijil Penyiapan Dan Pematuhan dalam tempoh kajian. Unit ini masih tidak terjual melebihi tempoh sembilan bulan dari tarikh pelancaran atau selepas 1 Januari 1997.

7. **Nilai** harta tanah yang tidak terjual diperolehi daripada harga jualan purata oleh pemaju mengikut jenis harta tanah yang ditawarkan untuk jualan dikalikan dengan bilangan harta tanah yang tidak terjual pada penghujung tempoh kajian.

TECHNICAL NOTES

1. *The review period of this report covers the first half of 2024 ending on 30th June 2024.*

2. *The coverage of the survey was confined to residential, commercial and industrial units.*

3. ***Launch of Property Sales** is an activity to start marketing formally the property units of a project by the developer. The launch can be done after obtaining the advertisement and sales permit from the Ministry of Housing and Local Government.*

   If a scheme was re-launched, the new launch date is considered. The unofficial launch (soft Launch) is a marketing event to provide information about the project before the approval of advertisement and sales permit is obtained. The unofficial date is not considered in data collection. Therefore, the official launch date will be the date recorded.

4. ***New launches** comprise properties in residential schemes launched in first half year 2021.*

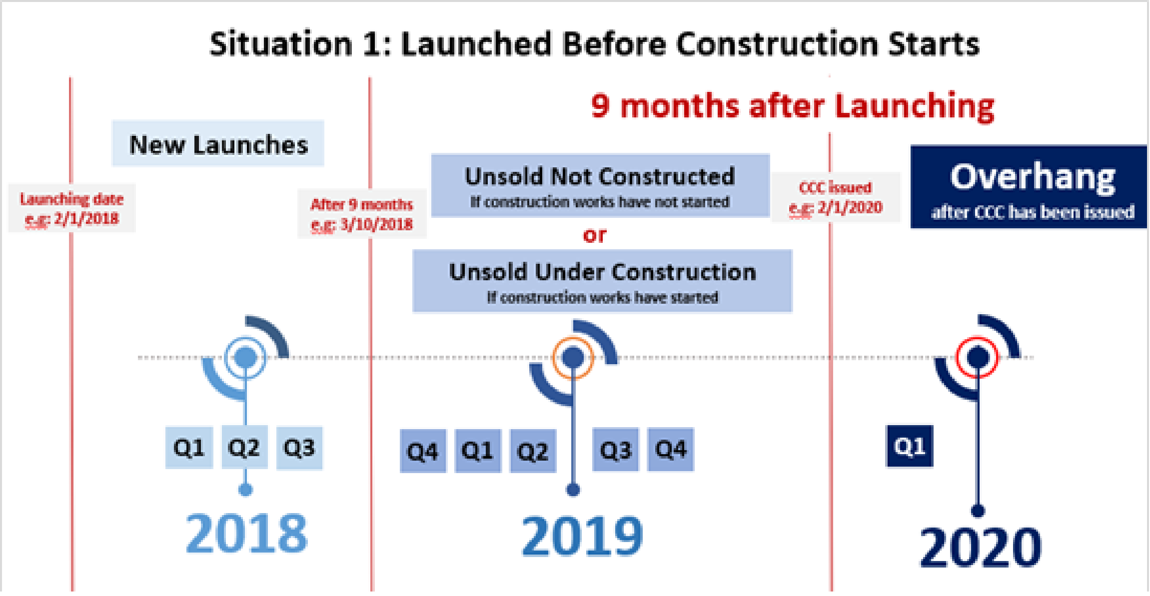
   ***Sales performance** refers to the percentage of number of units sold from the total units launched for a specific type of property in the review period. Two types of sales performance are computed in this publication namely quarterly sales performance and accumulated sales performance.*

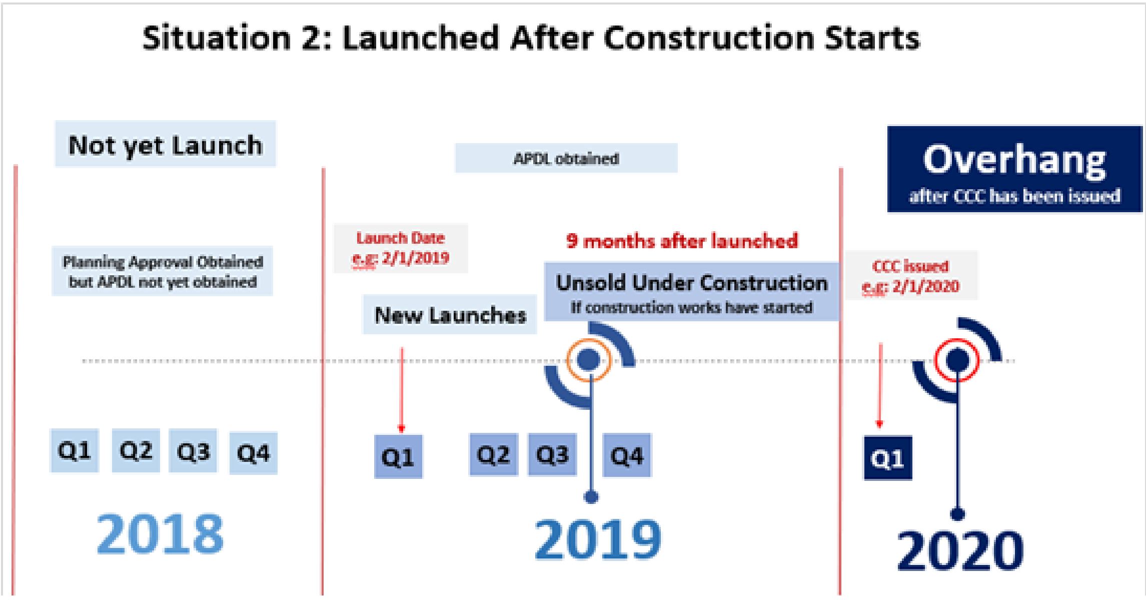
5. *Starting January 1, 2003 “property overhang” has been defined as residential, commercial and industrial units that have been completed and issued with a Certificate of Completion and Compliance / Temporary Certificate of Fitness for Occupation but remained unsold for more than nine months after it was launched for sales on or after 1st January 1997.*

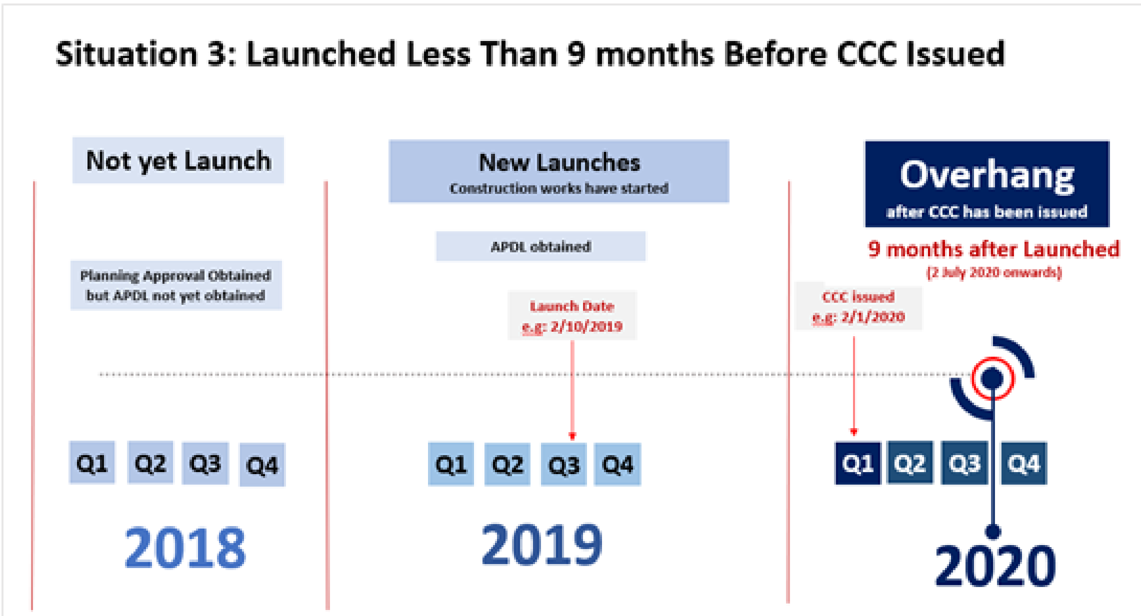
6. ***Property overhang** comprises residential units, commercial units and industrial units that are completed with Certificate of Completion and Compliance/ Temporary Certificate of Fitness for Occupation in the review period. These units remained unsold for more than nine months from the date of launching or after 1st January 1997.*

7. ***The value** of overhang properties is derived from the average selling price for the particular type of property offered for sale by the developer multiplied by the number of overhang property at the end of the review period.*

Understanding The Property Overhang







8. **Harta tanah dalam pembinaan belum terjual** merangkumi unit kediaman, komersial dan industri yang sedang dalam pembinaan dan memperolehi kelulusan pelan bangunan. Unit ini tidak terjual melebihi tempoh sembilan bulan daripada tarikh dilancarkan untuk jualan atau selepas 1 Januari 1997.

9. **Harta tanah belum dibina belum terjual** merangkumi unit kediaman, komersial dan industri yang belum dibina dan belum memperolehi kelulusan pelan bangunan. Unit ini tidak terjual melebihi tempoh sembilan bulan daripada tarikh dilancarkan untuk jualan atau selepas 1 Januari 1997.

10. **Sebuah skim perumahan** adalah projek perumahan yang mengandungi sekurang-kurang lima atau lebih bangunan yang digunakan untuk tujuan kediaman. Satu skim perumahan adalah satu identiti. Ianya boleh dibangunkan di atas sekeping tanah dengan satu hakmilik, atau banyak tanah dengan hakmilik yang lebih dari satu, serta boleh dibangunkan dalam beberapa fasa. Pembangunan tersebut boleh bercampur dengan bangunan untuk kegunaan lain seperti perniagaan, industri dan institusi.

8. ***Unsold Under Construction** property comprises residential units, commercial units and industrial units with building plan approval that are under constructed. These Units remained unsold for more than nine months from the date of launch or after 1st January 1997.*

9. ***Unsold Not Constructed** property comprises residential units, commercial units and industrial units with building plan approval that are not yet constructed. These units remained unsold for more than nine months from the date of launch or after 1st January 1997.*

10. ***A residential scheme** is a housing project comprised a minimum of five or more buildings mainly used for dwelling purposes. A residential scheme has one identity. It may be developed on a land with a single title or on lands with multiple titles and could be developed in phases. The developments can be mixed with buildings for other uses like retail, industrial or institutional.*

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