KEMENTERIAN KEWANGAN
MALAYSIA

LAPORAN STATUS PASARAN HARTA TANAH
Property Market Status Report

2023

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 2023.

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:

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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 2023.*

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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Ringkasan Status Pasaran Harta Tanah 2023
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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	5,927	3,535	3,632.51	6,128	3,448.66	2,714	1,659.46
WP Putrajaya	338	137	277.01	424	171.19	0	0.00
WP Labuan	55	42	13.73	89	61.47	18	12.58
Selangor	11,542	3,405	3,632.28	6,068	4,034.28	2,090	1,516.31
Johor	12,390	4,228	3,396.10	4,817	2,601.52	57	19.03
Pulau Pinang	5,208	3,001	2,607.96	5,093	2,298.09	126	65.85
Perak	5,443	4,598	1,231.53	6,841	1,606.77	299	93.35
Negeri Sembilan	3,060	1,177	473.48	1,978	668.14	651	211.11
Melaka	2,706	532	216.81	3,123	906.65	633	199.06
Kedah	437	199	87.26	3,090	953.28	119	36.21
Pahang	4,074	492	212.98	1,845	611.34	306	115.97
Terengganu	190	308	119.36	445	145.22	0	0.00
Kelantan	840	360	112.91	3,342	996.78	109	35.26
Perlis	372	6	2.16	338	96.23	0	0.00
Sabah	1,852	2,068	934.66	3,928	2,634.22	101	72.95
Sarawak	2,092	1,728	729.63	3,583	1,676.92	703	284.64
MALAYSIA	**56,526**	**25,816**	**17,680.39**	**51,132**	**22,910.76**	**7,926**	**4,321.77**

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	23	8.05	0	0.00	0	0.00
WP Putrajaya	9	34.33	0	0.00	0	0.00
WP Labuan	0	0.00	0	0.00	0	0.00
Selangor	374	439.14	461	523.03	16	25.87
Johor	1,517	1,537.28	1,036	1,171.74	30	18.54
Pulau Pinang	94	53.84	44	66.00	0	0.00
Perak	613	299.63	97	71.57	92	51.54
Negeri Sembilan	411	258.13	30	22.47	6	2.99
Melaka	192	162.42	25	13.78	19	10.22
Kedah	356	249.25	131	78.93	0	0.00
Pahang	349	224.32	172	131.11	231	185.81
Terengganu	104	104.39	20	10.78	0	0.00
Kelantan	403	267.60	163	113.67	8	5.72
Perlis	32	23.36	38	22.02	0	0.00
Sabah	739	505.69	391	422.75	54	60.76
Sarawak	1,017	1,225.89	244	277.61	0	0.00
MALAYSIA	**6,233**	**5,393.32**	**2,852**	**2,925.46**	**456**	**361.45**

State	Serviced Apartment					
	Overhang		Unsold			
			Under Construction		Not Constructed	
	Units	Value (RM Mil)	Units	Value (RM Mil)	Units	Value (RM Mil)
WP Kuala Lumpur	4,806	4,587.14	8,974	8,522.89	4,004	2,862.73
WP Putrajaya	84	31.62	0	0.00	0	0.00
WP Labuan	0	0.00	0	0.00	0	0.00
Selangor	2,065	1,154.98	6,774	3,348.22	1,738	598.03
Johor	11,710	9,717.69	4,722	3,779.13	0	0.00
Pulau Pinang	311	420.81	453	322.17	35	28.41
Perak	0	0.00	234	120.80	0	0.00
Negeri Sembilan	1,348	553.77	546	213.61	0	0.00
Melaka	24	11.63	340	107.12	0	0.00
Kedah	0	0.00	0	0.00	0	0.00
Pahang	80	36.32	1,448	1,011.04	827	368.27
Terengganu	92	39.80	0	0.00	0	0.00
Kelantan	225	42.30	0	0.00	0	0.00
Perlis	0	0.00	0	0.00	0	0.00
Sabah	0	0.00	0	0.00	0	0.00
Sarawak	80	32.37	304	113.92	0	0.00
MALAYSIA	**20,825**	**16,628.43**	**23,795**	**17,538.91**	**6,604**	**3,857.44**

State	SOHO					
	Overhang		Unsold			
			Under Construction		Not Constructed	
	Units	Value (RM Mil)	Units	Value (RM Mil)	Units	Value (RM Mil)
WP Kuala Lumpur	709	663.76	987	425.35	0	0.00
WP Putrajaya	0	0.00	0	0.00	0	0.00
WP Labuan	0	0.00	0	0.00	0	0.00
Selangor	429	188.21	2,772	844.81	61	15.25
Johor	347	207.95	166	68.56	0	0.00
Pulau Pinang	35	19.20	1,065	428.68	0	0.00
Perak	28	7.02	0	0.00	0	0.00
Negeri Sembilan	0	0.00	0	0.00	0	0.00
Melaka	0	0.00	0	0.00	0	0.00
Kedah	0	0.00	0	0.00	0	0.00
Pahang	0	0.00	0	0.00	0	0.00
Terengganu	0	0.00	0	0.00	0	0.00
Kelantan	0	0.00	0	0.00	0	0.00
Perlis	0	0.00	0	0.00	0	0.00
Sabah	0	0.00	0	0.00	0	0.00
Sarawak	138	44.01	71	29.62	0	0.00
MALAYSIA	**1,686**	**1,130.15**	**5,061**	**1,797.03**	**61**	**15.25**

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	0.00	0	0.00	0	0.00
WP Putrajaya	0	0.00	0	0.00	0	0.00
WP Labuan	0	0.00	0	0.00	0	0.00
Selangor	45	105.81	155	105.81	0	0.00
Johor	173	216.78	126	698.13	0	0.00
Pulau Pinang	7	22.40	18	58.48	0	0.00
Perak	78	59.63	12	6.34	0	0.00
Negeri Sembilan	41	22.75	40	52.00	0	0.00
Melaka	9	8.72	0	0.00	0	0.00
Kedah	20	9.98	0	0.00	0	0.00
Pahang	51	39.24	0	0.00	0	0.00
Terengganu	14	4.95	0	0.00	0	0.00
Kelantan	0	0.00	26	18.93	0	0.00
Perlis	0	0.00	0	0.00	0	0.00
Sabah	47	128.67	0	0.00	22	98.57
Sarawak	323	219.87	80	148.55	0	0.00
MALAYSIA	**808**	**838.80**	**457**	**1,804.76**	**22**	**98.57**

1.0 HARTA TANAH KEDIAMAN

1.1 Pelancaran Baru Skim Perumahan

Pelancaran baharu meningkat 4.4% kepada 56,526 unit (2022: 54,118 unit). Secara keseluruhannya, prestasi jualan juga telah meningkat sebanyak 40.4% (2022: 36.0%).

Mengikut kategori harta tanah, harta tanah bertanah membentuk 62.1% (35,114 unit) dari jumlah pelancaran baru, didominasi oleh unit teres, merangkumi 49.2% (27,801 unit), manakala 33.5% (18,964 unit) lagi direkodkan bagi kondominium/ apartmen.

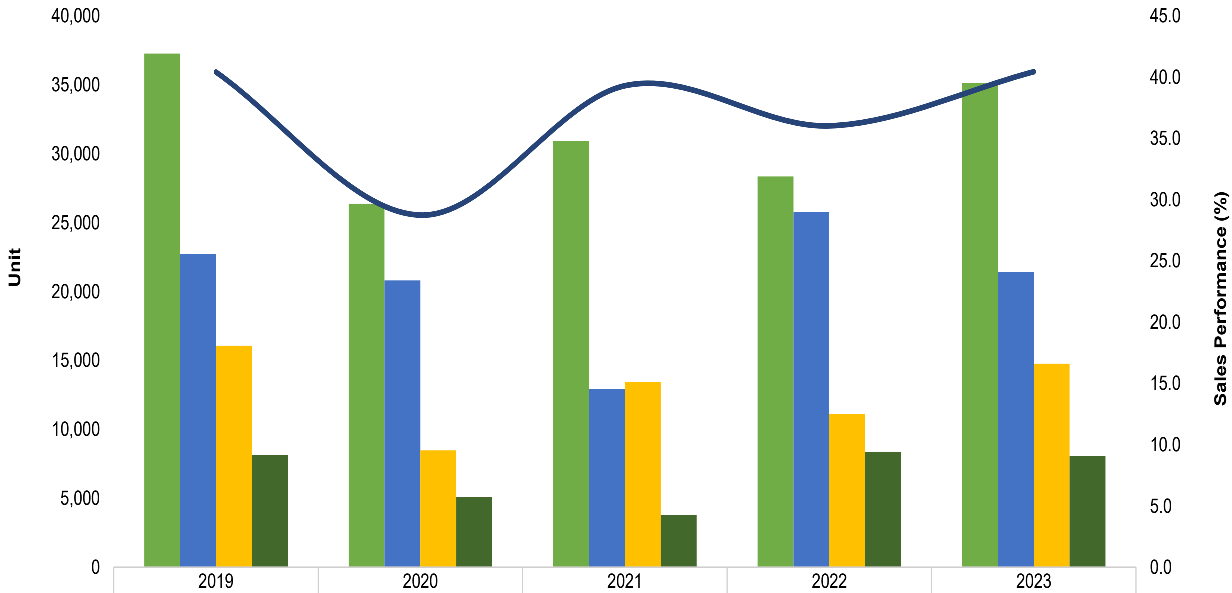
1.0 RESIDENTIAL PROPERTY

1.1 Newly Launched Housing Scheme

New launches increased by 4.4% to 56,526 units (2022: 54,118 units). Overall, sales performance also increased by 40.4% (2022: 36.0%).

By property category, landed properties formed 62.1% (35,114 units) of the total new launches, dominated by terraced units, accounting 49.2% (27,801 units) whilst 33.5% (18,964 units), recorded for condominium/ apartment.

Chart 1: Newly Launched Residential 2019 – 2023



	2019	2020	2021	2022	2023
Unit Launched - Landed	37,261	26,372	30,916	28,357	35,114
Unit Launched - Stratified	22,707	20,806	12,944	25,761	21,412
Unit Sold - Landed	16,082	8,474	13,442	11,115	14,773
Unit Sold - Stratified	8,156	5,086	3,795	8,382	8,088
Sales Performance (%)	40.4	28.7	39.3	36.0	40.4

Chart 2: Newly Launched Residential – Volume by State 2023

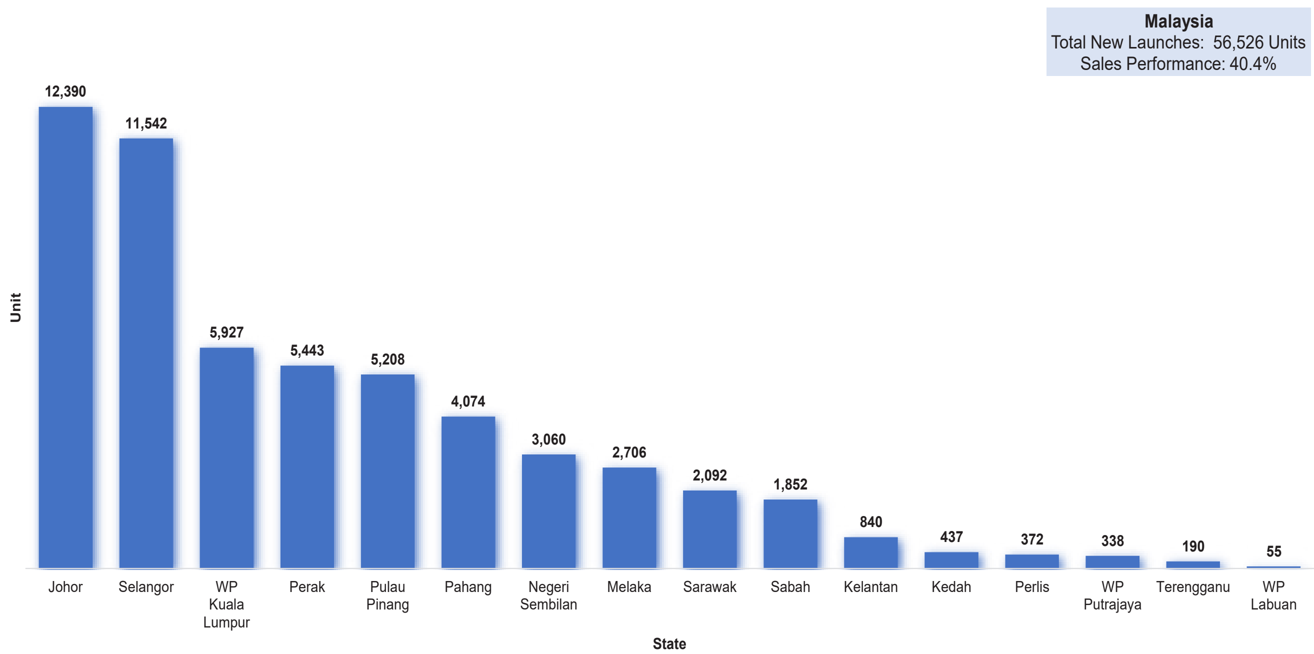
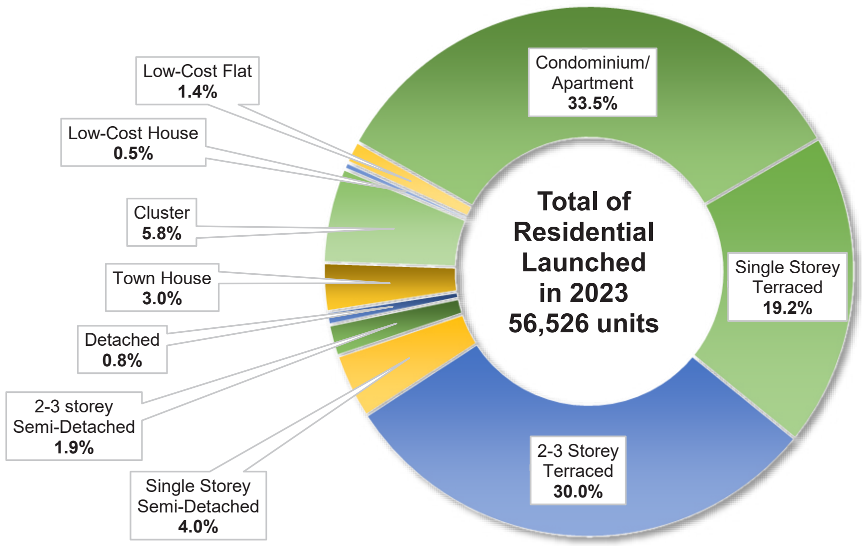


Chart 3: Newly Launched Residential by Type 2023



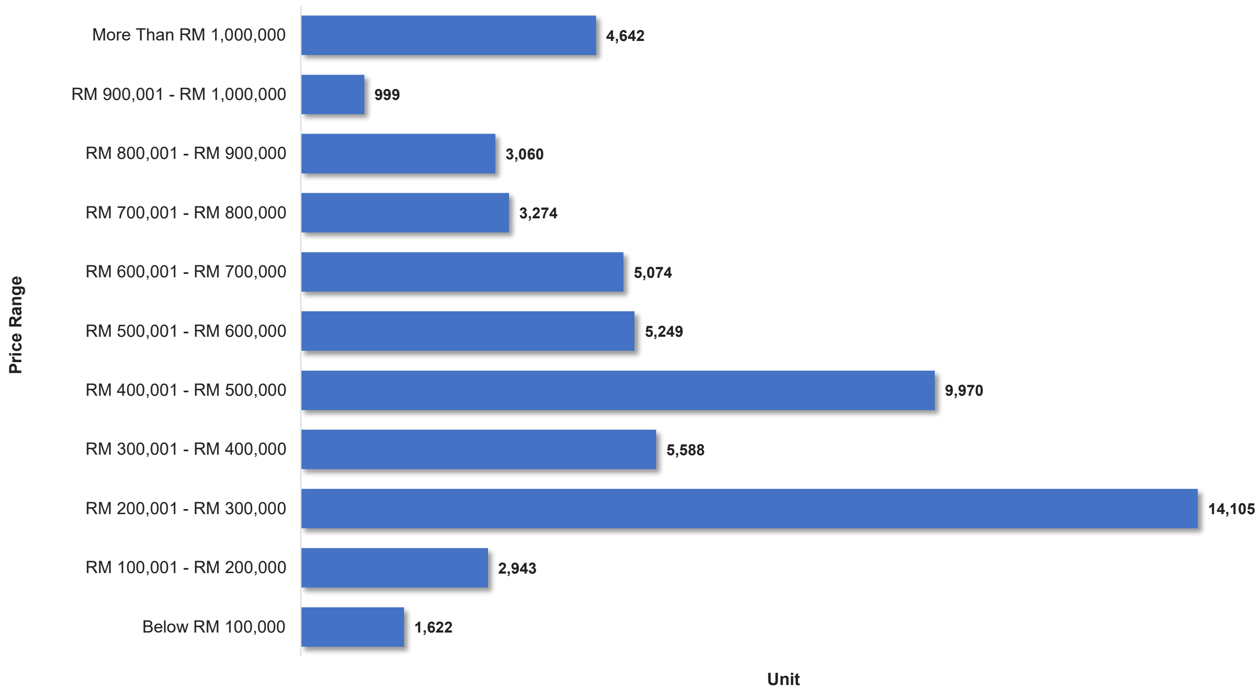
Komposisi kediaman dalam julat harga RM200,001 hingga RM300,000 menguasai 25.0% (14,105 unit) dari jumlah keseluruhan pelancaran kediaman pada 2023, diikuti oleh julat harga RM400,001 hingga RM500,000 sebanyak 17.6% (9,970 unit).

Composition of residential by price range RM200,001 to RM300,000 dominated 25.0% (14,105 units) of the total residential launched at 2023, followed by price range RM400,001 to RM500,000 at 17.6% (9,970 units).

Dari segi penjualan, unit bertanah menguasai 64.6% (14,773 unit) manakala unit strata membentuk 35.4% (8,088 unit).

In terms of sales, landed units captured 64.6% (14,773 units) of the total sold while stratified units took up another 35.4% (8,088 units).

Chart 4: Newly Launched Residential by Price Range 2023



1.2 Kediaman Siap Dibina Tidak Terjual

Sejumlah 25,816 unit siap dibina tidak terjual bernilai RM17.68 bilion direkodkan pada tahun 2023, menurun 7.0% dan 4.0% dari segi bilangan dan nilai berbanding tahun sebelumnya.

Perak merekodkan siap dibina tidak terjual tertinggi dengan 4,598 unit bernilai RM1.23 bilion. Sebaliknya, Kedah menunjukan kadar penurunan yang ketara sebanyak 83.0% kepada 199 unit (2022: 1,174 units).

Kondominium/ apartmen membentuk hampir dua-per-tiga (60.5%) daripada jumlah keseluruhan kediaman siap dibina tidak terjual dalam tempoh kajian. Mengekori di kedudukan kedua adalah unit teres 2 - 3 tingkat sebanyak 14.1%.

1.2 Residential Property Overhang

A total of 25,816 overhang units worth RM17.68 billion were recorded in 2023, decreased by 7.0% and 4.0% in volume and value compared to previous year.

Perak recorded the highest overhang with 4,598 units worth RM1.23 billion. Otherwise, Kedah saw a tremendous decreased of 83.0% to 199 units (2022: 1,174 units).

Condominium/ apartment formed almost two-third (60.5%) of the total residential overhang share in the review period. Trailing at second place was 2 -3 storey terraced units at 14.1%.

Chart 5: Volume of Residential Overhang 2019 - 2023

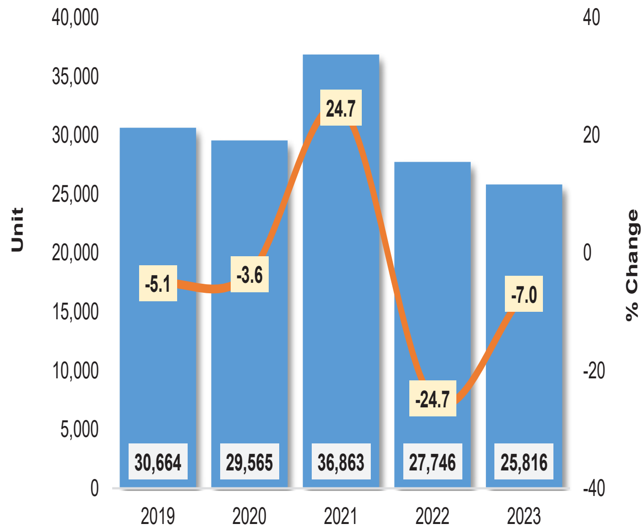


Chart 6: Value of Residential Overhang 2019 - 2023

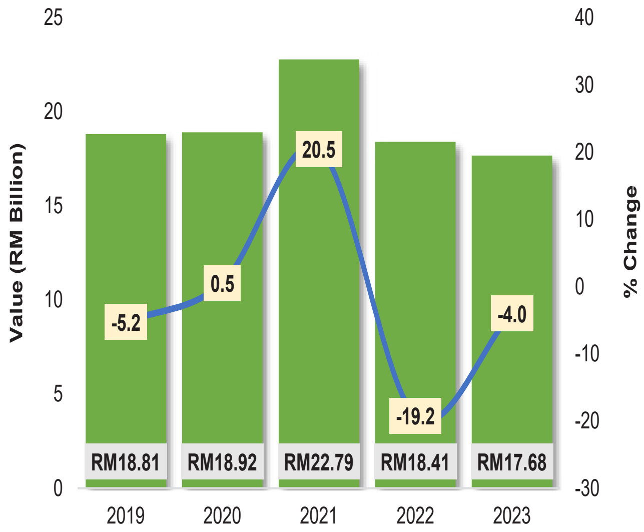


Chart 7: Residential Overhang by State 2023

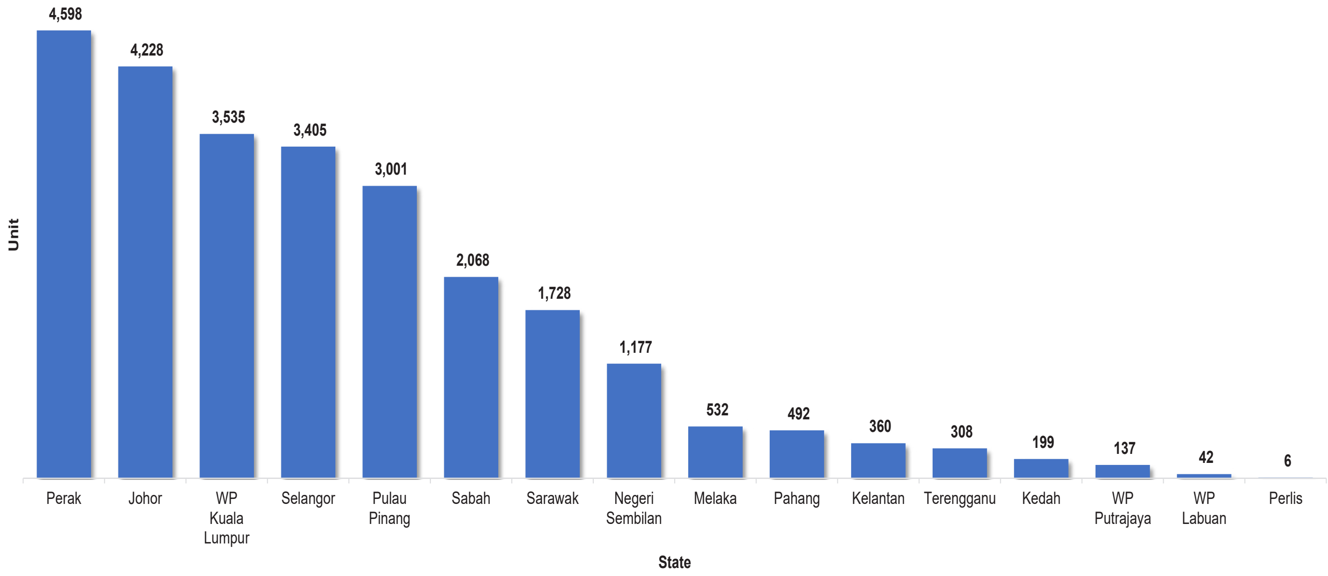
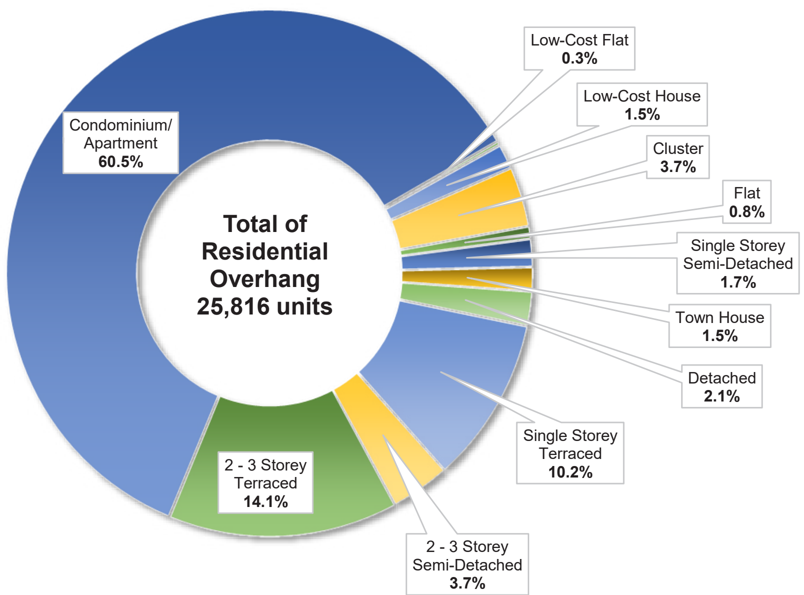


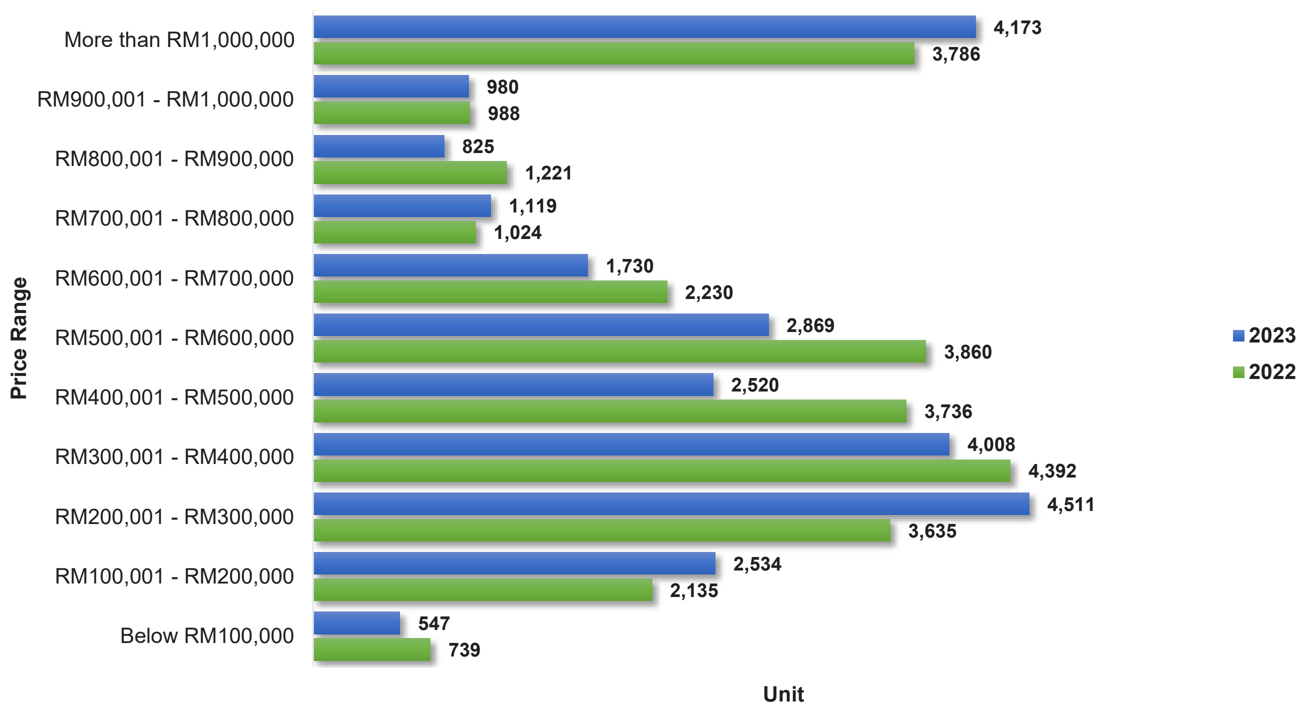
Chart 8: Residential Overhang by Type 2023



Unit kediaman mewah berharga melebihi RM500,000 menguasai majoriti syer siap dibina tidak terjual sebanyak 45.3% (11,696 unit), sedikit menurun sebanyak 1.9% berbanding tahun sebelumnya. Sebaliknya, unit berharga RM300,000 ke bawah meningkat 5.9% kepada 7,592 unit.

High-end residential units priced above RM500,000 took up the majority of the overhang share at 45.3% (11,696 units), slightly decreased by 1.9% compared to previous year. Otherwise, units priced RM300,000 and below increased 5.9% to 7,592 units.

Chart 9: Residential Overhang by Price Range 2022 & 2023



1.3 Dalam Pembinaan Belum Terjual

Seiring dengan trend menurun kediaman siap dibina tidak terjual ialah dalam pembinaan belum terjual, berkurang 11.3% kepada 51,132 unit berbanding 2022.

Negeri Sembilan menunjukkan pengurangan tertinggi sebanyak 40.8% kepada 1,978 unit dan WP Kuala Lumpur sebanyak 39.4% kepada 6,128 unit. Kedah, Kelantan dan Melaka menunjukkan trend yang bertentangan dengan dalam pembinaan belum terjual meningkat dari tahun-ke-tahun masing-masing sebanyak 46.9%, 28.2% dan 21.1%. WP Labuan mempunyai bilangan tidak terjual paling rendah sebanyak 89 unit.

Kondominium/ apartmen mendominasi dalam pembinaan belum terjual sebanyak 46.0% diikuti oleh unit teres sebanyak 38.3%.

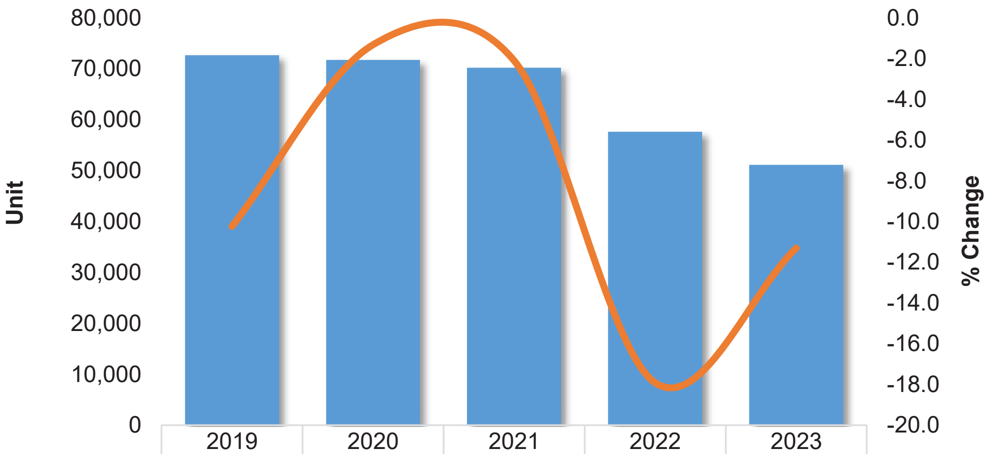
1.3 Unsold Under Construction

Following the declining trend of residential overhang was unsold under construction, reduced 11.3% to 51,132 units compared to 2022.

Negeri Sembilan showed the highest reductions by 40.8% to 1,978 units and WP Kuala Lumpur by 39.4% to 6,128 units. Kedah, Kelantan and Melaka show the opposite where unsold under construction increased year-on-year by 46.9%, 28.2% and 21.1% respectively. WP Labuan has the lowest unsold units at 89 units.

Condominium/ apartment dominated the unsold under construction at 46.0% followed by terraced units at 38.3%.

Chart 10: Trend of Unsold Under Construction Residential 2019 – 2023



	2019	2020	2021	2022	2023
Residential (Unit)	72,692	71,735	70,231	57,649	51,132
Percentage change (%)	-10.2	-1.3	-2.1	-17.9	-11.3

Chart 11: Unsold Under Construction Residential by State 2023

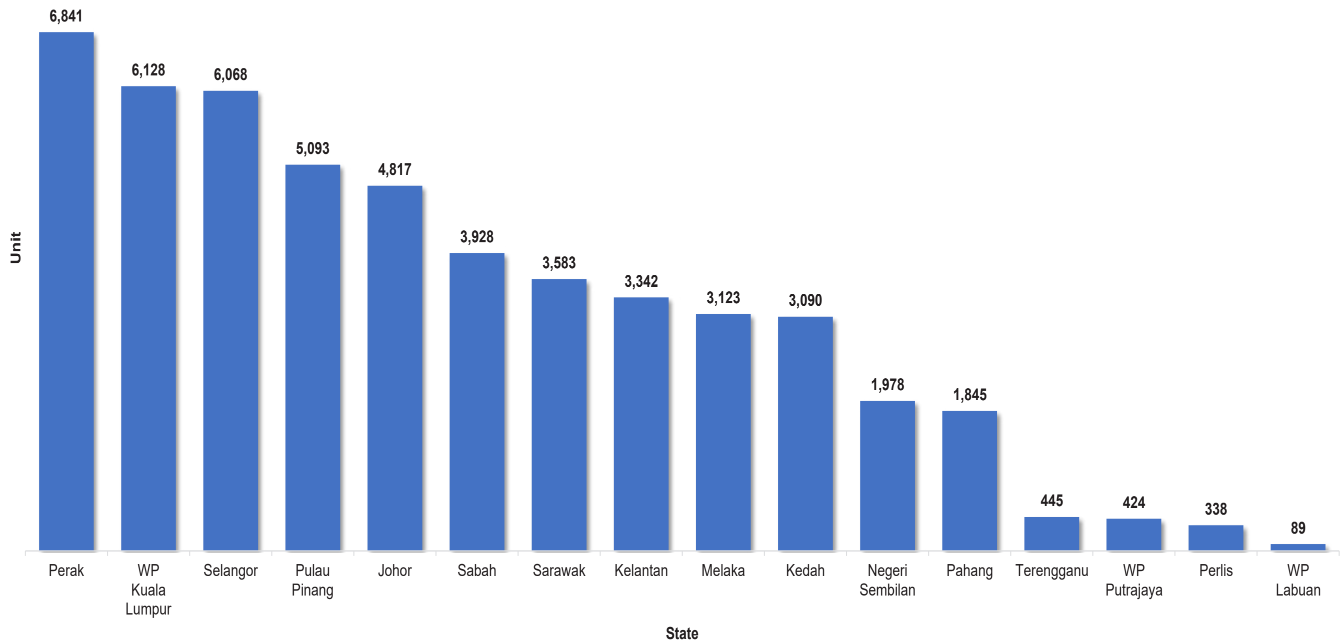
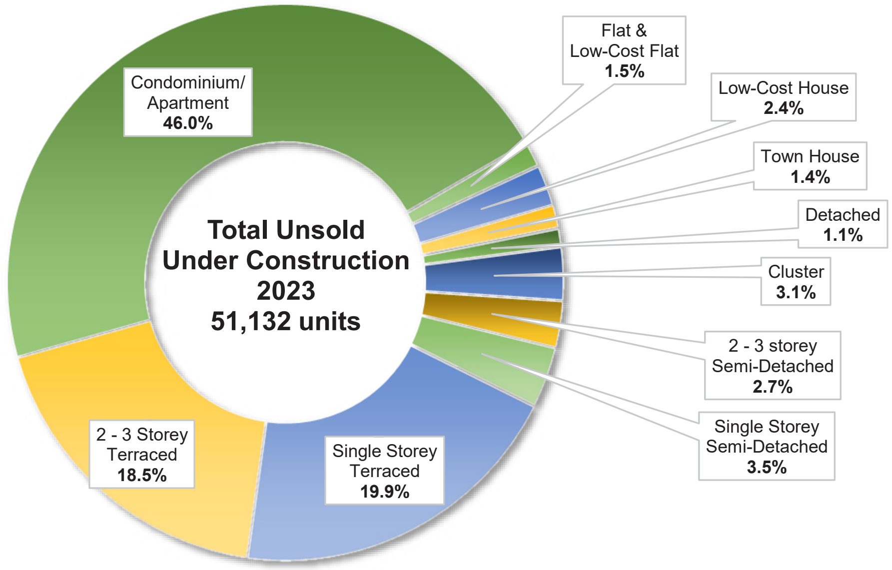


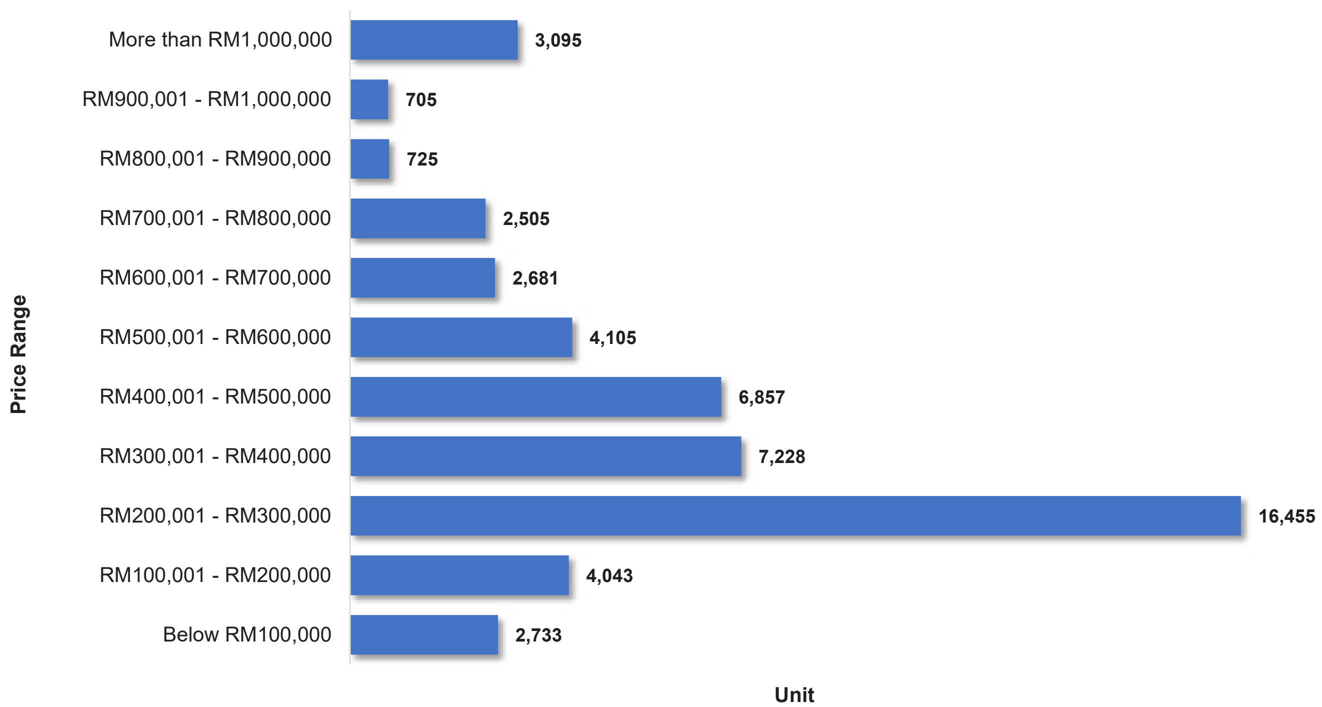
Chart 12: Residential Unsold Under Construction by Type 2023



Majoriti dalam pembinaan tidak terjual didominasi oleh rumah mampu milik berharga RM300,000 dan ke bawah merangkumi 45.4% (23,231 unit). Ini diikuti oleh unit berharga di antara RM300,001 dan RM500,000 sebanyak 27.5% (14,085 unit). Selebihnya 27.0% (13,816 unit) terdiri daripada kediaman mewah berharga melebihi RM500,000.

The majority of unsold under construction were dominated by affordable houses priced at RM300,000 and below accounting for 45.4% (23,231 units). This was followed by units priced between RM300,001 and RM500,000. at 27.5% (14,085 units). The remaining 27.0% (13,816 units) consisted of the high-end houses priced above RM500,000.

Chart 13: Unsold Under Construction by Price Range 2023



1.4 Belum Dibina Belum Terjual

Sepertimana siap dibina tidak terjual dan dalam pembinaan belum terjual, belum dibina belum terjual menyaksikan trend menurun dari tahun-ke-tahun yang mana angka 2023 menyusut sebanyak 28.3% kepada 7,926 unit berbanding tahun sebelum.

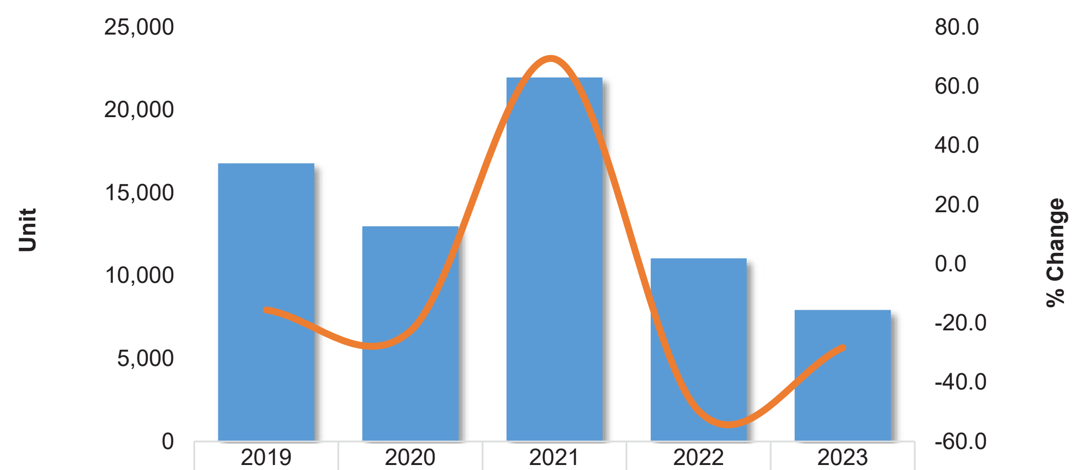
Walaupun WP Kuala Lumpur menerajui segmen kediaman belum dibina belum terjual dengan 2,714 unit, menurun 26.7% daripada angka pada tahun 2022, peningkatan terbesar tahun-ke-tahun direkodkan di Johor, menurun 92.1% kepada 57 unit diikuti oleh Perak, berkurang 74.0% kepada 299 unit pada 2023. Hanya Selangor, Negeri Sembilan dan Melaka mencatatkan kenaikan belum dibina belum terjual.

1.4 Unsold Not Constructed

Similar to overhang and unsold under construction, unsold not constructed demonstrated a declining trend year-on-year where the 2023 figure shrunk by 28.3% to 7,926 units compared to the preceding year.

Although WP Kuala Lumpur led the residential unsold not constructed segment in volume with 2,714 units, down 26.7% from the number in 2022, the largest improvements year-on-year were recorded in Johor, declined 92.1% to 57 units followed by Perak, declined 74.0% to 299 units in 2023. Only Selangor, Negeri Sembilan and Melaka recorded increase in unsold not constructed.

Chart 14: Trend of Unsold Not Constructed Residential 2019 – 2023



	2019	2020	2021	2022	2023
Residential (Unit)	16,774	12,975	21,960	11,053	7,926
Residential (% change)	-15.6	-22.6	69.2	-49.7	-28.3

Chart 15: Unsold Not Constructed by State 2023

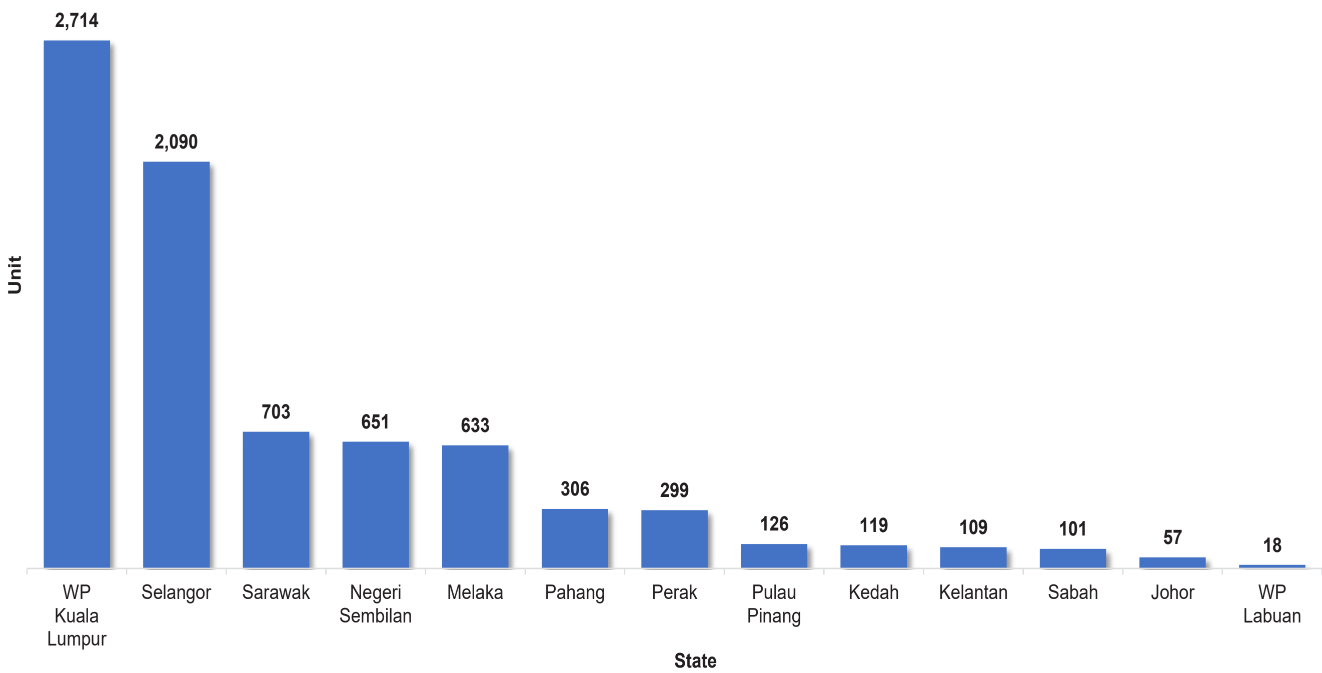
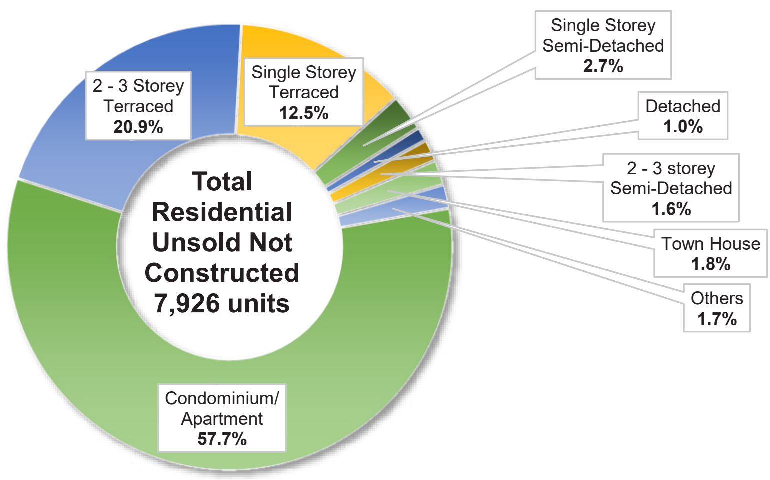


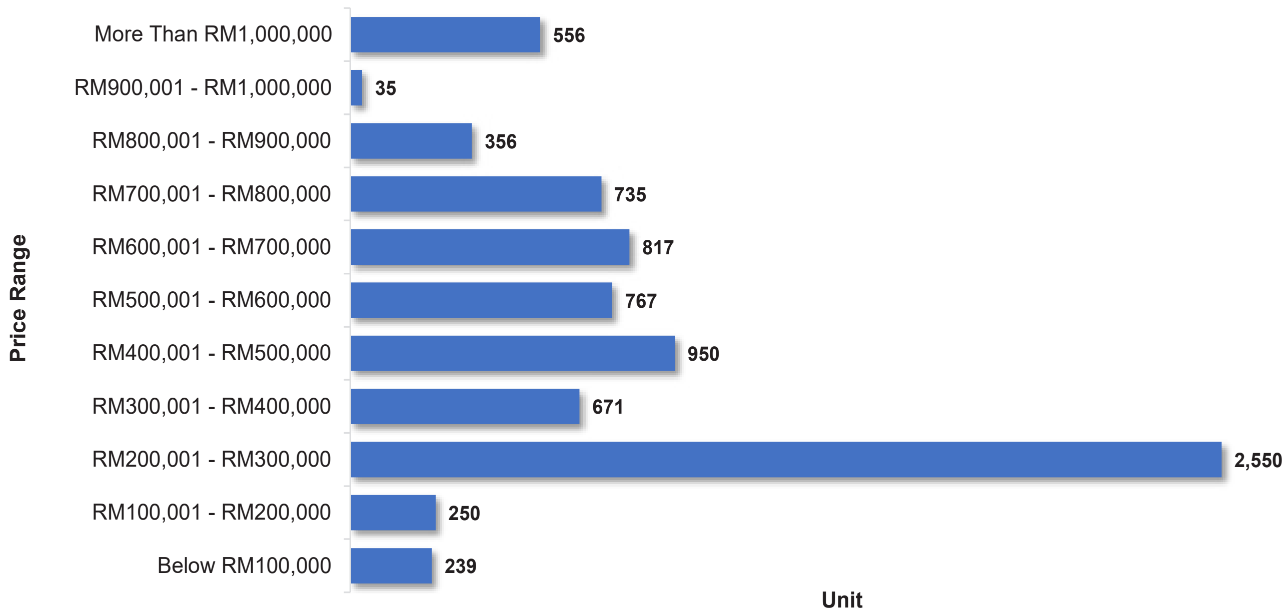
Chart 16: Residential Unsold Not Constructed by Type 2023



Unit berharga melebihi RM500,000 menyumbang 41.2% (3,266 unit), diikuti unit berharga di bawah RM300,000 menyumbang 38.3% (3,039 unit), manakala unit dalam julat RM300,001 ke RM500,000 menyumbang sebanyak 20.5% (1,621 unit).

Units priced above RM500,000 contributed 41.2% (3,266 units), followed by the units priced below RM300,000 contributed 38.3% (3,039 units), whilst units priced between RM300,001 to RM500,000 contributed 20.5% (1,621 units).

Chart 17: Unsold Not Constructed by Price Range 2023



2.0 HARTA TANAH KOMERSIAL

2.1 Harta Tanah Siap Dibina Tidak Terjual

Pada 2023, siap dibina tidak terjual bagi subsektor perdagangan menurun kepada 12.7% dengan 28,744 unit bernilai RM23.15 bilion.

Pangsapuri khidmat mendominasi bilangan tertinggi siap dibina tidak terjual iaitu 20,825 unit (72.4%) bernilai RM16.63 bilion (71.8%).

2.0 COMMERCIAL PROPERTY

2.1 Property Overhang

In 2023, the overhang of commercial subsector decreased to 12.7% with 28,744 units valued at RM23.15 billion.

Serviced apartment dominated the highest number of overhang at 20,825 units (72.4%) worth RM16.63 billion (71.8%).

Chart 18: Volume of Commercial Property Overhang 2019 - 2023

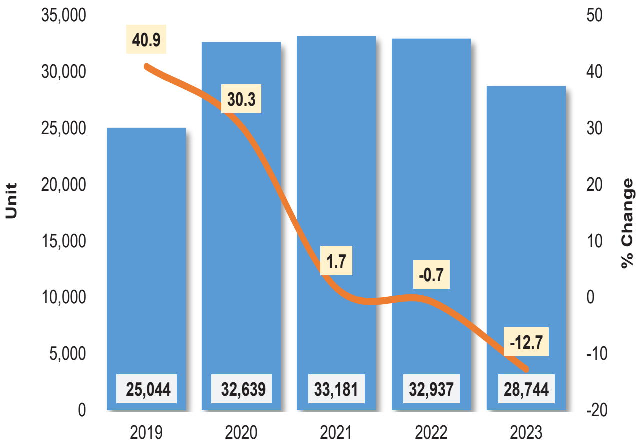


Chart 19: Value of Commercial Property Overhang 2019 - 2023

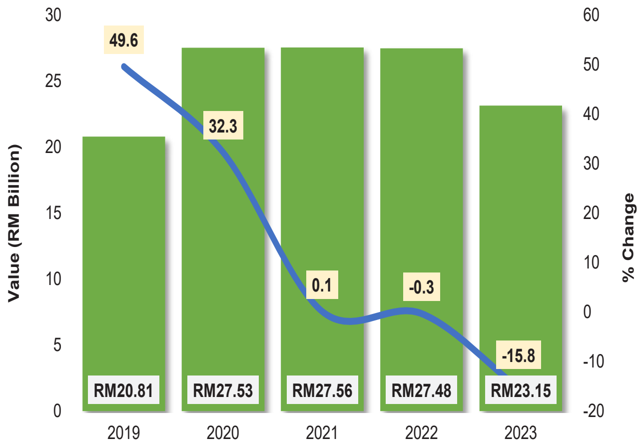
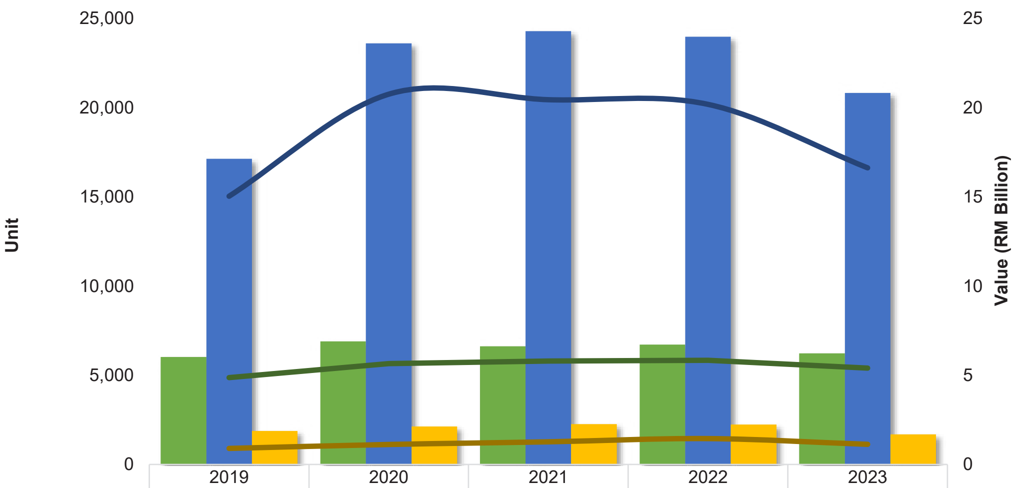


Chart 20: Volume and Value of Commercial Property Overhang 2019 – 2023



	2019	2020	2021	2022	2023
Shops (Unit)	6,024	6,904	6,621	6,720	6,233
Serviced Apartment (Unit)	17,142	23,606	24,295	23,978	20,825
SOHO (Unit)	1,878	2,129	2,265	2,239	1,686
Shops Value (RM)	4.87	5.65	5.80	5.84	5.40
Serviced Apartment Value (RM)	15.04	20.76	20.45	20.19	16.63
SOHO Value (RM)	0.90	1.12	1.27	1.45	1.13

Johor mendahului keseluruhan siap dibina tidak terjual perdagangan dengan syer 47.2%, diikuti oleh WP Kuala Lumpur (19.3%) dan Selangor (10.0%). Johor menunjukkan peningkatan dengan siap dibina tidak terjual menyusut 16.2% berbanding tahun sebelum, manakala WP Kuala Lumpur dan Selangor masing-masing mencatatkan penurunan 19.5% dan 3.3%.

Johor led the overall commercial overhang with 47.2% share, followed by WP Kuala Lumpur (19.3%) and Selangor (10.0%). Johor exhibited improvement with overhang declined by 16.2% compared to the previous year, while WP Kuala Lumpur and Selangor also showed decrease by 19.5% and 3.3% respectively.

Chart 21: Commercial Property Overhang by State 2023

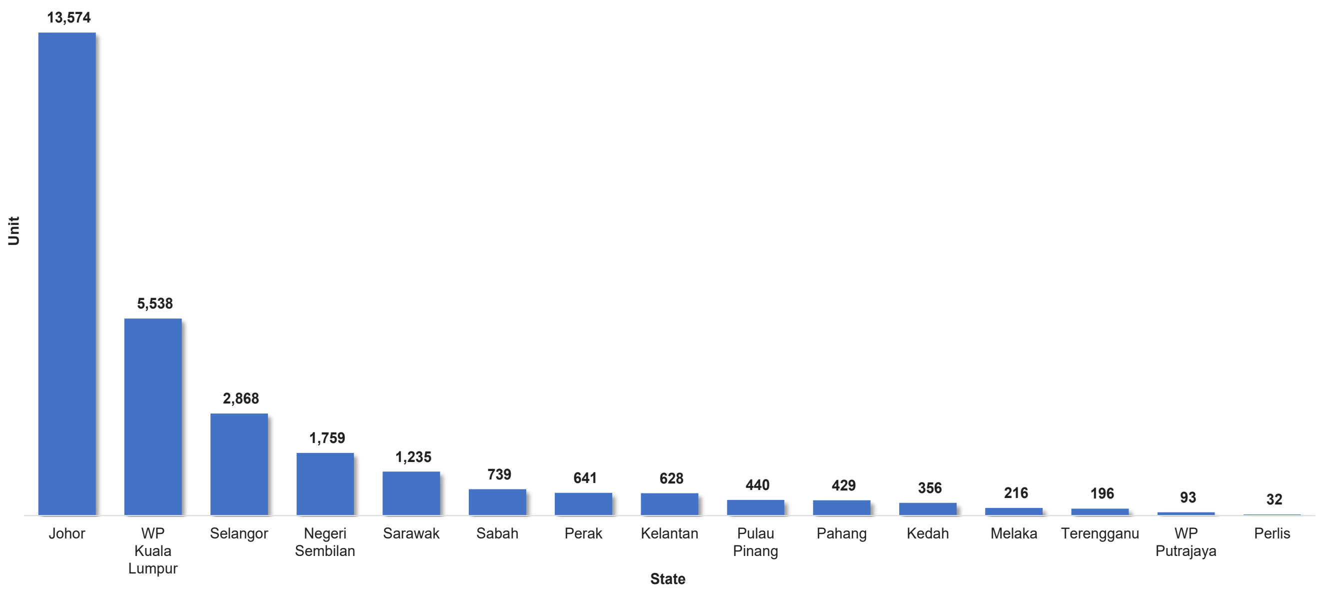
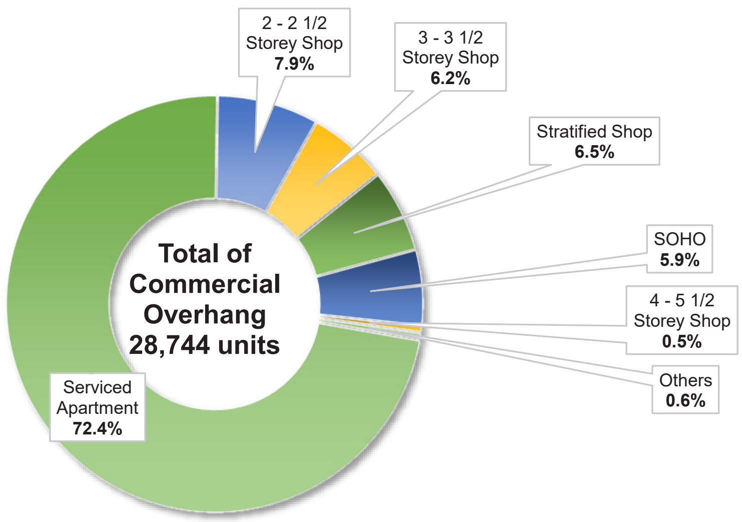


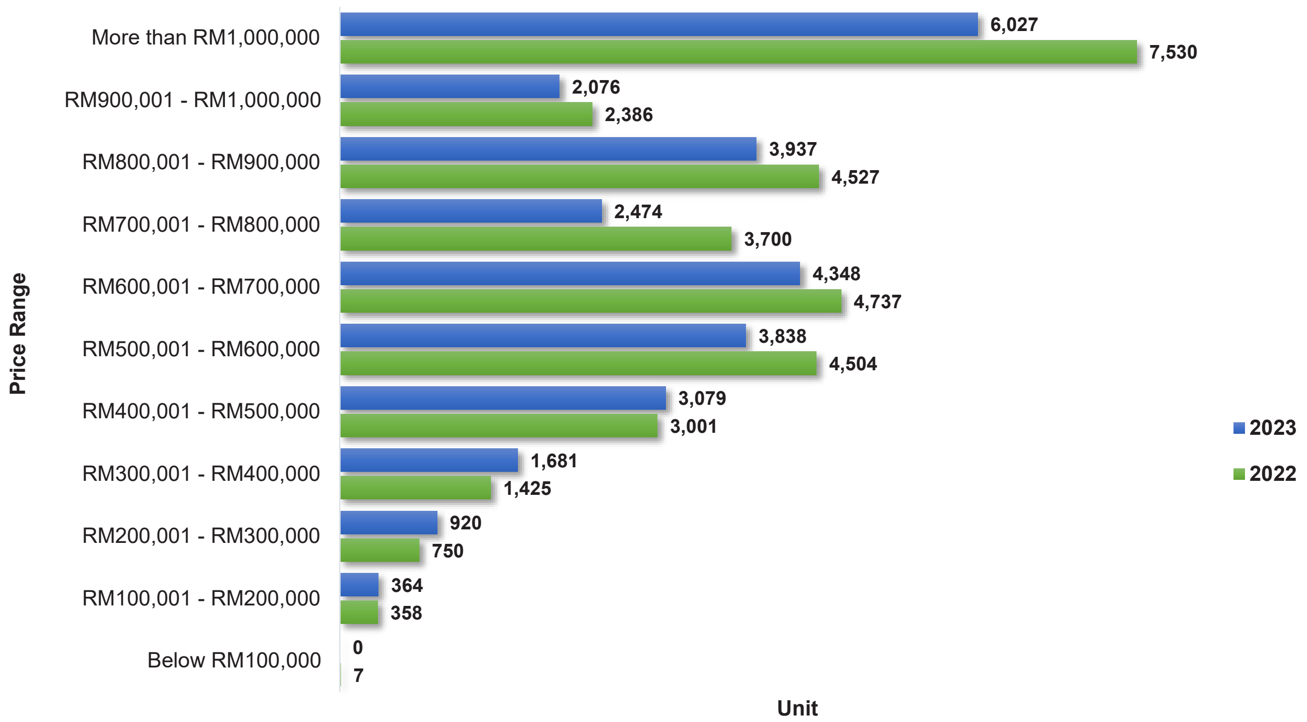
Chart 22: Commercial Overhang by Type 2023



Unit berharga melebihi RM500,000 membentuk majoriti (79.0%) unit perdagangan siap dibina tidak terjual, menurun 4.2% berbanding tahun sebelumnya. Harta tanah dengan harga melebihi RM1 juta turut menurun 1.9%.

Units priced above RM500,000 made up the majority (79.0%) of commercial overhang, decreased 4.2% compared to previous year. Property priced above RM1 million also decreased by 1.9%.

Chart 23: Commercial Property Overhang by Price Range 2022 & 2023



2.1.1 Kedai

Kedai merekodkan 6,233 unit siap dibina tidak terjual bernilai RM5.39 bilion, menurun sebanyak 7.2% dan 7.7% dari segi bilangan dan nilai berbanding tahun sebelumnya.

Johor mendominasi segmen ini dengan 1,517 unit (24.3%) diikuti oleh Sarawak dengan 1,017 unit (16.3%) dan Sabah dengan 739 unit (11.9%).

2.1.1 Shop

Shop recorded 6,233 overhang units valued at RM5.39 billion, decreased at 7.2% and 7.7% in numbers and value compared to the preceding year.

Johor dominated this segment with 1,517 unit (24.3%) followed by Sarawak with 1,017 units (16.3%) and Sabah with 739 units (11.9%).

Chart 24: Volume of Shop Overhang 2019 – 2023

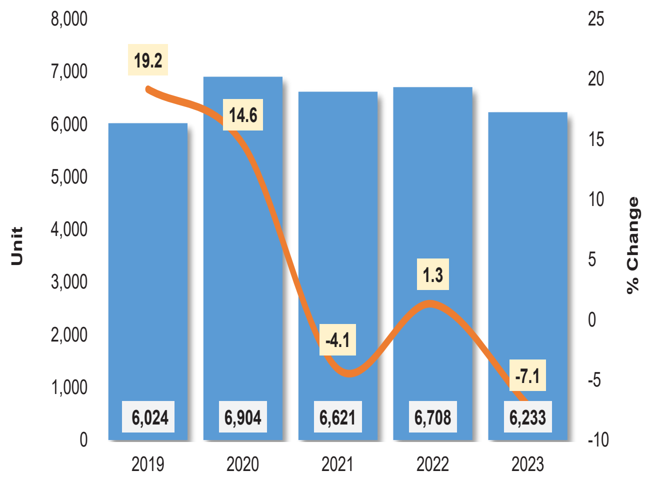


Chart 25: Value of Shop Overhang 2019 – 2023

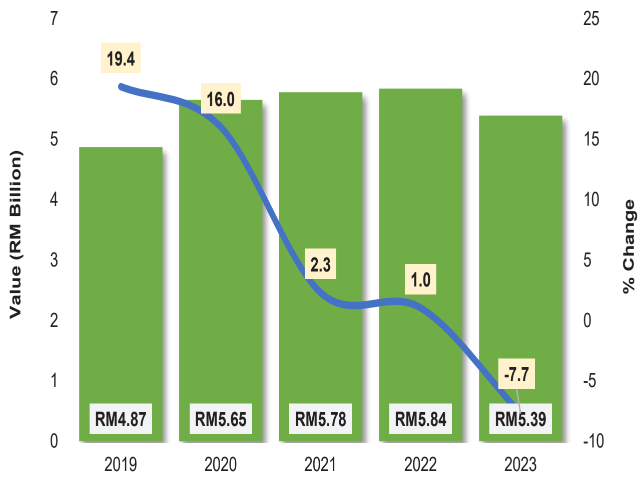
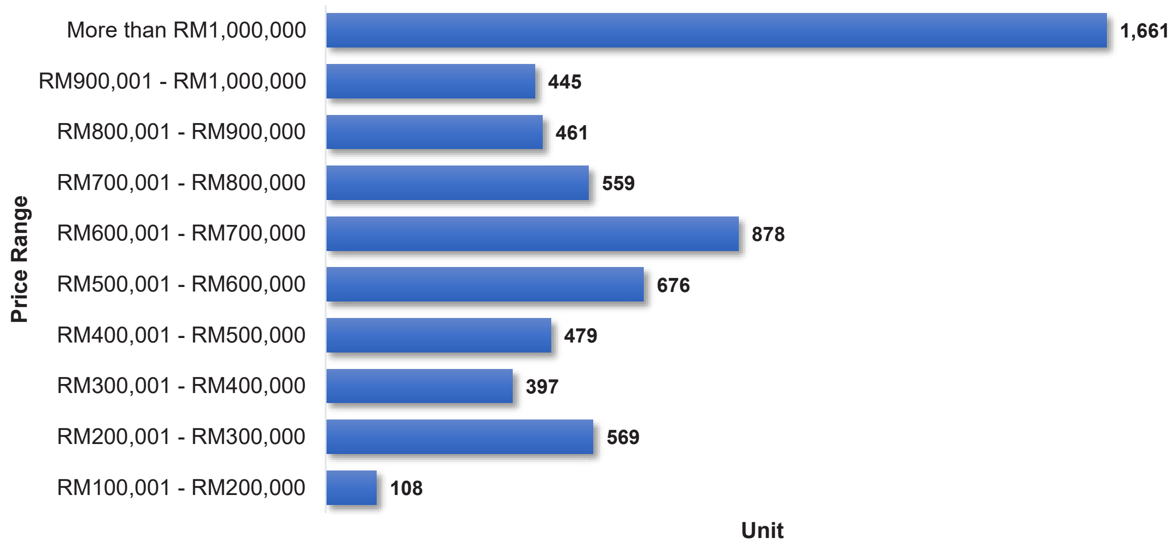


Chart 26: Shop Overhang by Price Range 2023



2.1.2 Pangsapuri Khidmat

Sebanyak 20,825 unit siap dibina tidak terjual bernilai RM16.63 bilion direkodkan pada 2023, menurun sebanyak 13.1% dan 17.6% dari segi bilangan dan nilai berbanding tahun sebelumnya.

2.1.2 Serviced Apartment

There were 20,825 overhang units worth RM16.63 billion recorded in 2023, reduced by 13.1% and 17.6% in volume and value compared to the preceding year.

Chart 27: Volume of Serviced Apartment Overhang 2019 – 2023

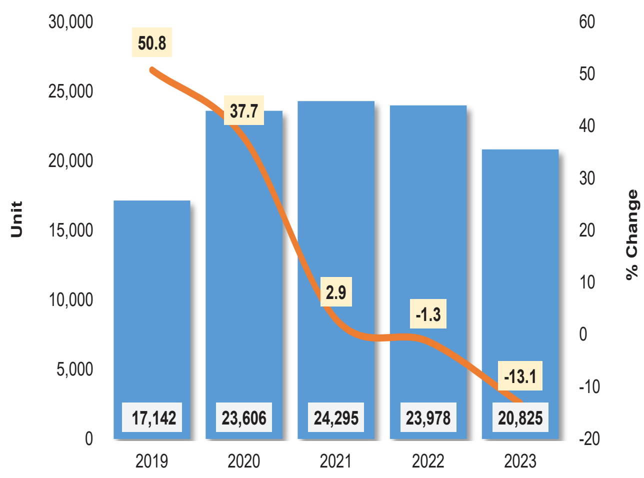
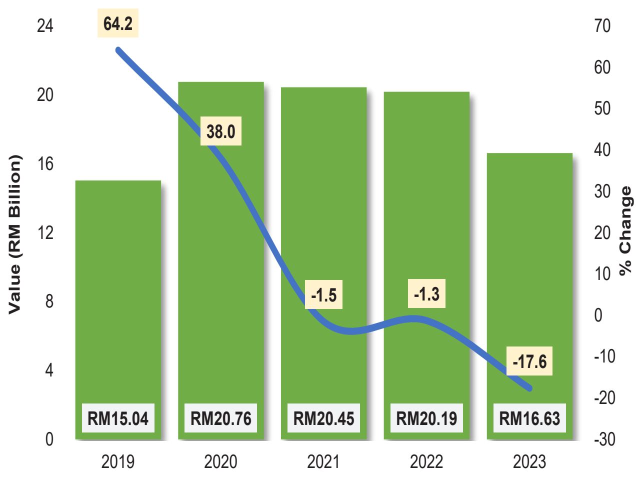


Chart 28: Value of Serviced Apartment Overhang 2019 – 2023



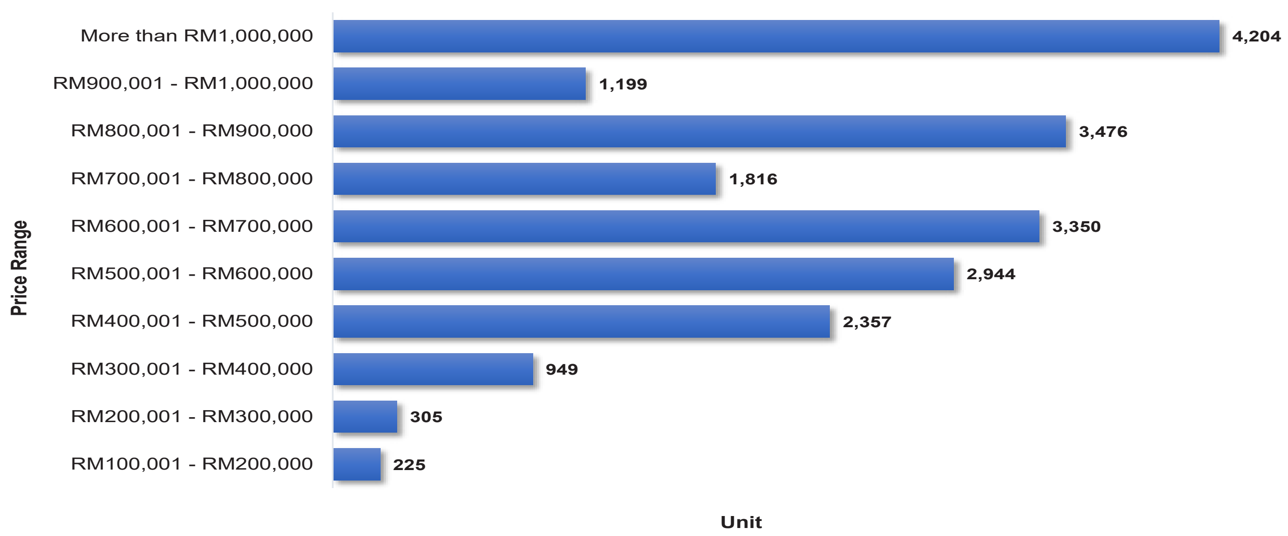
Johor mendominasi pangsapuri khidmat siap dibina tidak terjual sebanyak 56.2% (11,710 unit) diikuti oleh WP Kuala Lumpur dan Selangor masing-masing sebanyak 23.1% (4,806 unit) dan 9.9% (2,065 unit). Walaupun Johor menguasai siap dibina tidak terjual tertinggi, ia menunjukkan prestasi yang positif dengan bilangan siap dibina tidak terjual berkurang dari tahun sebelumnya sebanyak 17.1% (2022: 14,132 unit).

Pangsapuri khidmat berharga RM500,000 dan ke atas membentuk bilangan majoriti siap dibina tidak terjual (81.6%; 4,204 unit).

Johor dominated serviced apartment overhang, at 56.2% (11,710 unit) followed by WP Kuala Lumpur and Selangor, at 23.1% (4,806 unit) and 9.9% (2,065 unit) respectively. Even though, Johor led the highest number of overhang, the number seen positive with the reduce at 17.1% (2022: 14,132 unit) from the previous year.

Service apartment priced RM500,000 and above made up the majority of overhang (81.6%:4,204 unit).

Chart 29: Serviced Apartment Overhang by Price Range 2023



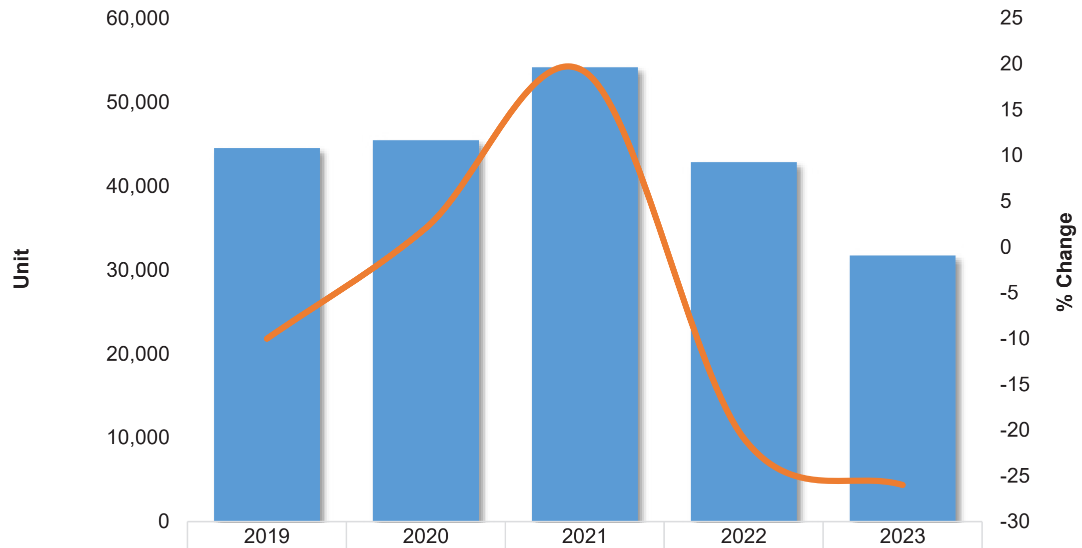
2.2 Dalam Pembinaan Belum Terjual

Unit perdagangan dalam pembinaan tidak terjual memaparkan penurunan mendadak kepada 26.0% (31,708 unit) berbanding tahun sebelumnya. Pangsapuri khidmat merekodkan jumlah bilangan tertinggi dalam pembinaan tidak terjual yang mana melebihi 70% daripada jumlah keseluruhan.

2.2 Unsold Under Construction

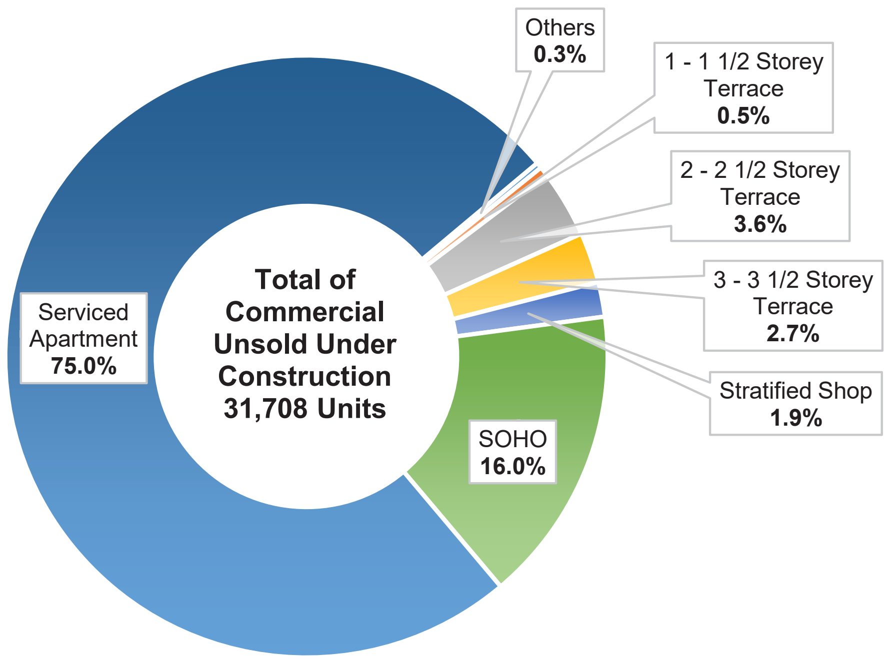
The unsold under construction commercial saw a significant decreased to 26.0% (31,708 units) compared to the preceding year. Serviced apartment recorded the highest number of unit unsold under construction which is more than 70% of the total units.

Chart 30: Trend of Unsold Under Construction Commercial Property 2019 – 2023



	2019	2020	2021	2022	2023
Commercial (Unit)	44,528	45,452	54,154	42,848	31,708
Commercial (% Change)	-10.0	2.1	19.1	-20.9	-26.0

Chart 31: Commercial Unsold Under Construction by Type 2023



Selangor mendominasi dengan 31.6% (10,007 unit) diikuti oleh WP Kuala Lumpur sebanyak 31.4% (9,961 unit) dan Johor sebanyak 18.7% (5,924 unit).

Selangor dominated with 31.6% (10,007 units) followed by WP Kuala Lumpur at 31.4% (9,961 units) and Johor at 18.7% (5,924 units).

Kira-kira 50.0% unit perdagangan dalam pembinaan tidak terjual terdiri dari unit berharga RM500,000 dan ke atas manakala 24.0% daripada keseluruhan unit adalah unit melebihi harga RM1 juta.

About 50.0% of unsold under construction made up by commercial priced RM500,000 and above, meanwhile 24.0% of the total was priced above RM1 million.

Chart 32: Unsold Under Construction Commercial Property by State 2023

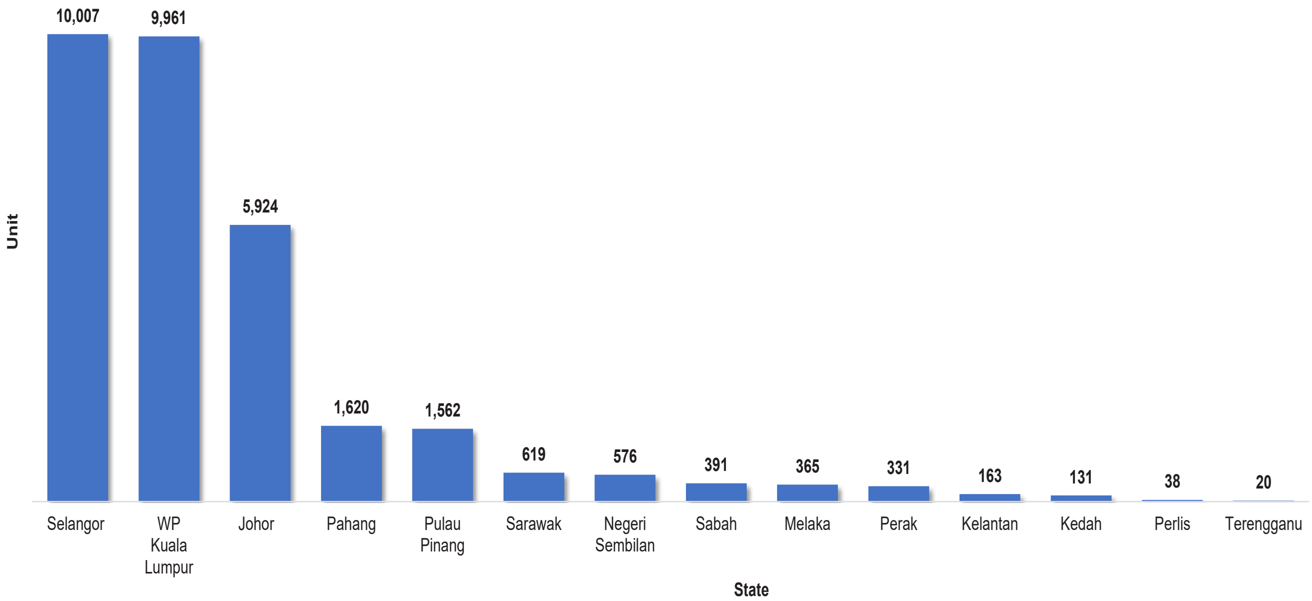
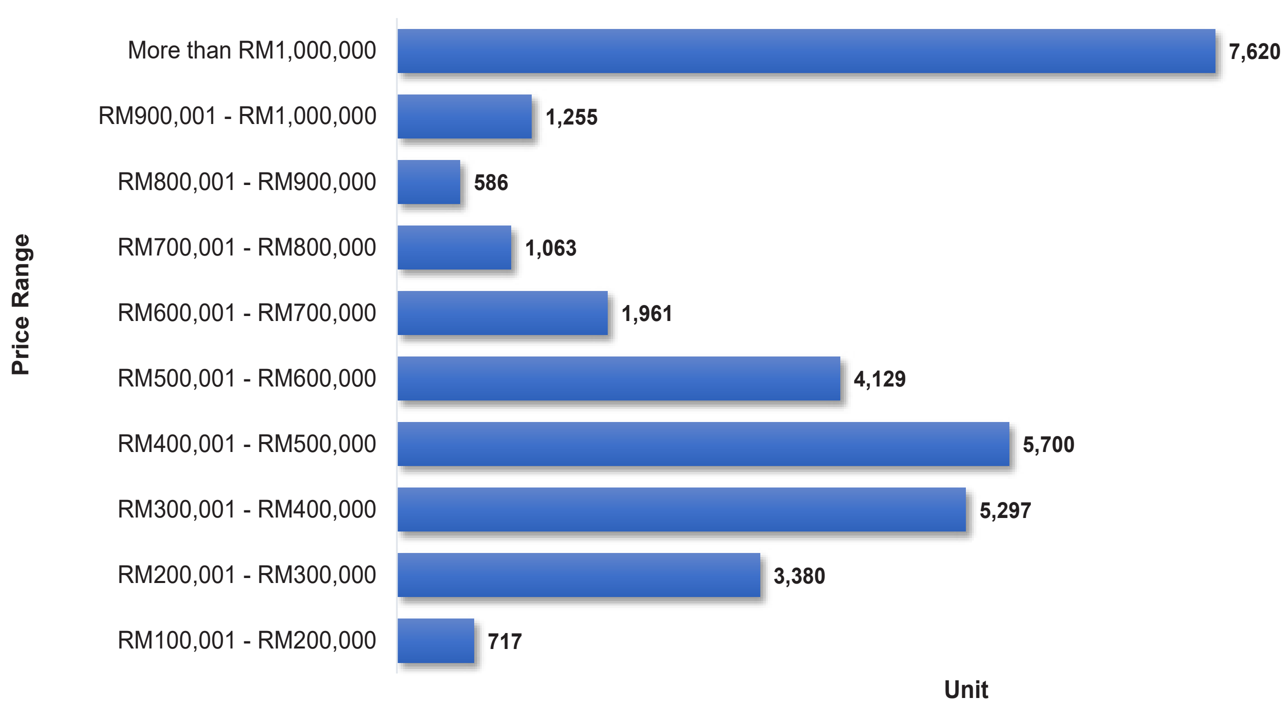


Chart 33: Unsold Under Construction Commercial by Price Range 2023



2.2.1 Kedai

Dalam segmen kedai dalam pembinaan belum terjual, ia menunjukkan peningkatan sedikit 2.7% kepada 2,852 unit berbanding tahun sebelumnya.

Kedai dua dan dua setengah tingkat membentuk sebanyak 40.3% (1,149 unit) daripada jumlah keseluruhan, diikuti oleh kedai tiga dan tiga setengah tingkat sebanyak 30.2% (861 unit) serta kedai strata 20.7% (589 unit).

Harga RM1 juta dan ke atas mendominasi unit dalam pembinaan belum terjual (36.5%) diikuti julat harga RM500,001 – RM700,000 (25.7%).

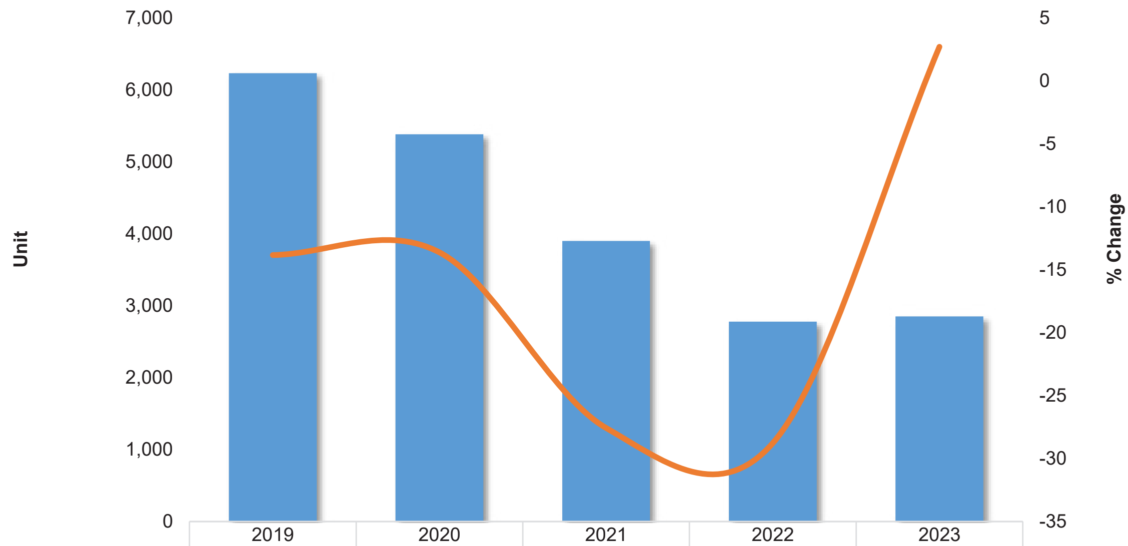
2.2.1 Shop

In the segment of unsold under construction shop, it saw slightly increased by 2.7% to 2,852 units compared to the preceding year.

Two and two-and-a-half storey shops formed 40.3% (1,149 units) of the total, followed by three and three-and-a-half storey shops at 30.2% (861 units) and stratified shops at 20.7% (589 units).

Unsold under construction with price RM1 million and above dominated the highest number of the total (36.5%), followed by price range RM500,001 – RM700,000 (25.7%).

Chart 34: Trend of Unsold Under Construction Shops 2019 – 2023



	2019	2020	2021	2022	2023
Shops (Unit)	6,232	5,383	3,899	2,777	2,852
Shops (% Change)	-13.8	-13.6	-27.6	-28.8	2.7

Chart 35: Unsold Under Construction Shops by Type 2023

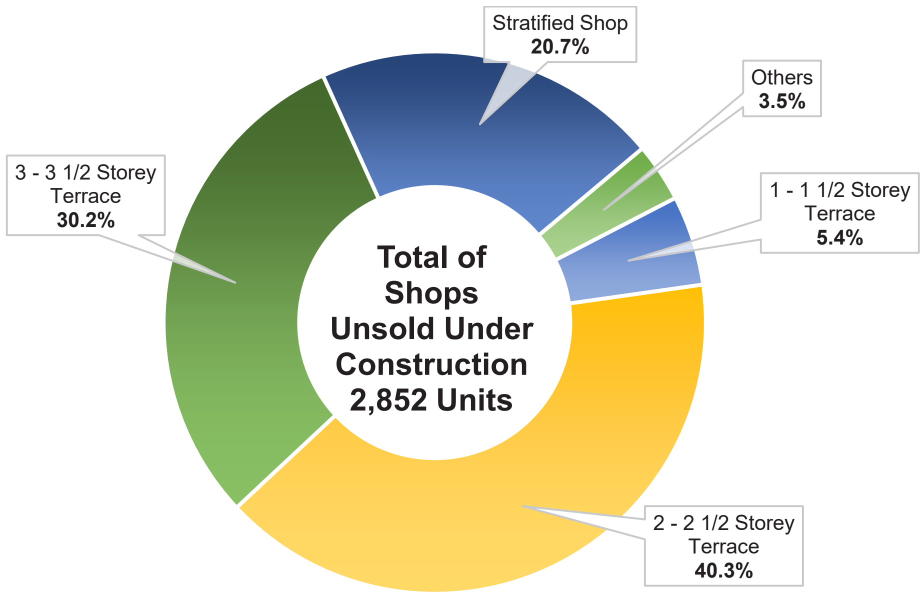
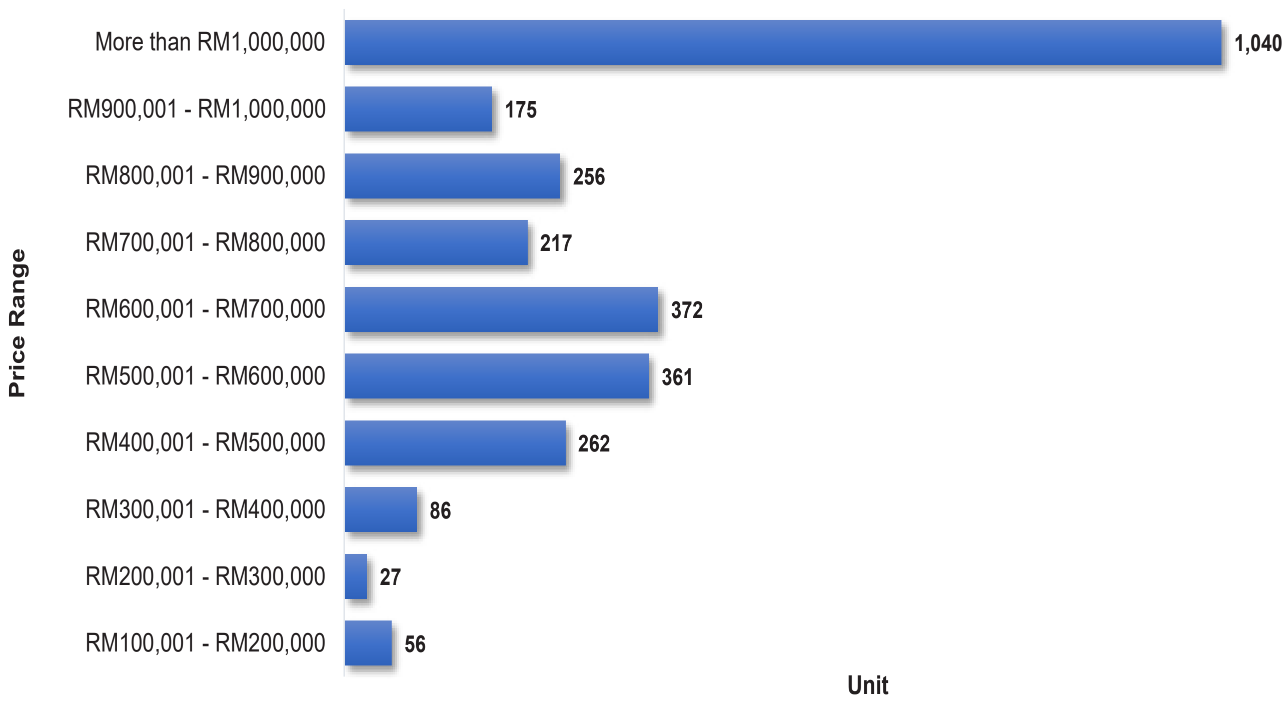


Chart 36: Unsold Under Construction Shops by Price Range 2023



2.2.2 Pangsapuri Khidmat

Status pangsapuri khidmat dalam pembinaan belum terjual berkurang 28.1% kepada 23,795 unit berbanding tahun sebelumnya.

WP Kuala Lumpur mencatatkan bilangan dalam pembinaan belum terjual tertinggi, sebanyak 37.7% (8,974 unit) daripada jumlah keseluruhan, diikuti oleh Selangor sebanyak 28.5% (6,774 unit) dan Johor sebanyak 19.8% (4,722 unit).

Kebanyakan dalam pembinaan belum terjual berharga melebihi RM500,000, melibatkan 57.3% (13,628 unit) daripada jumlah keseluruhan diikuti oleh unit berharga dari RM300,001 hingga RM500,000 sebanyak 36.5% (8,688 unit).

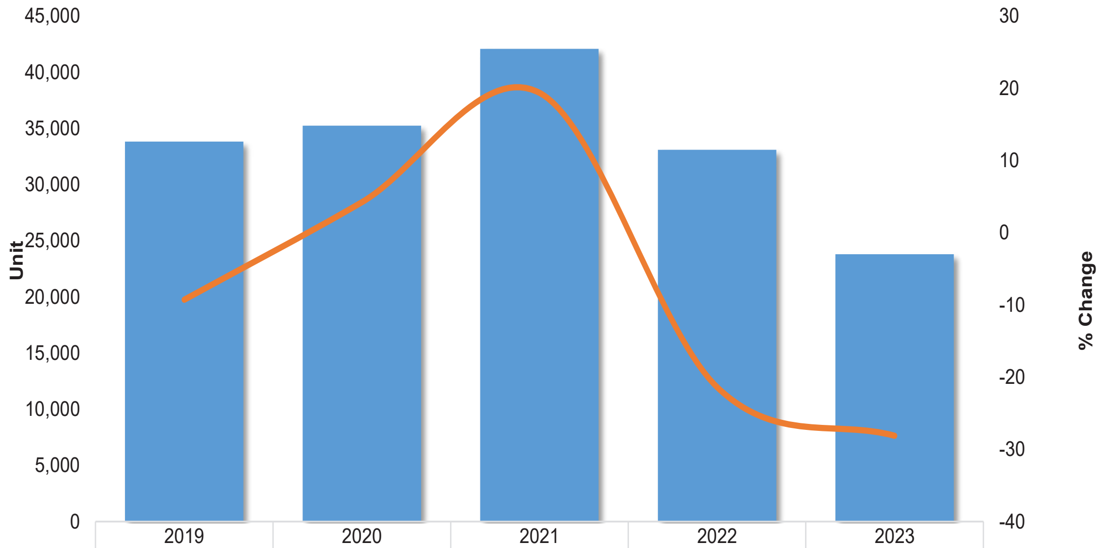
2.2.2 Serviced Apartment

Status unsold under construction of serviced apartment decreased by 28.1% to 23,795 units compared to the preceding year.

WP Kuala Lumpur recorded the highest number of unsold under construction, accounting for 37.7% (8,974 units) of the total, followed by Selangor at 28.5% (6,774 units) and Johor at 19.8% (4,722 units).

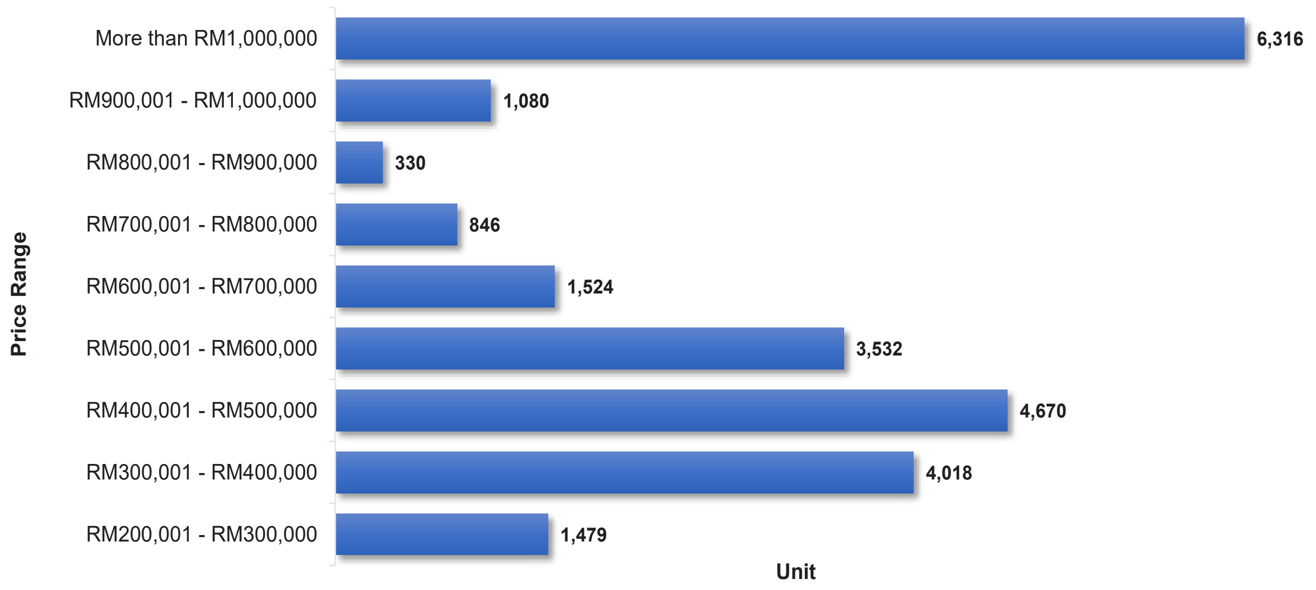
Most of the unsold under construction units were in the priced above RM500,000, accounting for 57.3% (13,628 units) of the total followed by unit priced between RM300,001 and RM500,000 at 36.5% (8,688 units).

Chart 37: Trend of Unsold Under Construction Serviced Apartment 2019 – 2023



	2019	2020	2021	2022	2023
Serviced Apartment (Unit)	33,827	35,258	42,094	33,101	23,795
Serviced Apartment (% Change)	-9.3	4.2	19.4	-21.4	-28.1

Chart 38: Unsold Under Construction Serviced Apartment by Price Range 2023



2.3 Belum Dibina Belum Terjual

Prestasi unit belum dibina belum terjual bagi subsektor perdagangan menurun dengan ketara melebihi 40.0% kepada 7,121 unit berbanding tahun 2022. WP Kuala Lumpur mendahului semua negeri dengan 56.2% daripada jumlah keseluruhan (4,004 unit).

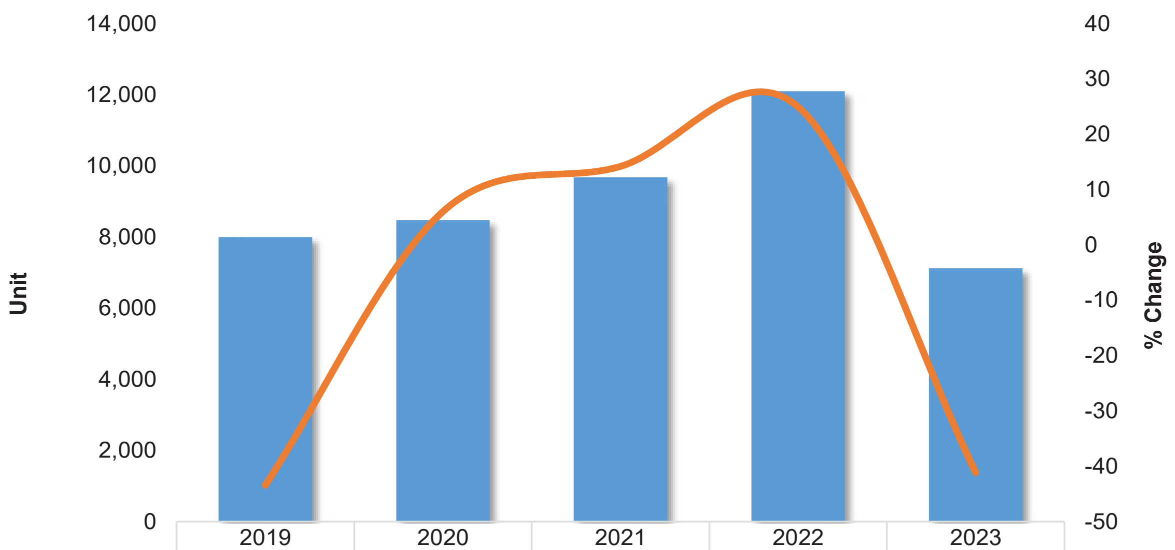
Pangsapuri khidmat merekodkan jumlah bilangan tertinggi belum dibina belum terjual yang mana melebihi 90% daripada jumlah keseluruhan.

2.3 Unsold Not Constructed

The performance of unsold not constructed for commercial subsector significantly decreased more than 40.0% to 7,121 units as compared to 2022. WP Kuala Lumpur led over other states with 56.2% of the total share (4,004 units).

Serviced apartment recorded the highest number of unit unsold not constructed which is more than 90% of the total units.

Chart 39: Trend of Unsold Not Constructed Commercial Property 2019 – 2023



	2019	2020	2021	2022	2023
Commercial (Unit)	7,995	8,478	9,682	12,097	7,121
Commercial (% Change)	-43.4	6.0	14.2	24.9	-41.1

Chart 40: Unsold Not Constructed Commercial Property by State 2023

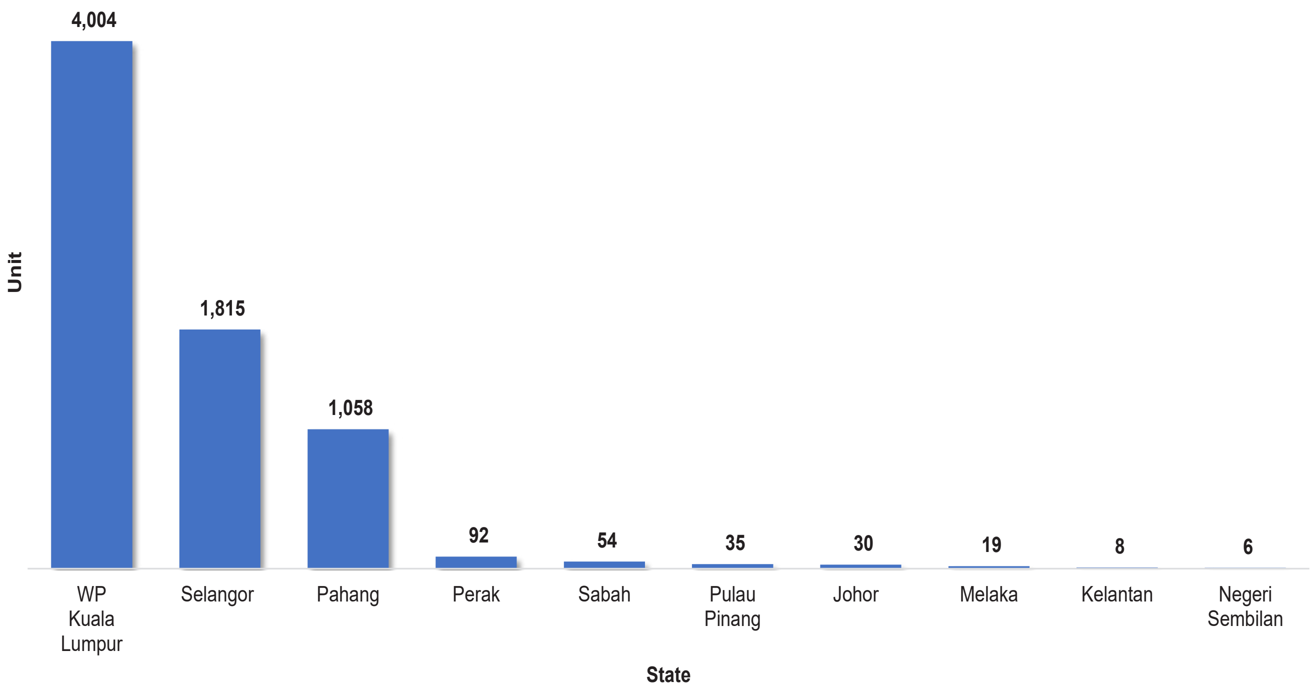
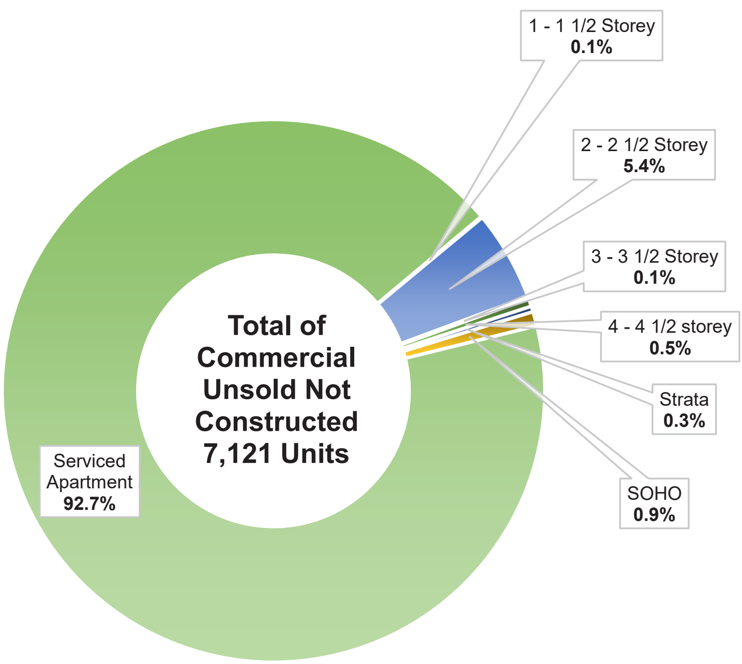


Chart 41: Commercial Unsold Not Constructed by Type 2023



2.3.1 Kedai

Kedai merekodkan peningkatan 24.9% kepada 456 unit. Pahang mendominasi dengan 50.7% (231 unit), diikuti oleh Perak sebanyak 20.2% (92 unit) and Sabah sebanyak 11.8% (54 unit).

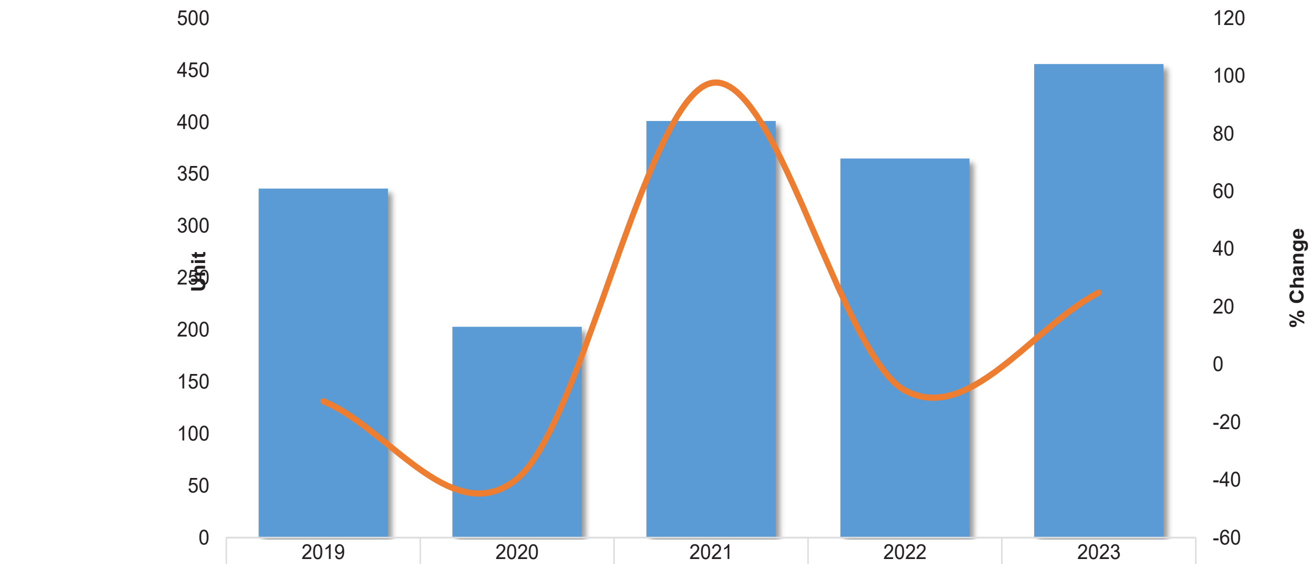
Kebanyakan kedai belum dibina belum terjual merupakan unit yang berharga dari RM500,000 hingga RM600,000 (36.8%) dan dari RM700,000 hingga RM800,000 (19.1%).

2.3.1 Shop

Shop recorded an increase of 24.9% to 456 units. Pahang dominated with 50.7% (231 units), followed by Perak at 20.2% (92 units) and Sabah at 11.8% (54 units).

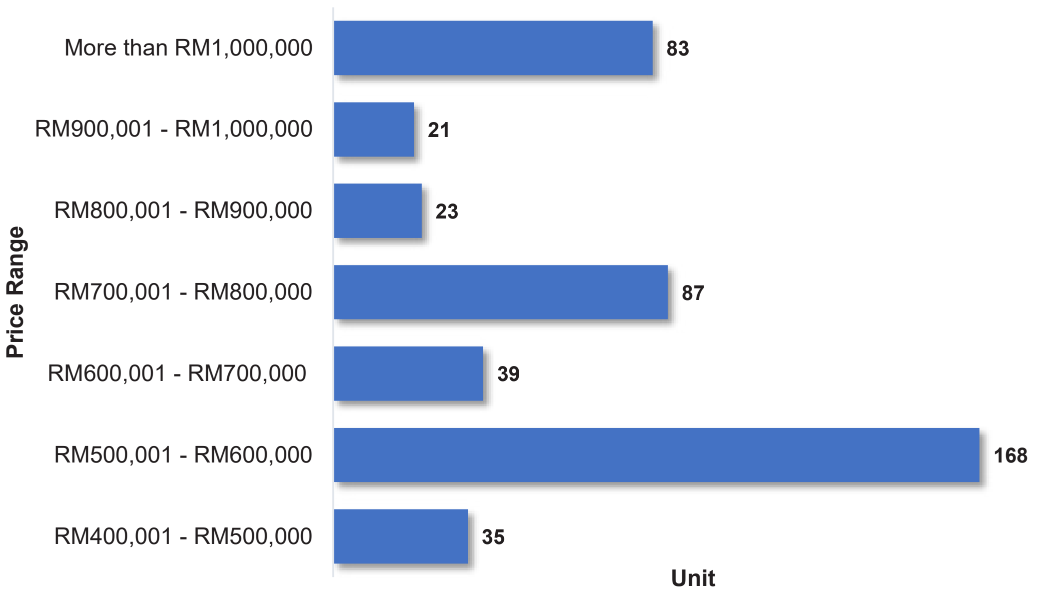
The most unsold not constructed shops were priced from RM500,000 to RM600,000 (36.8%) and from RM700,000 to RM800,000 (19.1%).

Chart 42: Trend of Unsold Not Constructed Shops 2019 – 2023



	2019	2020	2021	2022	2023
Shops (Unit)	336	203	401	365	456
Shops (% Change)	-12.7	-39.6	97.5	-9.0	24.9

Chart 43: Unsold Not Constructed Shops by Price Range 2023



2.3.2 Pangsapuri Khidmat

Segmen pangsapuri khidmat belum dibina belum terjual menunjukkan penurunan 34.3% berbanding separuh tahun sebelumnya, sebanyak 6,991 unit belum terjual direkodkan.

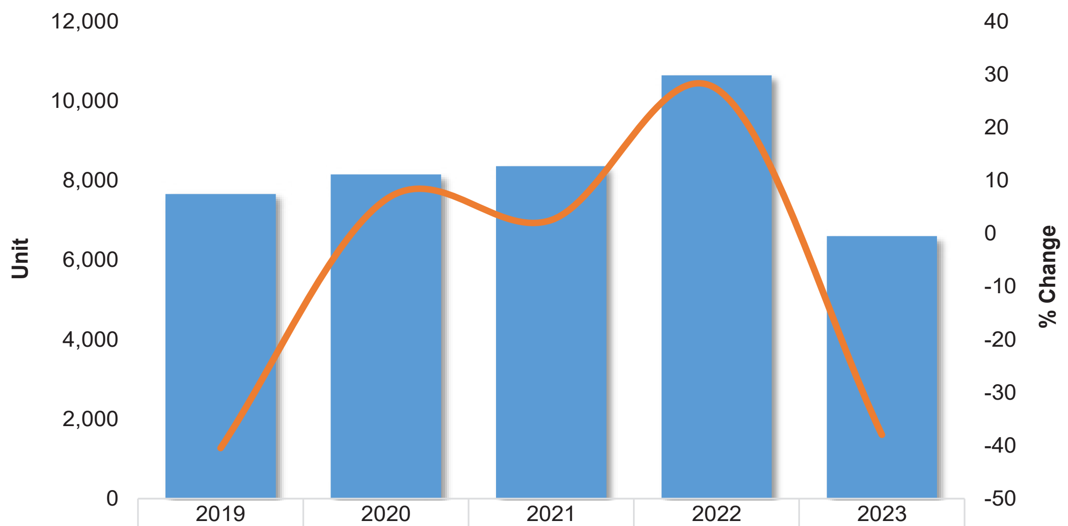
WP Kuala Lumpur menyumbang 65.6% (4,586 unit) daripada jumlah belum terjual seluruh negara, diikuti Johor dan Pahang masing-masing dengan 15.7% (1,097 unit) dan 10.4% (724 unit).

2.3.2 Serviced Apartment

Unsold not unconstructed serviced apartment increased by 34.3% compared to the preceding half where 6,991 unsold units were recorded.

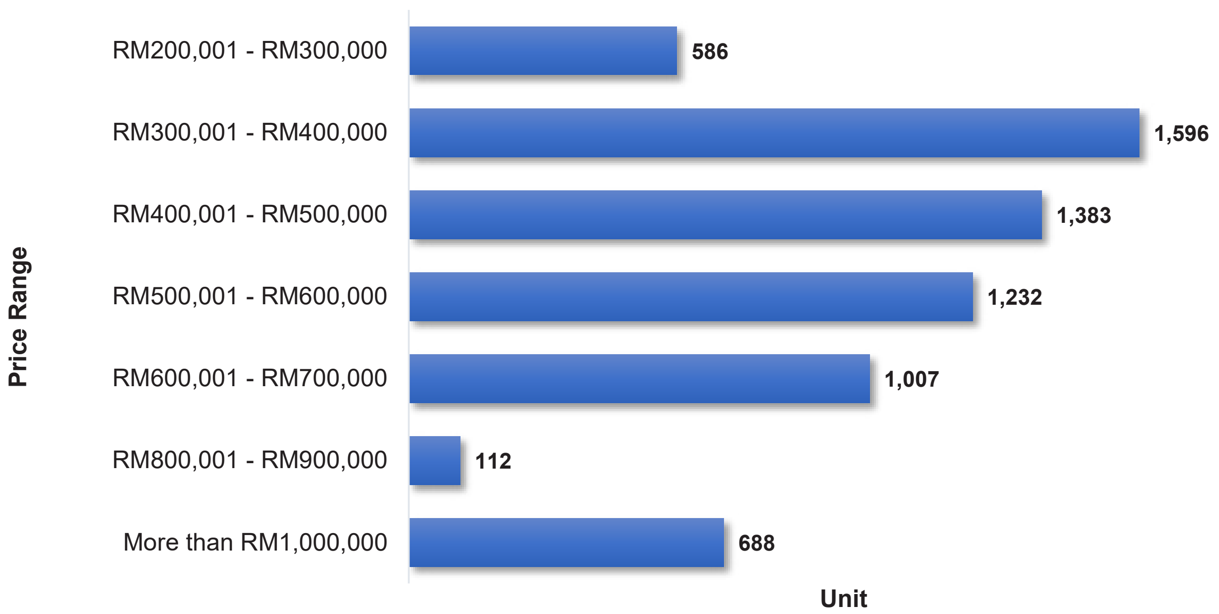
WP Kuala Lumpur contributed 65.6% (4,586 units) of the country's unsold total, followed by Johor and Pahang with 15.7% (1,097 units) and 10.4% (724 units) respectively.

Chart 44: Trend of Unsold Not Constructed Serviced Apartments 2019 – 2023



	2019	2020	2021	2022	2023
Serviced Apartment (Unit)	7,659	8,153	8,361	10,644	6,604
Serviced Apartment (% Change)	-40.5	6.4	2.6	27.3	-38.0

Chart 45: Unsold Not Constructed Serviced Apartments by Price Range 2023



3.0 HARTA TANAH INDUSTRI

3.1 Harta Tanah Siap Dibina Tidak Terjual

Situasi harta tanah industri siap dibina tidak terjual bertambah baik pada tahun 2023. Sebanyak 808 unit siap dibina tidak terjual bernilai RM0.84 bilion direkodkan, turun 8.2% dan 27.0% dari segi bilangan dan nilai berbanding tahun sebelumnya.

Sarawak menguasai bilangan harta tanah industri tidak terjual dengan 323 unit (40.0%), diikuti oleh Johor dengan 173 unit (21.4%).

3.0 INDUSTRIAL PROPERTY

3.1 Property Overhang

The overhang situation for the industrial subsector continued to improve in year 2023. A total of 808 overhang units valued at RM0.84 billion were recorded, down 8.2% and 27.0% in volume and value compared to the preceding year.

Sarawak dominated the number of overhang industrial property with 323 units (40.0%), followed by Johor with 173 units (21.4%).

Chart 46: Volume of Industrial Overhang 2019 – 2023

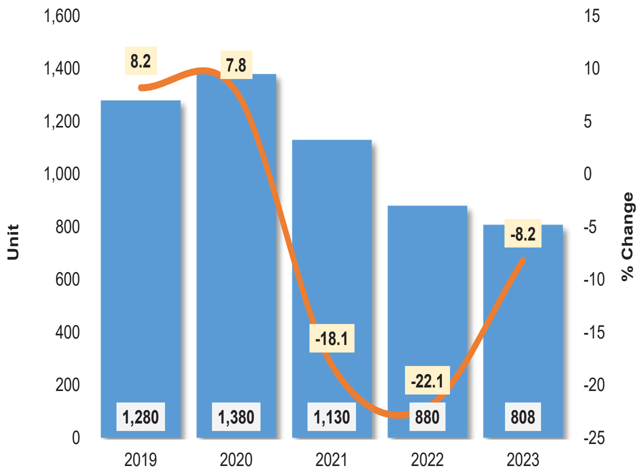
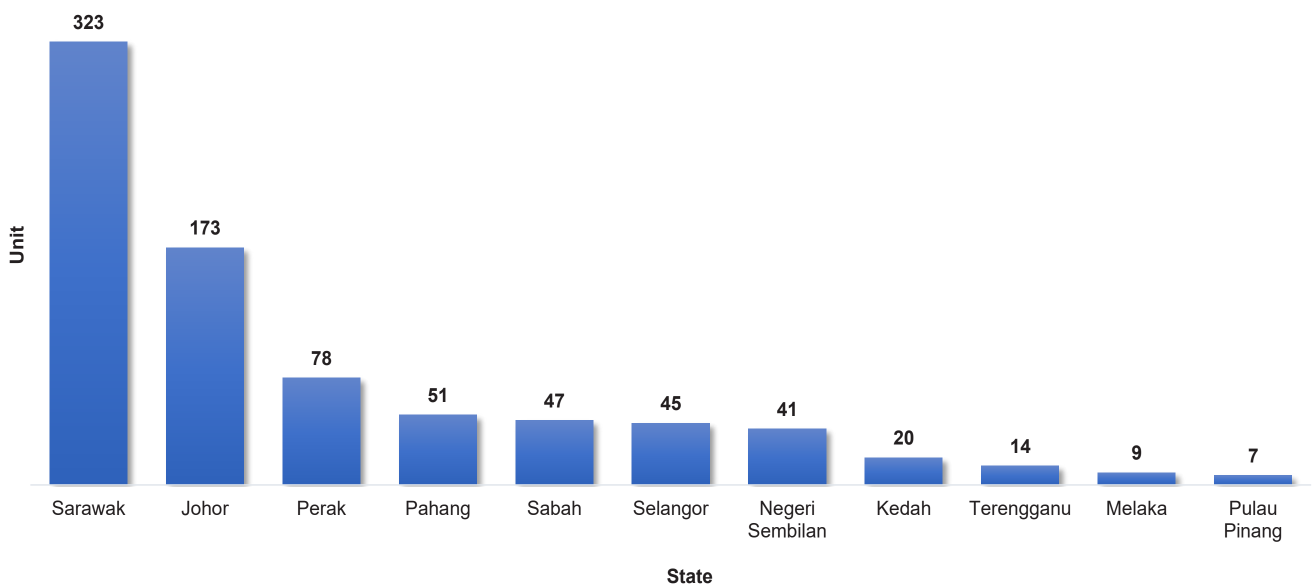


Chart 47: Value of Industrial Overhang 2019 – 2023

Chart 48: Industrial Overhang by State 2023



Unit teres merekodkan bilangan tertinggi industri siap dibina tidak terjual mengikut jenis bangunan sebanyak 61.1% (494 unit), diikuti unit berkembar sebanyak 31.3% (253 unit).

Dari segi harga, unit industri berharga melebihi RM1 juta melibatkan 37.6% (304 unit) manakala unit berharga RM500,000 dan ke atas sebanyak 35.4% (286 unit).

Terraced units recorded the highest number of industrial overhang by building type at 61.1% (494 units) followed by semi-detached units at 31.3% (253 unit).

In terms of price, industrial units above RM1 million accounted for 37.6% (304 units), whilst the price for RM500,000 and above were 35.4% (286 units).

Chart 49: Industrial Overhang by Type 2023

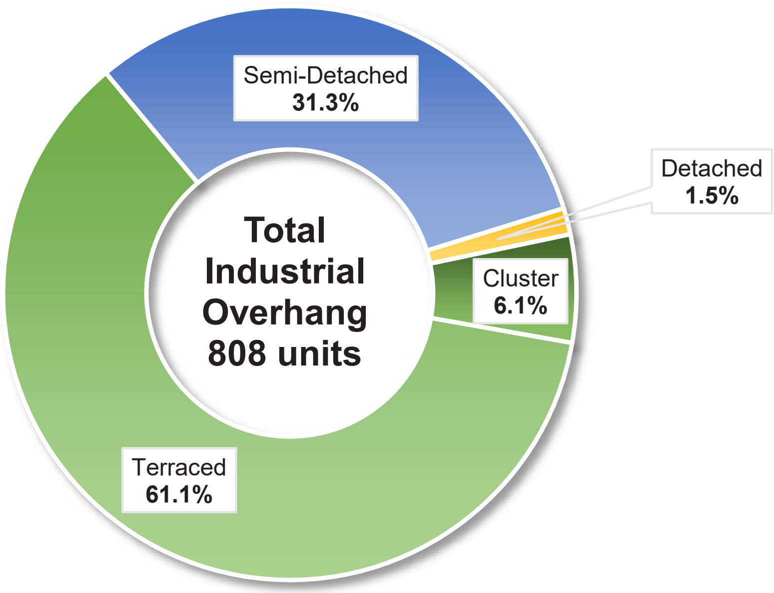
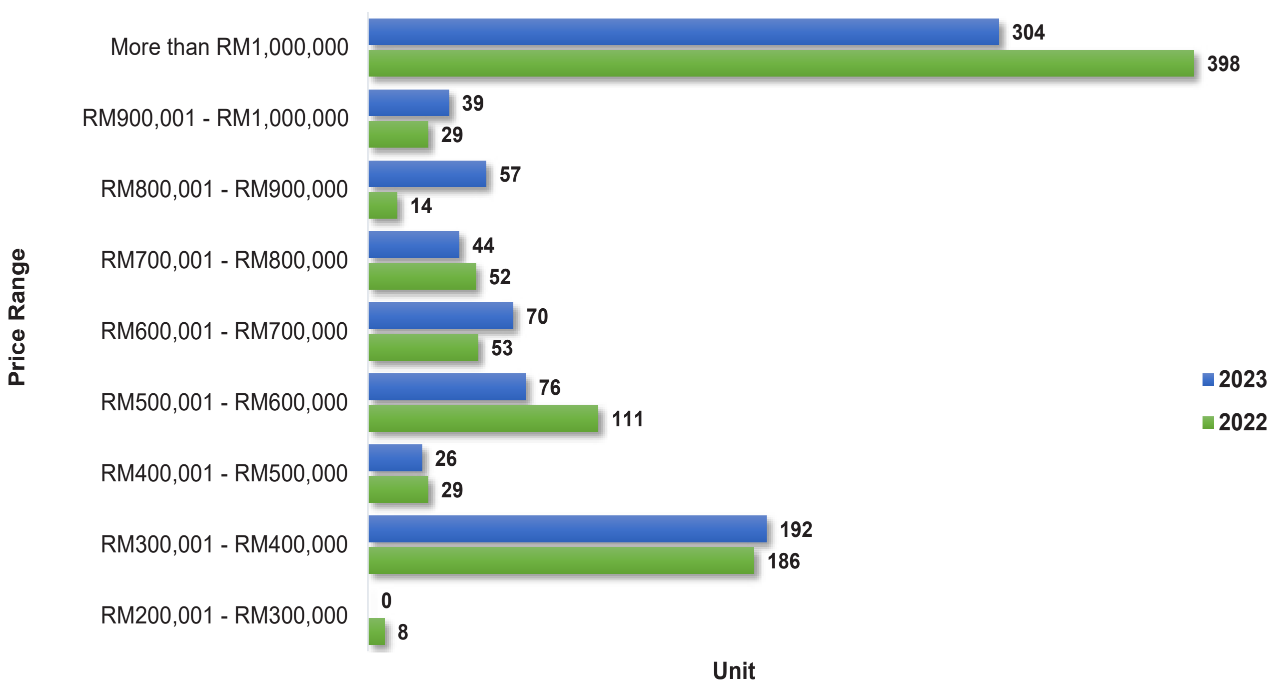


Chart 50: Industrial Overhang Units by Price Range 2022 & 2023



3.2 Dalam Pembinaan Belum Terjual

Harta tanah industri dalam pembinaan belum terjual sedikit meningkat pada tahun 2023. Tempoh kajian merekodkan 457 unit industri belum terjual, meningkat 1.6% berbanding tahun sebelumnya.

Selangor mendahului dengan 33.9% (155 unit) daripada jumlah dalam pembinaan belum terjual, diikuti Johor (27.6%; 126 unit) dan Sarawak (17.5%; 80 unit).

Unit berkembar dan teres masing-masing menyumbang 42.5% (194 unit) dan 38.7% (177 unit) daripada jumlah industri dalam pembinaan belum terjual.

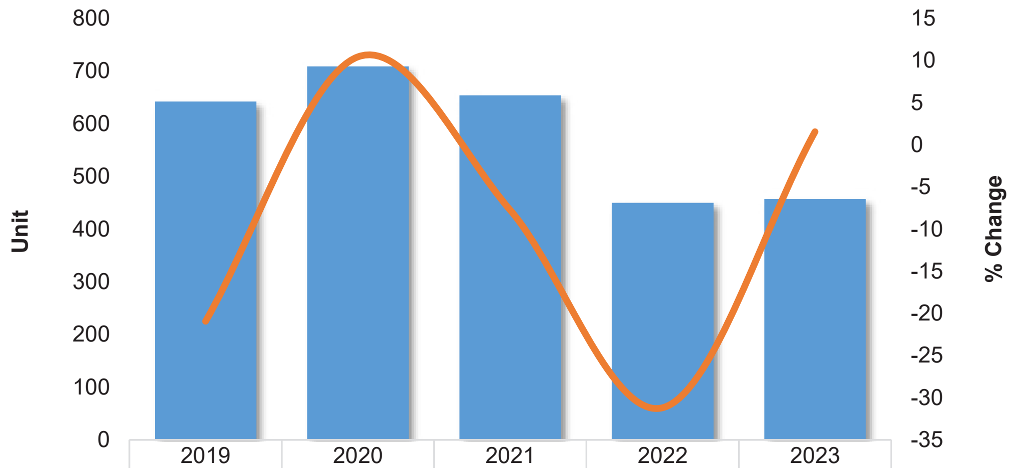
3.2 Unsold Under Construction

Unsold under construction for industrial property slightly increased in 2023. The review period recorded 457 unsold industrial units, an increased of 1.6% compared to the preceding year.

Selangor led with 33.9% (155 units) of the total unsold under construction, followed by Johor (27.6%; 126 units) and Sarawak (17.5%; 80 units).

Semi-detached and terraced respectively contributed for 42.5% (194 units) and 38.7% (177 units) of the total unsold industrial under construction.

Chart 51: Trend of Unsold Under Construction Industrial Property 2019 – 2023



	2019	2020	2021	2022	2023
Industrial (Unit)	642	709	654	450	457
Industrial (% Change)	-20.9	10.4	-7.8	-31.2	1.6

Chart 52: Industrial Unsold Under Construction by State 2023

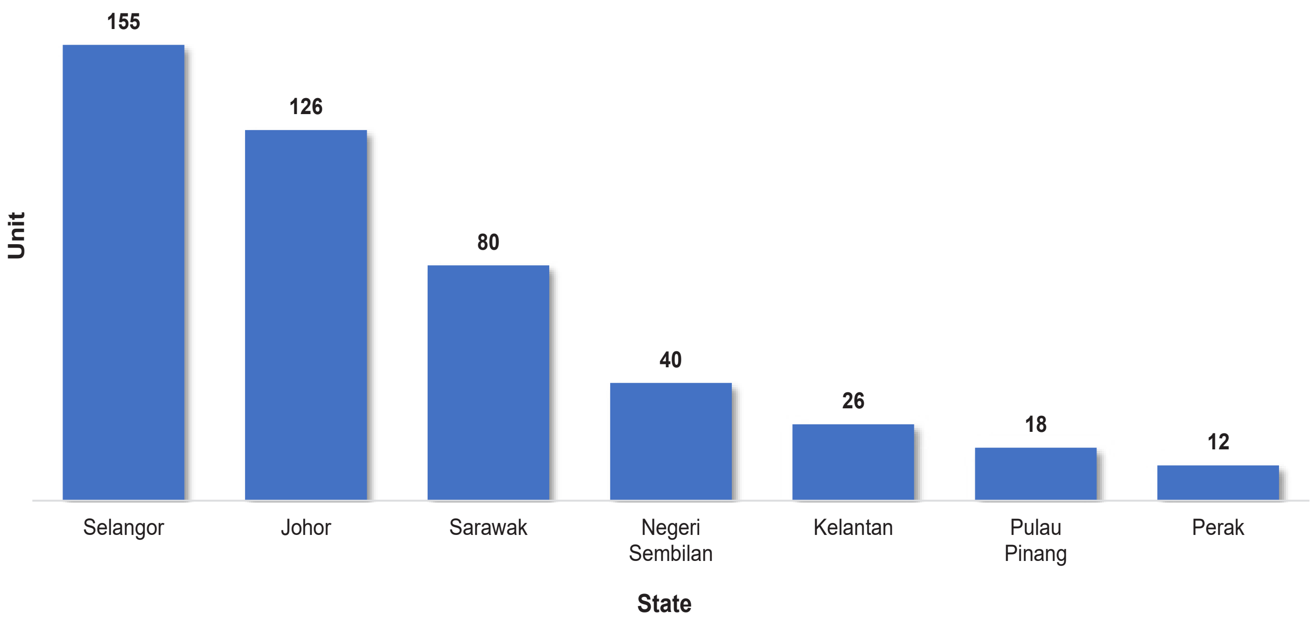
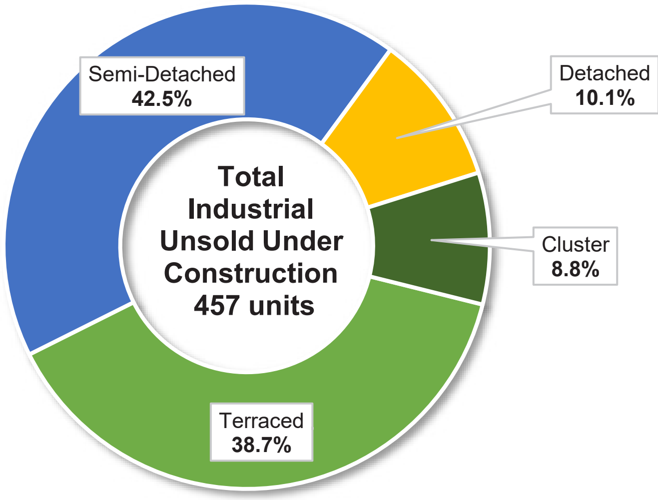


Chart 53: Industrial Unsold Under Construction by Type 2023



3.3 Belum Dibina Belum Terjual

Pada 2023, belum dibina belum terjual merekodkan 22 unit bernilai RM98.57 juta yang terletak di Sabah. Kesemua unit tersebut berharga melebihi RM 1 juta.

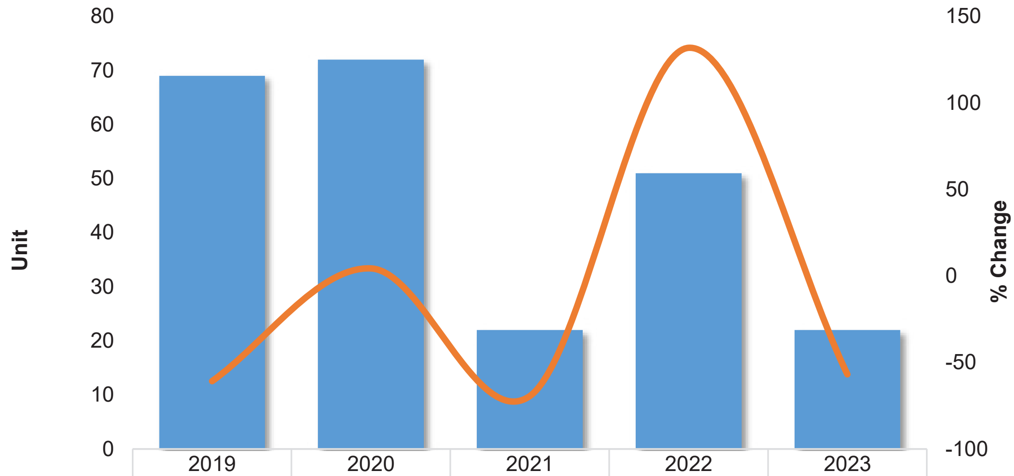
Unit berkembar mencatatkan jumlah tertinggi belum dibina belum terjual iaitu 45.5% diikuti dengan unit sesebuah dan teres masing-masing 27.3%.

3.3 Unsold Not Constructed

In 2023, unsold not constructed recorded 22 units valued RM98.57 million which located in Sabah. All of them were priced above RM1 million.

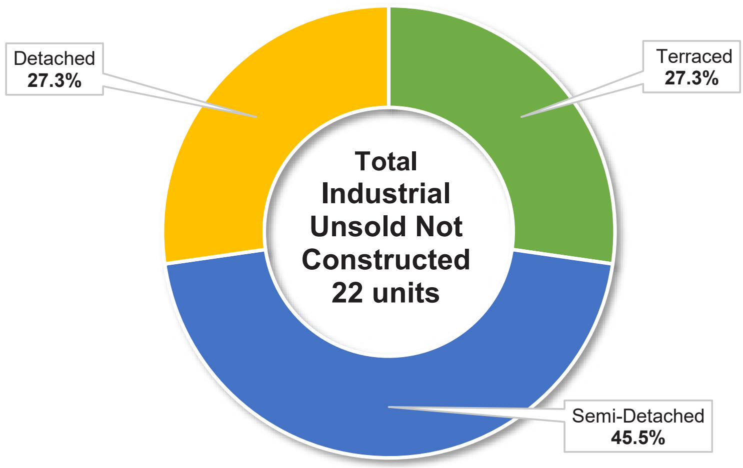
Semi-detached units recorded the highest number of unsold not constructed at 45.5% followed by detached and terraced units at 27.3% respectively.

Chart 54: Trend of Unsold Not Constructed Industrial Property 2019 – 2023



	2019	2020	2021	2022	2023
Industrial (Unit)	69	72	22	51	22
Industrial (% change)	-60.8	4.3	-69.4	131.8	-56.9

Chart 55: Industrial Unsold Not Constructed by Type 2023



Catatan Teknikal

Technical Notes

CATATAN TEKNIKAL

1. Tempoh kajian laporan ini adalah meliputi tahun 2023 berakhir pada 31 Disember 2023.

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/ Sijil 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 year of 2023 ending on 31st December 2023.*

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.*

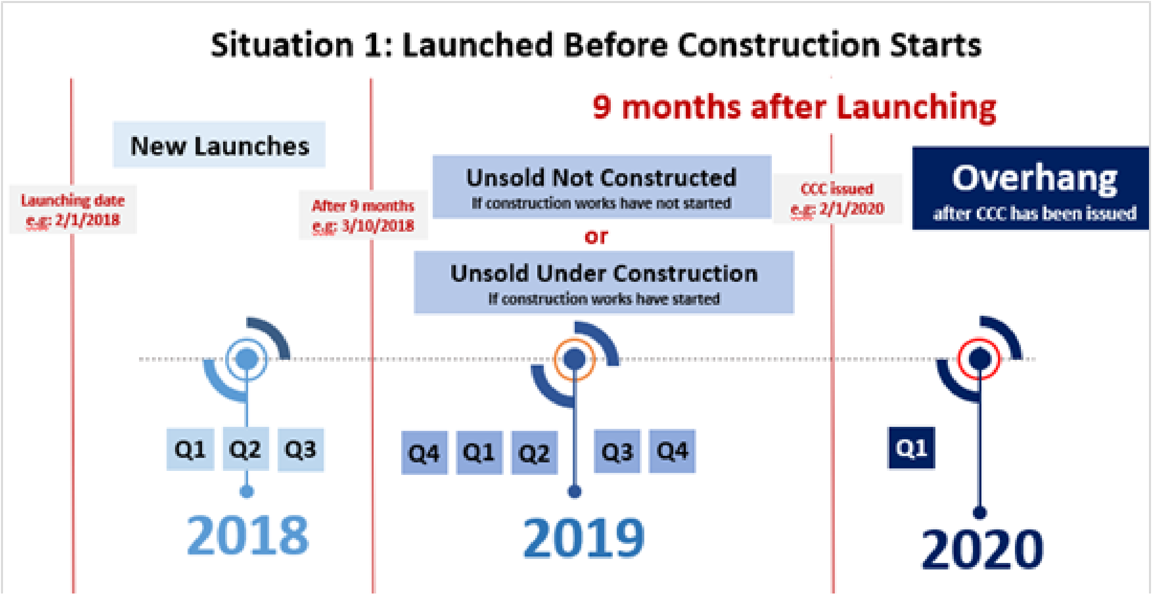
   ***Sales performance** refers to the percentage of number of units sold from the total units launched for a specific type of property in the review period. Two types of sales performance are computed in this publication namely quarterly sales performance and accumulated sales performance.*

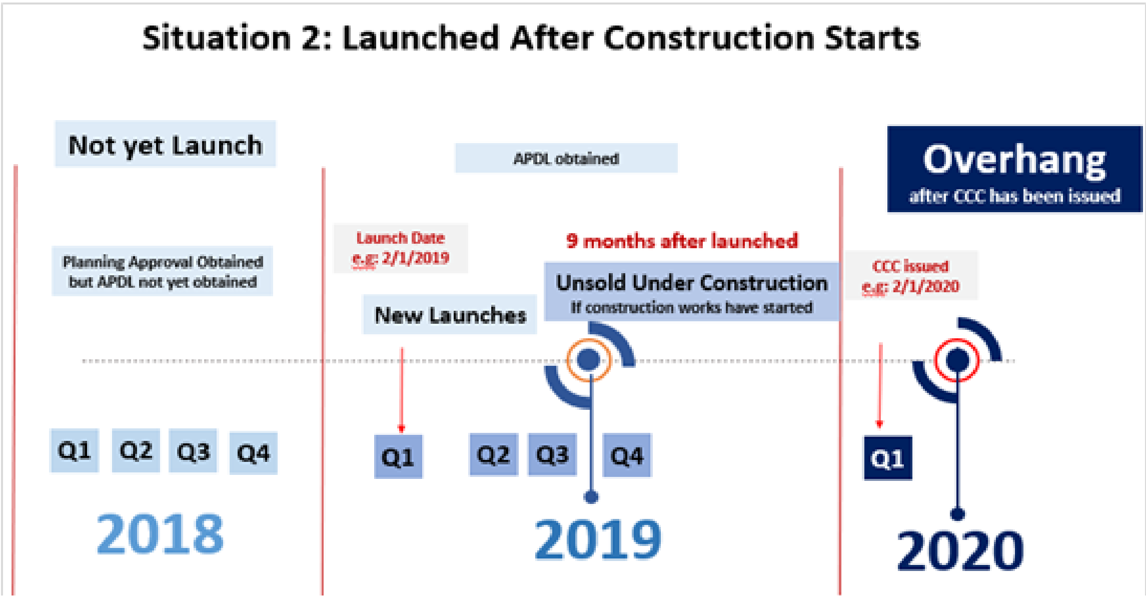
5. *Starting January 1, 2003 “property overhang” has been defined as residential, commercial and industrial units that have been completed and issued with a Certificate of Completion and Compliance / Temporary Certificate of Fitness for Occupation but remained unsold for more than nine months after it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

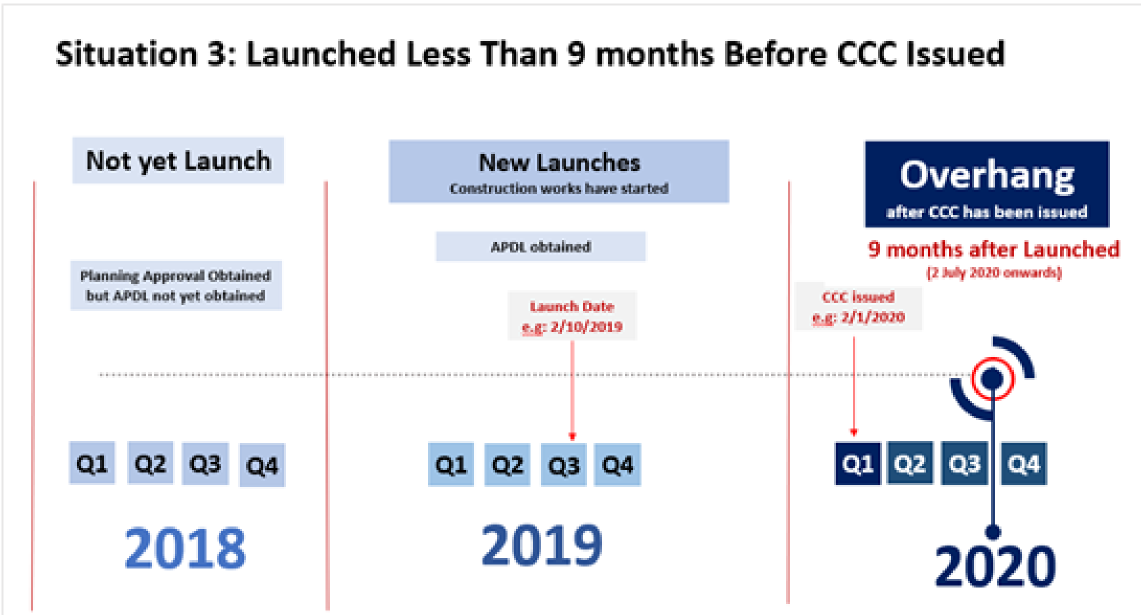
6. ***Property overhang** comprises residential units, commercial units and industrial units that are completed with Certificate of Completion and Compliance/ Temporary Certificate of Fitness for Occupation in the review period. These units remained unsold for more than nine months from the date of launching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