KEMENTERIAN KEWANGAN
MALAYSIA

LAPORAN STOK HARTA TANAH
Property Stock Report

H1 2023

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

PENDAHULUAN

Laporan Stok Harta Tanah menyebarkan maklumat berdasarkan kepada skop berikut:

i. Stok sedia ada mengikut sub-sektor harta tanah iaitu kediaman, perdagangan, industri dan riadah.
ii. Penawaran hadapan yang terdiri daripada data penawaran akan datang, mula pembinaan dan penawaran yang dirancang.

Ingin dimaklumkan bahawa semua jadual data tersebut perlu dibaca seiring dengan catatan teknikal yang disertakan bersama laporan ini. Maklumat berkenaan harta tanah perdagangan iaitu kompleks perniagaan dikategorikan kepada pusat membeli belah, arked dan pasaraya besar manakala bagi pejabat binaan khas terdiri daripada pejabat kerajaan dan swasta.

Kami ingin merakamkan ucapan ribuan terima kasih kepada semua yang telah menjayakan penerbitan laporan ini terutamanya kepada semua Pihak Berkuasa Tempatan, Pemaju, Pengurus Harta, Pemilik Bangunan, Pejabat Tanah dan lain-lain agensi Kerajaan yang terlibat di dalam memberikan input bagi tujuan penerbitan berkala ini. Tanpa sokongan tuan, kami tidak mungkin dapat menerbitkan laporan ini.

Seperti yang telah diketahui, pasaran harta tanah yang sihat dan stabil tidak sahaja penting bagi individu tetapi juga kepada ekonomi negara pada keseluruhannya. Oleh itu, kami akan sentiasa memastikan laporan yang disediakan kepada pembaca adalah berkualiti dan menepati masa. Kami sangat mengalu-alukan maklum balas, komen serta pandangan daripada pembaca untuk memperbaiki lagi laporan ini. Kami boleh dihubungi melalui telefon, faksimili atau emel kepada:

Pengarah
Pusat Maklumat Harta Tanah Negara (NAPIC)
Jabatan Penilaian dan Perkhidmatan Harta
Kementerian Kewangan Malaysia
Aras 7, Perbendaharaan 2
No 7, Pesiaran Perdana
Presint 2
62592 Putrajaya

Tel : 03-8886 9000
Fax : 03-8886 9007
Email : napic@jpph.gov.my

FOREWORD

The Property Market Stock Report disseminates informations on the following scopes:

i. Existing inventories of properties on a sectorial basis namely residential, commercial, industry and leisure.
ii. Future supply comprises Incoming Supply, Construction Starts and Planned Supply.

Please be informed that all the data tabulated should be read in line with NAPIC's Technical Notes attached in the report. Information pertaining to commercial properties ie shopping complex is categorized into three sections ie shopping centre, arcade and hypermarket whilst for purpose built office designated for publicly owned and private ownership.

We would like to express our gratitude to all those who had made this publication a success. Specifically, we wish to thank all local councils, developers, property managers/building owners, land offices nation wide and other relevant government bodies for giving their valuable inputs to make this quarterly 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. Therefore, 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. You may call, write, fax or email to us.

Director
National Property Information Centre (NAPIC)
Valuation and Property Services Department
Ministry Of Finance Malaysia
Level 7, Perbendaharaan 2
No 7, Pesiaran Perdana
Precinct 2
62592 Putrajaya

Tel : 03-8886 9000
Fax : 03-8886 9007
Email : napic@jpph.gov.my

Laporan Stok Harta Tanah H1 2023
Property Stock Report H1 2023

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Ringkasan Stok Harta Tanah H1 2023
Property Stock Summary H1 2023

State	Residential		
	Existing Stock	Incoming Supply	Planned Supply
WP Kuala Lumpur	540,974	42,345	58,913
WP Putrajaya	17,896	3,012	3,252
WP Labuan	13,196	940	216
Selangor	1,677,913	87,285	79,020
Johor	899,156	40,761	51,925
Pulau Pinang	544,549	35,016	14,499
Perak	524,175	42,029	38,808
Negeri Sembilan	298,980	21,982	25,281
Melaka	215,100	23,344	14,444
Kedah	348,384	18,808	11,160
Pahang	301,217	15,439	32,776
Terengganu	109,091	17,825	8,898
Kelantan	89,895	11,117	4,352
Perlis	27,223	1,360	1,732
Sabah	239,802	18,641	24,210
Sarawak	286,985	16,508	7,613
MALAYSIA	**6,134,536**	**396,412**	**377,099**

State	Shop		
	Existing Stock	Incoming Supply	Planned Supply
WP Kuala Lumpur	32,162	1,107	979
WP Putrajaya	538	0	0
WP Labuan	1,035	30	20
Selangor	110,694	5,531	3,427
Johor	94,275	5,319	5,581
Pulau Pinang	39,177	1,101	1,767
Perak	63,219	2,342	3,257
Negeri Sembilan	27,211	927	2,306
Melaka	23,211	1,311	1,278
Kedah	32,463	1,019	788
Pahang	25,929	1,248	3,326
Terengganu	8,673	920	701
Kelantan	14,429	1,077	665
Perlis	5,809	282	779
Sabah	33,009	1,841	2,307
Sarawak	37,539	1,233	1,272
MALAYSIA	**549,373**	**25,288**	**28,453**

State	SOHO			Serviced Apartment		
	Existing Stock	Incoming Supply	Planned Supply	Existing Stock	Incoming Supply	Planned Supply
WP Kuala Lumpur	8,528	4,363	979	104,609	59,561	49,416
WP Putrajaya	0	0	0	746	781	940
WP Labuan	0	0	20	0	0	0
Selangor	40,441	14,600	3,427	97,657	54,662	19,957
Johor	2,843	966	5,581	86,257	20,373	41,282
Pulau Pinang	3,627	1,863	1,767	7,372	5,104	7,460
Perak	577	1,078	3,257	1,314	564	1,257
Negeri Sembilan	104	0	2,306	11,285	5,402	733
Melaka	0	352	1,278	6,363	6,528	3,738
Kedah	64	0	788	637	0	0
Pahang	0	0	3,326	6,398	370	5,994
Terengganu	0	0	701	132	0	132
Kelantan	0	0	665	858	0	1,358
Perlis	0	0	779	0	0	0
Sabah	467	0	2,307	1,913	2,290	2,378
Sarawak	405	72	1,272	1,295	966	407
MALAYSIA	**57,056**	**23,294**	**28,453**	**326,836**	**156,601**	**135,052**

State	SHOPPING COMPLEX									
	Existing Stock						Incoming Supply		Planned Supply	
	Shopping Centre		Arcade		Hypermarket		All Shopping Complexes		All Shopping Complexes	
	No. of Building	Total Space (s.m.)	No. of Building	Total Space (s.m.)	No. of Building	Total Space (s.m.)	No. of Building	Total Space (s.m.)	No. of Building	Total Space (s.m.)
WP Kuala Lumpur	74	2,823,377	30	274,829	7	166,821	9	478,578	3	196,691
WP Putrajaya	2	78,364	1	1,380	0	0	2	29,277	0	0
WP Labuan	1	26,063	1	2,551	0	0	0	0	0	0
Selangor	88	2,986,507	16	114,612	51	852,172	5	331,202	0	0
Johor	69	1,832,571	39	101,543	47	514,487	1	3,716	0	0
Pulau Pinang	41	1,211,751	48	374,502	17	252,504	3	190,552	2	96,421
Perak	38	594,610	9	41,599	34	381,151	3	24,373	0	0
Negeri Sembilan	30	318,200	42	80,382	23	215,029	0	0	0	0
Melaka	22	442,650	0	0	9	192,972	2	57,245	0	0
Kedah	37	471,202	12	21,692	11	109,005	0	0	1	15,045
Pahang	24	377,867	10	7,471	10	73,767	0	0	2	15,373
Terengganu	8	110,807	27	35,287	5	58,470	3	126,520	0	0
Kelantan	9	237,418	14	73,471	7	92,586	0	0	0	0
Perlis	4	22,110	17	26,091	1	8,220	5	38,527	0	0
Sabah	35	674,570	5	13,499	11	61,638	1	35,743	1	23,509
Sarawak	72	1,016,807	2	1,517	7	65,906	2	41,676	0	0
MALAYSIA	**554**	**13,224,874**	**273**	**1,170,426**	**240**	**3,044,728**	**36**	**1,357,409**	**9**	**347,039**

State	PURPOSE BUILT OFFICE							
	Existing Stock				Incoming Supply		Planned Supply	
	Private-owned		Public-owned		All Office Buildings		All Office Buildings	
	No. of Building	Total Space (s.m.)	No. of Building	Total Space (s.m.)	No. of Building	Total Space (s.m.)	No. of Building	Total Space (s.m.)
WP Kuala Lumpur	413	9,338,590	47	587,781	16	978,869	19	761,621
WP Putrajaya	12	410,574	35	2,130,279	3	59,940	3	39,875
WP Labuan	5	50,014	6	17,037	0	0	0	0
Selangor	252	4,313,179	23	328,089	3	60,243	1	10,276
Johor	126	958,431	94	451,187	5	181,641	1	33,817
Pulau Pinang	147	775,498	60	291,043	4	76,693	3	44,408
Perak	78	301,537	148	366,360	2	8,767	0	0
Negeri Sembilan	44	149,437	65	194,604	3	8,831	0	0
Melaka	48	241,709	34	168,928	0	0	0	0
Kedah	52	220,659	58	211,369	0	0	0	0
Pahang	71	193,365	83	228,354	1	36,375	1	4,911
Terengganu	39	132,522	85	296,478	1	9,704	1	31,760
Kelantan	123	173,043	166	218,034	0	0	0	0
Perlis	20	41,348	32	89,690	2	25,085	0	0
Sabah	71	540,735	34	285,278	3	14,744	2	37,498
Sarawak	77	529,739	42	290,998	4	63,941	0	0
MALAYSIA	**1,578**	**18,370,380**	**1,012**	**6,155,509**	**47**	**1,524,833**	**31**	**964,166**

State	Industrial		
	Existing Stock	Incoming Supply	Planned Supply
WP Kuala Lumpur	5,138	0	37
WP Putrajaya	48	0	0
WP Labuan	643	6	0
Selangor	41,673	1,796	1,797
Johor	19,001	512	523
Pulau Pinang	9,722	119	135
Perak	8,507	82	324
Negeri Sembilan	5,574	184	597
Melaka	7,184	803	1,783
Kedah	3,873	73	339
Pahang	3,680	28	190
Terengganu	866	83	66
Kelantan	630	5	44
Perlis	296	22	158
Sabah	6,325	162	319
Sarawak	7,487	246	148
MALAYSIA	**120,647**	**4,121**	**6,460**

State	Leisure					
	Existing Stock		Incoming Supply		Planned Supply	
	No. of Hotel	No. of Room	No. of Hotel	No. of Room	No. of Hotel	No. of Room
WP Kuala Lumpur	250	46,184	20	4,831	5	843
WP Putrajaya	7	1,769	0	0	1	270
WP Labuan	41	1,697	1	80	0	0
Selangor	205	24,201	3	878	1	200
Johor	484	31,184	13	3,087	9	3,371
Pulau Pinang	240	23,301	20	3,942	11	1,592
Perak	330	16,450	8	685	2	361
Negeri Sembilan	143	9,542	5	1,546	3	358
Melaka	175	17,877	3	682	5	1,558
Kedah	175	13,154	6	756	3	252
Pahang	302	25,601	1	30	6	677
Terengganu	246	11,037	6	860	1	280
Kelantan	91	4,360	1	144	0	0
Perlis	32	1,245	2	120	1	120
Sabah	415	23,402	14	3,217	11	2,942
Sarawak	383	20,387	1	318	0	0
MALAYSIA	**3,519**	**271,391**	**104**	**21,176**	**59**	**12,824**

1.0 HARTA TANAH KEDIAMAN

Stok sedia ada melebihi 6.13 juta unit pada H1 2023, dengan 0.40 juta unit di penawaran akan datang dan 0.38 juta unit penawaran yang dirancang. Selangor menerajui penawaran kediaman dengan bilangan tertinggi merentasi ketiga-tiga peringkat pembangunan.

Kediaman bertanah mengatasi strata di stok sedia ada tetapi jurang ini mengecil di penawaran akan datang dan penawaran yang dirancang.

Siap dibina, mula dibina dan penawaran baru dirancang merekodkan pengurangan tahun-ke-tahun masing-masing sebanyak 10.4%, 1.2% dan 15.8%.

Selangor, WP Kuala Lumpur dan Perak mendominasi aktiviti pembinaan dalam tempoh kajian dengan gabungan syer pasaran 56.7% (16,098 unit) siap dibina, 45.9% (18,864 unit) mula dibina dan 54.0% (16,806 unit) penawaran baru dirancang.

1.0 RESIDENTIAL PROPERTY

Existing stock exceeded 6.13 million units in H1 2023, with another 0.40 million units in the incoming supply and 0.38 million units in planned supply. Selangor led residential supply with the highest number of units across all three development stages.

Landed surpassed stratified units in the existing stock but the gap narrowed in the incoming supply and planned supply.

Completion, starts and new planned supply recorded reduction by 10.4%, 1.2% and 15.8% year-on-year respectively.

Selangor, WP Kuala Lumpur and Perak dominated residential construction activity in the survey period with a combined share of 56.7% (16,098 units) in completion, 45.9% (18,864 units) in starts and 54.0% (16,806 units) in new planned supply.

Chart 1: Residential Existing Stock by State H1 2023

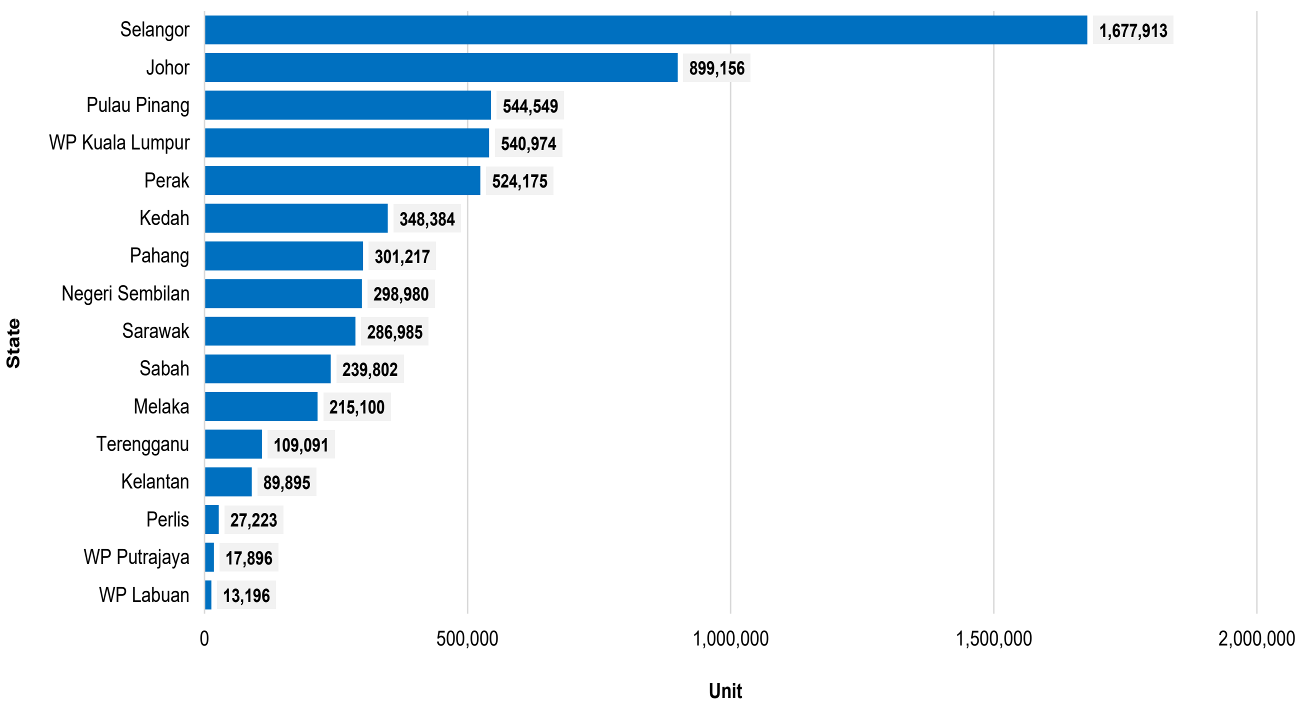


Chart 2: Residential Incoming Supply and Planned Supply by State H1 2023

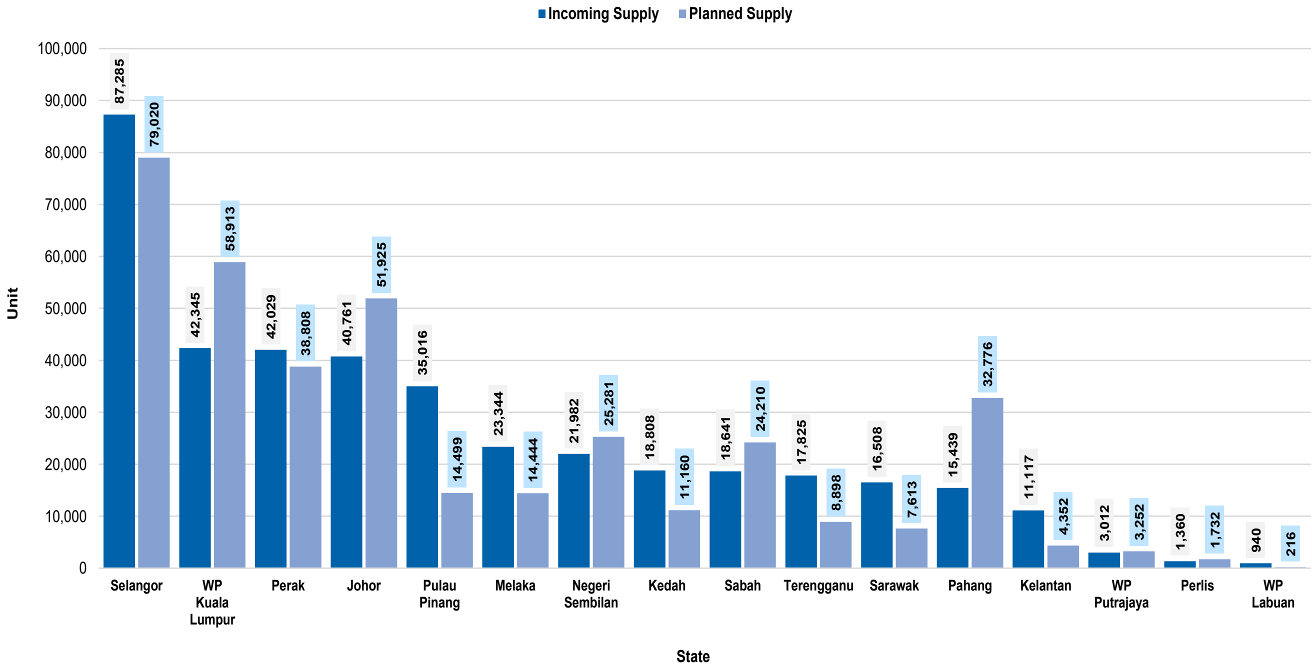
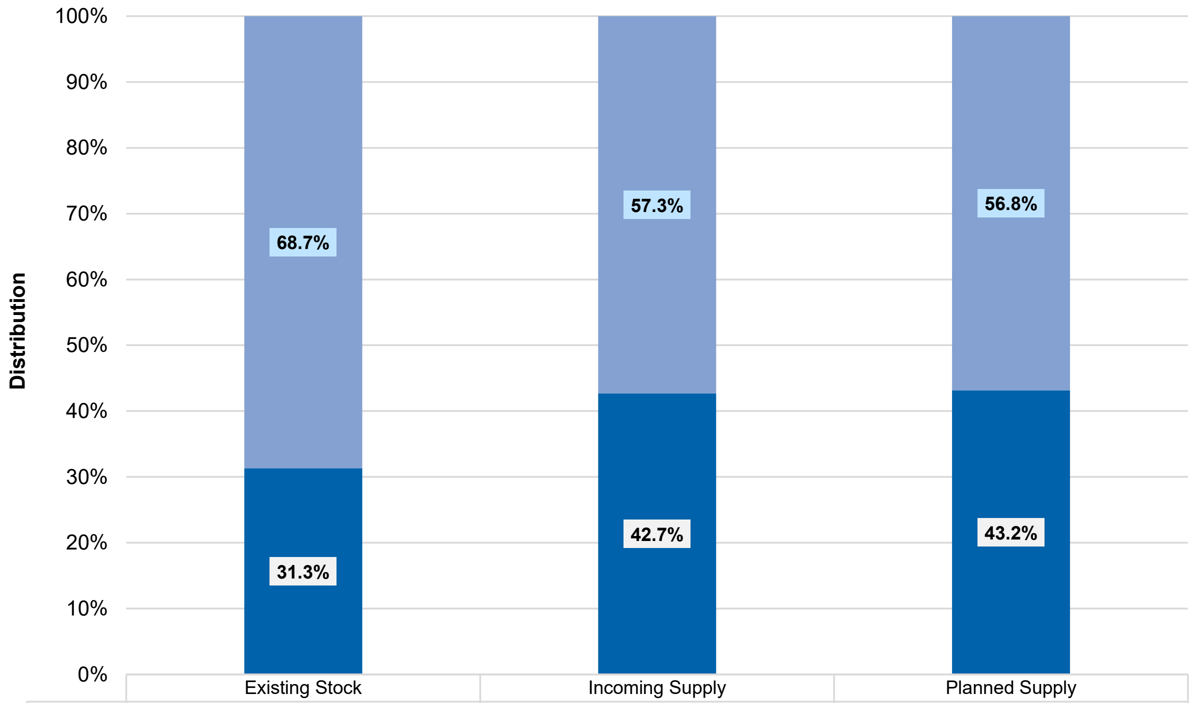
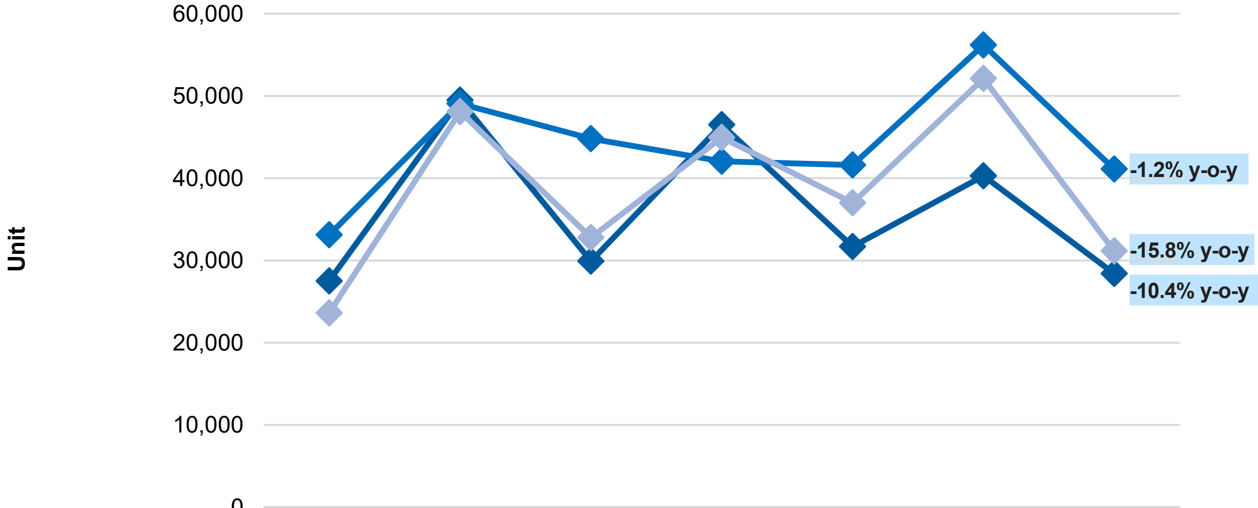


Chart 3: Distribution of Landed and Stratified Residential Supply by Development Stage H1 2023



	Existing Stock	Incoming Supply	Planned Supply
Landed	4,212,204	227,178	214,314
Stratified	1,922,332	169,234	162,785

Chart 4: Trends of Completion, Starts and New Planned Supply for Residential Supply from H1 2020 to H1 2023



	H1 2020	H2 2020	H1 2021	H2 2021	H1 2022	H2 2022	H1 2023
Completion	27,514	49,495	29,919	46,496	31,699	40,282	28,412
Starts	33,112	49,076	44,807	42,039	41,600	56,204	41,101
New Planned Supply	23,629	48,096	32,766	44,965	36,997	52,114	31,139

2.0 KEDAI

Kedai sedia ada berjumlah 549,373 unit pada tahun H1 2023 dengan 25,288 unit penawaran akan datang dan 28,453 unit penawaran yang dirancang. Kedai teres dua dan dua setengah tingkat mendominasi inventori di semua peringkat pembangunan.

Selangor, Johor dan Perak menerajui inventori sedia ada dan penawaran akan datang. Pahang bertukar tempat dengan Perak untuk menyertai dua negeri yang dinyatakan sebagai tiga penyumbang terbesar di penawaran yang dirancang.

Dari segi pembangunan, siap dibina berkurang sebanyak 19.4% dari tahun-ke-tahun tetapi meningkat 27.4% di mula dibina dan 0.9% di penawaran baru dirancang.

2.0 SHOP

Existing shops totalled 549,373 units in H1 2023, with 25,288 units in the incoming supply and 28,453 units in planned supply. Two to two-and-a-half storey terrace shops dominated the inventory across all development stages.

Selangor, Johor and Perak topped the existing inventory and incoming supply. Pahang trade places with Perak to join the other two states as top three contributors in planned supply.

On the development front, completion declined by 19.4% year-on-year but increased by 27.4% in starts and 0.9% in new planned supply respectively.

Chart 5: Shop Existing Stock by State H1 2023

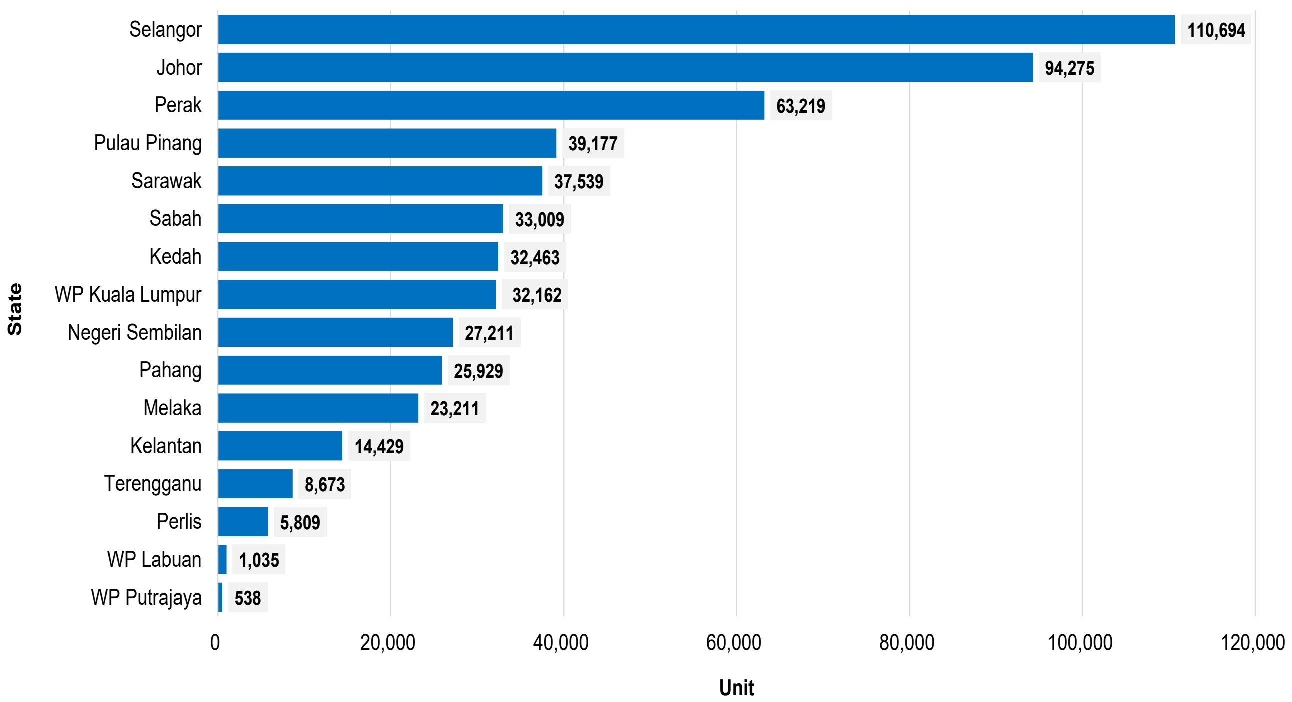


Chart 6: Shop Incoming Supply and Planned Supply by State H1 2023

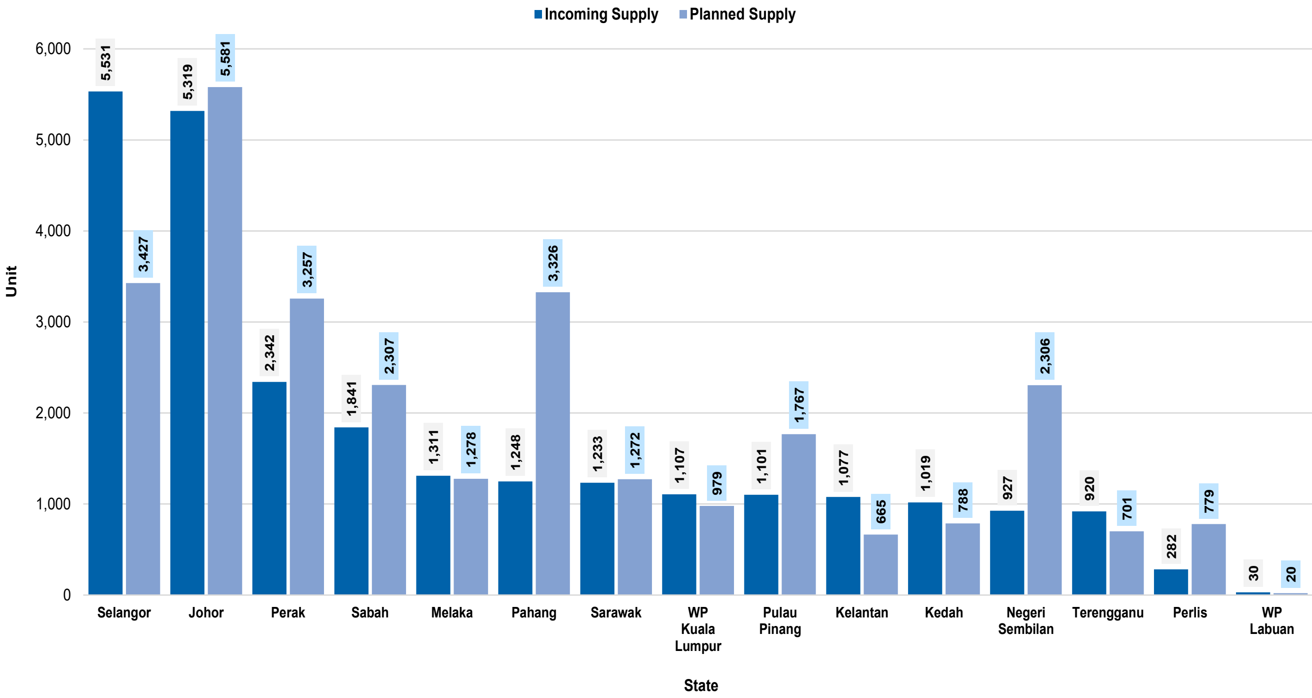
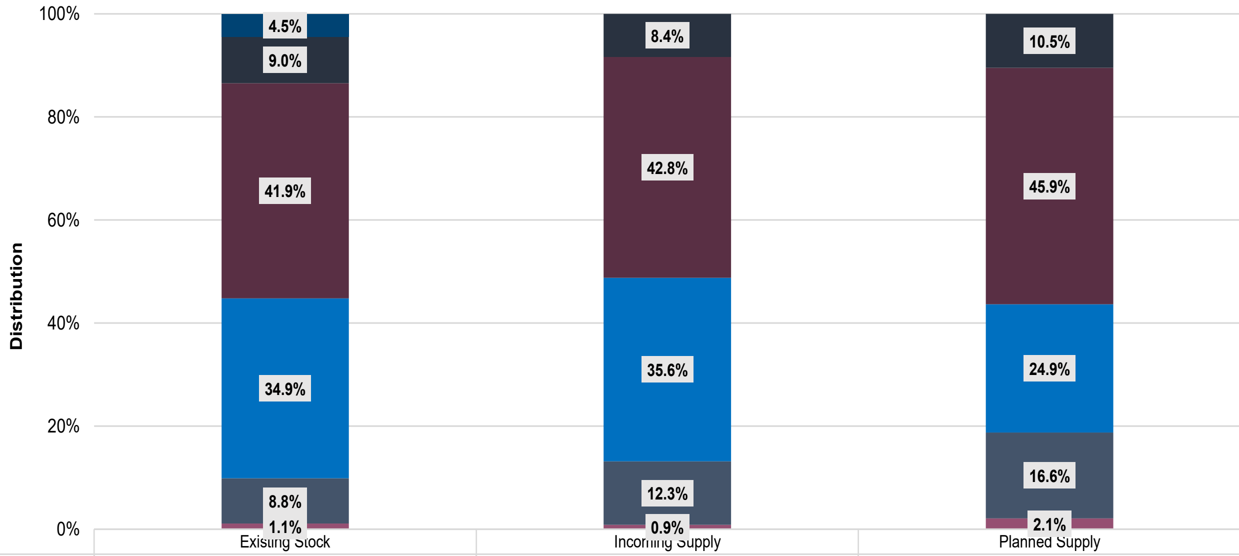
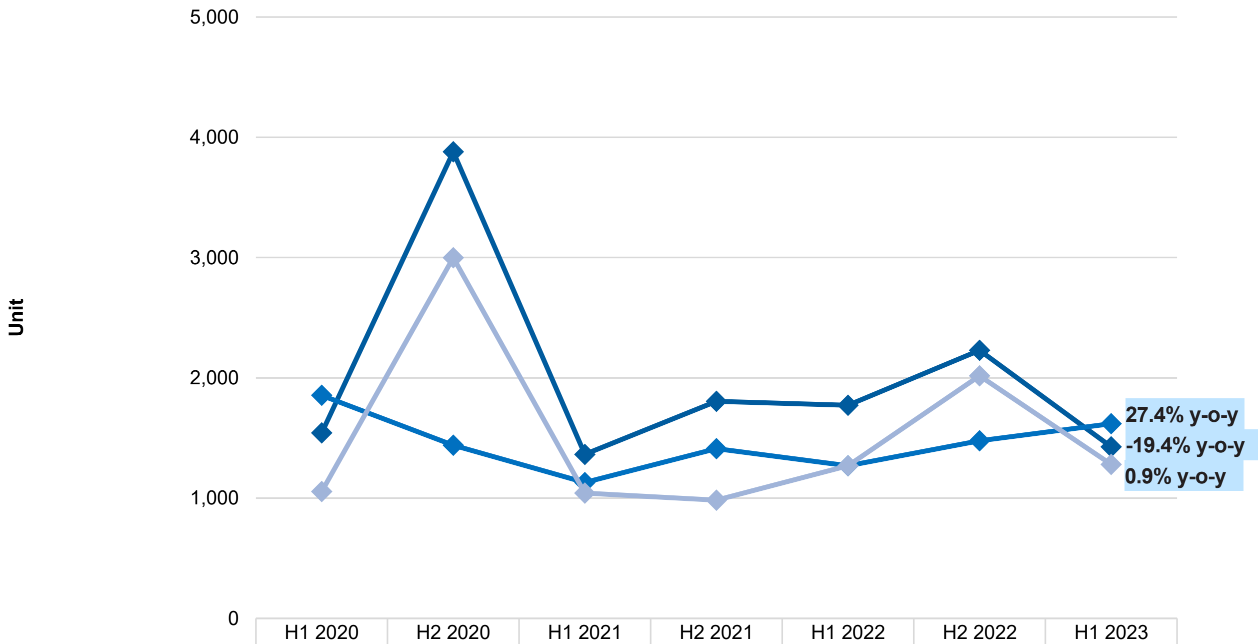


Chart 7: Distribution of Shop by Building Type H1 2023



	Existing Stock	Incoming Supply	Planned Supply
Prewar	24,459	0	0
< 2 storey terrace	49,413	2,117	2,983
2 - 2 1/2 storey terrace	229,370	10,828	13,053
> 2 1/2 storey terrace	191,821	9,008	7,080
Stratified	48,180	3,120	4,732
Others	6,130	215	605

Chart 8: Trends of Completion, Starts and New Planned Supply for Shop from H1 2020 to H1 2023



	H1 2020	H2 2020	H1 2021	H2 2021	H1 2022	H2 2022	H1 2023
Completion	1,542	3,879	1,364	1,805	1,771	2,229	1,427
Starts	1,854	1,440	1,130	1,411	1,270	1,476	1,618
New Planned Supply	1,054	2,999	1,041	983	1,268	2,017	1,280

3.0 PANGSAPURI KHIDMAT

Sejumlah 326,836 unit sedia ada pangsapuri khidmat telah direkodkan pada separuh pertama tahun 2023 dengan 156,601 unit penawaran akan datang dan 135,052 unit penawaran yang dirancang.

Majoriti pangsapuri khidmat tertumpu di WP Kuala Lumpur, Selangor dan Johor dengan gabungan syer pasaran 88.3% stok sedia ada (288,523 unit), 85.9% penawaran akan datang (134,596 unit) dan 81.9% penawaran yang dirancang (110,655 unit).

Aktiviti pembinaan menunjukkan trend menurun yang signifikan dari tahun-ke-tahun sebanyak 20.6% siap dibina, 28.9% mula dibina 52.8% penawaran baru dirancang.

3.0 SERVICED APARTMENT

A total of 326,836 units of existing serviced apartments were recorded in the first half of 2023 with another 156,601 units in the incoming supply and 135,052 units in planned supply.

Majority of serviced apartments were concentrated in WP Kuala Lumpur, Selangor and Johor, with a combined market share of 88.3% in the existing stock (288,523 units), 85.9% incoming supply (134,596 units) and 81.9% planned supply (110,655 units).

Construction activities showed significant declines year-on-year by 20.6% in completion, 28.9% in starts and 52.8% in new planned supply respectively.

Chart 9: Serviced Apartment Existing Stock by State H1 2023

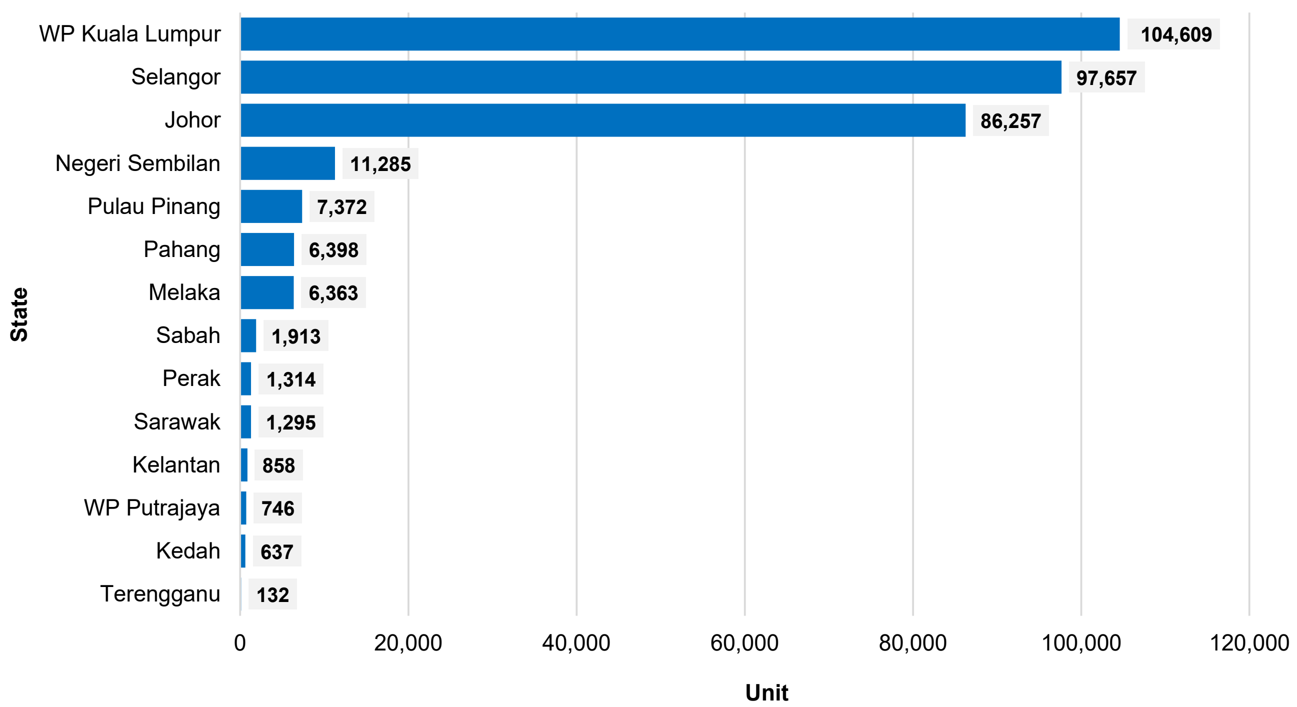


Chart 10: Serviced Apartment Incoming Supply and Planned Supply by State H1 2023

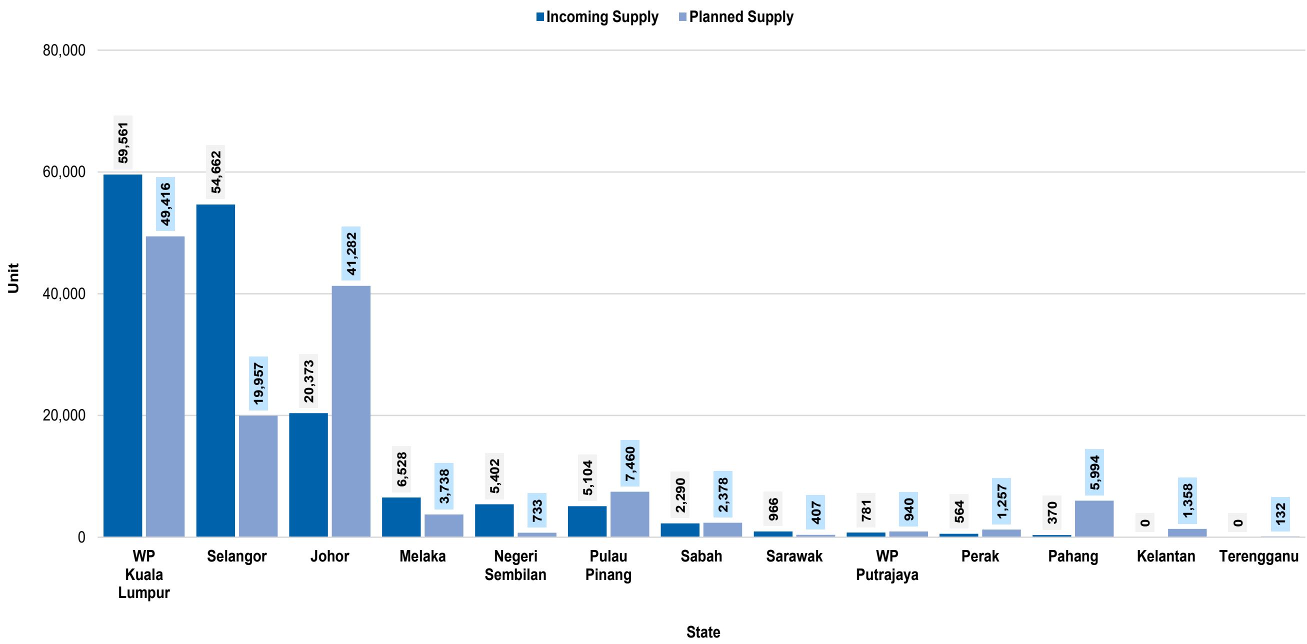
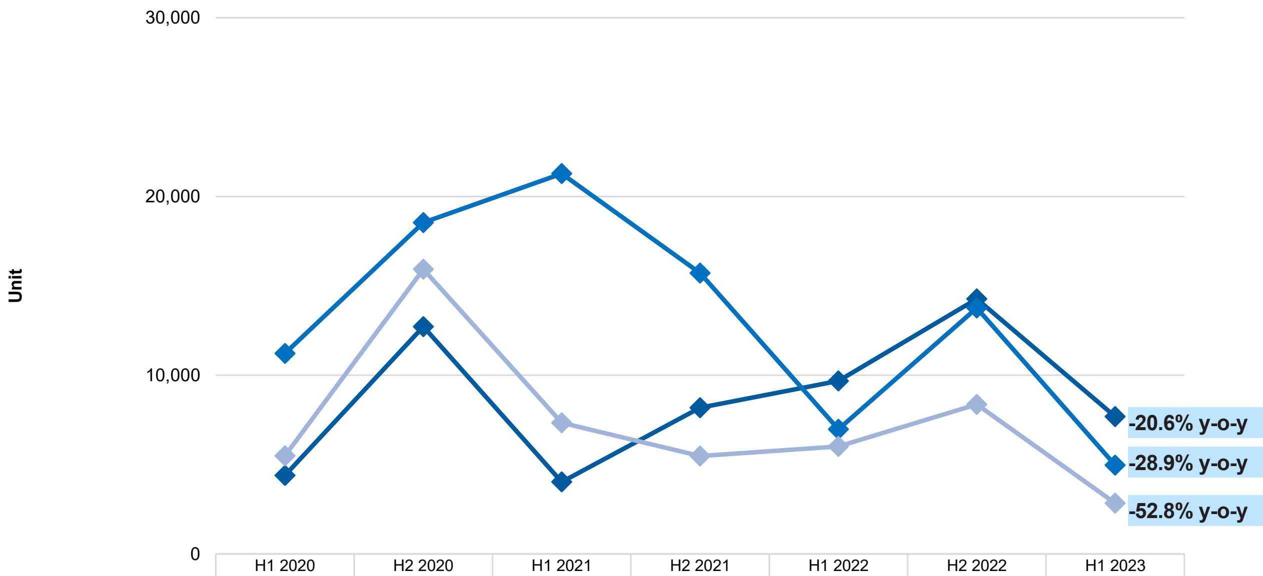


Chart 11: Trends of Completion, Starts and New Planned Supply for Serviced Apartment from H1 2020 to H1 2023



	H1 2020	H2 2020	H1 2021	H2 2021	H1 2022	H2 2022	H1 2023
Completion	4,393	12,721	4,030	8,183	9,677	14,270	7,684
Starts	11,224	18,537	21,278	15,719	6,982	13,757	4,967
New Planned Supply	5,489	15,931	7,339	5,481	6,022	8,369	2,842

4.0 KOMPLEKS PERNIAGAAN

Kompleks perniagaan sedia ada mendaftarkan 1,067 bangunan dengan jumlah keluasan ruang niaga 17.44 juta m.p. pada H1 2023. Stok ini terdiri daripada 554 pusat beli-belah (13.22 juta m.p.), 273 arked (1.17 juta m.p.) dan 240 pasaraya besar (3.04 juta m.p.).

Selangor mendahului pasaran dari segi penawaran ruang dengan syer 22.7% (3.95 juta m.p.) diikuti oleh WP Kuala Lumpur dengan 18.7% (3.27 juta m.p.) dan Johor dengan 14.0% (2.45 juta m.p.).

Sejumlah 36 bangunan (1.36 juta m.p.) berada di penawaran akan datang dengan sembilan bangunan lagi (0.35 juta m.p.) di penawaran yang dirancang. WP Kuala Lumpur menguasai penawaran akan datang sebanyak 35.3% (0.48 juta m.p.) diikuti oleh Selangor (0.33 juta m.p.) dan Pulau Pinang (0.19 juta m.p.) manakala 56.7% daripada keseluruhan penawaran dirancang tertumpu di WP Kuala Lumpur (0.20 juta m.p.) dan 27.8% (0.10 juta m.p.) lagi di Pulau Pinang.

Sebanyak empat kompleks perniagaan siap dibina dalam tempoh kajian. Sementara itu, tiada mula dibina atau penawaran baru dirancang direkodkan.

Kompleks perniagaan berikut siap dibina pada H1 2023:

4.0 SHOPPING COMPLEX

Existing shopping complex registered 1,067 buildings offering a total retail space of 17.44 million s.m. in H1 2023. The stock comprised 554 shopping centres (13.22 million s.m.), 273 arcades (1.17 million s.m.) and 240 hypermarkets (3.04 million s.m.).

Selangor led the market in terms of space offerings with 22.7% share (3.95 million s.m.) followed by WP Kuala Lumpur with 18.7% (3.27 million s.m.) and Johor with 14.0% (2.45 million s.m.).

A total of 36 buildings (1.36 million s.m.) are in the incoming supply with another nine buildings (0.35 million s.m.) in the planned supply. WP Kuala Lumpur dominated the incoming supply at 35.3% (0.48 million s.m.) followed by Selangor (0.33 million s.m.) and Pulau Pinang (0.19 million s.m.) while 56.7% of the total planned supply is in WP Kuala Lumpur (0.20 million s.m.) and another 27.8% (0.10 million s.m.) in Pulau Pinang.

A total of four shopping complexes were completed in the review period. Meanwhile, starts and new planned supply were nil.

The following shopping complexes were completed in H1 2023:

No	State	Name of Building	Location	Category	Total Space (s.m.)
1.	WP Kuala Lumpur	Chow Kit Trade Centre	Jalan Abdul Rahman Idris	Arcade	3,219
2.	Negeri Sembilan	Econsave Port Dickson	Jalan Seremban-Port Dickson	Hypermarket	5,534
3.	Negeri Sembilan	Pilah Gateway	Jalan Melang, Kuala Pilah	Arcade	2,621
4.	Pahang	Lotus's Hypermarket	Jalan Tun Razak, Kuantan	Hypermarket	9,894
Total Completion in H1 2023					**21,268**

Chart 12: Shopping Complex Existing Stock by State H1 2023

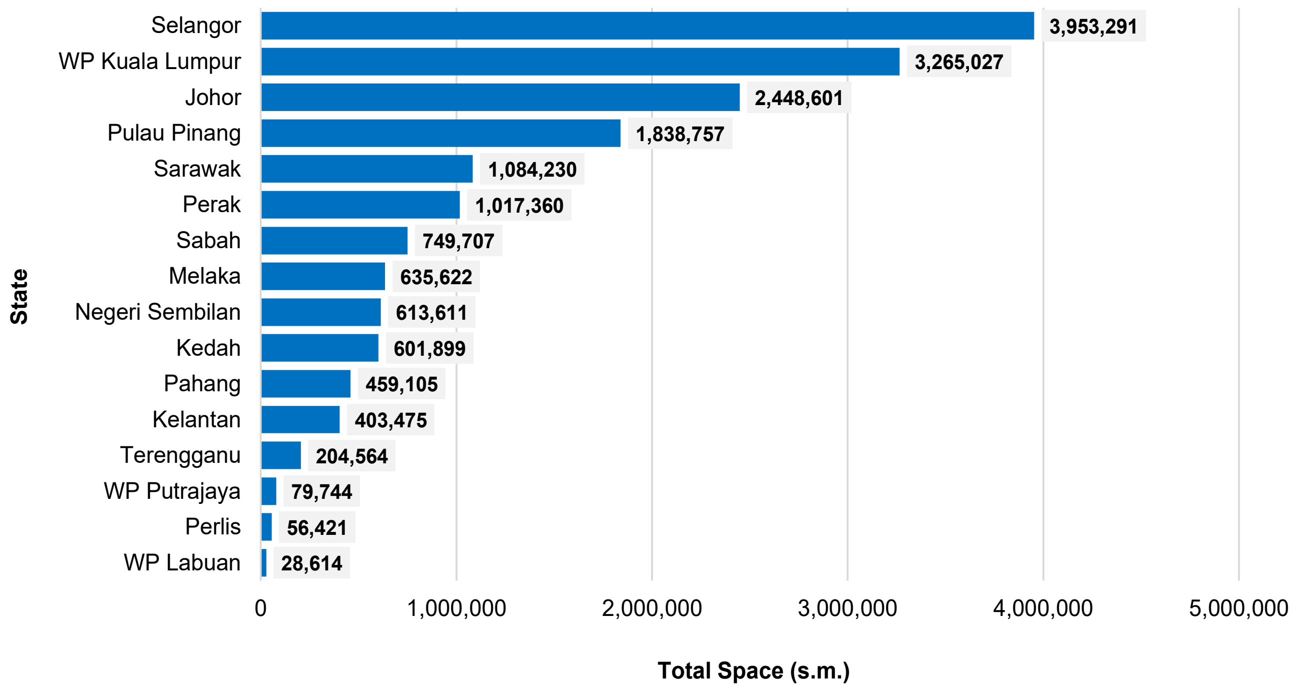


Chart 13: Shopping Complex Incoming Supply and Planned Supply by State H1 2023

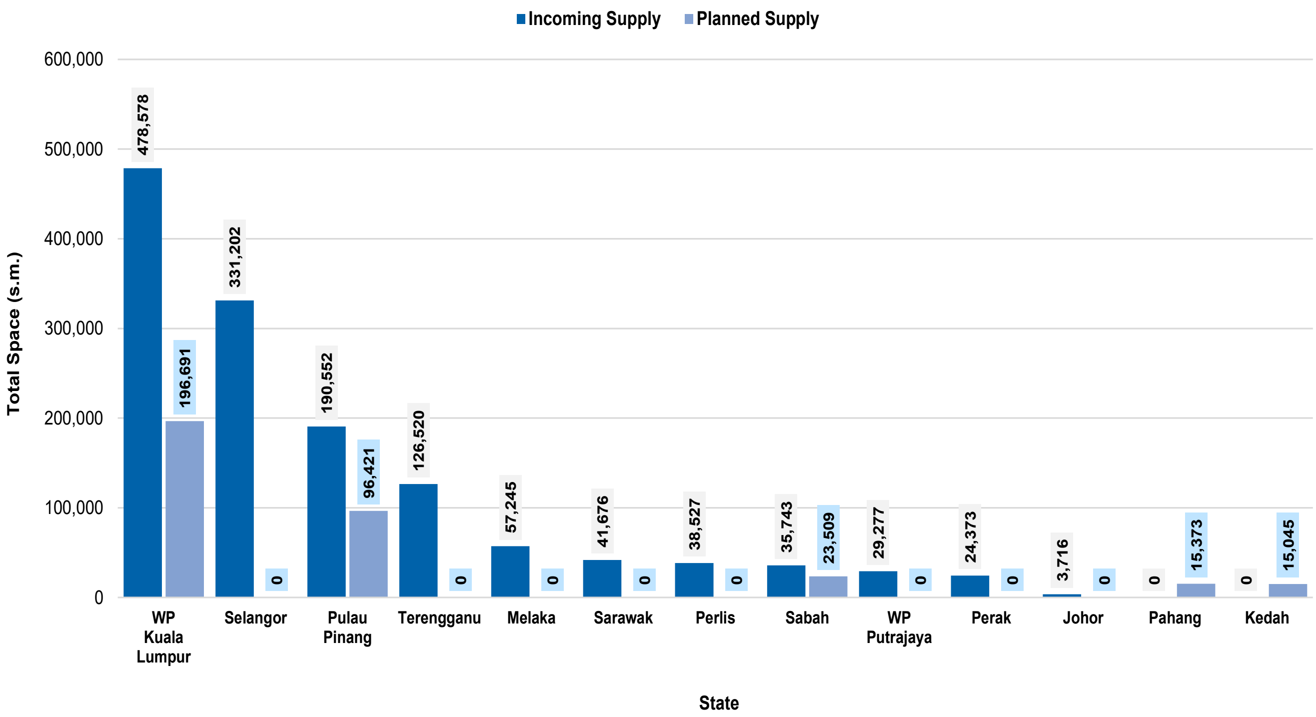
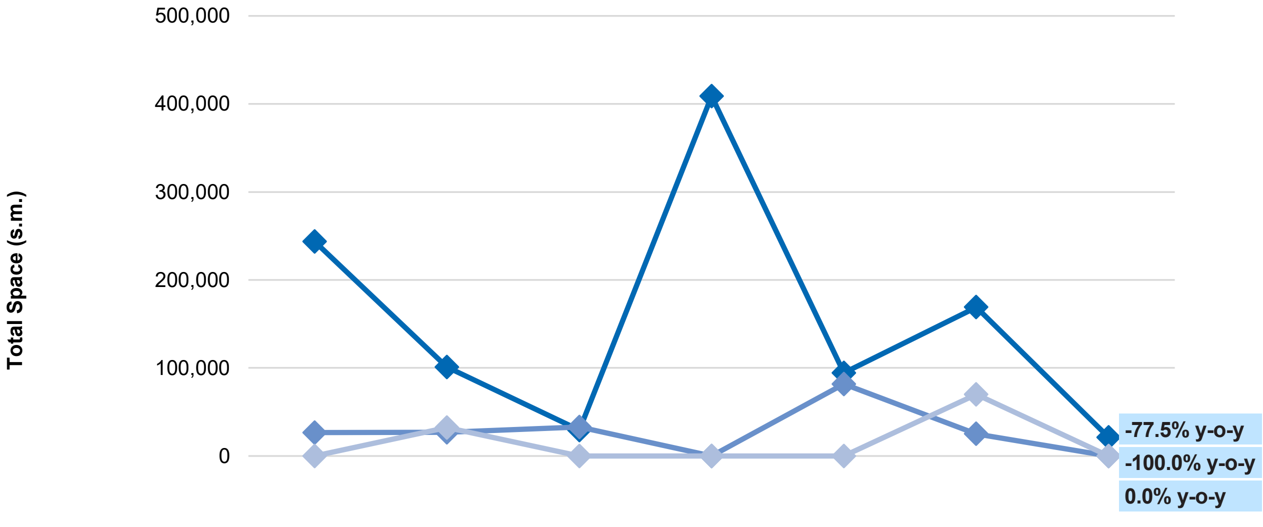


Chart 14: Trends of Completion, Starts and New Planned Supply for Shopping Complex from H1 2020 to H1 2023



	H1 2020	H2 2020	H1 2021	H2 2021	H1 2022	H2 2022	H1 2023
Completion	243,886	100,973	29,469	408,808	94,482	168,997	21,268
Starts	26,674	26,974	32,886	0	81,772	25,165	0
New Planned Supply	0	32,242	0	0	0	69,960	0

5.0 PEJABAT BINAAN KHAS

Pada separuh pertama tahun 2023, sub-sektor pejabat mencatatkan 2,590 bangunan yang menawarkan jumlah ruang sebanyak 24.53 juta m.p. merangkumi 1,578 bangunan swasta (18.37 juta m.p.) dan 1,012 bangunan kerajaan (6.16 juta m.p.).

WP Kuala Lumpur menerajui pasaran pejabat dengan syer 40.5% (9.93 juta m.p.) stok sedia ada, 64.2% (0.98 juta m.p.) di penawaran akan datang dan 79.0% (0.76 juta m.p.) di penawaran yang dirancang. Mengikuti di tempat kedua bagi stok sedia ada ialah Selangor dengan 18.9% (4.64 juta m.p.), Johor di penawaran akan datang dengan 11.9% (0.18 juta m.p.) dan Pulau Pinang di penawaran yang dirancang dengan 4.6% (44,408 m.p.).

Tiga bangunan swasta dan satu bangunan kerajaan siap dibina dalam tempoh kajian, menambah jumlah ruang pejabat sebanyak 60,990 m.p. Mula dibina dan penawaran baru dirancang masing-masing menawarkan satu bangunan.

Bangunan pejabat berikut siap dibina pada H1 2023:

5.0 PURPOSE-BUILT OFFICE

In the first half of 2023, the office sub-sector recorded 2,590 buildings offering a total space of 24.53 million s.m. comprising 1,578 private buildings (18.37 million s.m.) and 1,012 public buildings (6.16 million s.m.).

WP Kuala Lumpur led the office market with a share of 40.5% (9.93 million s.m.) in the existing stock, 64.2% (0.98 million s.m.) in incoming supply and 79.0% (0.76 million s.m.) in planned supply. Trailing in second place in the existing stock is Selangor with 18.9% (4.64 million s.m.), Johor in the incoming supply 11.9% (0.18 million s.m.) and Pulau Pinang in planned supply with 4.6% (44,408 s.m.).

Three private buildings and one government building were completed in the review period, adding 60,990 s.m. to the total office space. Starts and new planned supply saw one building each respectively.

The following office buildings were completed in H1 2023:

No	State	Name of Building	Location	Category	Total Space (s.m.)
1.	WP Kuala Lumpur	Corporate Tower @ Sunway Velocity 2 (Sunway V2 Office Tower)	Jalan Peel/ Jalan Cheras	Private	29,185
2.	Johor	Wisma Sunway Big Box	Medini, Iskandar Puteri	Private	15,792
3.	Negeri Sembilan	Kompleks Pentadbiran Pejabat Agama Islam Daerah Kuala Pilah	Pekan Kuala Pilah	Government	1,606
4.	Perak	Menara Air Perak	Jalan Raja Ashman Shah (Jalan Hospital), Ipoh	Private	14,407
Total Completion in H1 2022					**60,990**

Chart 15: Purpose Built Office Existing Stock by State H1 2023

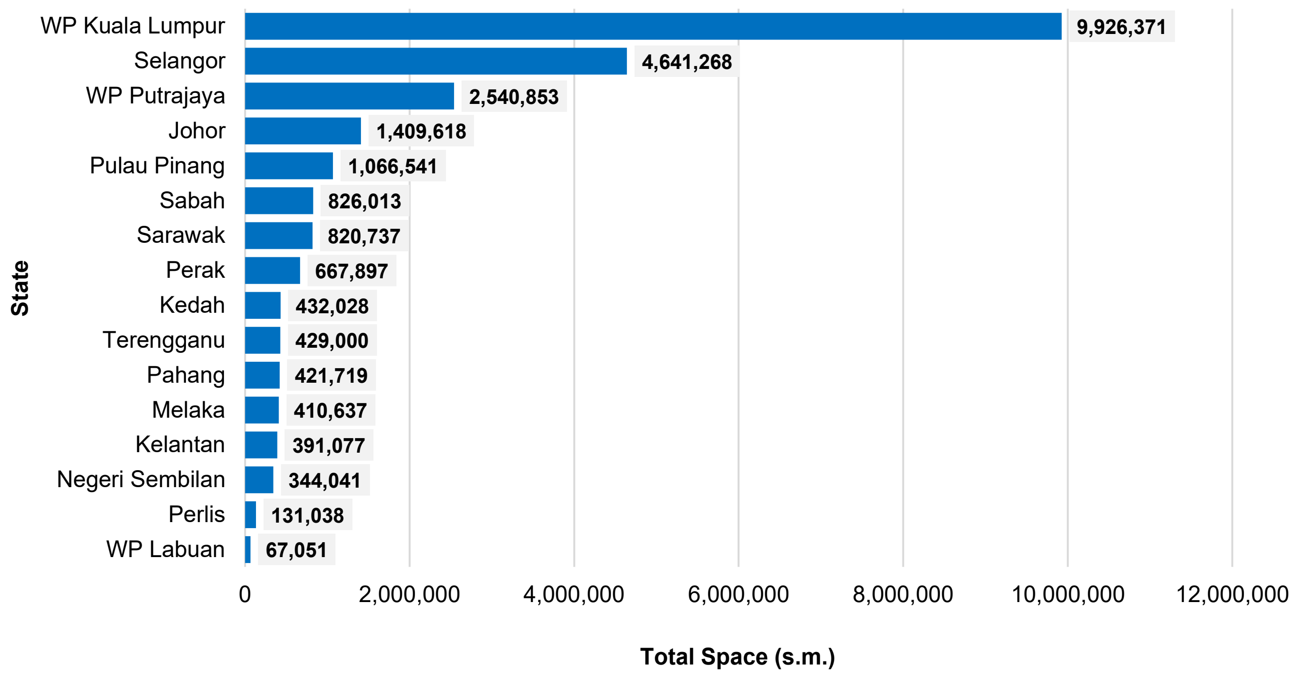


Chart 16: Purpose Built Office Incoming Supply and Planned Supply by State H1 2023

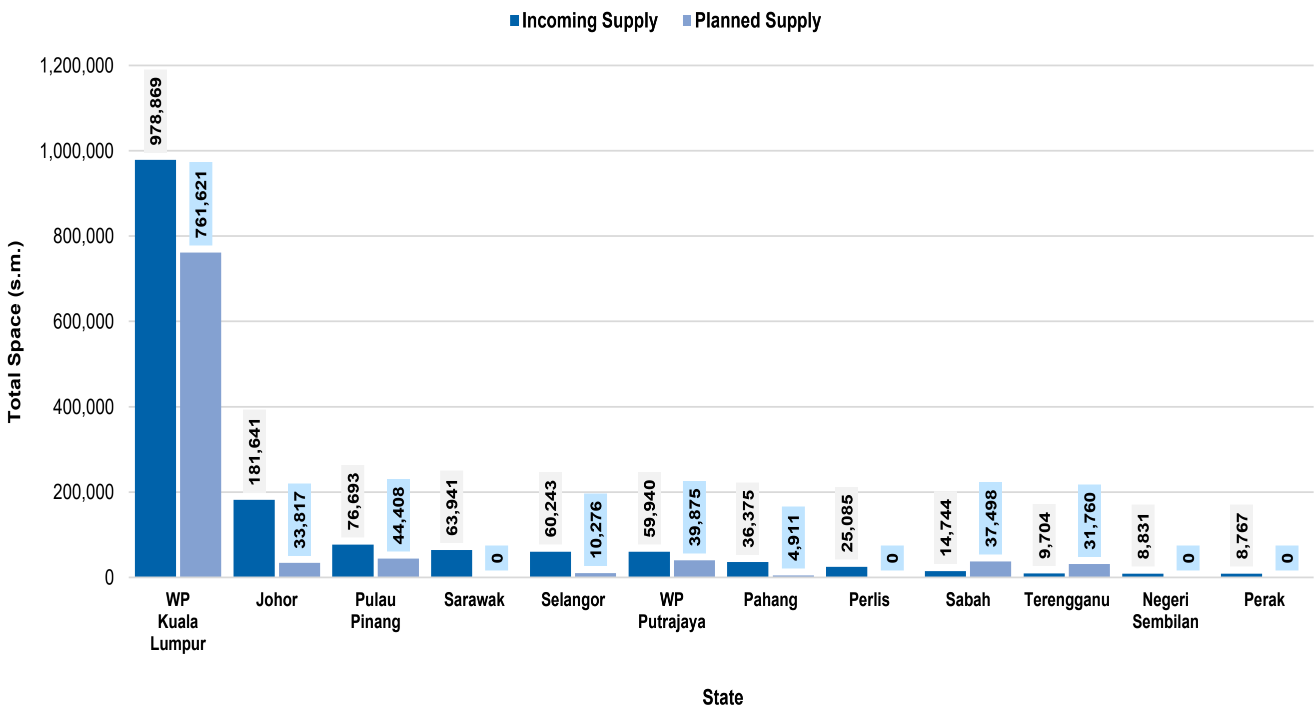
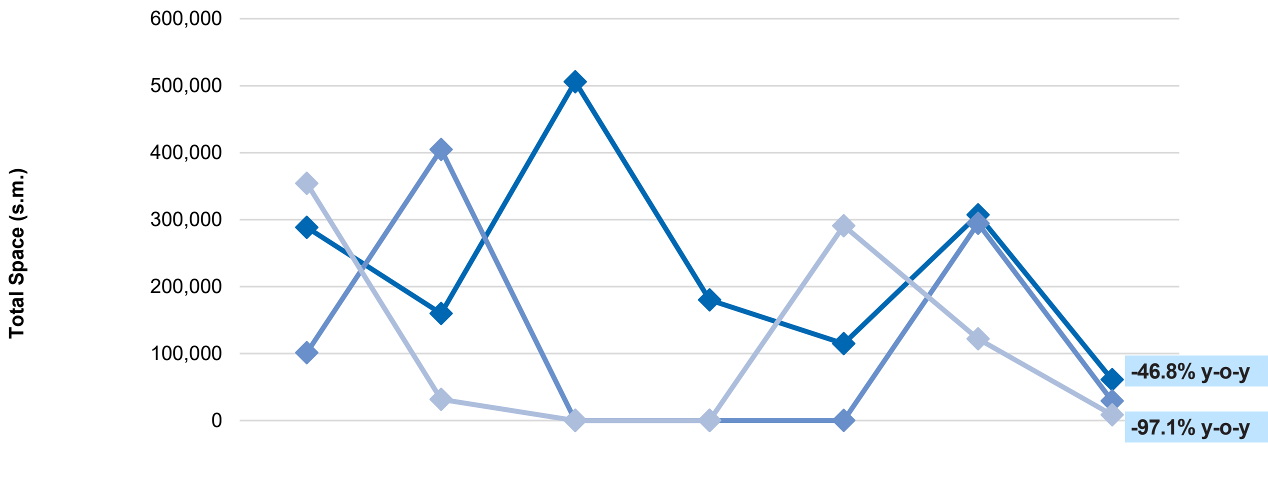


Chart 17: Trends of Completion, Starts and New Planned Supply for Purpose Built Office from H1 2020 to H1 2023



	H1 2020	H2 2020	H1 2021	H2 2021	H1 2022	H2 2022	H1 2023
Completion	288,262	159,890	505,842	180,026	114,716	307,257	60,990
Starts	101,340	404,844	0	0	0	294,560	29,185
New Planned Supply	354,205	31,760	0	0	290,610	121,812	8,330

6.0 HARTA TANAH INDUSTRI

Pada H1 2023, stok sedia ada industri negara berjumlah 120,647 unit dengan 4,121 unit di penawaran akan datang dan 6,460 unit di penawaran yang dirancang. Unit teres ketara dominan di setiap peringkat pembangunan.

Selangor mendahului semua peringkat pembinaan dengan syer pasaran 34.5% (41,673 unit) stok sedia ada, 43.6% (1,796 unit) penawaran akan datang dan 27.8% (1,797 unit) penawaran yang dirancang. Mengikut di belakang ialah Johor dengan 19,001 unit (15.7%) stok sedia ada manakala Melaka di kedudukan kedua di penawaran akan datang (803 unit) dan penawaran yang dirancang (1,783 unit).

Aktiviti pembinaan memaparkan peningkatan berbanding tahun sebelumnya dengan siap dibina naik dua kali ganda 120.3% (260 unit), siap dibina sebanyak 55.8% (413 unit) dan penawaran baru dirancang 305.1% (478 unit).

6.0 INDUSTRIAL PROPERTY

In H1 2023, the nation's industrial stock stood at 120,647 units with another 4,121 units in the incoming supply and 6,460 units in the planned supply. Terraced units were distinctly dominant across all development stages.

Selangor led across all development stages with a market share of 34.5% (41,673 units) in the existing stock, 43.6% (1,796 units) in incoming supply and 27.8% (1,797 units) of planned supply. Trailing behind were Johor with 19,001 units (15.7%) in existing stock while Melaka was second in both incoming supply (803 units) and planned supply (1,783 units).

Construction activity showed improvements from the previous year with completion increased two-fold 120.3% (260 units), starts by 55.8% (413 units) and new planned supply by 305.1% (478 units).

Chart 18: Industrial Existing Stock by State H1 2023

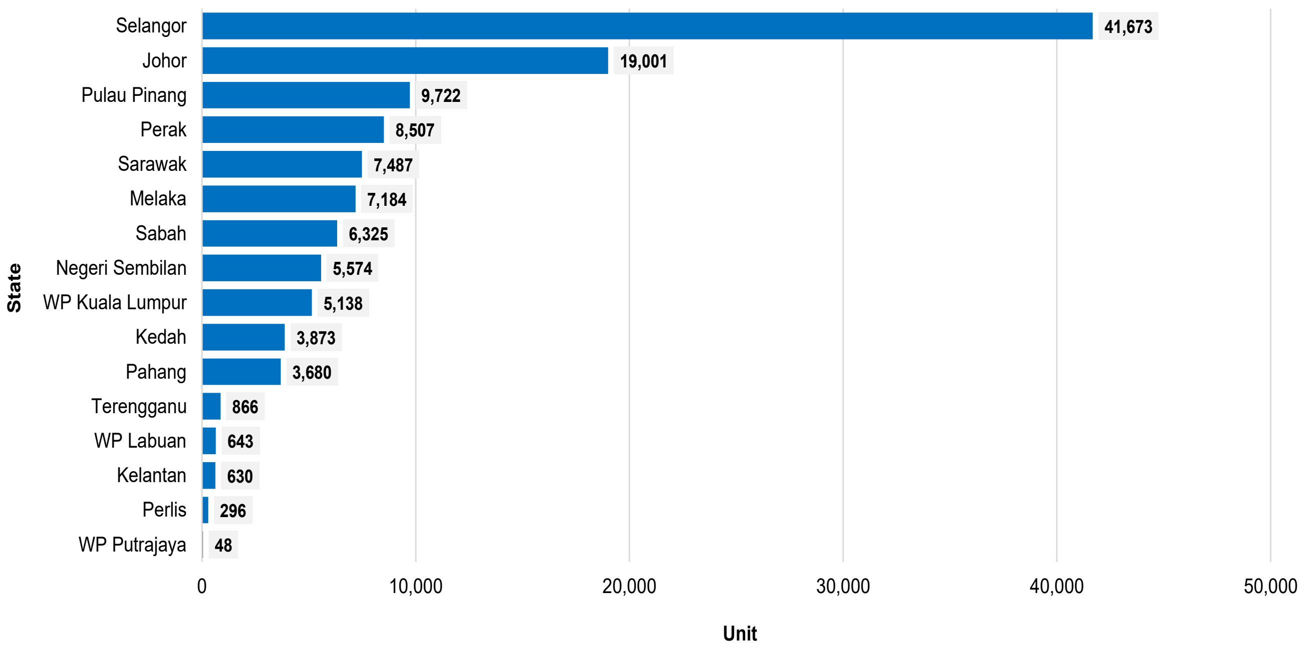


Chart 19: Industrial Incoming Supply and Planned Supply by State H1 2023

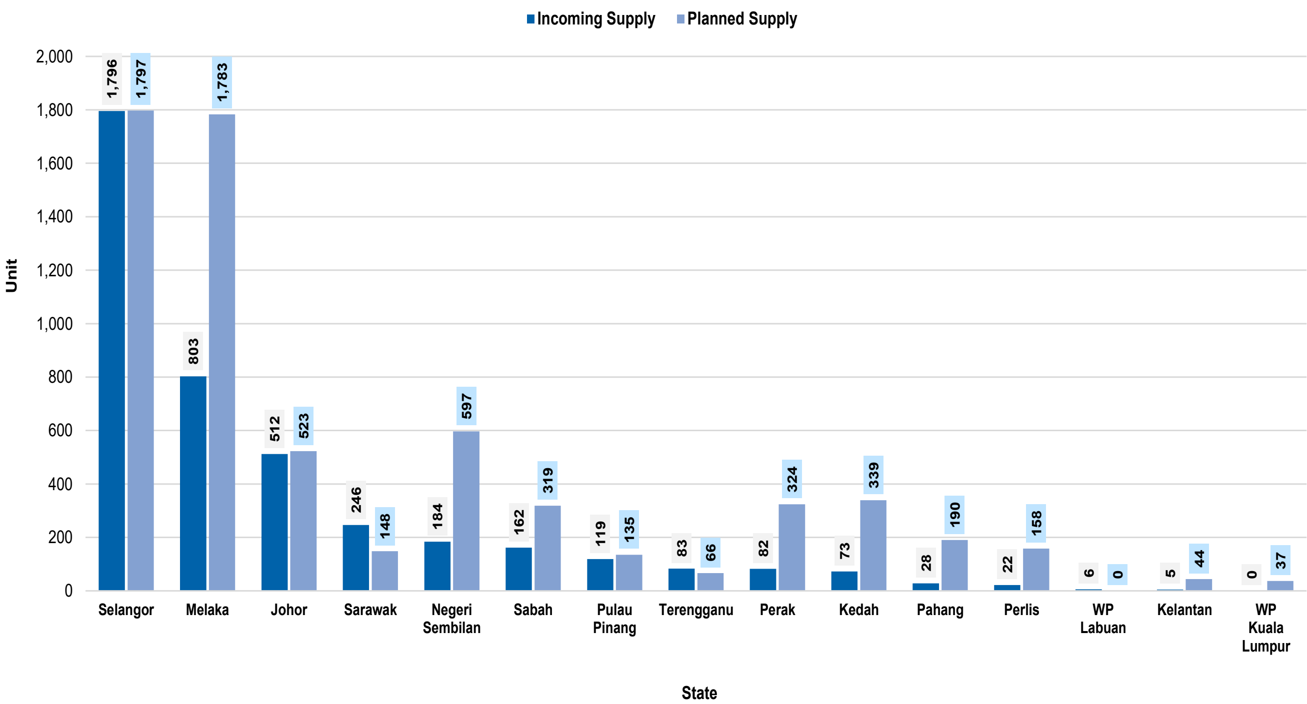
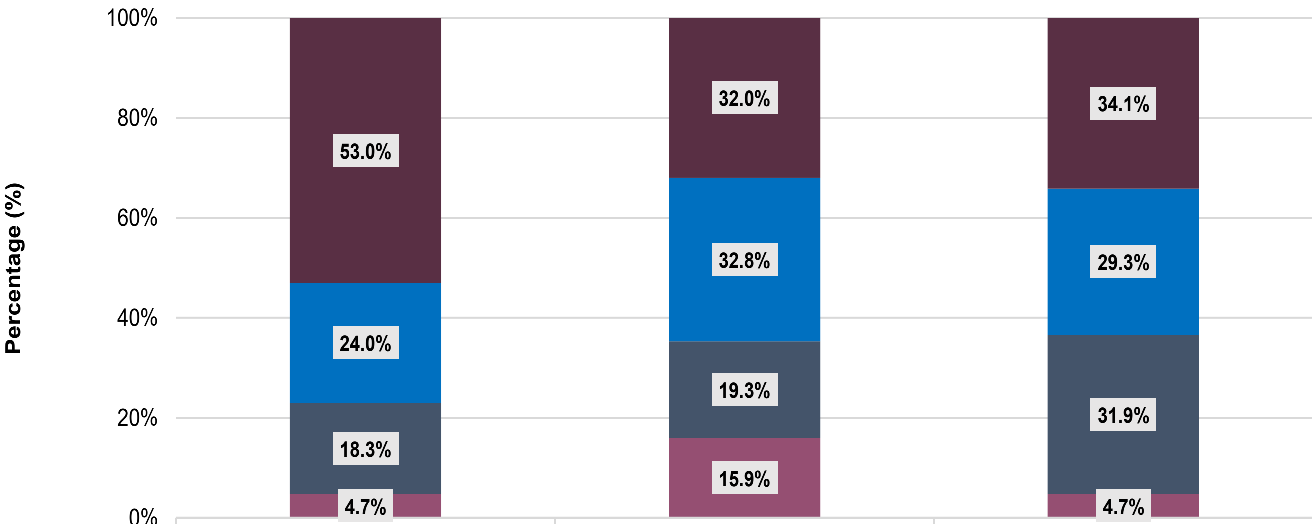
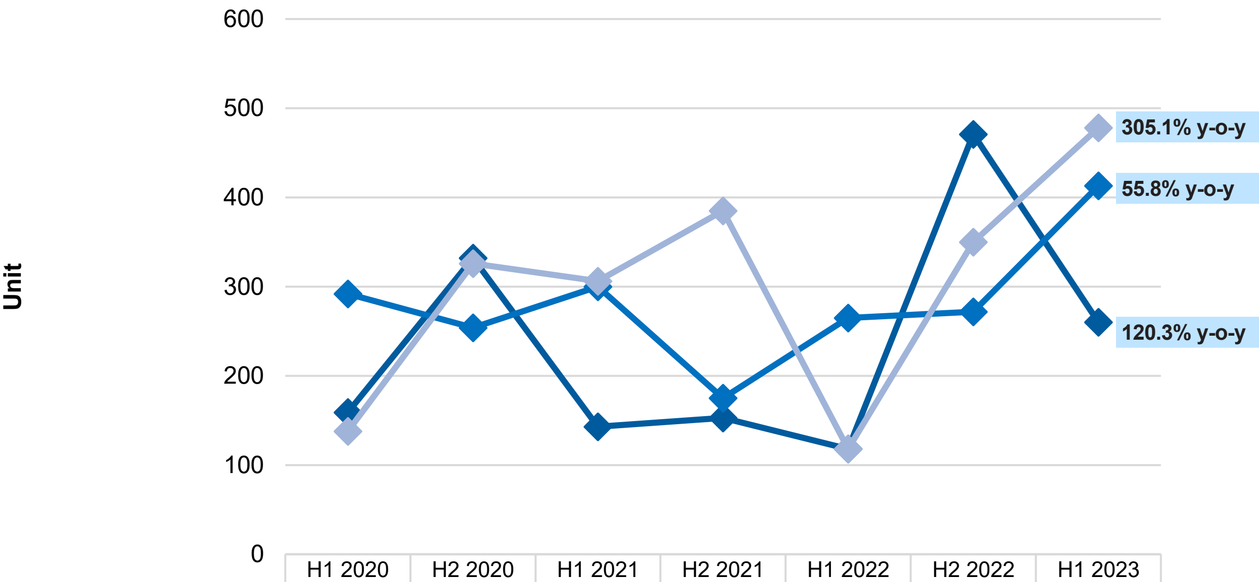


Chart 20: Distribution of Industrial by Building Type H1 2023



	Existing Stock	Incoming Supply	Planned Supply
Terraced	63,988	1,318	2,206
Semi-Detached	28,898	1,350	1,892
Detached	22,095	797	2,058
Others	5,666	656	304

Chart 21: Trends of Completion, Starts and New Planned Supply for Industrial from H1 2020 to H1 2023



	H1 2020	H2 2020	H1 2021	H2 2021	H1 2022	H2 2022	H1 2023
Completion	159	332	143	153	118	471	260
Starts	292	254	300	175	265	272	413
New Planned Supply	138	326	306	385	118	350	478

7.0 HARTA TANAH RIADAH

Pada H1 2023, stok harta tanah riadah negara berjumlah 271,391 bilik dengan 21,176 bilik dalam penawaran akan datang dan 12,824 bilik dalam penawaran yang dirancang. WP Kuala Lumpur menyumbangkan jumlah tertinggi bilik hotel dalam negara di bawah stok sedia ada serta penawaran akan datang, manakala Johor menawarkan bilangan bilik tertinggi di penawaran yang dirancang.

Dalam tempoh kajian, tiga hotel (733 bilik) di daftarkan sebagai penawaran baru dirancang. Tiada hotel direkodkan di bawah siap dibina atau penawaran baru dirancang.

7.0 LEISURE PROPERTY

In H1 2023, the country's leisure stock stood at 271,391 rooms with another 21,176 rooms in the incoming supply and 12,824 rooms in planned supply. WP Kuala Lumpur contributed the highest number of existing hotel rooms in the country, as well as those in incoming supply, whereas Johor has the highest number of rooms in the planned supply.

In the survey period, three hotels (733 rooms) were registered in new planned supply. None were recorded in completion or starts.

Chart 22: Hotel Existing Stock by State H1 2023

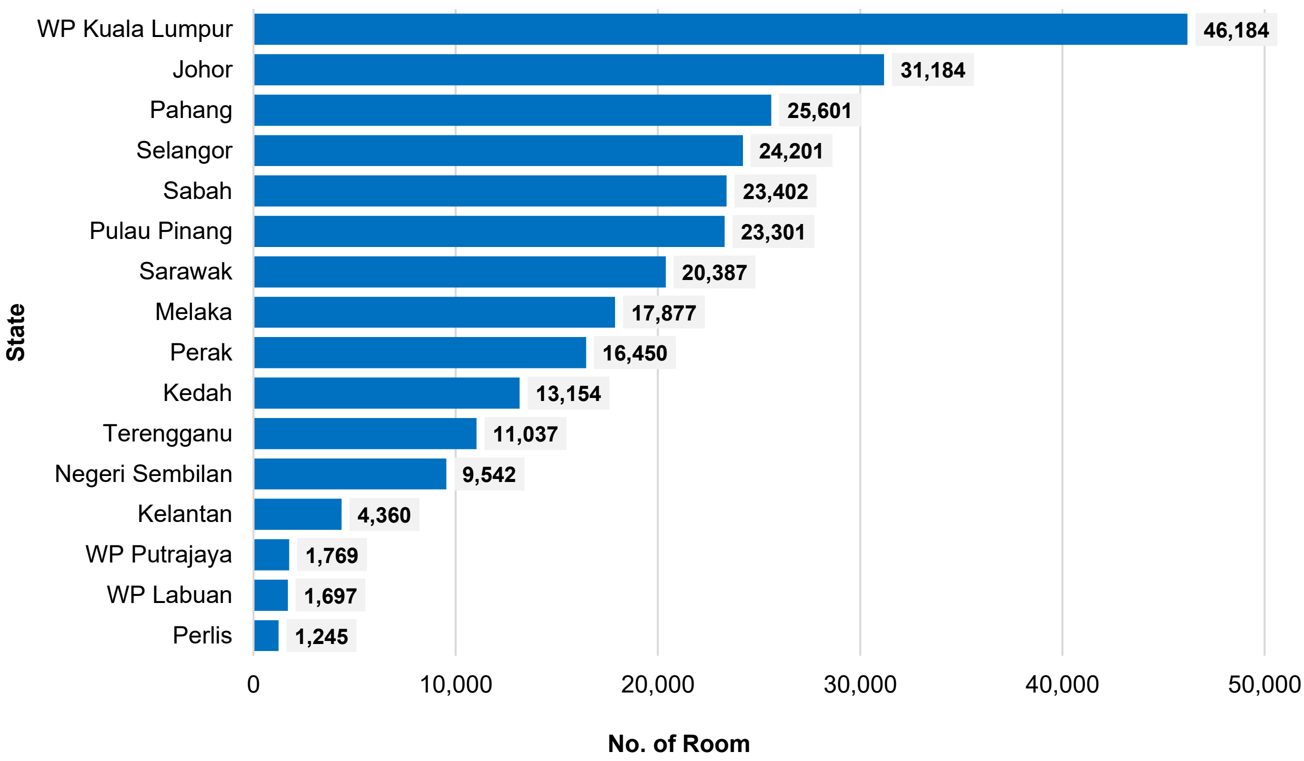


Chart 23: Hotel Incoming Supply and Planned Supply by State H1 2023

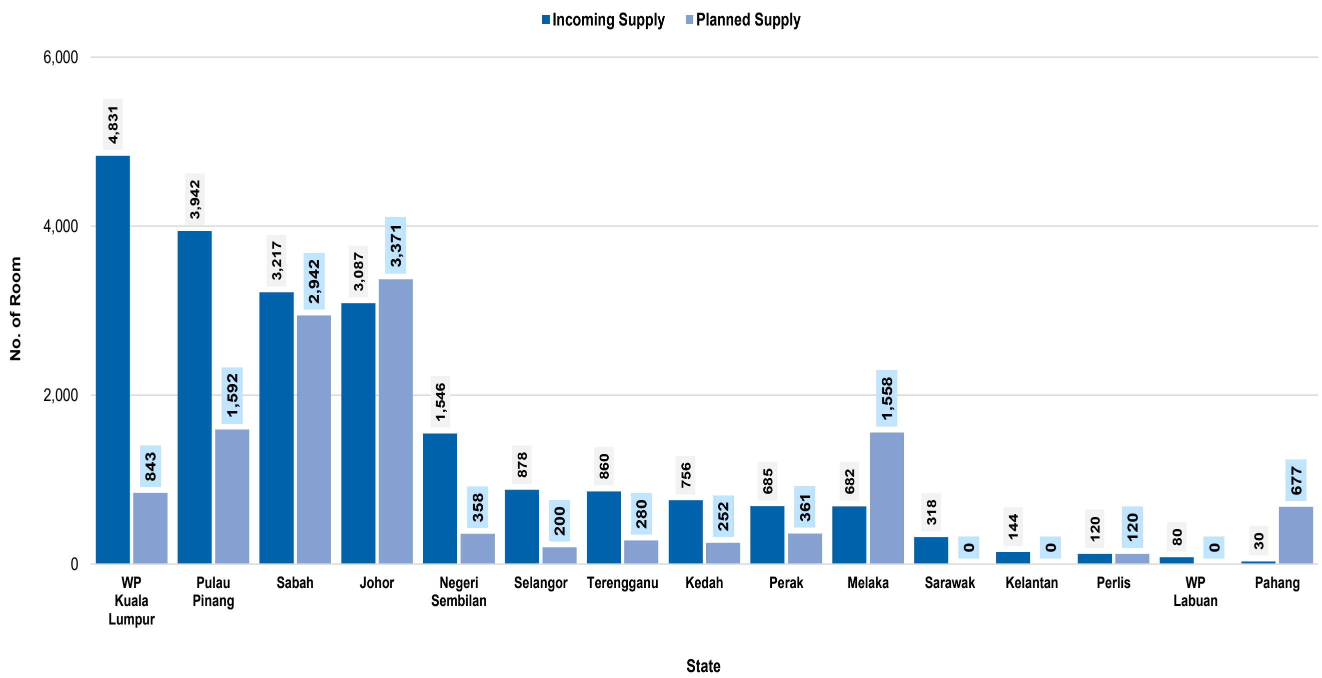
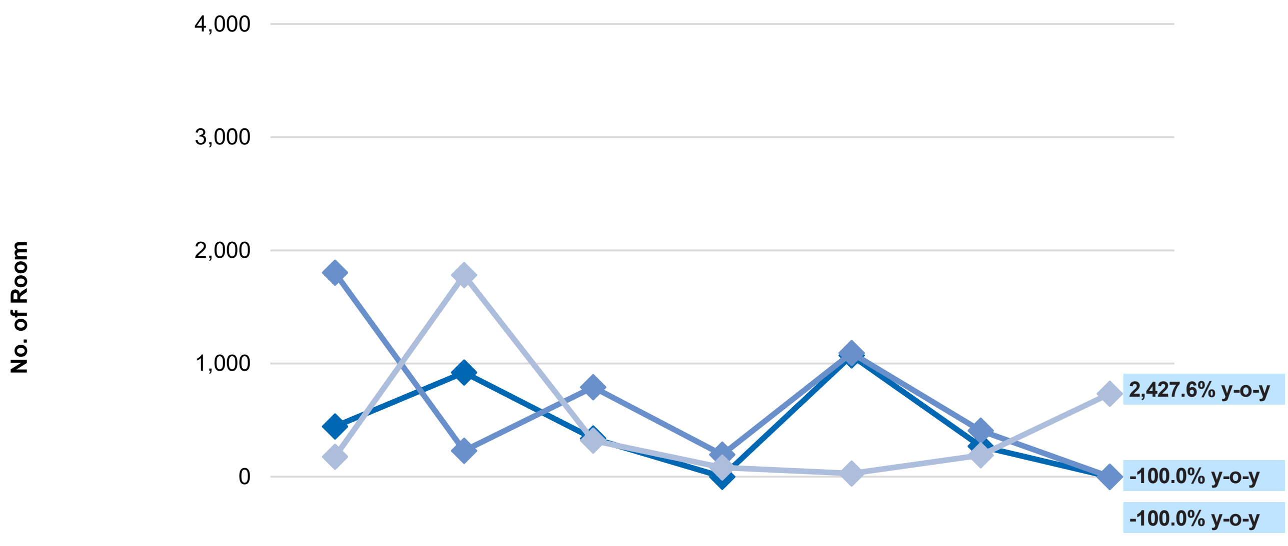


Chart 24: Trends of Completion, Starts and New Planned Supply for Hotel from H1 2020 to H1 2023



	H1 2020	H2 2020	H1 2021	H2 2021	H1 2022	H2 2022	H1 2023
Completion	443	920	337	0	1,071	270	0
Starts	1,802	228	790	195	1,094	407	0
New Planned Supply	175	1,781	320	80	29	190	733

Catatan Teknikal

Technical Notes

CATATAN TEKNIKAL

1.0 Tempoh kajian

Laporan Stok Harta Tanah pada tahun 2023 adalah seperti berikut:

Q1	:	1 Januari 2023 - 31 Mac 2023
Q2	:	1 April 2023 - 30 Jun 2023
Q3	:	1 Julai 2023 - 30 September 2023
Q4	:	1 Oktober 2023 - 31 Disember 2023

2.0 Peringkat Penyebaran

Laporan terbahagi adalah pada tiga peringkat pembangunan yang utama dan subperingkat berpandukan jadual di bawah:

2.1 Inventori Sedia Ada

Inventori sedia ada (stok) adalah unit yang telah memperoleh sijil layak menduduki (CF) atau sijil layak menduduki sementara (TCF) sebelum tempoh kajian termasuk unit yang siap dibina dan memperoleh CF/ TCF dalam tempoh kajian. Angka dalam inventori sedia ada adalah jumlah terkumpul dari suku-suku sebelumnya ditambah dengan suku semasa.

INVENTORI SEDIA ADA

↑

Siap Dibina

↑

PENAWARAN AKAN DATANG

↑

Dalam Pembinaan

↑

Mula Dibina

↑

PENAWARAN DIRANCANG

↑

Penawaran Baharu Dirancang

2.2 Siap dibina

Siap dibina adalah terma yang digunakan bagi bangunan yang mana kerja pembinaan bangunan telah siap dan CF/ TCF telah diperolehi dalam tempoh kajian.

2.3 Penawaran akan datang

Penawaran akan datang merangkumi unit yang mana kerja pembinaannya sedang dijalankan termasuk unit mula dibina dan CF/ TCF belum dikeluarkan dalam tempoh kajian. Unit dalam penawaran akan datang mewakili jumlah terkumpul yang mana unit dalam pembinaan dalam suku kajian dan suku sebelumnya ditambah dengan unit yang memulakan pembinaan dalam suku kajian. Ianya tidak mengambil kira tanah kosong tetapi termasuk **unit tertangguh.**

Pengiraan penawaran akan datang adalah berterusan dan belum menyamai jumlah bilangan penduduk. Penawaran akan datang yang disebarkan dalam sebarang laporan suku tahunan merangkumi penawaran akan datang yang diselaraskan bagi suku sebelumnya dan penawaran akan datang dalam suku kajian.

Penawaran akan datang suku sebelumnya perlu diselaraskan dalam suku kajian atas sebab berikut:

- Pertambahan dalam kawasan liputan kajian
- Data tertunda dari suku sebelumnya tetapi diterima dalam suku semasa
- Kesilapan dalam operasi.

Unit tertangguh ialah yang mana kerja asas bangunan secara fizikalnya telah dimulakan tetapi belum siap dibina dan tiada aktiviti pembinaan selepas tiga tahun daripada tarikh kelulusan pembangunan.

TECHNICAL NOTES

1.0 Review Periods

The quarters in the 2023 of the Property Stock Report is as follows:

Q1	*:*	*1 January* 2023 *- 31 March* 2023
Q2	*:*	*1 April* 2023 *- 30 June* 2023
Q3	*:*	*1 July* 2023 *- 30 September* 2023
Q4	*:*	*1 October* 2023 *- 31 December* 2023

2.0 Stages of Dissemination

Information at the three main stages of development and their sub-stages according to the chart below:

2.1 Existing Inventory (stock)

Existing inventory (stock) are units that have been issued with the certificate of fitness (CF) or temporary certificate of fitness (TCF) prior to the review period plus units completed and issued with CF/ TCF within the review period. The figures in the existing inventory are accumulated figures from previous quarters plus the review quarter.

EXISTING INVENTORY

↑

Completion

↑

INCOMING SUPPLY

↑

Under Construction

↑

Starts

↑

PLANNED SUPPLY

↑

New Planned Supply

2.2 Completions

Completion is the term used when the building construction works are completed and a CF/ TCF is issued within the review period.

2.3 Incoming supply

*Incoming supply comprises units where physical construction works are in progress including starts and CF/ TCF have not been issued during the review period. Units in the incoming supply represent accumulative totals where units under construction in the review quarter and from the previous quarter are added to the units that have started construction in the review quarter. It does not include vacant land but includes **delayed units.***

The calculation of incoming supply is on going and has not reached a total population count. Incoming supply disseminated in any quarter publication includes the adjusted incoming supply for the previous quarter and the incoming supply in the review quarter.

Incoming supply of the previous quarter have to be adjusted in the review quarter because of the following reasons:

- *An increase in coverage*
- *Delayed data from the previous quarter but received during the review period,*
- *Operational errors.*

***Delayed units** are those where the foundation work has physically started but not completed and no construction activity has taken place for a period of more than three years from the date the development was approved.*

2.4 Mula dibina

Mula dibina terdiri daripada bangunan-bangunan yang mana:

- Kerja asas dan kerja tapak bagi bangunan bertingkat rendah atau kerja bawah paras tanah termasuk cerucuk dan asas bagi bangunan bertingkat tinggi, telah dimulakan,
- Ianya tidak termasuk kerja-kerja membersih, merata dan menyediakan infrastruktur

2.5 Penawaran dirancang

Penawaran dirancang merangkumi unit yang mana kelulusan pelan bangunan telah diperolehi daripada pihak berkuasa tempatan dalam suku kajian. Unit tersebut belum memulakan pembinaan secara fizikalnya. Unit dalam penawaran dirancang termasuk jumlah terkumpul daripada suku-suku sebelumnya ditambah dengan unit dalam penawaran baharu dirancang dalam suku kajian. Pengiraan penawaran dirancang adalah berterusan dan belum menyamai jumlah bilangan penduduk. Penawaran dirancang yang disebarkan dalam sebarang laporan suku tahunan merangkumi penawaran dirancang yang diselaraskan bagi suku sebelumnya dan penawaran baharu dirancang dalam suku kajian. Penawaran yang dirancang suku sebelumnya perlu diselaraskan dalam suku kajian atas sebab berikut:

- Pertambahan kawasan liputan kajian,
- Data tertunda daripada suku sebelumnya tetapi diterima dalam suku semasa,
- Kesilapan dalam operasi.

2.6 Kelulusan Pelan Bangunan (Penawaran baharu dirancang)

Penawaran baharu dirancang merangkumi unit dimana kelulusan pelan bangunan telah diperolehi dari pihak berkuasa tempatan dalam suku kajian.

3.0 **Penawaran hadapan** adalah terma yang digunakan dalam laporan ini bagi menunjukkan penawaran akan datang dan penawaran dirancang.

4.0 Terma Am

4.1 Struktur

Struktur termasuk kekal, separuh kekal dan sementara.

4.2 Pemilikan

Termasuk kedai/ Pejabat binaan khas/ Kompleks perniagaan milik kerajaan dan swasta. Kerajaan termasuklah kerajaan persekutuan, negeri dan pihak berkuasa tempatan. Swasta juga merangkumi kedai yang dimiliki oleh badan separa kerajaan.

4.3 **Tanah kosong** tidak dikira dalam inventori sedia ada. Setelah ianya memperoleh kelulusan pelan bangunan, ianya dimasukkan dalam penawaran yang dirancang dan seterusnya memasuki pelbagai peringkat pembinaannya.

5.0 Harta Tanah Kediaman

5.1 Definisi

Rumah tempat tinggal adalah termasuk mana-mana bangunan, teneman atau mesuaj yang keseluruhannya atau sebahagian binaannya, disesuaikan atau diniatkan bagi kediaman manusia dan sebahagiannya bagi premis perniagaan. Istilah kediaman manusia adalah termasuk bangunan yang dibina untuk manusia tinggal bersama keluarga. Bagi tujuan laporan ini, rumah kedai, yang mana sebahagiannya lagi untuk tempat tinggal adalah dikecualikan daripada harta tanah kediaman tetapi dilaporkan sebagai kedai.

5.2 Jenis Harta Tanah

Maklumat merangkumi kediaman individu samada yang terletak dalam atau luar skim perumahan di dalam kawasan pihak berkuasa tempatan. Jenis harta tanah kediaman termasuk teres, berkembar, sesebuah, unit kos rendah, rumah pangsa, pangsapuri/ kondominium, unit berkelompok dan rumah bandar di semua peringkat.

Walau bagaimanapun, institusi, kuarters dan unit setinggan tidak termasuk dalam laporan ini.

2.4 Starts

Starts comprises buildings where:

- *The foundation and footing works of low-rise buildings or works below ground level including piling and foundation of high-rise buildings have started, and*
- *It does not include site clearring, levelling and laying of infrastructure.*

2.5 Planned supply

Planned supply comprises units with building plan approval obtained within a review quarter from the local authority. The units have not started physical construction works. Units in the planned supply include accumulative totals from previous quarters plus units in the new planned supply in the review quarter. The calculation of planned supply is on going and has not reached a total population count. Planned supply disseminated in any quarter publication includes the adjusted planned supply for the previous quarter and the planned supply in the review quarter. Planned supply of the previous quarter has to be adjusted in the review quarter because of the following reasons:

- *An increase in coverage,*
- *Delayed data from the previous quarter but received during the review period,*
- *Operational errors.*

2.6 Building Plan Approval (New planned supply)

New planned supply comprises units where building plan approval have been obtained within the review period.

3.0 ***Future supply** is a term used in the report to denote incoming supply and planned supply.*

4.0 General Terms

4.1 Structures

The structures include permanent, semi-permanent and temporary construction.

4.2 Ownership

Include all shops/ purpose-built office/ shopping complexes owned by government and private sectors. Governments comprise federal, state and local authorities. Private sector embraces private companies and quasi-government agencies.

4.3 ***Vacant lands** are not included under existing inventory. When they obtain building plan approval they are included under planned supply and progresses into the construction stages.*

5.0 Residential Property

5.1 Definition

Defines housing accommodation to include any building, which is wholly or principally constructed, adapted or intended for human habitation or partly for human habitation and partly for business premises. The term human habitation would include buildings constructed for humans to live with their families. For the purpose of this report, shop houses, which is partially used as retail and partially for human habitation is excluded as residential property but reported as shop.

5.2 Property Types

The data is conducted by survey within local authority area. Property types include terraced, semi-detached, detached, low-cost units, flats, condominium/ apartment, clustered units and town houses at various levels.

However, the property excluded from this report are institutional quarters and squatter units.

6.0 Kedai

6.1 Definisi

Kedai merangkumi premis di mana barang runcit dan perkhidmatan diniagakan. Barang yang dijual dan perkhidmatan yang disediakan memenuhi keperluan harian pelanggan.

Kedai adalah merangkumi:

- Rumah kedai
- Kedai pejabat
- Unit kedai dengan kegunaan perniagaan
- Kedai makan binaan khas

Kedai tidak termasuk:

- Kedai yang telah diubahsuai 75% (ini menunjukkan penukaran kegunaan yang kekal) kepada kegunaan perdagangan lain seperti ruang pejabat.
- Kedai yang telah ditukar kegunaan secara kekal

6.2 Jenis Harta Tanah

Data adalah berdasarkan lawat periksa dalam kawasan pihak berkuasa tempatan. Jenis harta tanah kedai adalah termasuk teres, berkembar, sesebuah, kedai strata dan kedai sebelum perang. SOHO dan pangsapuri khidmat dimasukkan mulai Q1 2018.

7.0 Industri

7.1 Definisi

Unit perindustrian iaitu bangunan/ kilang yang terlibat dalam aktiviti pembuatan dan penyimpanan (gudang). Akta Penyelarasan Perindustrian 1975 (ICA) mendefinisikan "Aktiviti Pengilangan" sebagai membuat, mengubah, mengadun, menghiasi, memperkemas atau dengan cara lain merawat atau menyesuaikan apa-apa barang atau bahan dengan bermaksud pengunaan, penjualan, pengangkutan, penghantaran atau pembuangannya dan merangkumi pemasangan bahagian-bahagian dan pembaikan kapal tetapi tidak termasuk sebarang aktiviti yang biasanya berkaitan dengan perniagaan jual runcit atau borong. Unit perindustrian juga termasuk kemudahan penyimpanan *stand-alone* atau gudang yang tidak disebut di dalam definisi ICA. Walau bagaimanapun, laporan ini belum mengumpul data bagi kemudahan penyimpanan.

7.2 Jenis Harta Tanah

Data adalah berdasarkan lawatperiksa dalam dan luar kawasan pihak berkuasa tempatan. Jenis harta tanah industri merangkumi Jenis perindustrian termasuk unit teres, berkembar, sesebuah, kompleks perindustrian dan bertingkat.

8.0 Pejabat Binaan khas

8.1 Definisi

Bangunan binaan khas bermaksud satu kegunaan utama yang disokong oleh kegunaan sampingan. Kegunaan utama menggabungkan rekabentuk asal, yang mengoptimumkan ruang bagi manfaatnya. Apabila rekabentuk asal diubahsuai sebanyak 75% bagi memanfaatkan kegunaan lain, kegunaan asalnya akan ditukar dengan kegunaan baru.

Inventori pejabat binaan khas dalam laporan NAPIC termasuk tempat perniagaan berbentuk perkhidmatan dijalankan dan bukannya pembuatan atau penjualan barangan. Ruang pejabat ini diperlukan untuk aktiviti kertas kerja, komunikasi serta lain-lain aktiviti pejabat.

Dengan ini terma pejabat binaan khas digunakan untuk menunjukkan bangunan yang dibina secara khusus untuk pejabat sebagai kegunaan utamanya. Bagi pengumpulan dan penyebaran maklumat oleh NAPIC, kegunaan dominan bermaksud kegunaan pejabat adalah tidak kurang dari 75% daripada keluasan bersih yang disewakan. Penyebaran maklumat ruang pejabat adalah berdasarkan luas bersih yang disewakan sebagaimana yang dinyatakan di dalam *Uniform Methods of Measurement of Buildings* yang diterbitkan oleh Pertubuhan Juruukur DiRaja Malaysia.

6.0 Shop

6.1 Defination

Shops are premises where retail goods and services are sold. The goods and services meet day-to-day needs of customers.

The Shops include:

- *Shop house*
- *Shop offices*
- *Shop unit with retail use*
- *Purpose-built eateries*

The shops excluded:

- *Shops that have been renovated 75% (indicating a permanent change) to other commercial uses like office space.*
- *Shops that has permanently changed to another use.*

6.2 Property Types

The data is conducted by survey within local authority area. Property types include terraced, semi-detached, detached, stratified shop and pre-war. SOHO and serviced apartments are included from Q1 2018 onwards.

7.0 Industrial

7.1 Definition

Units that are buildings/ factories that engage in manufacturing activity and storage (warehouses). The Industrial Co-ordination Act 1975 (ICA) defines industrial activity as the making, altering, blending, ornamenting, finishing or otherwise treating or adapting any article or substance with a view of its use, sale, transport, delivery or disposal; and includes the assembly of parts and ship repairing but shall not include any activity normally associated with retail or wholesale trade. Industrial units also include stand-alone storage facilities or warehouses that is not mentioned in the ICA definition. However the publication has not captured the data on storage facilities.

7.2 Property Types

The data is conducted by survey within and outside local authority area. Property types include terraced, semi-detached, detached, industrial complex and flatted units.

8.0 Purpose-built Offices

8.1 Definition

Purpose-built (as opposed to multi-purpose) signifies one primary use with supporting uses complimenting it. The intended use incorporates an original design, which optimises space for its benefit. When the original design is renovated by 75% to benefit another use, the original intention is replaced by the new use.

NAPIC publication of purpose-built office inventory includes places where service-orientated businesses are carried out as opposed to goods being manufactured or sold. The office space is required to attend to paperwork for communication and other office activity.

Therefore the term purpose-built office is used to denote buildings that are intentionally built with office as a dominant use. In data capturing and dissemination by NAPIC, dominant use means office use not less than 75% of the net let-table area. Office space information is disseminated based on the net let-table floor area according to the Uniform Methods of Measurement of Buildings of the Royal Institution of Surveyors Malaysia.

Included within the inventory are:

- *Office space within integrated development*

Termasuk di dalam laporan ini adalah:
- Ruang pejabat dalam pembangunan bersepadu
- Ruang dengan kegunaan asal misalnya pejabat tetapi telah ditukar kegunaannya buat sementara waktu

Tidak termasuk di dalam laporan ini adalah:
- Ruang pejabat dalam bangunan pelbagai guna di mana kegunaannya boleh bertukar ganti dengan kegunaan perniagaan, kediaman, hotel dan perindustrian
- Ruang pejabat yang mana telah ditukar dari kegunaan asalnya secara kekal

9.0 Kompleks Perniagaan

9.1 Definisi

Kompleks perniagaan termasuk penubuhan perniagaan pelbagai unit dengan laluan pejalan kaki yang tertutup bagi menggalakkan aliran pejalan kaki untuk menampung aktiviti perniagaan. Maklumat kompleks perniagaan yang disebarkan oleh NAPIC merangkumi:
- Pusat membeli-belah
- Arked perniagaan
- Pasar raya besar (stand-alone)

Pusat beli-belah ialah penubuhan perniagaan binaan khas dominan yang dirancang, dibangunkan dan diurusniagakan dalam beberapa rangkaian dalam satu pusat untuk perniagaan. Bagi pengumpulan dan penyebaran maklumat oleh NAPIC, kegunaan dominan bermaksud kegunaan perniagaan adalah tidak kurang dari 75% daripada luas bersih yang disewakan.

Pusat membeli-belah mempunyai:
- Jalan-jalan keluar dalam kawasan tertutup yang mempunyai kawalan suhu dan ruang laluan pejalan kaki yang lebar
- Penyewa perniagaan runcit dan perkhidmatan yang telah dipilih bagi tujuan keseimbangan perniagaan
- Satu atau lebih penyewa utama
- Satu syarikat pengurusan
- Tempat letak kereta kegunaan bersama
- Sistem penyaman udara pusat
- Perkhidmatan keselamatan pusat
- Perkhidmatan kawalan kebakaran pusat
- Lif dan eskalator kegunaan bersama
- Lampu, tunjuk arah dan landskap kegunaan bersama
- Polisi pengurusan yang seragam
- Kegunaan sampingan seperti perbankan dan perkhidmatan lain, yang mana adalah kurang dari 25% daripada luas lantai bersih.

Arked perniagaan adalah kedai runcit dominan bagi tujuan perniagaan yang terletak di sebelah atau kedua-dua belah laluan kedai tersebut. Bagi pengumpulan dan penyebaran maklumat oleh NAPIC, kegunaan dominan bermaksud kegunaan perniagaan mestilah tidak kurang daripada 75% luas lantai bersih.

Arked perniagaan mempunyai:
- Kebiasaannya laluan pejalan kaki terbuka dan terdapat juga arked yang mempunyai ruang laluan pejalan kaki yang mempunyai kawalan suhu
- Penyewa runcit dan perkhidmatan kebiasaannya tidak terancang serta barangan yang dijual adalah serupa
- Tiada penyewa utama dalam arked
- Satu syarikat pengurusan
- Tempat letak kereta kegunaan bersama
- Kebiasaannya tiada sistem penyaman udara, tetapi terdapat juga arked yang mempunyai unit penyaman udara dan sistem penyaman udara
- Kebiasaannya tiada perkhidmatan keselamatan pusat
- Perkhidmatan kawalan kebakaran pusat
- Kebiasaannya tangga tetapi terdapat arked yang mempunyai lif dan eskalator kegunaan bersama
- Lampu, tunjuk arah dan landskap pada amnya adalah minimum
- Polisi pengurusan seragam yang minima

- *Space with the original use as office but has changed use on a temporary basis*

Excluded from the inventory are:
- *Office space within multipurpose buildings where use can interchange with retail, residential, hotel and industrial use*
- *Office space that has permanently changed from the original use*

9.0 Shopping Complex

9.1 Definition

Shopping complexes includes multi-unit retail establishments under a covered walkway that encourages pedestrian flow to sustain business activity. Shopping complexes disseminated by NAPIC includes:
- *Shopping centres*
- *Shopping arcades*
- *Hypermarkets (stand-alone)*

Shopping centres are purpose-built dominant retail establishments planned, developed and operated as a number of outlets within a centre for trade. In data capturing and dissemination by NAPIC, dominant use means retail use not less than 75% of the net lettable area.

Shopping centres have:
- *Outlets within an enclosed climate-controlled and spacious walkway*
- *Retail and service tenants selected for merchandise balance*
- *One or more anchor tenants*
- *A single management company*
- *Common car parks*
- *Central air-conditioning*
- *Central security service*
- *Central fire fighting services*
- *Common lifts and escalators*
- *Common lighting, signage and landscaping*
- *Unified management policies*
- *Complimentary secondary uses like banking and other services, which are less than 25% of the net floor area.*

Shopping arcades are dominant retail shops along one or both sides for trade. In data capturing and dissemination by NAPIC, dominant use means retail use not less than 75% of the net lettable area.

Shopping arcades have:
- *Generally open-sided walkway and few have an enclosed climate-controlled passageway.*
- *Retail and service tenants mix generally unplanned and retail goods are generally similar in kind*
- *No anchor tenants within the arcade*
- *A single management company*
- *Common car parks or public car parks*
- *Generally no air-conditioning, some unit air-conditioning and few with central air conditioning*
- *Central security service generally unavailable*
- *Central fire fighting services*
- *Mostly stairways but some have common lifts and escalators*
- *General minimum common lighting, signage and landscaping*
- *Minimum unified management policies*
- *Complimentary secondary uses like insurance services, which are less than 25% of the net floor area.*

- Kegunaan sampingan seperti perkhidmatan insuran, yang mana adalah kurang dari 25% daripada luas lantai bersih.

Inventori arked perniagaan juga merangkumi:

- Ruang dengan kegunaan asal sebagai perniagaan tetapi telah ditukar kegunaannya buat sementara waktu.
- Ruang niaga dalam pembangunan bersepadu (di mana pelbagai kategori kegunaan saling membantu satu sama lain).

Tidak termasuk dalam laporan ini adalah:

- Ruang niaga dalam bangunan pelbagai guna di mana kegunaannya boleh bertukar ganti dengan kegunaan pejabat, kediaman, hotel dan industri.
- Ruang niaga yang mana telah ditukar dari kegunaan asalnya secara kekal.
- Ruang niaga dalam kompleks perniagaan yang digunakan untuk boling, medan selera, taman tema dan panggung wayang.

Pasar raya besar adalah pembangunan perniagaan yang mendapat faedah dari skala ekonomi akibat daripada saiz minimum yang besar dan menawarkan persaingan harga dan rangkaian barangan yang banyak. Pasar raya dalam data NAPIC termasuklah:

- Pembangunan perniagaan dengan keperluan modal minimum RM50 juta dan saiz minimum 5,000 m.p.
- Diuruskan oleh satu pemilik/ perbadanan dengan kemudahan umum.
- Bangunan bebas (freestanding) di bawah satu bumbung.

Tidak termasuk di dalam laporan ini adalah:

- Pasar raya yang mana merupakan penyewa utama di kompleks perniagaan.

10.0 Liputan Kajian

Liputan kajian bagi semua jenis sektor harta tanah kecuali hotel adalah seperti berikut:

- Dalam kawasan pihak berkuasa tempatan
- Skim perumahan
- Luar skim perumahan - bangunan yang mempunyai kelulusan pelan bangunan

11.0 Harta Tanah Riadah

11.1 Definisi

Merangkumi Hotel yang menyediakan penginapan jangka pendek yang mana tetamu hotel atau pengunjung perlu membayar kemudahan yang disediakan. Bilik yang disediakan adalah lengkap untuk penginapan sementara dan khidmat pembantu hotel.

Termasuk di dalam laporan ini adalah:

- Hotel yang menawarkan 10 bilik dan ke atas yang dikenalpasti oleh Kementerian Pelancongan.
- Motel, rumah tumpangan, chalet, kabin, kotej, rumah kampung, hotel resort.
- Hotel binaan khas dan bangunan pelbagai guna atau bangunan yang diubahsuai yang mempunyai lesen untuk beroperasi sebagai hotel.

Tidak termasuk:
Hostel, pangsapuri khidmat dan rumah rehat kerajaan.

Pangsapuri Khidmat yang dimasukkan dalam Laporan Stok Harta Tanah Riadah merupakan sesebuah bangunan yang turut menyediakan penginapan jangka pendek yang mana tetamu hotel atau pengunjung perlu membayar kemudahan yang disediakan. Setiap unit menyediakan ruang yang lebih besar berbanding dengan bilik hotel dan mempunyai suasana seperti sebuah rumah yang dilengkapi dengan ruang tamu, ruang makan, dapur dan bilik tidur daripada satu hingga empat bilik beserta bilik air. Perkhidmatan yang disediakan sama seperti hotel. Unit-unit ini adalah sebagaimana yang terdapat di

Included within the inventory are:

- *Space with the original use as retail but has changed use on a temporary basis.*
- *Retail space in an integrated development (where various category of use compliment each other).*

Excluded from the inventory are:

- *Retail space within multipurpose buildings where use can interchange with office, residential, hotel and industrial use.*
- *Retail space that has permanently changed from the original use.*
- *Retail space within shopping complexes for bowling alley, food court, theme park and Cineplex.*

Hypermarkets are retail establishments that benefit from the economies of scale due to its large minimum size and offers competitive pricing and a wide range of goods. Hypermarkets in NAPIC publication include:

- *Retail establishments with a minimum paid-up capital requirement of RM50 million and minimum size of 5,000 s.m.*
- *Operated by a single owner/corporation with common facilities/ amenities.*
- *A freestanding building under one roof.*

Excluded from publication:

- *Hypermarkets that are an anchor in shopping centres.*

10.0 Coverage

The coverage of for all property sector except hotel are follows:

- *Within local authority area*
- *Housing scheme*
- *Outside housing scheme - buildings that hare obtained building plan approval*

11.0 Leisure Property

11.1 Definition

Includes hotel with a number of rooms within a building that provides short-term accommodation for hotel guests or travellers who pay for the services provided. The rooms provided are furnished for a short stay and maid service.

Hotel inventory includes:

- *Hotels that offer 10 rooms and above as defined by the Ministry of Tourism·*
- *Motels, lodging homes, chalets, cabins, cottages, kampong houses, resort hotels.*
- *Purpose-built hotels and multi-purpose buildings or modified buildings with a licence to operate as a hotel.*

Excludes:
Hostels, serviced apartments and public operated rest house.

The Leisure Property Stock Report also includes serviced apartments, which are a number of units within a building that also provides a short-term accommodation for hotel guests and travellers who pay for the services provided. Each unit provides more space compared to a hotel room and has a home atmosphere like a living room, a dining room, a kitchenette and a choice of bedrooms from one to four rooms with attached bathrooms. Services provided are very similar to hotels. These units are similar to those under residential stock except that hoteliers own them or run them as an alternative to hotel rooms.

dalam stok kediaman kecuali ianya dimiliki oleh pengusaha hotel atau dijalankan oleh mereka sebagai alternatif kepada bilik hotel.

11.2 Jenis Harta Tanah

Penyebaran NAPIC termasuk semua hotel yang berada di dalam sempadan negeri.

11.3 Pengelasan

Penerbitan adalah termasuk hotel yang diberi penarafan atau tidak. Pengelasan hotel ditentukan oleh Kementerian Pelancongan Malaysia berdasarkan taraf antarabangsa. Hotel kelas ekonomi diberi penarafan okid (3 peringkat) dan selain itu adalah penarafan bintang (5 peringkat). Penarafan bintang bagi hotel-hotel di Malaysia dikendalikan oleh Kementerian Pelancongan dan Kebudayaan Malaysia.

11.2 Property Types

NAPIC dissemination includes all hotels within the state boundary.

11.3 Classification

Both rated and unrated hotels are included within the publication. Hotel rating classification is carried out by the Ministry of Tourism Malaysia based on international standards. Budget hotels are rated by orchid classification (3 levels) and the others are by star classification (5 levels). The rating of hotels in Malaysia is ongoing and carried out by the Ministry of Tourism and Culture Malaysia.

Glosari — *Glossary*

Glosari		Glossary
Q1- suku pertama	:	*Q1 - first quarter*
Q2- suku kedua	:	*Q2 - second quarter*
Q3 - suku ketiga	:	*Q3 - third quarter*
Q4 - suku keempat	:	*Q4 - fourth quarter*
bahagian	:	*division*
berkembar	:	*semi-detached*
bilangan bangunan	:	*number of buildings*
bilangan bilik	:	*number of rooms*
bilik	:	*room*
daerah	:	*district*
jumlah	:	*total*
jumlah penawaran	:	*total supply*
jumlah ruang	:	*total space*
jumlah ruang dihuni	:	*total space occupied*
kadar ambilan	:	*take-up rate*
kadar penghunian	:	*occupancy rate*
kadar purata penginapan	:	*average occupancy rate*
kedai tanpa inap	:	*lock-up shop*
kelas	:	*class*
kilang bertingkat	:	*flatted factory*
kompleks industri	:	*industrial complex*
kompleks perniagaan	:	*shopping complex*
kondominium	:	*condominium*
lebih daripada 6 ½ tingkat	:	*above 6 ½ storeys*
lokasi	:	*location*
negeri	:	*state*
padang golf	:	*golf course*
pangsapuri	:	*apartment*
pangsapuri khidmat	:	*service apartment*
pejabat binaan khas	:	*purpose-built office*
pekan/bandar	:	*city/town*
penawaran akan datang	:	*incoming supply*
penawaran yang dirancang	:	*planned supply*
perubahan dalam kadar penghunian	:	*change in occupancy rate*
RM semalam	:	*RM per night*
rumah bandar	:	*town house*
rumah berkelompok	:	*cluster house*
rumah berkembar setingkat	:	*single storey semi-detached house*
rumah kos rendah	:	*low-cost house*
rumah pangsa	:	*flat*
rumah pangsa kos rendah	:	*low-cost flat*
rumah sesebuah	:	*detached house*
rumah teres setingkat	:	*single storey terraced house*
sebelum perang	:	*prewar*
sesebuah	:	*detached*
siap dibina	:	*completion*
stok sedia ada	:	*existing stock*
tarif	:	*tariff*
teres	:	*terraced*
tiada data	:	*ND – no data*
tiada maklumat	:	*NA – not available*
tidak dikelaskan	:	*NR (not rated)*
tingkat	:	*storey*

Cawangan JPPH Di Seluruh Negara / JPPH *Branch Offices*

IBU PEJABAT NAPIC
Pusat Maklumat Harta Tanah Negara (NAPIC)
Jabatan Penilaian dan Perkhidmatan Harta
Aras 7, Perbendaharaan 2,
No. 7, Persiaran Perdana, Presint 2
Pusat Pentadbiran Kerajaan Persekutuan
62592 Putrajaya
No. Tel: 03-88869000
No. Fax: 03- 88869007

WILAYAH PERSEKUTUAN
Jabatan Penilaian dan Perkhidmatan Harta
Wilayah Persekutuan,
Tingkat 2, 1 Sentral,
KL Sentral, Jalan Travers,
50470 Kuala Lumpur
No.Tel: 03-22721760
No. Faks: 03-22721796

SELANGOR
Jabatan Penilaian dan Perkhidmatan Harta
Negeri Selangor
Tingkat 4, Plaza Perangsang
40000 Shah Alam
No.Tel:03- 55184603
No. Faks: 03 -55119907

JOHOR
Jabatan Penilaian dan Perkhidmatan Harta
Negeri Johor
Bangunan JARO
No. 18, Jalan Sg, Chat
80100 Johor Bahru, Johor
No. Tel:07-2241707 / 2239933
No. Faks:07-2234266

PULAU PINANG
Jabatan Penilaian dan Perkhidmatan Harta
Negeri Pulau Pinang
Tingkat 41, Bangunan KOMTAR
10593 Pulau Pinang
No. Tel:04-2644914
No. Faks:04-2644915

PERAK
Jabatan Penilaian dan Perkhidmatan Harta
Negeri Perak
Tingkat 7A, Bangunan Sri Kinta
Jalan Sultan Idris Shah
30593 Ipoh
No. Tel:05-2434258
No. Faks:05-2429537

NEGERI SEMBILAN
Jabatan Penilaian dan Perkhidmatan Harta
Negeri Sembilan
Tingkat 9, Bangunan Yayasan Negeri
Jalan Yam Tuan
70000 Seremban
No. Tel:06-7638602
No. Faks:06-7639306

MELAKA
Jabatan Penilaian dan Perkhidmatan Harta
Negeri Melaka
Aras 7,Wisma Persekutuan
Jalan MITC, Hang Tuah Jaya
75450 Ayer Keroh, Melaka
No. Tel:06-2328205
No. Faks:06-2328202

KEDAH
Jabatan Penilaian dan Perkhidmatan Harta
Negeri Kedah
Aras 2, Zon C, Wisma Persekutuan
Pusat Pentadbiran Kerajaan Persekutuan
Bandar Muadzam Shah, Anak Bukit
06550 Alor Setar
No. Tel:04-7001900
No. Faks:04-7001903

PAHANG
Jabatan Penilaian dan Perkhidmatan Harta
Negeri Pahang
Tingkat 2, Bangunan KWSP
Bandar Indera Mahkota
25200 Kuantan
No. Tel:09-5715111
No. Faks:09-5715113

TERENGGANU
Jabatan Penilaian dan Perkhidmatan Harta
Negeri Terengganu
Tingkat 9, Wisma Persekutuan
Jalan Sultan Ismail
20200 Kuala Terengganu
No. Tel:09-6204550
No. Faks:09-6204551

KELANTAN
Jabatan Penilaian dan Perkhidmatan Harta
Negeri Kelantan
Tingkat 12, Wisma Persekutuan
Jalan Bayam
15200 Kota Bahru
No. Tel:09-7471763
No. Faks:09-7474975

PERLIS
Jabatan Penilaian dan Perkhidmatan Harta
Negeri Perlis
Tingkat 2, Bangunan Persekutuan
Persiaran Jubli Emas
01000 Kangar
No. Tel:04-9782763
No. Faks:04-9772595

SABAH
Jabatan Penilaian dan Perkhidmatan Harta
Negeri Sabah
Tingkat 4, Blok B, Bangunan KUWASA
Beg Berkunci 2043
88999 Kota Kinabalu
No. Tel:088-248325
No. Faks:088-242328

SARAWAK
Jabatan Penilaian dan Perkhidmatan Harta
Negeri Sarawak
Tingkat 3, Wisma Hong
No. 202, Lot 3012, Jalan Rock
93200 Kuching
No. Tel:082-255859 / 234051
No. Faks:082-234575

Untuk Sebarang Pertanyaan, Sila Hubungi :

For any enquiries, please contact:

Timbalan Pengarah (Bahagian Inventori Harta Tanah)

Tel : 03-8886 9102

Laman Web : http://www.jpph.gov.my