KEMENTERIAN KEWANGAN
MALAYSIA

LAPORAN STATUS PASARAN HARTA TANAH
Property Market Status Report

H1 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 H1 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:

Pengarah
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FOREWORD

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

i. *Sales performance of newly launched housing schemes as at H1 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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Laporan Status Pasaran Harta Tanah H1 2023
Property Market Status Report H1 2023

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Property Market Status Summary H1 2023

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	1,399	3,173	3327.99	8,702	5,298.08	2,865	1,695.94
WP Putrajaya	338	210	318.63	0	0.00	22	30.49
WP Labuan	0	46	15.04	37	25.87	0	0.00
Selangor	2,978	4,307	4086.36	7,944	5,053.45	1,709	1,286.62
Johor	4,286	4,717	4004.24	4,453	2,504.94	202	124.52
Pulau Pinang	1,632	2,901	2402.87	5,194	2,411.93	66	47.85
Perak	1,546	3,333	990.88	8,048	1,793.34	356	96.30
Negeri Sembilan	323	695	368.55	2,867	1,022.64	300	122.84
Melaka	886	630	241.47	2,787	792.05	371	145.64
Kedah	202	619	204.52	1,680	505.46	6	2.31
Pahang	1,637	619	257.61	1,828	598.21	276	112.62
Terengganu	12	390	141.86	470	155.93	0	0.00
Kelantan	61	297	98.53	2,976	859.78	319	72.88
Perlis	266	26	3.48	221	60.67	0	0.00
Sabah	106	2,555	1074.91	4,267	2,795.27	367	133.98
Sarawak	873	1,768	766.26	3,370	1,655.82	2,865	336.66
MALAYSIA	**16,545**	**26,286**	**18,303.20**	**54,844**	**25,533.44**	**7,927**	**4,208.65**

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	82	50.02	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	370	437.50	545	515.02	75	200.45
Johor	1,632	1,680.97	961	1,102.84	95	91.76
Pulau Pinang	123	79.96	45	67.50	0	0.00
Perak	687	328.96	128	84.83	29	14.50
Negeri Sembilan	432	276.60	25	15.68	0	0.00
Melaka	230	178.75	30	16.53	0	0.00
Kedah	296	204.08	168	99.39	0	0.00
Pahang	461	325.94	159	114.17	255	206.21
Terengganu	105	105.03	14	8.26	0	0.00
Kelantan	218	127.10	47	36.06	20	10.04
Perlis	55	38.36	27	15.30	0	0.00
Sabah	559	424.07	417	411.32	21	20.27
Sarawak	1,103	1,327.45	201	210.80	13	11.70
MALAYSIA	**6,362**	**5,619.12**	**2,767**	**2,697.69**	**508**	**554.91**

State	Serviced Apartment					
	Overhang		Unsold			
			Under Construction		Not Constructed	
	Units	Value (RM Mil)	Units	Value (RM Mil)	Units	Value (RM Mil)
WP Kuala Lumpur	5,450	5,151.90	12,231	10,809.14	4,586	3,199.30
WP Putrajaya	94	35.38	0	0.00	0	0.00
WP Labuan	0	0.00	0	0.00	0	0.00
Selangor	2,689	1,546.87	7,010	3,310.10	167	82.33
Johor	13,366	11,725.71	5,866	4,573.81	1,097	470.39
Pulau Pinang	358	483.93	377	285.64	0	0.00
Perak	0	0.00	243	123.31	0	0.00
Negeri Sembilan	0	0.00	2,071	841.09	0	0.00
Melaka	27	13.09	266	83.30	101	32.50
Kedah	0	0.00	0	0.00	0	0.00
Pahang	82	31.69	1,332	941.67	724	313.24
Terengganu	99	42.79	0	0.00	0	0.00
Kelantan	240	65.58	0	0.00	272	95.20
Perlis	0	0.00	0	0.00	0	0.00
Sabah	0	0.00	0	0.00	0	0.00
Sarawak	92	37.70	132	50.16	44	19.80
MALAYSIA	**22,497**	**19,134.64**	**29,528**	**21,018.22**	**6,991**	**4,212.76**

State	SOHO					
	Overhang		Unsold			
			Under Construction		Not Constructed	
	Units	Value (RM Mil)	Units	Value (RM Mil)	Units	Value (RM Mil)
WP Kuala Lumpur	871	785.18	1,650	818.31	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	932	402.05	3,472	1,097.96	296	74.00
Johor	329	183.01	88	56.13	223	92.10
Pulau Pinang	62	29.94	1,038	414.62	0	0.00
Perak	11	4.76	37	4.93	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	72	30.04	0	0.00
MALAYSIA	**2,343**	**1,448.94**	**6,357**	**2,421.98**	**519**	**166.10**

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	23	48.86	40	321.93
Johor	216	497.81	123	701.28	10	121.97
Pulau Pinang	0	0.00	8	25.60	0	0.00
Perak	54	43.12	36	22.85	0	0.00
Negeri Sembilan	41	22.75	40	52.00	0	0.00
Melaka	10	9.69	0	0.00	0	0.00
Kedah	0	0.00	20	9.98	0	0.00
Pahang	84	55.69	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	10	5.03	0	0.00	0	0.00
Sabah	21	17.96	33	118.17	34	120.27
Sarawak	324	221.83	88	152.14	28	41.45
MALAYSIA	**819**	**984.64**	**397**	**1,149.80**	**112**	**605.63**

PROPERTY MARKET STATUS REPORT H1 2023

1.0 HARTA TANAH KEDIAMAN

1.1 Pelancaran Baru Skim Perumahan

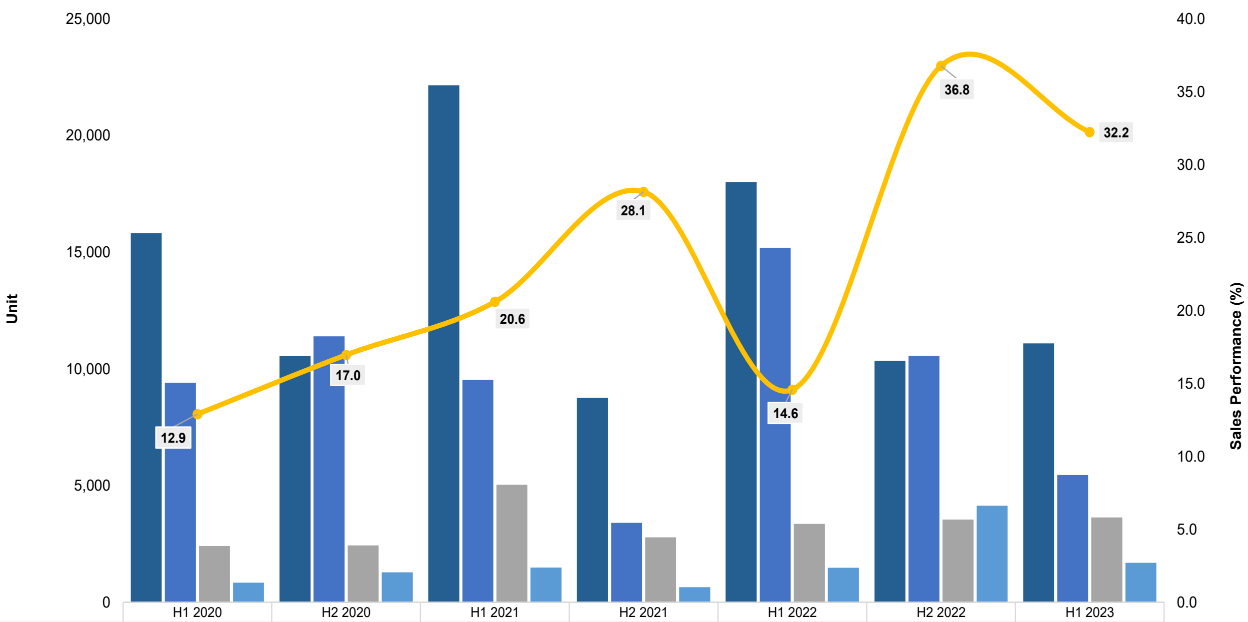
Separuh pertama tahun 2023, menyaksikan negara beralih dari mod pandemik kepada endemik pasca Covid-19. Dalam tempoh pemulihan, pasaran primer mencatatkan penurunan sebanyak 20.9% dari segi bilangan untuk pelancaran baru kediaman kepada 16,545 unit berbanding separuh tahun sebelumnya. Prestasi jualan adalah sederhana sebanyak 32.2% lebih rendah daripada separuh tahun pertama tetapi meningkat lebih dua kali ganda daripada separuh tahun pertama 2022.

1.0 RESIDENTIAL PROPERTY

1.1 Newly Launched Housing Scheme

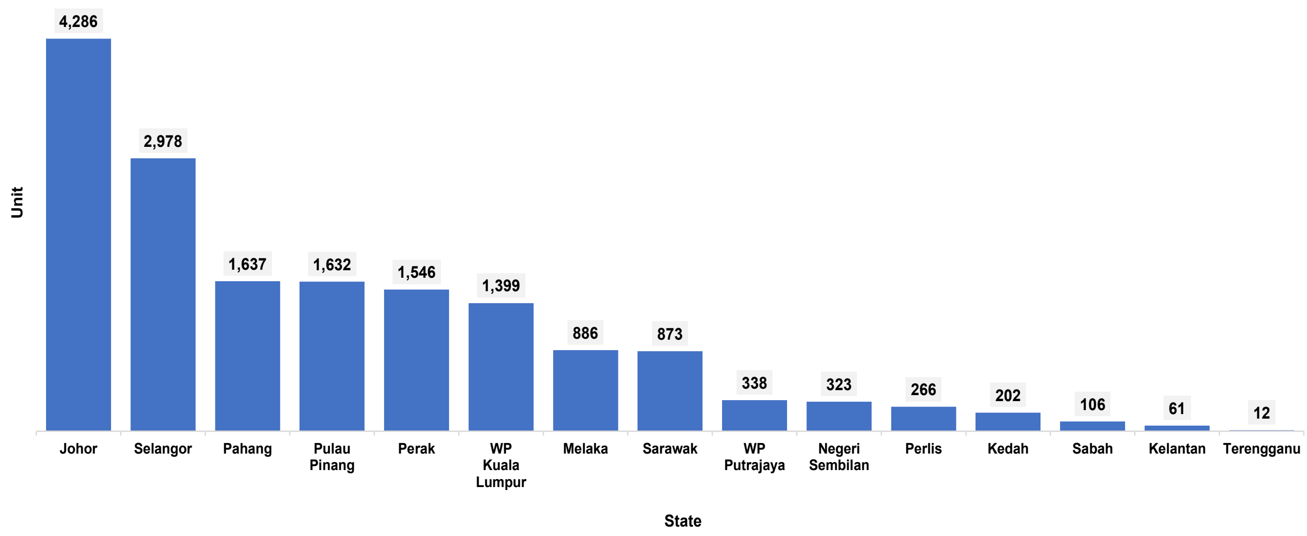
The first half of 2023 saw the nation transition from pandemic to endemic mode post-Covid 19. During the recovery period, the primary market observed a 20.9% reduction in volume for newly launched residential to 16,545 units compared to the preceding half. The overall sales performance was moderate at 32.2%, slightly lower than the preceeding half 2023 but more than two-fold in the corresponding half in 2022.

Chart 1: Trend of Newly Launched Residential H1 2020 – H1 2023



	H1 2020	H2 2020	H1 2021	H2 2021	H1 2022	H2 2022	H1 2023
Unit Launched - Landed	15,820	10,552	22,150	8,766	18,009	10,348	11,092
Unit Launched - Stratified	9,407	11,399	9,537	3,407	15,196	10,565	5,453
Unit Sold - Landed	2,414	2,441	5,034	2,781	3,360	3,547	3,638
Unit Sold - Stratified	840	1,282	1,493	645	1,481	4,144	1,696
Sales Performance (%)	12.9	17.0	20.6	28.1	14.6	36.8	32.2

Chart 2: Volume of Newly Launched Residential by State H1 2022



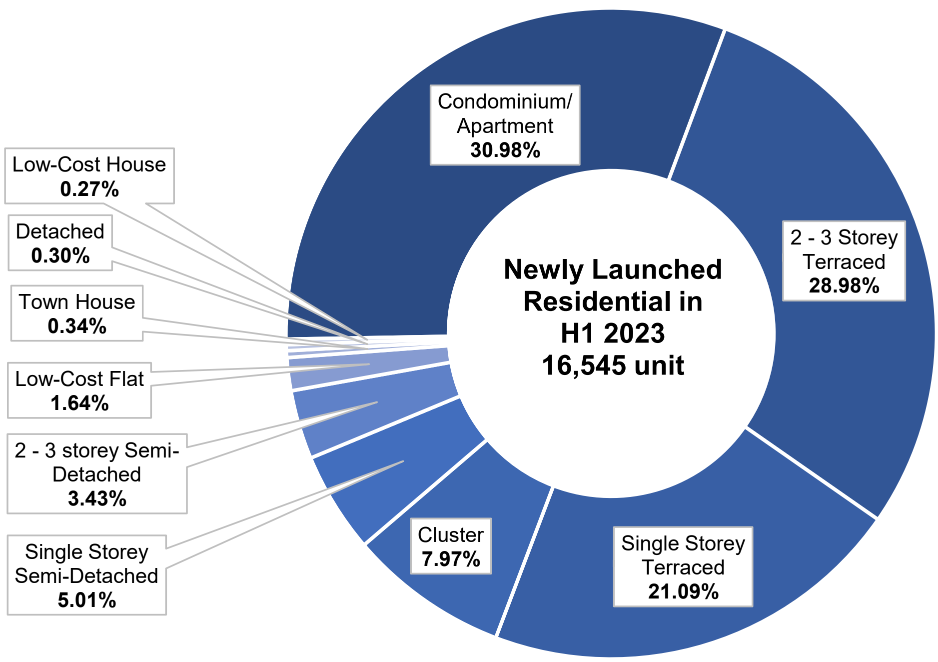
Mengikut kategori, harta tanah bertanah membentuk 67.0% (11,092 unit) daripada jumlah pelancaran baru, manakala harta tanah strata merekodkan 33.0% (5,453 unit). Jualan didominasi oleh unit teres, (49.1% atau 2,617 unit).

Jualan unit bertanah mengatasi strata sebanyak 68.2% (3,638 unit) berbanding 31.8% (1,696 unit).

By property category, landed properties formed 67.0% (11,092 units) of the total new launches, while stratified properties recorded 33.0% (5,453 units). Sales were dominated by terrace units (49.1% or 2,617 units).

Sale of landed units outperformed stratified at 68.2% (3,638 units) against 31.8% (1,696 units).

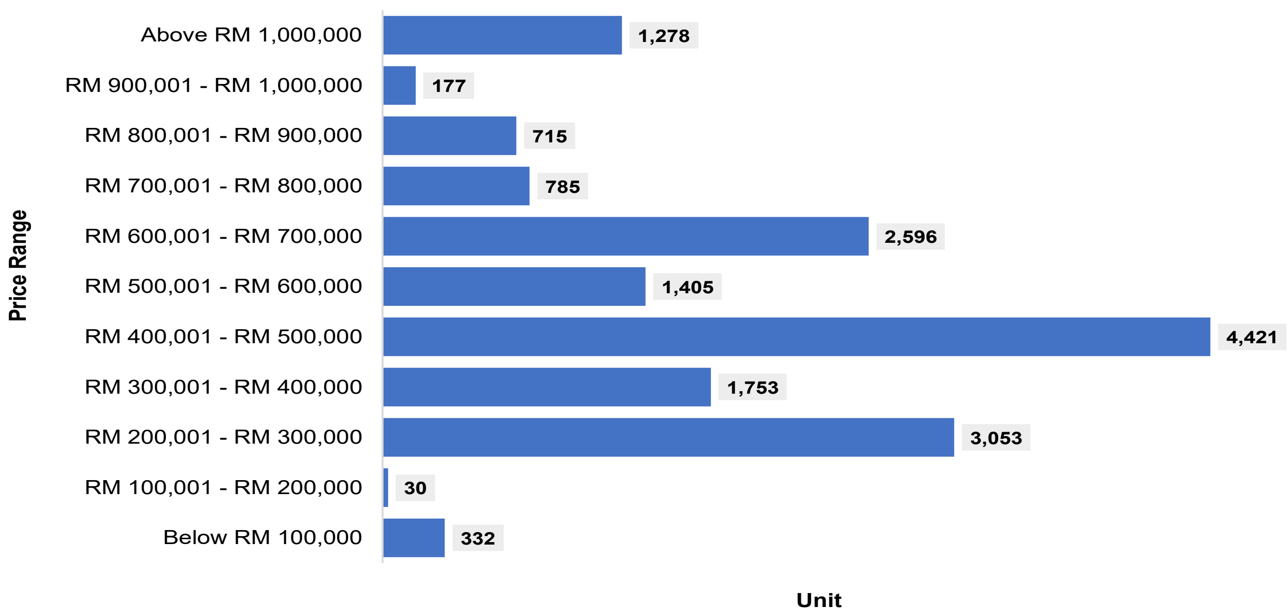
Chart 3: New Residential Units Launched by Property Type



Kediaman berharga RM300,001 hingga RM500,000 menerajui syer pasaran baru dilancar sebanyak 37.3% (6,174 unit), diikuti oleh RM500,001 hingga RM1,000,000 (34.3% atau 5,678 unit) dan RM300,000 dan ke bawah (20.6% atau 3,415 unit).

Houses priced from RM300,001 to RM500,000 led the newly launched market share at 37.3% (6,174 units), followed by RM500,001 to RM1,000,000 (34.3% or 5,678 units) and RM300,000 and below (20.6% or 3,415 units).

Chart 4: Newly Launched Residential by Price Range H1 2023



1.2 Kediaman Siap Dibina Tidak Terjual

1.2 Residential Property Overhang

Sejumlah 26,286 unit siap dibina tidak terjual bernilai RM18.3 bilion direkodkan pada separuh pertama 2023, menurun 5.3% dari segi bilangan dan 0.6% dari segi nilai berbanding tempoh sebelumnya.

A total of 26,286 overhang units worth RM18.3 billion were recorded in the first half of 2023, a decrease of 5.3% in volume and 0.6% in value against the preceding half.

Chart 5: Volume of Residential Overhang H1 2020 – H1 2023

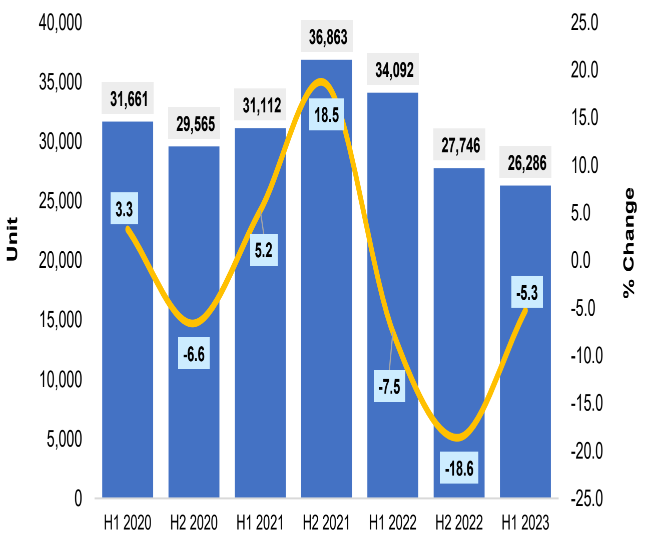
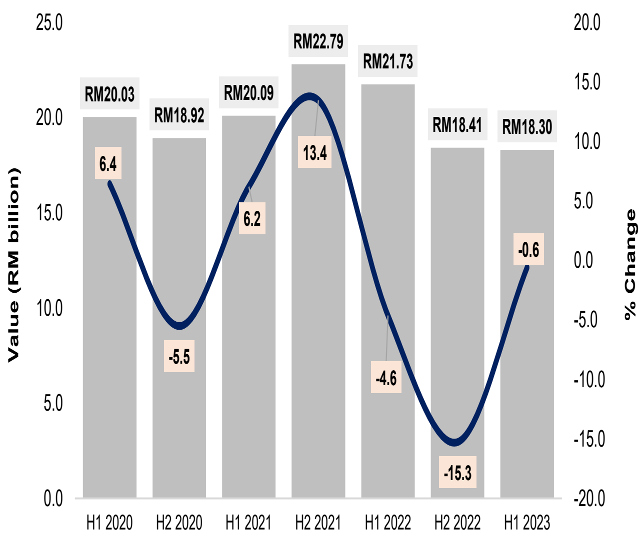


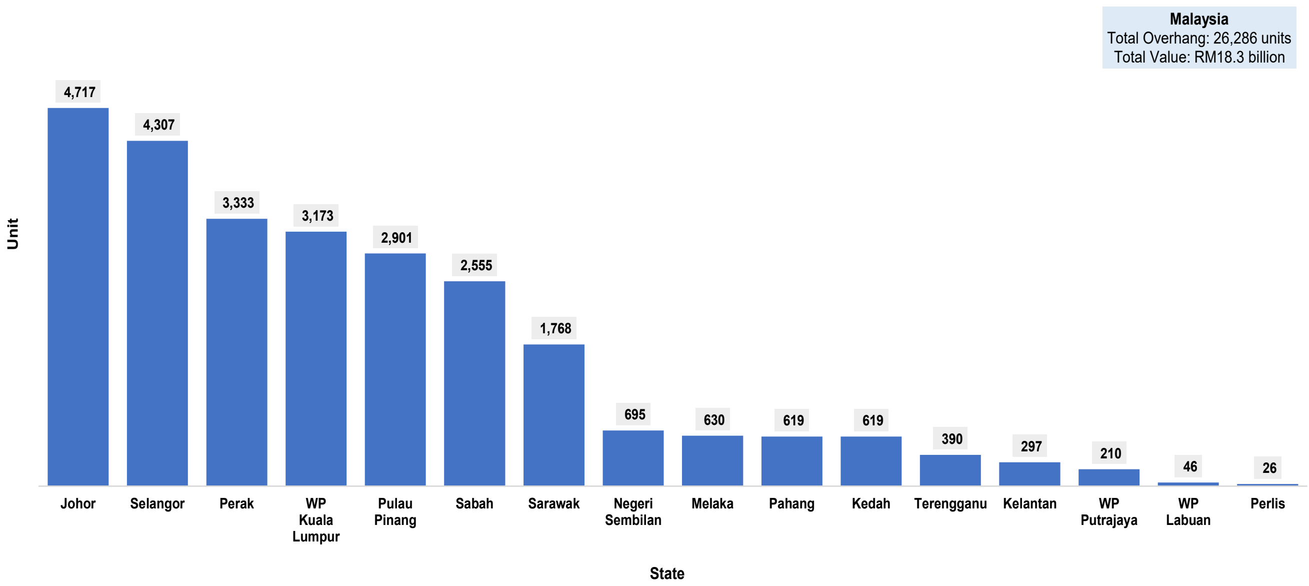
Chart 6: Value of Residential Overhang H1 2020 – H1 2023



Johor merekodkan siap dibina tidak terjual tertinggi dalam negara, merangkumi 4,717 unit (17.9%). Selangor berada di kedudukan kedua dengan 4,307 unit (16.4%), diikuti oleh Perak dengan 3,333 unit (12.7%).

Johor recorded the highest overhang in the country, accounting for 4,717 units (17.9%). Selangor ranked second with 4,307 units (16.4%) followed by Perak with 3,333 units (12.7%).

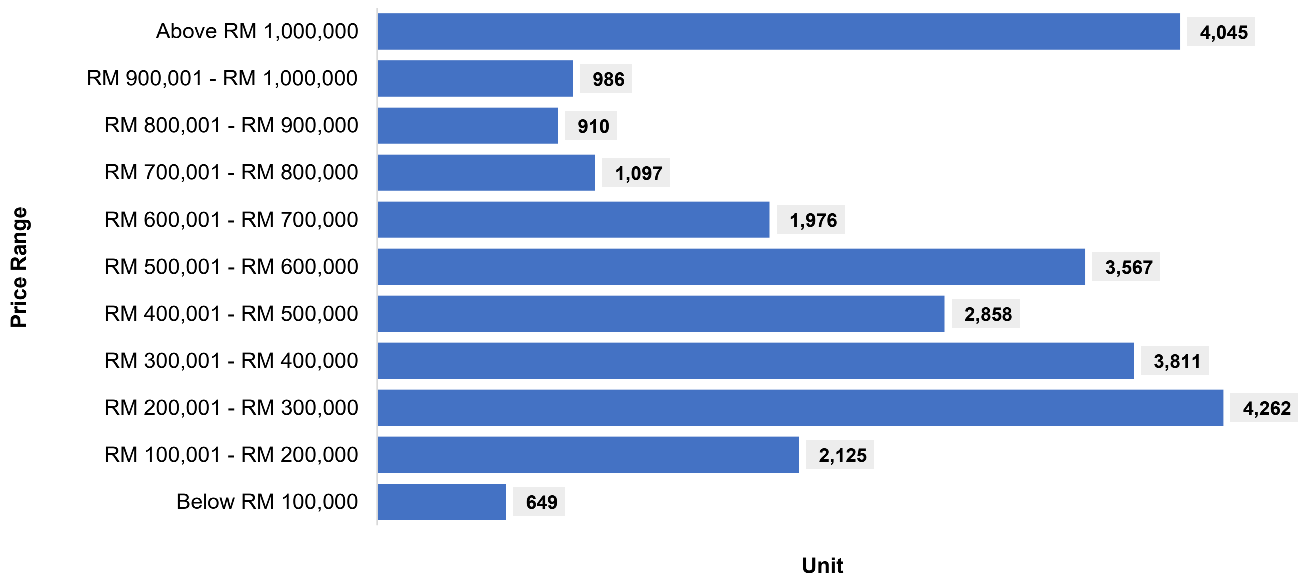
Chart 7: Residential Overhang by State H1 2023



Unit siap dibina tidak terjual di segmen mewah pada harga melebihi RM500,000 mengambil syer pasaran terbesar sebanyak 47.8% (12,581 unit). Selebihnya terbahagi sama rata sebanyak 26.8% di antara unit mampu milik (RM300,000 dan ke bawah) dan 25.4% di julat harga pertengahan (RM300,001 hingga RM500,000).

Overhang units in the high-end segment priced above RM500,000 took up the largest market share at 47.8% (12,581 units). The rest were equally spread at 26.8% between units priced in the affordable range (RM300,000 and below) and 25.4% in mid-level price range (RM300,001 to RM500,000).

Chart 8: Residential Overhang by Price Range H1 2023



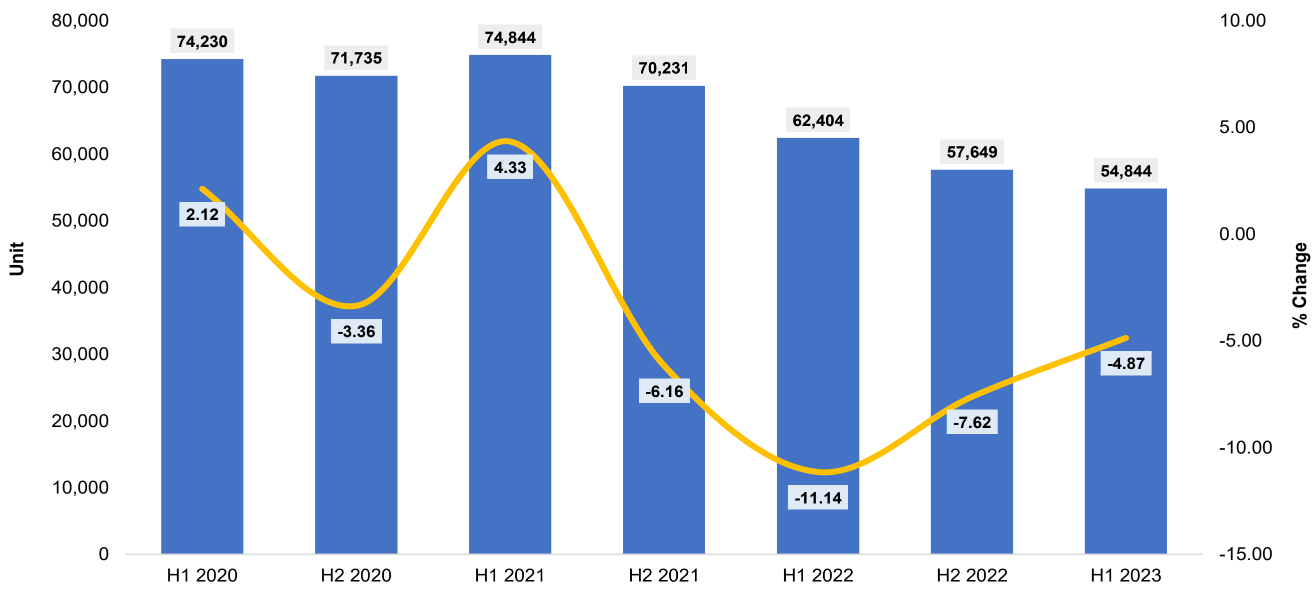
1.3 Dalam Pembinaan Belum Terjual

Unit kediaman dalam pembinaan belum terjual menunjukkan penurunan sebanyak 4.9% kepada 54,844 unit berbanding separuh tahun sebelumnya.

1.3 Unsold Under Construction

Unsold under construction for residential units showed a decrease of 4.9% to 54,844 units, compared to the preceding half.

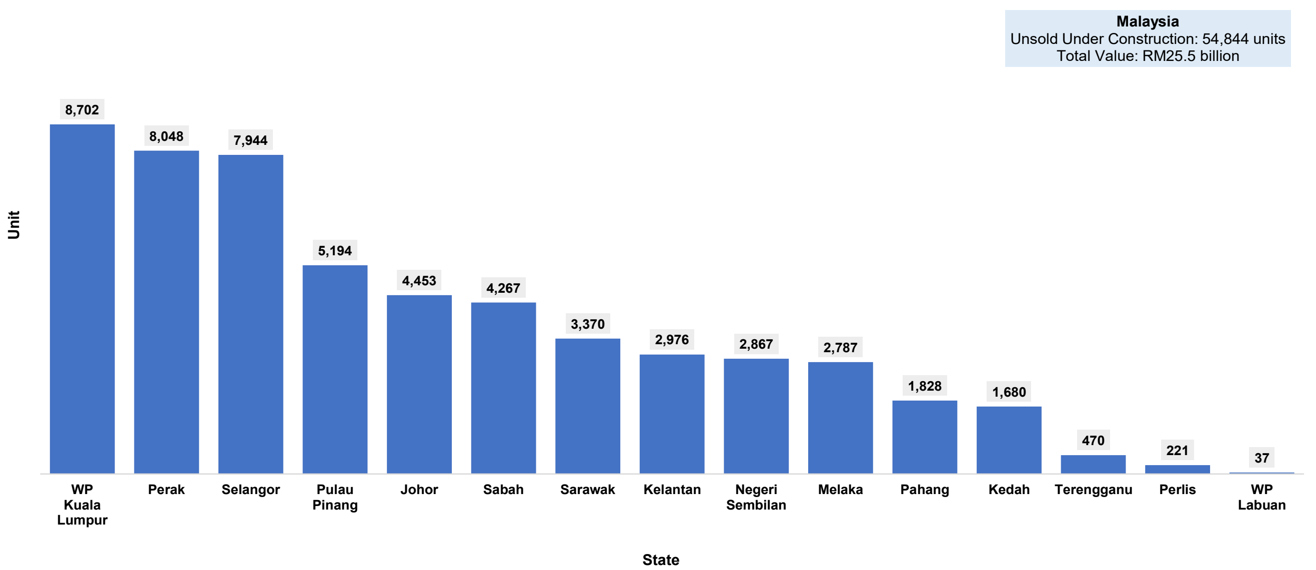
Chart 9: Trend of Unsold Under Construction Residential H1 2020 – H1 2023



WP Kuala Lumpur mendahului segmen dalam pembinaan belum terjual dengan syer pasaran sebanyak 15.9% diikuti oleh Perak (14.7%) dan Selangor (14.5%). Kondominium/ pangsapuri mendominasi pasaran dengan lebih separuh daripada jumlah keseluruhan (27,688 unit).

WP Kuala Lumpur led the unsold under construction segment with 15.9% market share, trailed by Perak (14.7%) and Selangor (14.5%). Condominium/ apartment dominated the market with more than half of the national total (27,688 units).

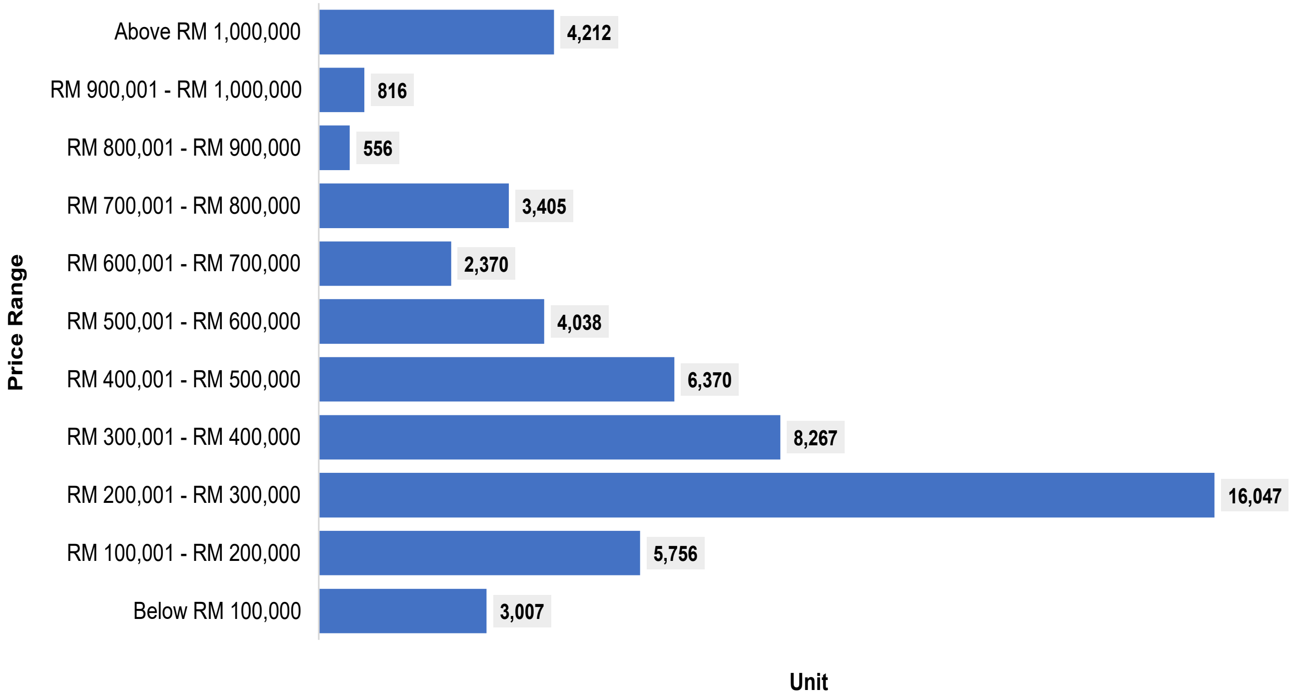
Chart 10: Unsold Under Construction Residential by State H1 2023



Unit dalam pembinaan belum terjual dalam segmen mampu milik berharga RM300,000 dan ke bawah menerajui jumlah keseluruhan, merangkumi 45.2% syer pasaran (24,810 unit). Ini diikuti oleh unit berharga RM300,001 hingga RM500,000 (26.7% atau 14,637 unit) dan melebihi RM500,000 (28.1% atau 15,397 unit).

Unsold units under construction in the affordable segment priced RM300,000 and below headed the national total, accounting for 45.2% of the market share (24,810 units). This was followed by units priced from RM300,001 to RM500,000 (26.7% or 14,637 units) and above RM500,000 (28.1% or 15,397 units).

Chart 11: Unsold Under Construction by Price Range H1 2023



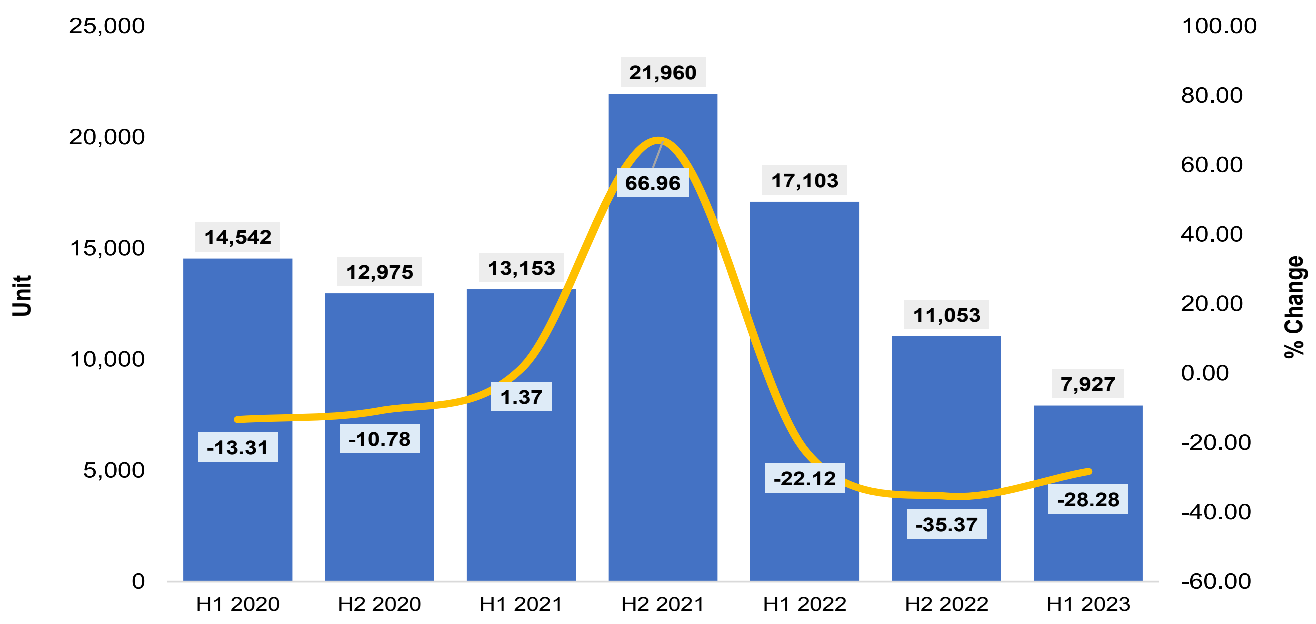
1.4 Belum Dibina Belum Terjual

Kediaman belum dibina belum terjual menurun kepada 7,927 unit, berkurang 28.3% berbanding separuh tahun sebelumnya.

1.4 Unsold Not Constructed

Unsold not constructed residential decreased to 7,927 units, down by 28.3% compared to the preceding half.

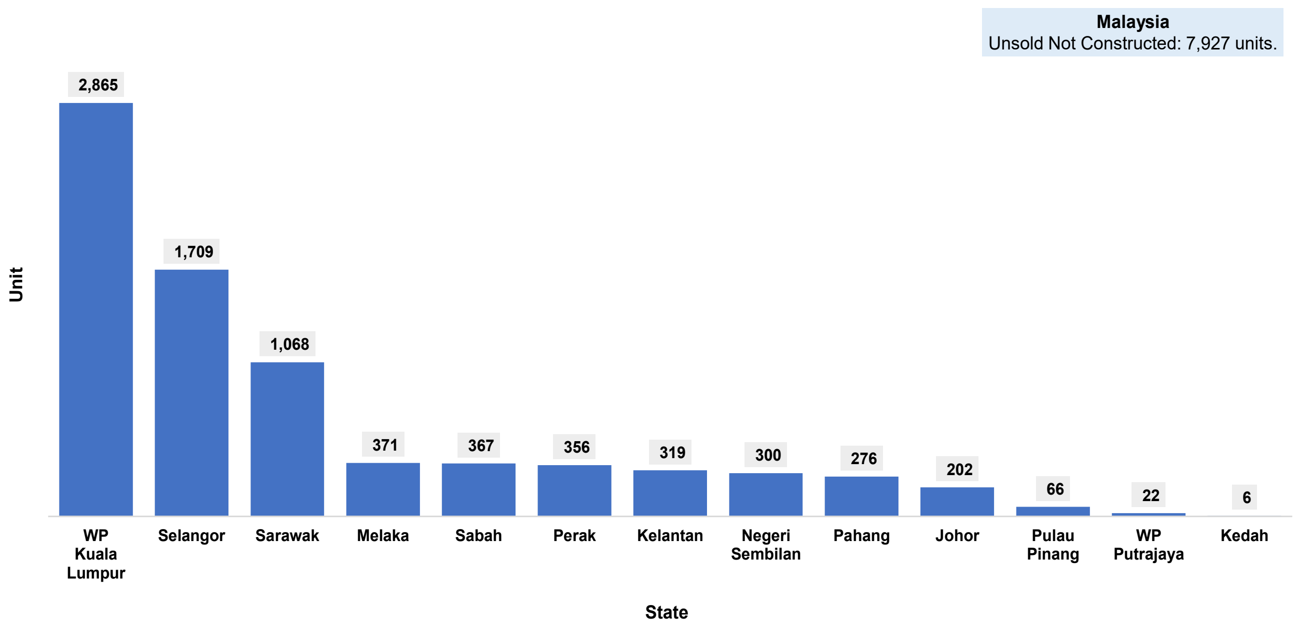
Chart 12: Trend of Unsold Not Constructed Residential H1 2020 – H1 2023



WP Kuala Lumpur merekodkan syer pasaran kediaman belum dibina belum terjual tertinggi sebanyak 36.1%, diikuti Selangor (21.6%). Unit kondominium/ pangsapuri menyumbang kepada majoriti dalam segmen ini sebanyak 62.3% (4,940 unit).

WP Kuala Lumpur recorded the highest market share for residential unsold not constructed at 36.1%, followed by Selangor (21.6%). Condominium/ apartment contributed the majority in this segment at 62.3% (4,940 units).

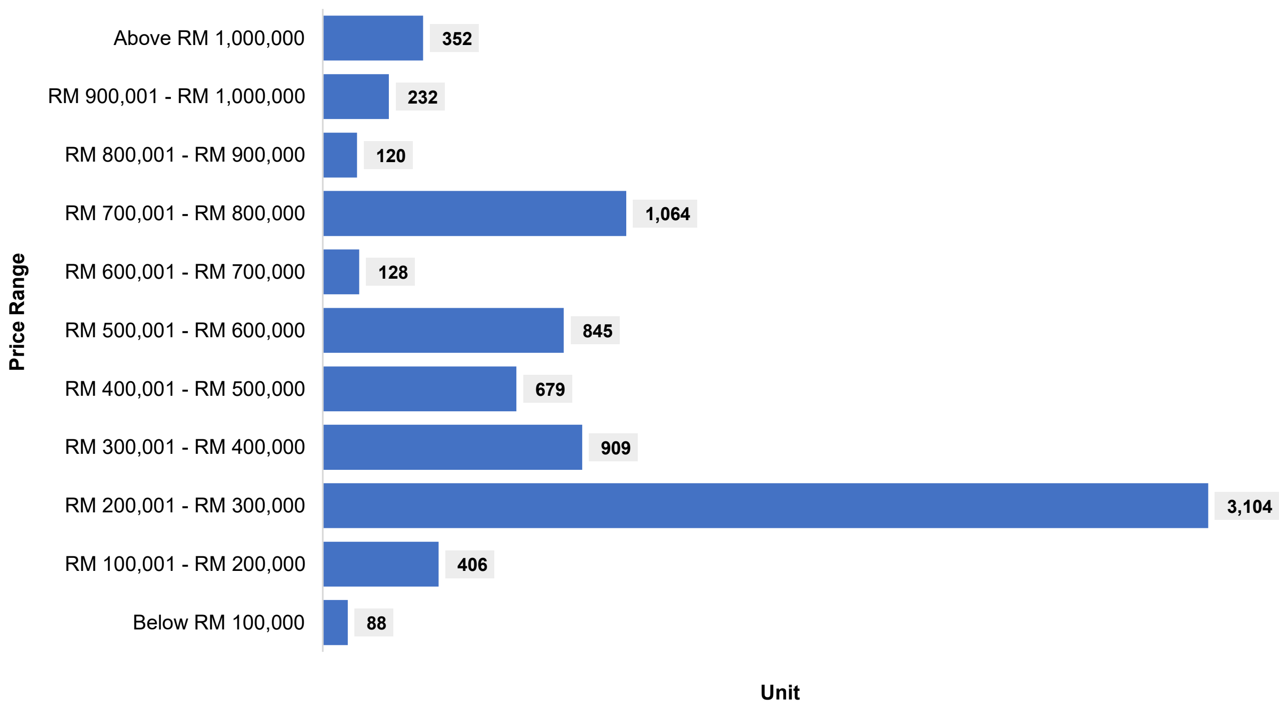
Chart 13: Unsold Not Constructed by State H1 2023



Unit dalam julat harga mampu milik RM300,000 dan ke bawah menyumbang kepada hampir separuh jumlah seluruh negara sebanyak 3,598 unit diikuti oleh julat harga sederhana dari RM300,001 hingga RM500,000 sebanyak 20.03% (1,588 unit) sementara selebihnya berharga di atas RM500,000.

Units in the affordable price range of RM300,000 and below contributed almost half of the national total at 3,598 units followed by the mid-level price range from RM300,001 to RM500,000 at 20.03% (1,588 units) while the rest are priced above RM500,000.

Chart 14: Unsold Not Constructed by Price Range H1 2023



2.0 HARTA TANAH KOMERSIAL

2.1 Harta Tanah Siap Dibina Tidak Terjual

Subsektor perdagangan merekodkan 31,202 unit siap dibina tidak terjual bernilai RM26.20 bilion, berkurang 5.3% dari segi bilangan dan 4.7% dari segi nilai berbanding separuh tahun terdahulu.

Pangsapuri khidmat menyumbang bilangan unit perdagangan siap dibina tidak terjual tertinggi sebanyak 22,497 unit (72.1%) bernilai RM19.13 bilion.

2.0 COMMERCIAL PROPERTY

2.1 Property Overhang

The commercial subsector recorded 31,202 overhang units valued at RM26.20 billion, declined 5.3% in volume and 4.7% in value compared to the preceding half.

Serviced apartments contributed the highest number of overhang commercial units at 22,497 units (72.1%) valued at RM19.13 billion.

Chart 15: Volume of Commercial Property Overhang H1 2020 - H1 2023

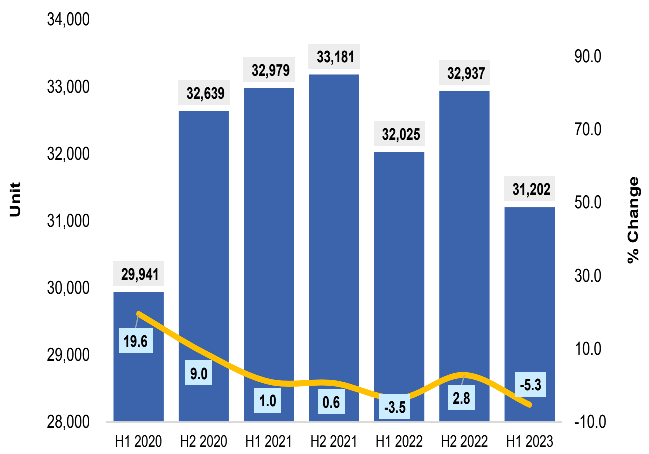


Chart 16: Value of Commercial Property Overhang H1 2020 - H1 2023

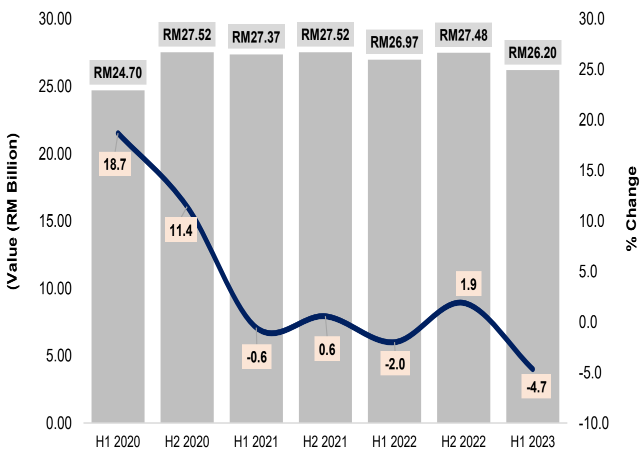
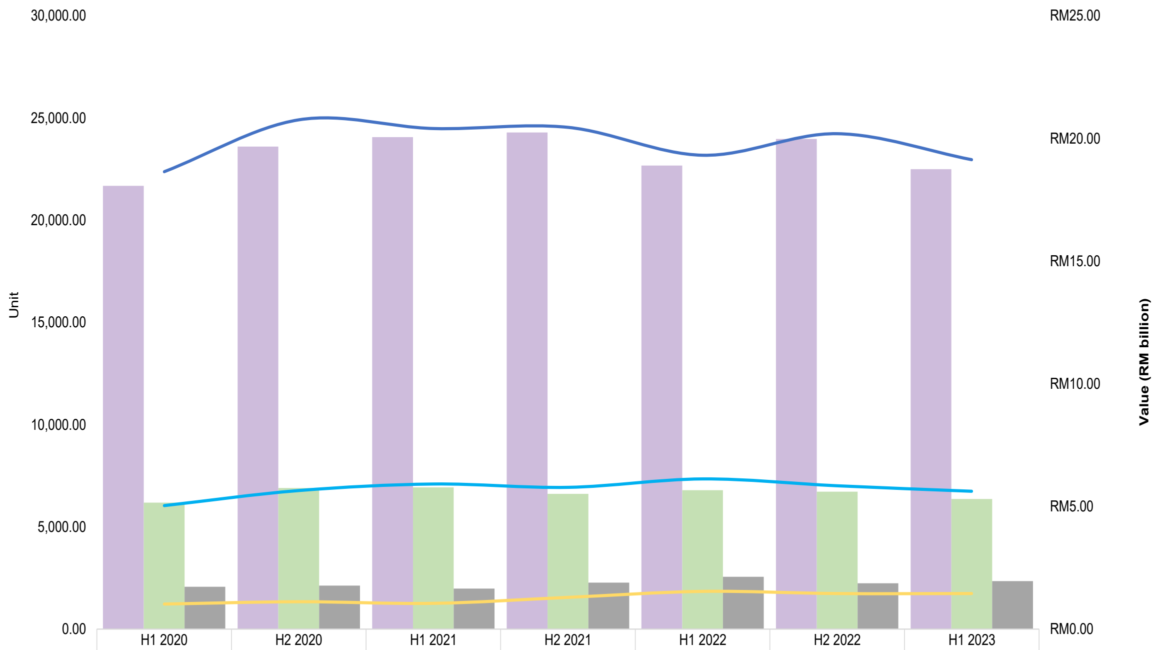


Chart 17: Volume and Value of Commercial Property Overhang H1 2020 – H1 2023

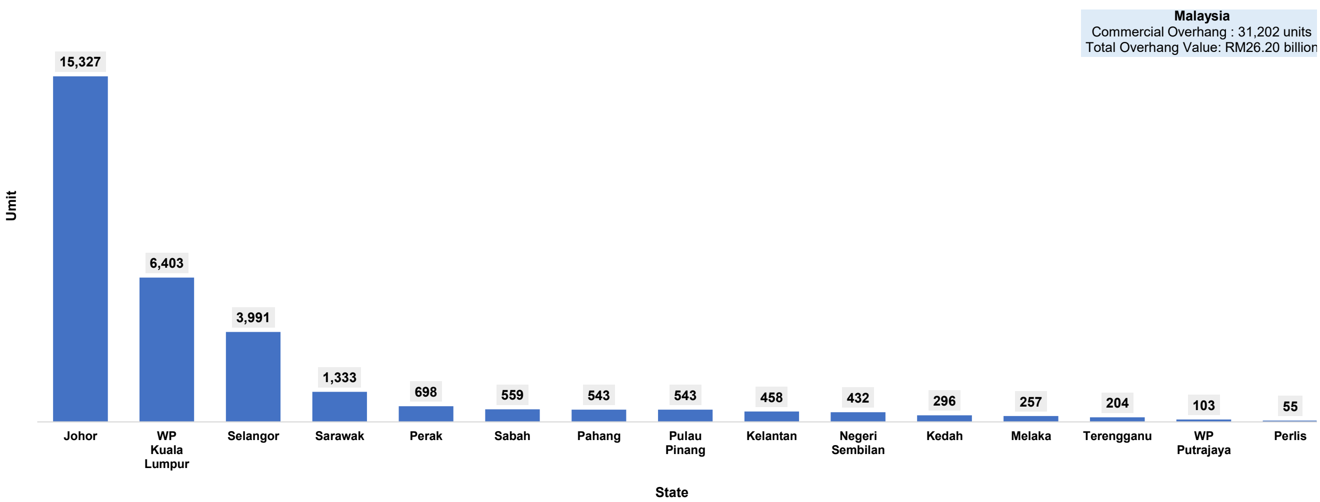


	H1 2020	H2 2020	H1 2021	H2 2021	H1 2022	H2 2022	H1 2023
Serviced Apartment (Unit)	21,683.00	23,606.00	24,064.00	24,295.00	22,674.00	23,978.00	22,497.00
Shops (Unit)	6,187.00	6,904.00	6,937.00	6,612.00	6,796.00	6,720.00	6,362.00
SOHO (Unit)	2,071.00	2,129.00	1,978.00	2,274.00	2,555.00	2,239.00	2,343.00
Serviced Apartment Value (RM Billion)	18.64	20.76	20.41	20.45	19.32	20.19	19.13
Shops Value (RM Billion)	5.03	5.65	5.91	5.78	6.12	5.84	5.62
SOHO Value (RM Billion)	1.02	1.12	1.05	1.29	1.54	1.45	1.45

Johor memegang syer pasaran terbesar harta tanah perdagangan siap dibina tidak terjual negara sebanyak 49.1%, diikuti oleh WP Kuala Lumpur (20.5%) dan Selangor (12.8%).

Johor held the largest market share of commercial overhang nationwide at 49.1%, followed by WP Kuala Lumpur (20.5%) and Selangor (12.8%).

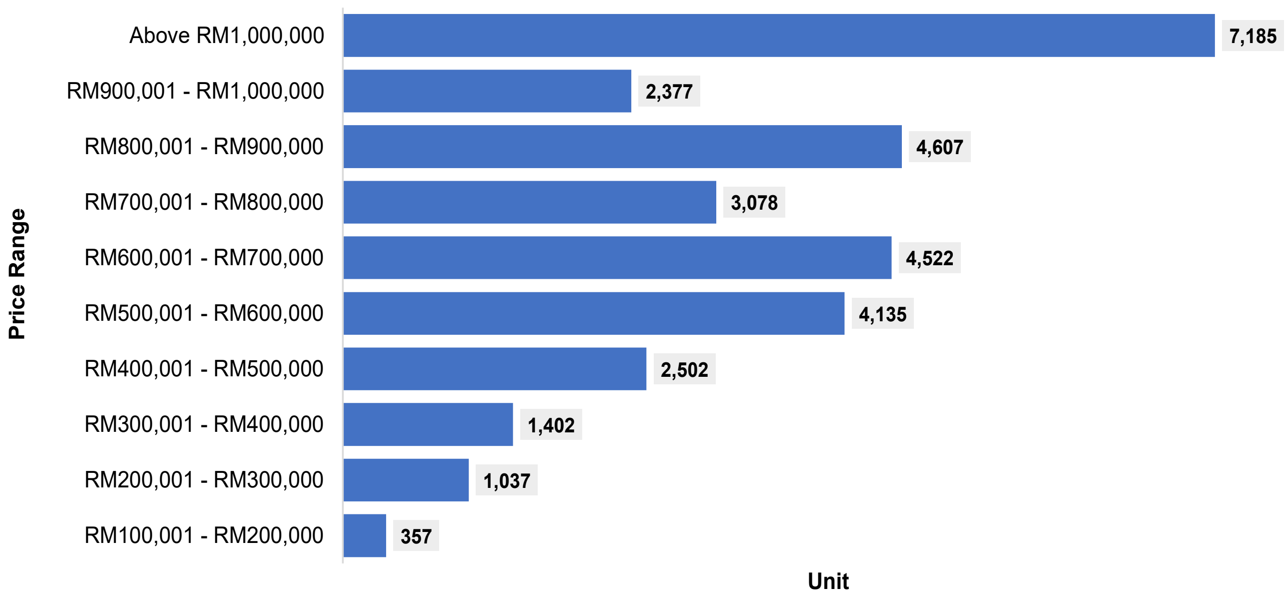
Chart 18: Commercial Property Overhang by State H1 2023



Majoriti perdagangan siap dibina tidak terjual berharga melebihi RM500,000 (83.0%), diikuti oleh unit berharga di antara RM300,001 dan RM500,000 (12.5%).

Majority of commercial overhang was in the price range above RM500,000 (83.0%), followed by unit priced between RM300,001 and RM500,000 (12.5%).

Chart 19: Commercial Property Overhang by Price Range H1 2023



2.1.1 Kedai

Kedai siap dibina tidak terjual merekodkan 6,362 unit bernilai RM5.62 bilion, menurun sebanyak 5.3% dari segi bilangan dan 3.8% dari segi nilai berbanding separuh tahun sebelumnya.

Johor mendominasi segmen ini dengan syer pasaran 25.7% (1,632 unit bernilai RM1.68 bilion) diikuti oleh Sarawak (17.3% atau 1,103 unit) dan Perak (10.8% atau 687 unit).

2.1.1 Shop

Shop recorded overhang at 6,362 units valued at RM5.62 billion, a decrease of 5.3% in volume and 3.8% in value compared to the preceding half.

Johor dominated this segment with a 25.7% market share (1,632 units worth RM1.68 billion) followed by Sarawak (17.3% or 1,103 units) and Perak (10.8% or 687 units).

Chart 20: Volume of Shop Overhang H1 2020 - H1 2023

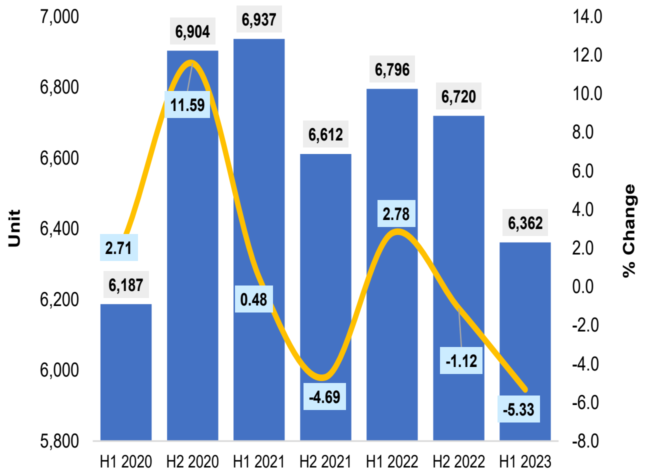


Chart 21: Value of Shop Overhang H1 2020 - H1 2023

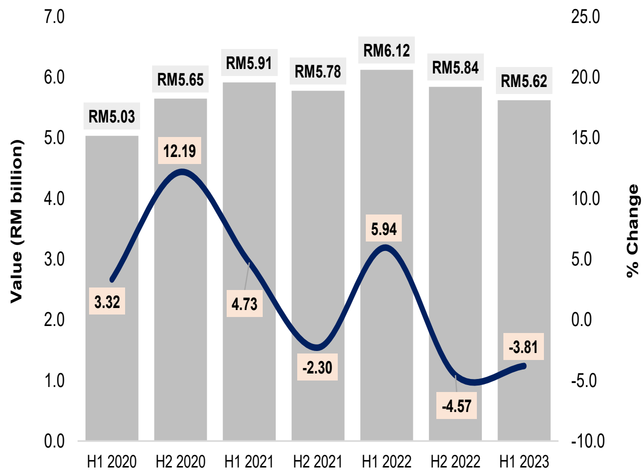
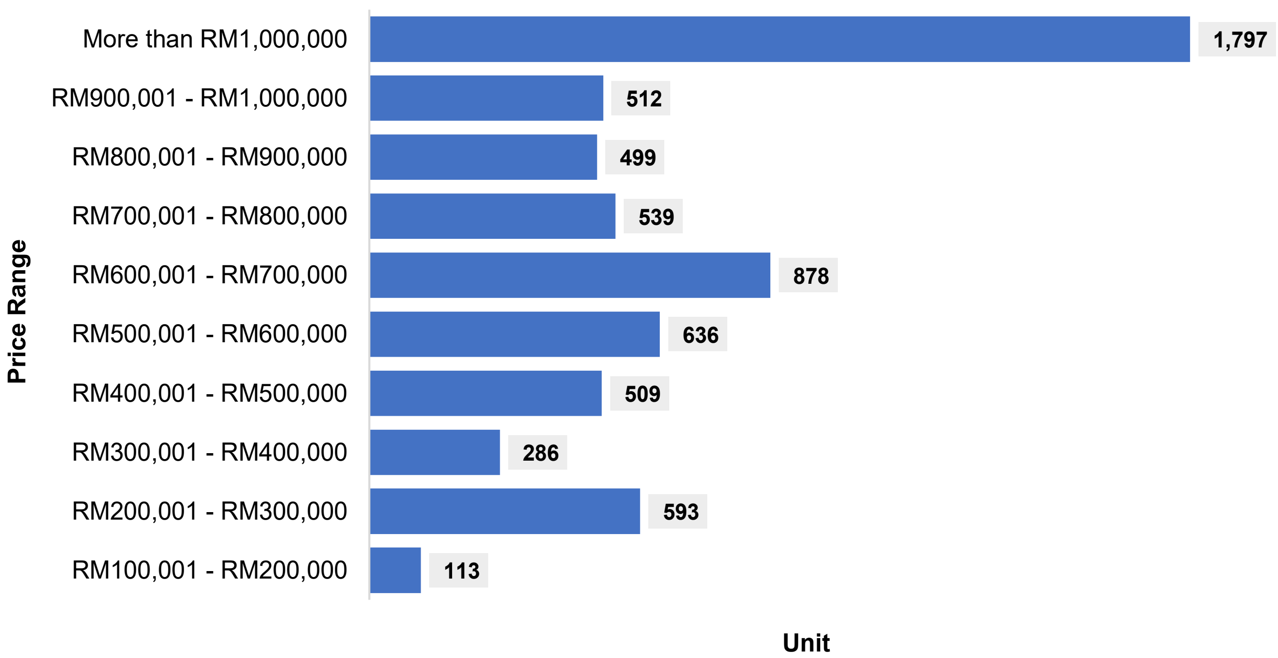


Chart 22: Shop Overhang by Price Range H1 2022



2.1.2 Pangsapuri Khidmat

Sejumlah 22,497 unit siap dibina tidak terjual direkodkan bernilai RM19.13 bilion, menunjukkan penurunan sebanyak 6.2% dari segi bilangan dan 5.3% dari segi nilai berbanding separuh tahun sebelumnya.

2.1.2 Serviced Apartment

There were 22,497 overhang units recorded worth RM19.13 billion, a decrease by 6.2% in volume and 5.3% in value compared to the preceding half.

Chart 23: Volume of Serviced Apartment Overhang H1 2020 – H1 2023

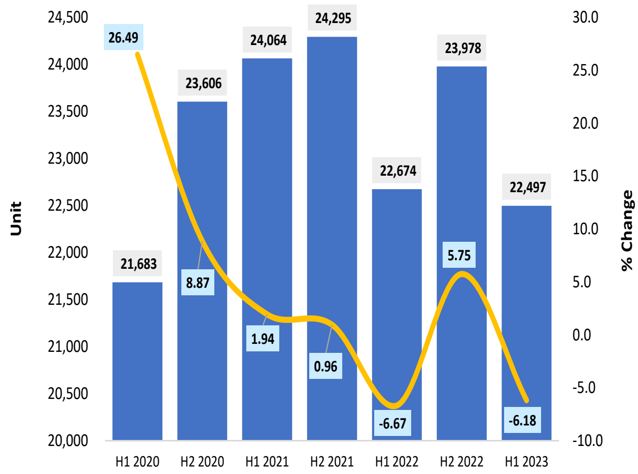
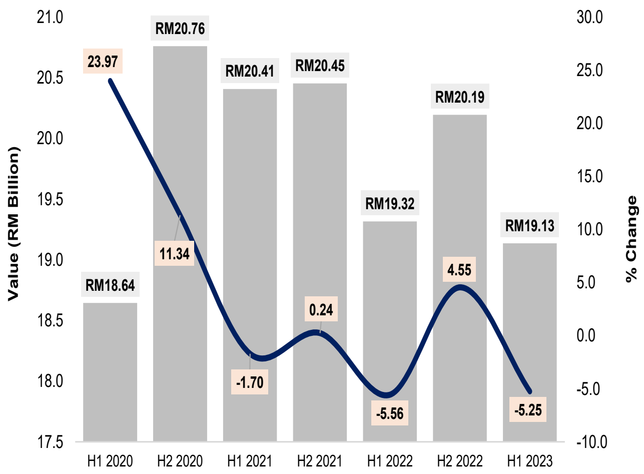


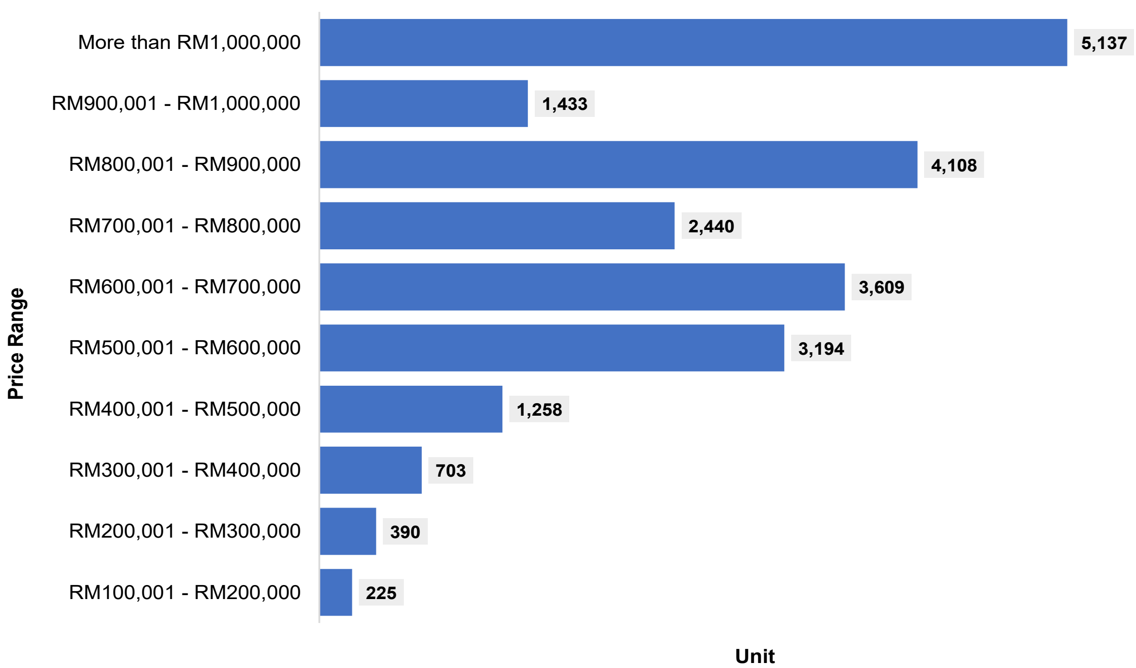
Chart 24: Value of Serviced Apartment Overhang H1 2020 – H1 2023



Johor mendominasi pangsapuri khidmat siap dibina tidak terjual, dengan syer 59.4% (13,366 unit), diikuti oleh WP Kuala Lumpur dan Selangor, masing-masing dengan syer 24.2% (5,450 unit) dan 12.0% (2,689 unit).

Johor dominated serviced apartment overhang, with 59.4% market share (13,366 units), followed by WP Kuala Lumpur and Selangor, each with 24.2% (5,450 units) and 12.0% (2,689 units) share respectively.

Chart 25: Serviced Apartment Overhang by Price Range H1 2023



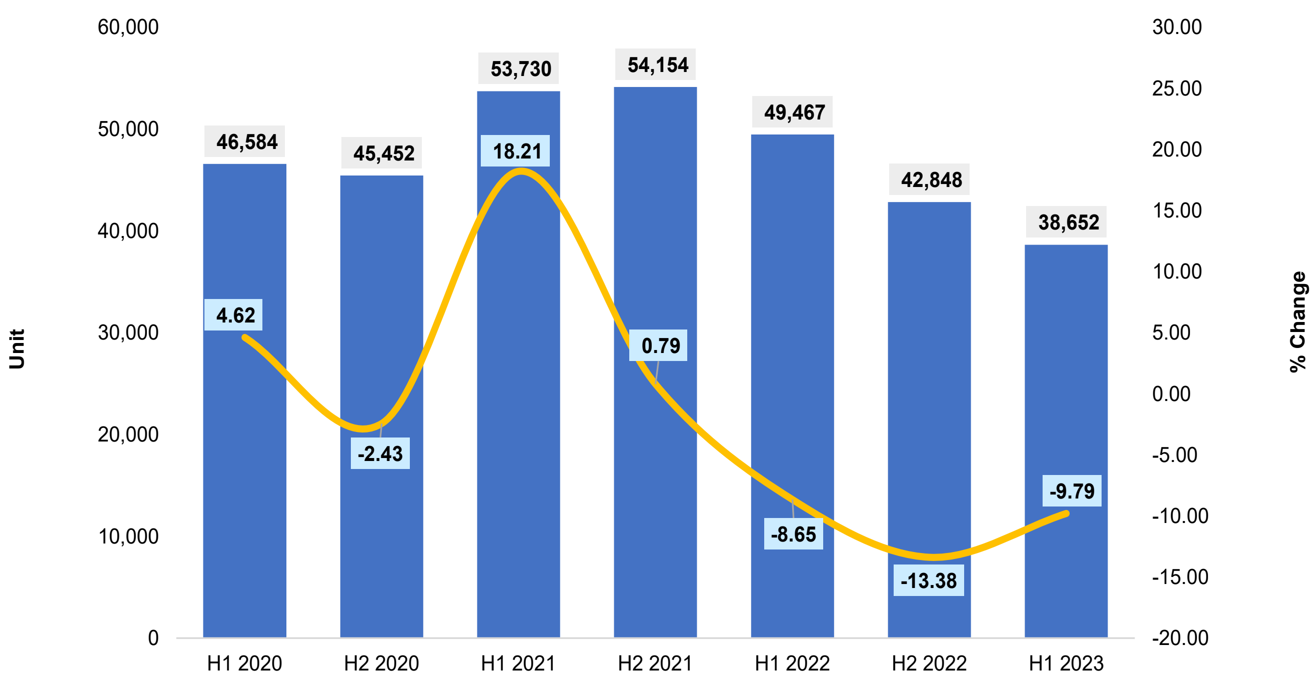
2.2 Dalam Pembinaan Belum Terjual

Harta tanah perdagangan dalam pembinaan belum terjual menurun kepada 38,652 unit, berkurang 9.8% berbanding separuh tahun sebelumnya.

2.2 Unsold Under Construction

Unsold commercial property under construction decreased to 38,652 units, down 9.8% compared to the preceding period.

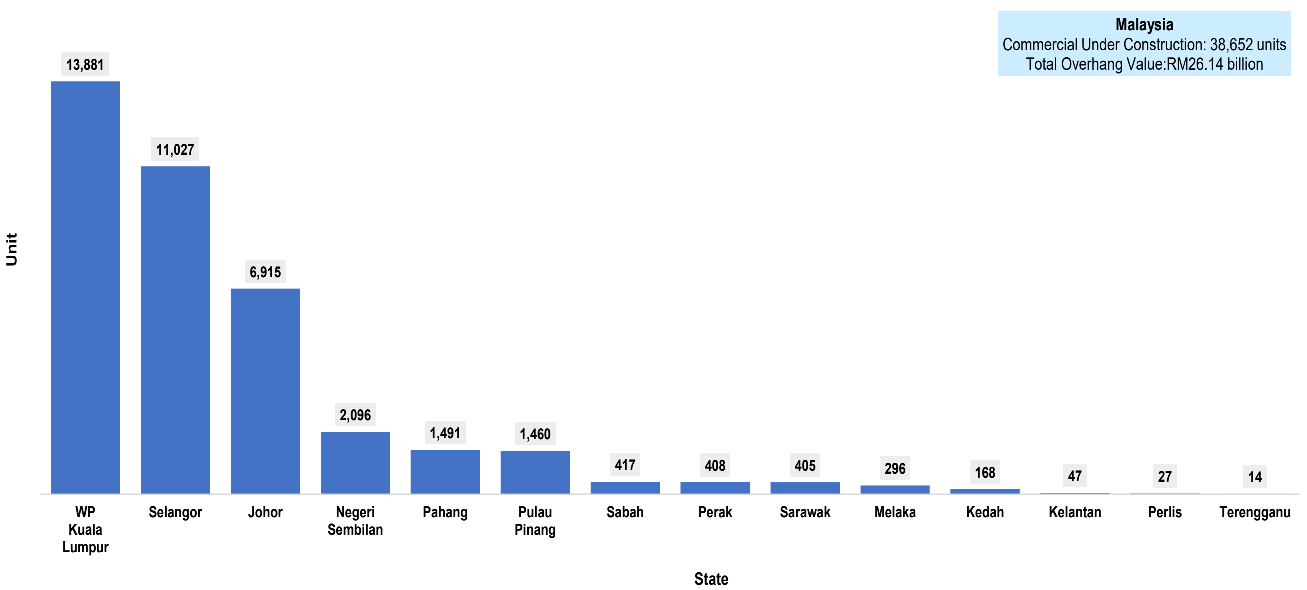
Chart 26: Trend of Unsold Under Construction Commercial Property



WP Kuala Lumpur mendominasi dengan syer pasaran 35.9% (13,881 unit) diikuti oleh Selangor (28.5% atau 11,027 unit) dan Johor (17.9% atau 6,915 unit).

WP Kuala Lumpur dominated with 35.9% (13,881 units) market share followed by Selangor (28.5% or 11,027 units) and Johor (17.9% or 6,915 units).

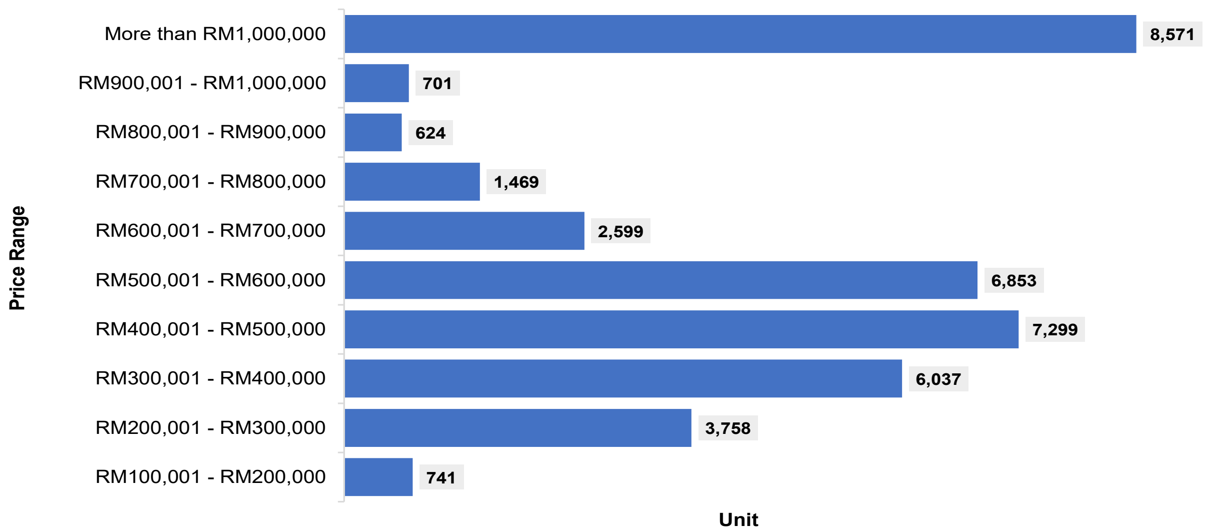
Chart 27: Unsold Under Construction Commercial Property by State H1 2023



Majoriti perdagangan dalam pembinaan belum terjual berharga melebihi RM500,000 (53.9%), diikuti oleh unit berharga di antara RM300,001 dan RM500,000 (34.5%).

Majority of unsold under construction commercial was in the price range above RM500,000 (53.9%), followed by unit priced between RM300,001 and RM500,000 (34.5%).

Chart 28: Unsold Under Construction Commercial by Price Range H1 2023



2.2.1 Kedai

Kedai dalam pembinaan belum terjual menurun sedikit sebanyak 0.4% kepada 2,767 unit berbanding separuh tahun sebelumnya.

Kedai dua dan dua setengah tingkat membentuk bahagian terbesar dalam segmen ini sebanyak 36.4% atau 1,007 unit daripada jumlah keseluruhan, diikuti oleh kedai tiga dan tiga setengah tingkat (29.5% atau 815 unit) serta kedai strata (25.5% atau 706 unit).

2.2.1 Shop

Unsold shop under construction declined by 0.4% to 2,767 units compared to the preceding half.

Two and two-and-a-half storey shops formed the largest share of this segment at 36.4% or 1,007 units of the total, followed by three and three-and-a-half storey shops (29.5% or 815 units) and stratified shops (25.5% or 706 units).

Chart 29: Trend of Unsold Under Construction Shops H1 2020 – H1 2023

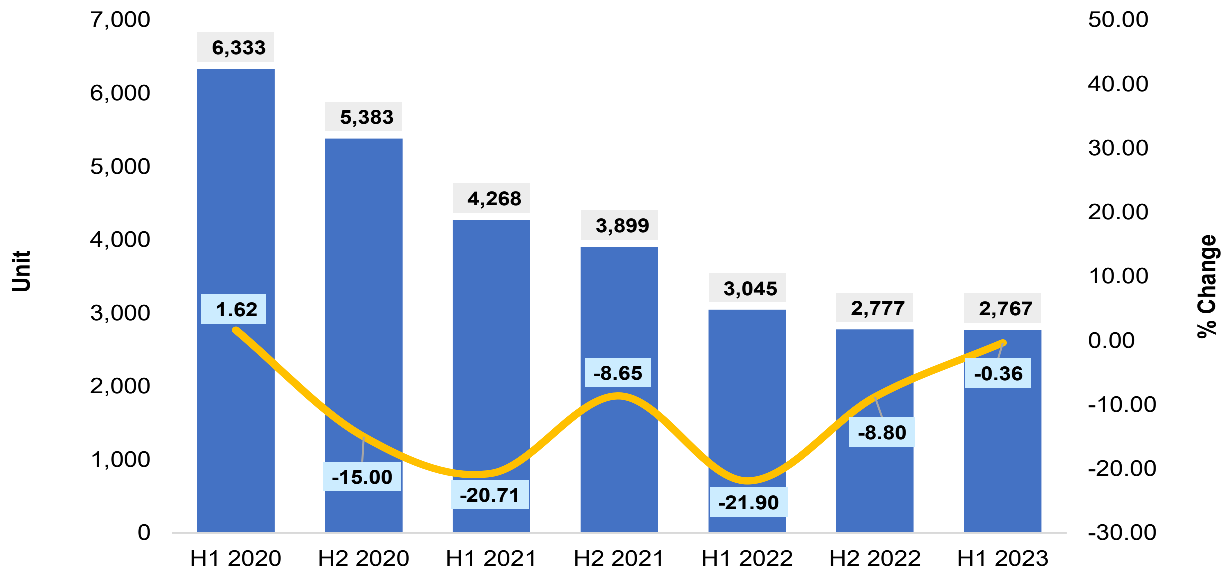
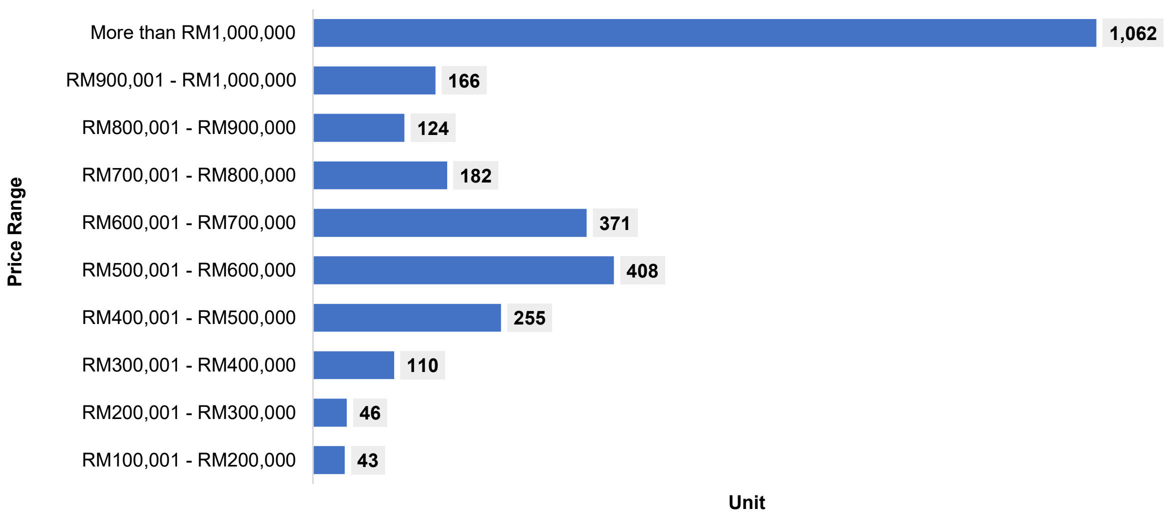


Chart 30: Unsold Under Construction Shops by Price Range H1 2023



2.2.2 Pangsapuri Khidmat

Unit dalam pembinaan belum terjual menurun 10.8% kepada 29,528 unit berbanding separuh tahun terdahulu.

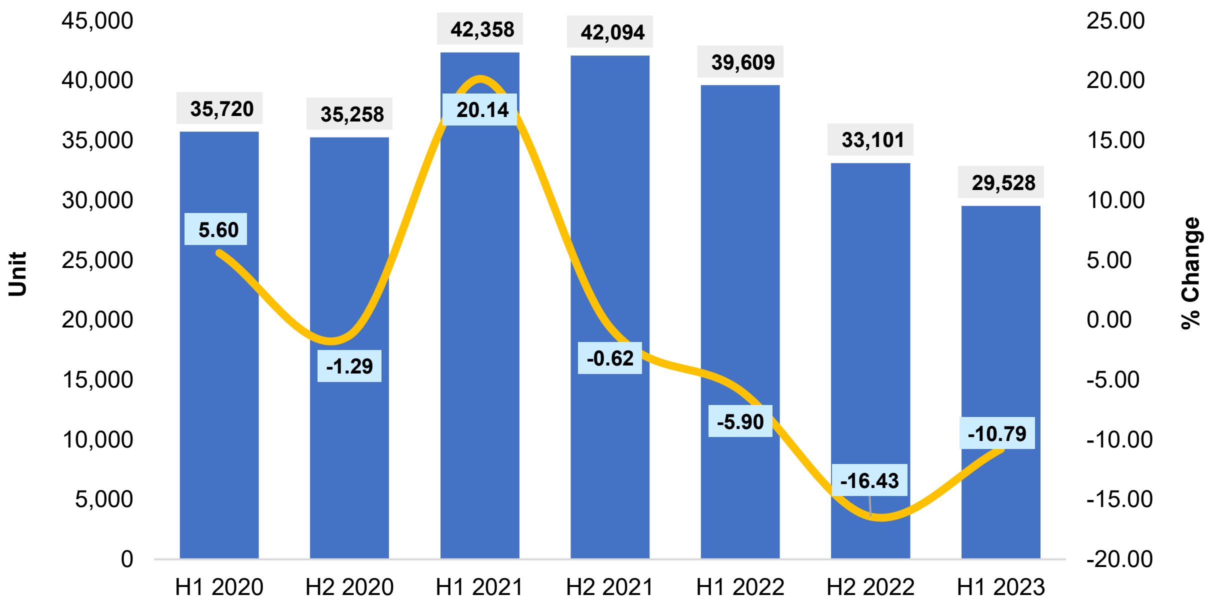
WP Kuala Lumpur mencatat bilangan dalam pembinaan belum terjual tertinggi, menguasai 41.4% (12,231 unit) daripada jumlah seluruh negara, manakala Selangor dan Johor masing-masing menyumbang 23.7% (7,010 unit) and 19.9% (5,886 unit).

2.2.2 Serviced Apartment

Unsold under construction serviced apartment decreased by 10.8% to 29,528 units compared to the preceding half.

WP Kuala Lumpur recorded the highest number of unsold under construction, accounting for 41.4% (12,231 units) of the national total, while Selangor and Johor contributed 23.7% (7,010 units) and 19.9% (5,886 units) respectively.

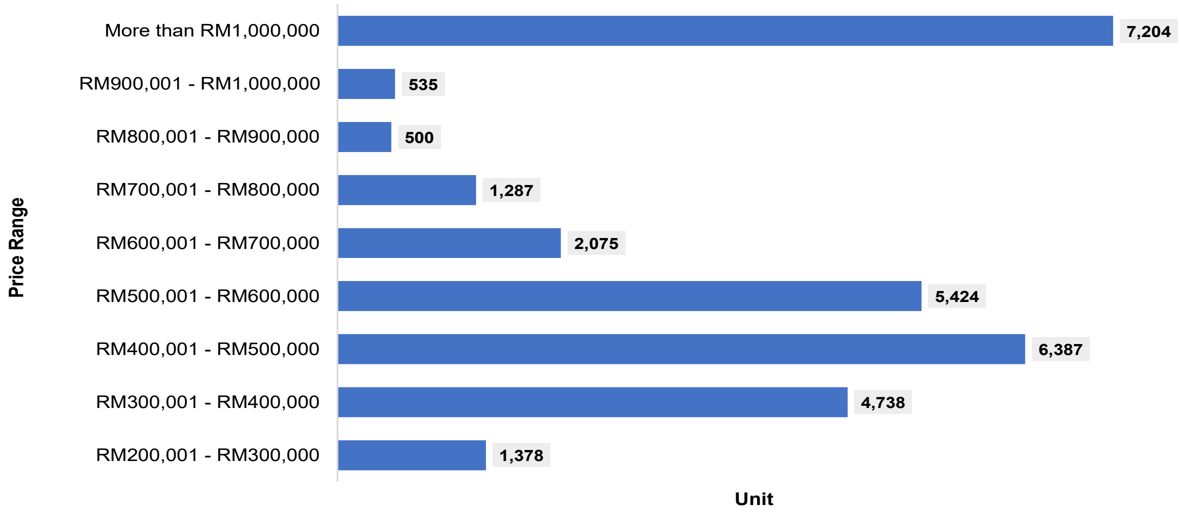
Chart 31: Trend of Unsold Under Construction Serviced Apartment H1 2020 – H1 2023



Kebanyakan unit dalam pembinaan belum terjual berharga antara RM500,001 dan ke atas, merangkumi 57.7% (17,025 unit) diikuti oleh unit berharga dari RM300,001 hingga RM500,000 sebanyak 37.7% (11,125 units).

Most of the unsold units were in the price range of RM500,001 and above accounting for 57.7% (17,025 units) followed by units priced from RM300,001 to RM500,000 at 37.7% (11,125 units).

Chart 32: Unsold Under Construction Serviced Apartment by Price Range H1 2023



2.3 Belum Dibina Belum Terjual

Harta tanah perdagangan belum dibina belum terjual menunjukkan penurunan sebanyak 33.7% (8,018 unit) berbanding separuh tahun sebelumnya.

2.3 Unsold Not Constructed

Unsold not constructed commercial property demonstrated an decrease at 33.7% (8,018 units) compared to the preceding half.

Chart 33: Trend of Unsold Not Constructed Commercial Property H1 2020 – H1 2023

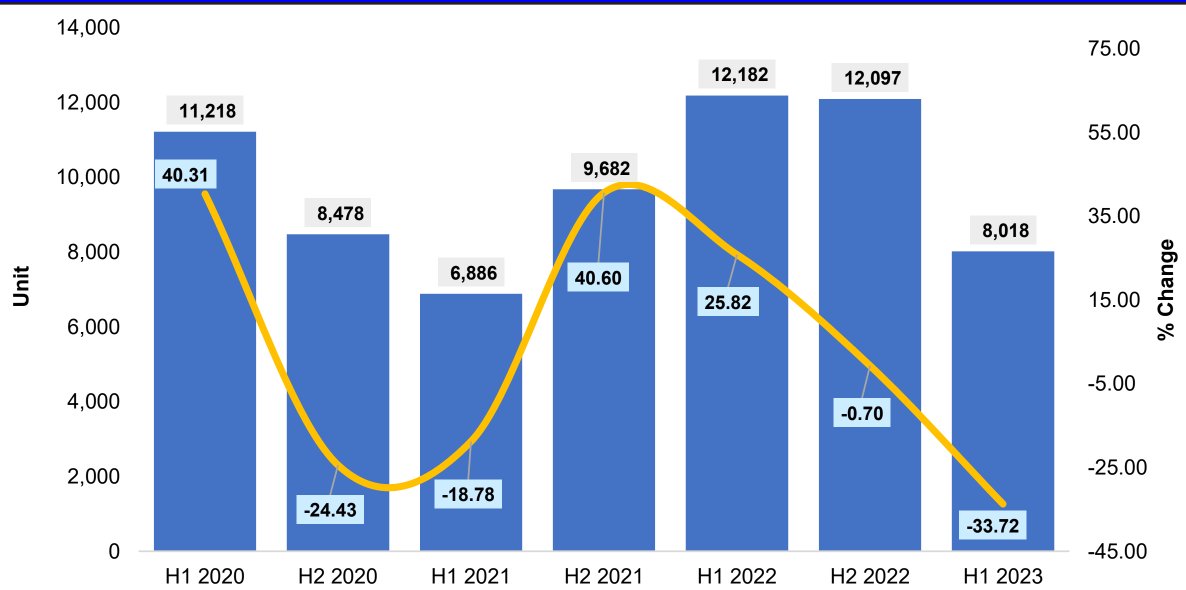
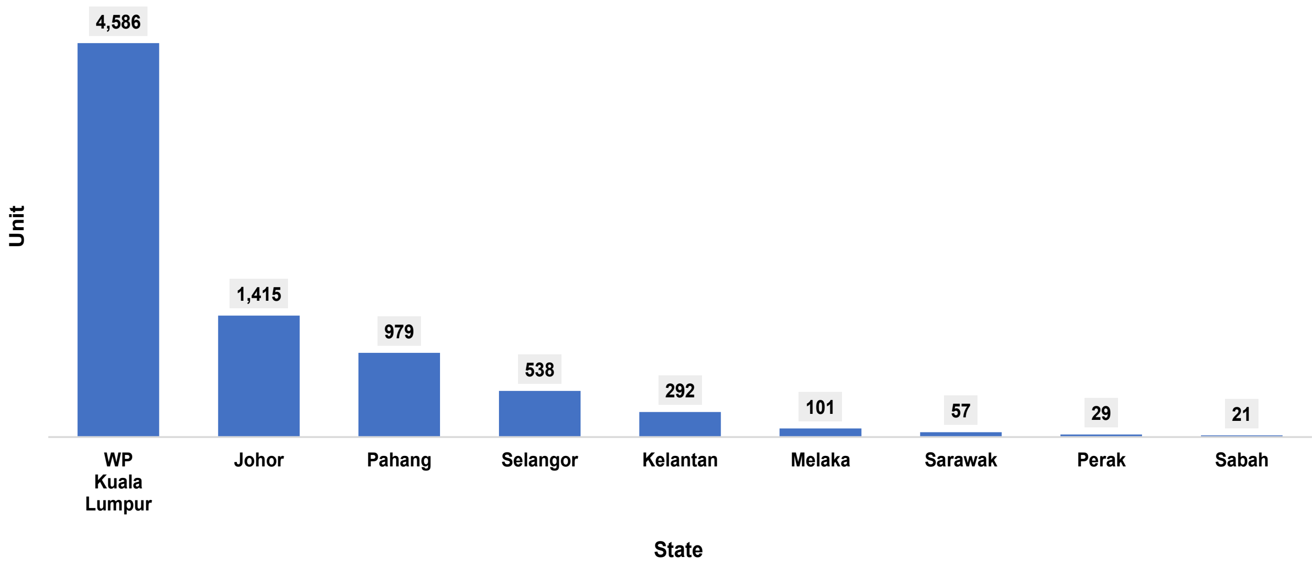


Chart 34: Unsold Not Constructed Commercial Property by State H1 2023



2.3.1 Kedai

Sejumlah 508 unit belum dibina belum terjual direkodkan, meningkat berbanding tempoh sebelumnya. Pahang mendominasi dengan 50.2% (255 unit), diikuti Johor dan Selangor masing-masing dengan 18.7% (95 unit) and 14.8% (75 unit).

2.3.1 Shop

A total of 508 unsold not constructed units were recorded, increased compared to the previous period. Pahang dominated with 50.2% (255 units), followed by Johor and Selangor with 18.7% (95 units) and 14.8% (75 units) respectively.

Chart 35: Trend of Unsold Not Constructed Shops H1 2020 – H1 2023

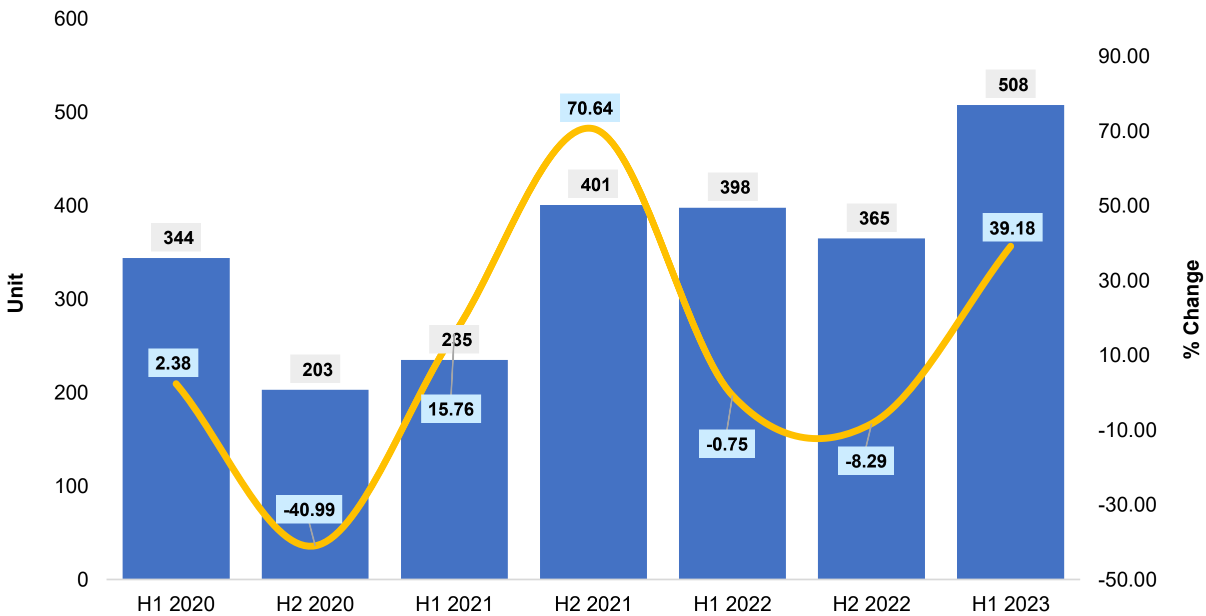
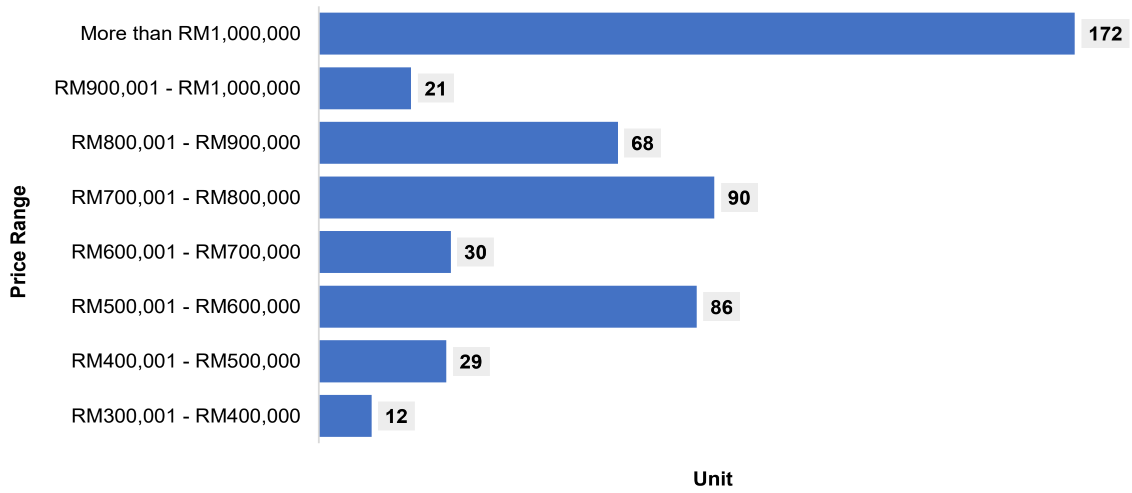


Chart 36: Unsold Not Constructed Shops by Price Range H1 2023



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 37: Trend of Unsold Not Constructed Serviced Apartments H1 2020 – H1 2023

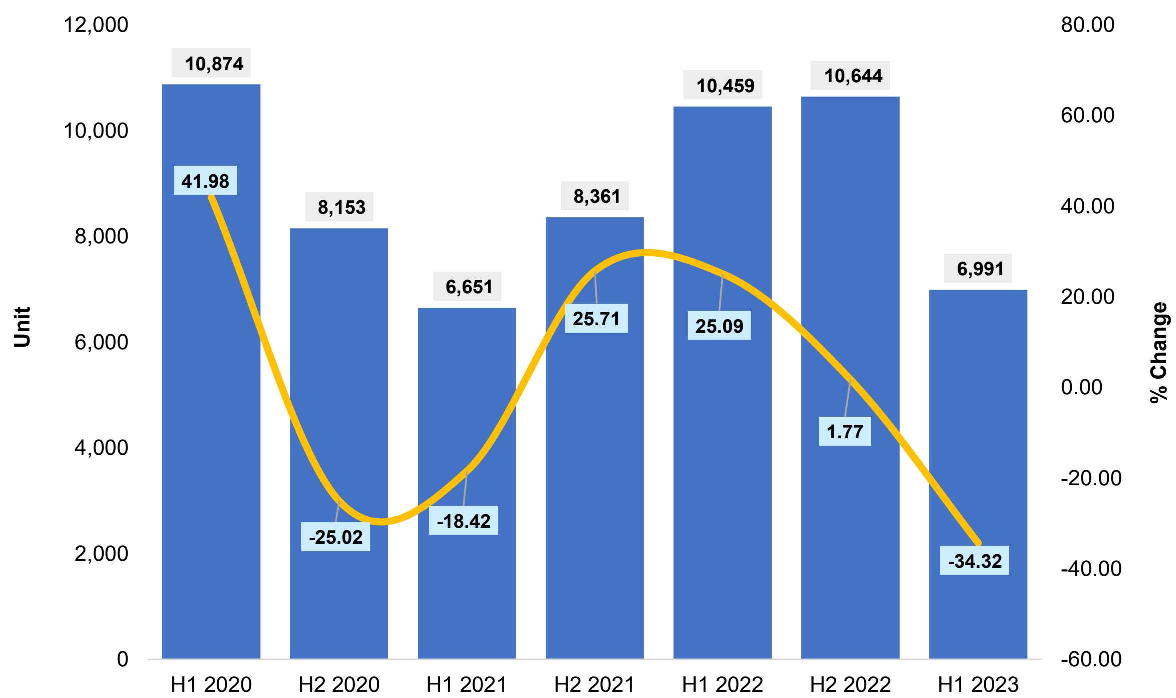
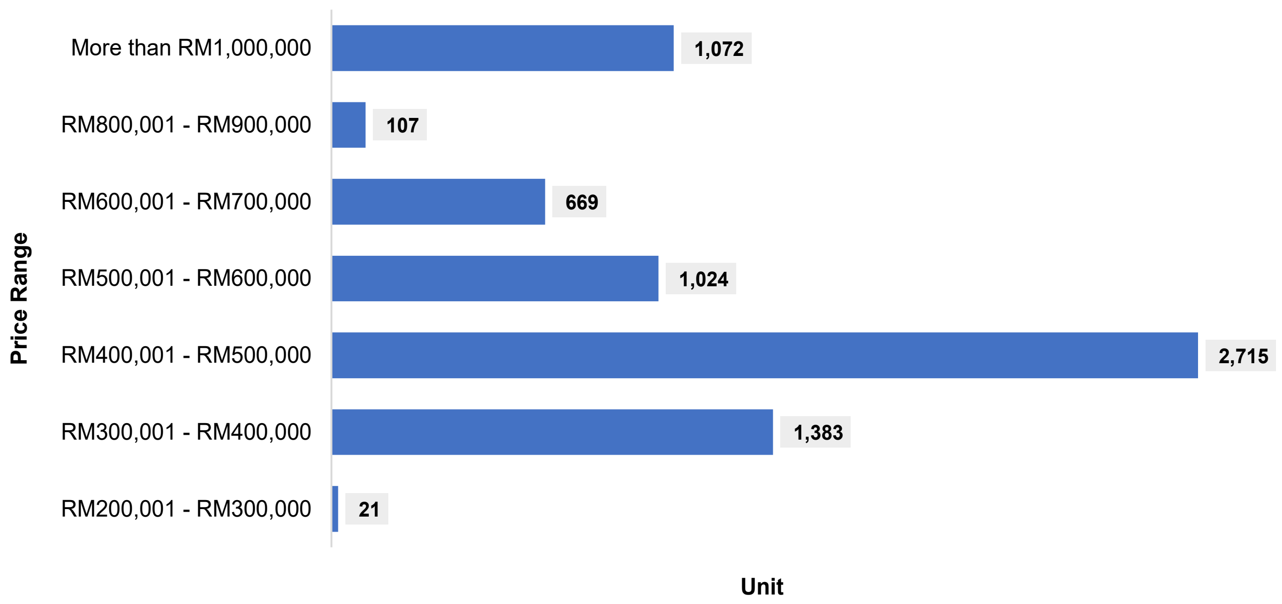


Chart 38: Unsold Not Constructed Serviced Apartments by Price Range H1 2023



3.0 HARTA TANAH INDUSTRI

3.1 Harta Tanah Siap Dibina Tidak Terjual

Situasi harta tanah industri siap dibina tidak terjual terus bertambah baik pada separuh pertama 2023. Sebanyak 819 unit siap dibina tidak terjual bernilai RM0.98 bilion direkodkan, turun 6.9% dari segi bilangan dan 14.1% dari segi nilai berbanding separuh tahun sebelumnya.

Sarawak menguasai bilangan harta tanah industri tidak terjual negara dengan 324 unit (39.6%) bernilai RM221.8 juta. Johor berada di kedudukan kedua dengan 216 unit bernilai RM497.8 juta.

3.0 INDUSTRIAL PROPERTY

3.1 Property Overhang

The overhang situation for the industrial subsector continued to improve in the first half of 2023. A total of 819 overhang units valued at RM0.98 billion were recorded, down 6.9% in volume and 14.1% in value compared to the preceding half.

Sarawak dominated the number of overhang industrial property in the country with 324 units (39.6%) worth RM221.8 million. Johor was in second position with 216 units worth RM497.8 million.

Chart 39: Volume of Industrial Overhang H1 2020 – H1 2023

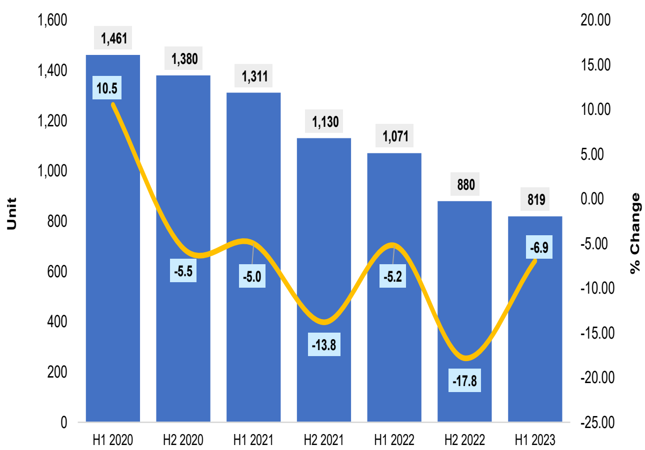


Chart 40: Value of Industrial Overhang H1 2020 – H1 2023

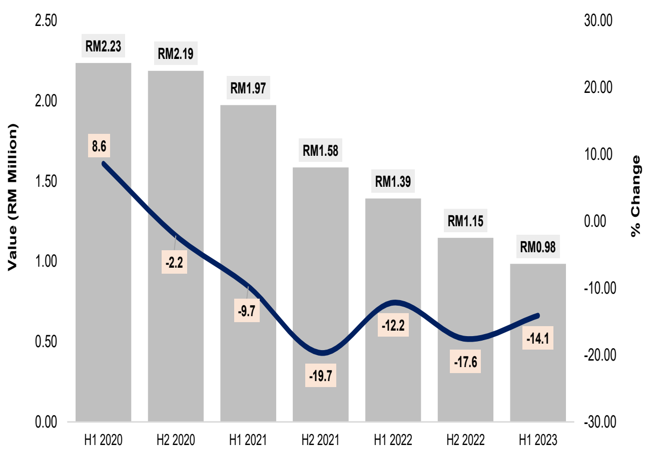
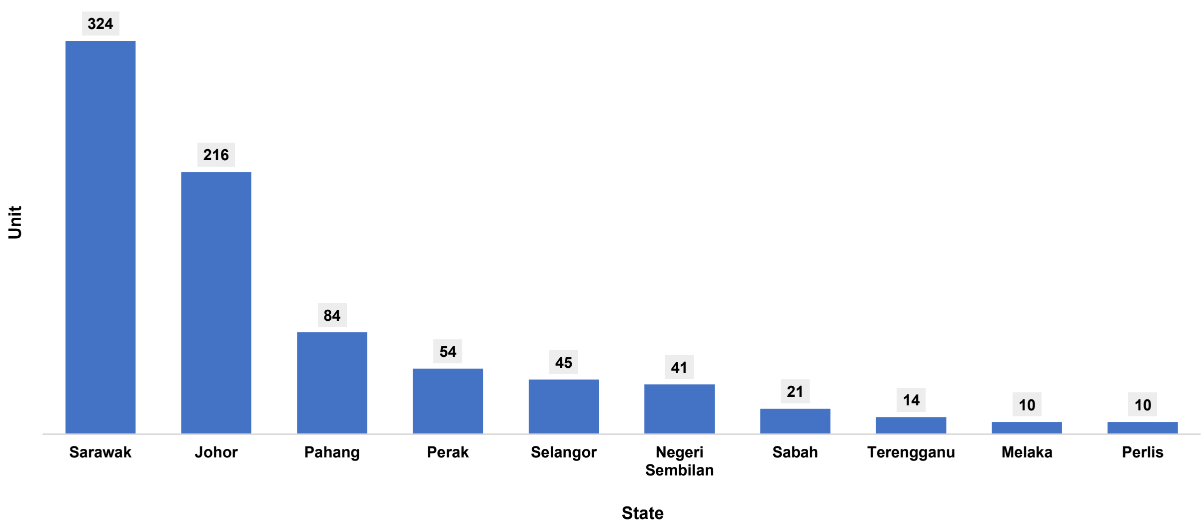


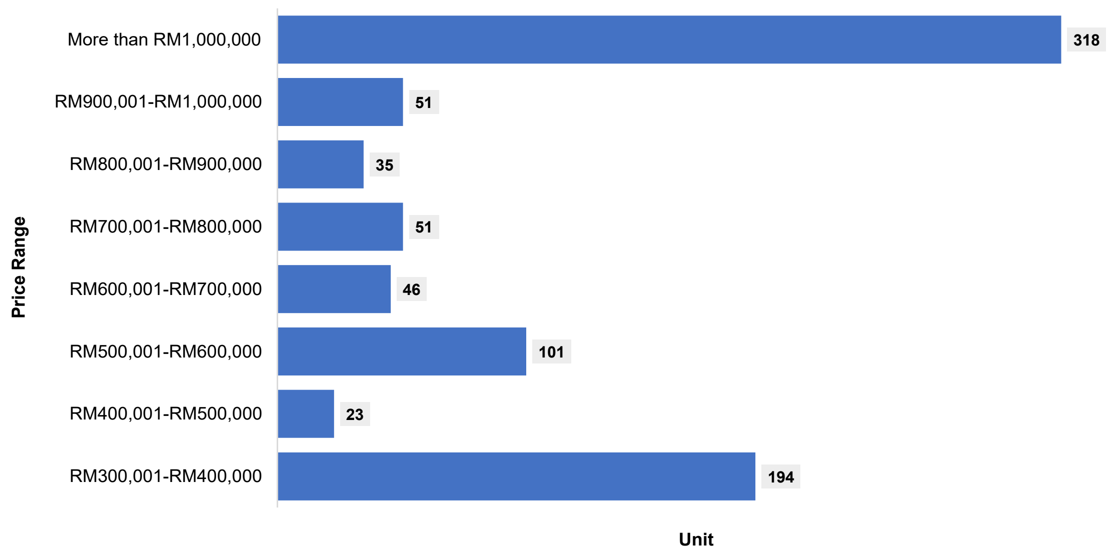
Chart 41: Industrial Overhang by State H1 2023



Unit teres menyumbang kepada majoriti industri siap dibina tidak terjual mengikut jenis bangunan sebanyak 61.9% (507 unit). Dari segi harga, unit industri berharga melebihi RM1 juta melibatkan (38.8% atau 318 unit) daripada jumlah keseluruhan.

Terraced units contributed the majority of industrial overhang by building type at 61.9% (507 units). In terms of price, industrial units above RM1 million accounted for (38.8% or 318 units) of the national total.

Chart 42: Industrial Overhang Units by Price Range H1 2023



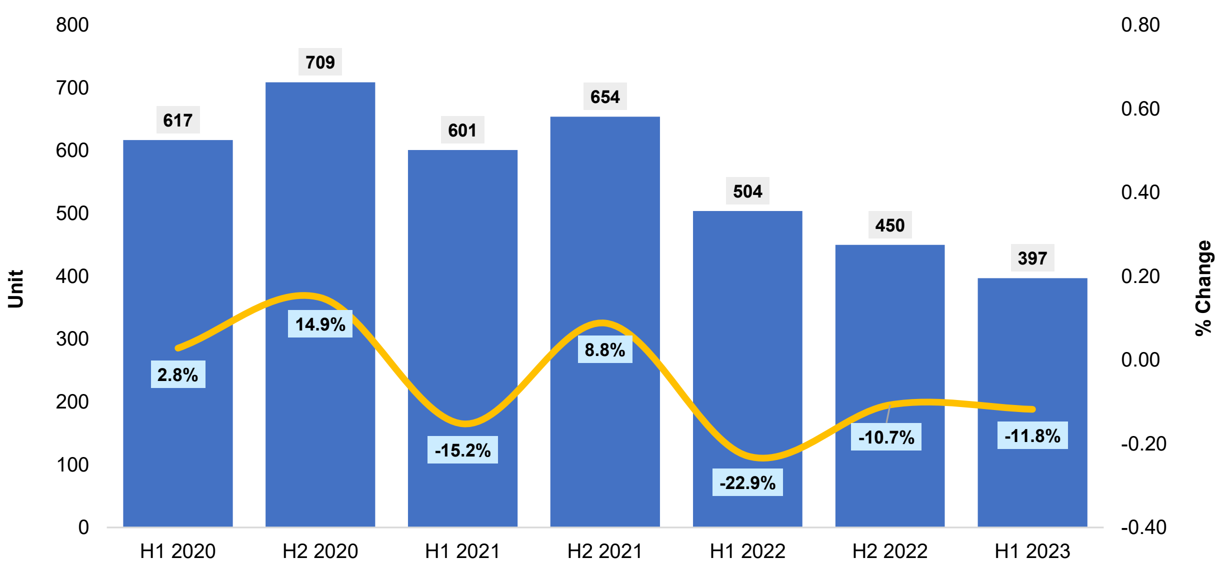
3.2 Dalam Pembinaan Belum Terjual

3.2 Unsold Under Construction

Harta tanah industri dalam pembinaan belum terjual menurun pada separuh pertama tahun 2023. Tempoh kajian merekodkan 397 unit industri belum terjual, berkurang 11.8% berbanding tempoh sebelumnya.

Unsold under construction for industrial property decreased in the first half of 2023. The review period recorded 397 unsold industrial units, a decrease of 11.8% compared to the preceding half.

Chart 43: Trend of Unsold Under Construction Industrial Property H1 2020 – H1 2023



Johor menguasai 31.0% (123 unit) daripada jumlah tidak terjual negara, diikuti oleh Sarawak (22.2% atau 88 unit) dan Negeri Sembilan (10.1% atau 40 unit).

Johor dominated with 31.0% (123 units) of the country's unsold total, followed by Sarawak (22.2% or 88 units) and Negeri Sembilan (10.1% or 40 units) respectively.

Unit teres dan berkembar masing-masing menyumbang 51.9% (206 unit) dan 41.1% (163 unit) daripada jumlah industri dalam pembinaan belum terjual.

Terraced and semi-detached units respectively account for 51.9% (206 units) and 41.1% (163 units) of the total unsold industrial under construction.

3.3 Belum Dibina Belum Terjual

3.3 Unsold Not Constructed

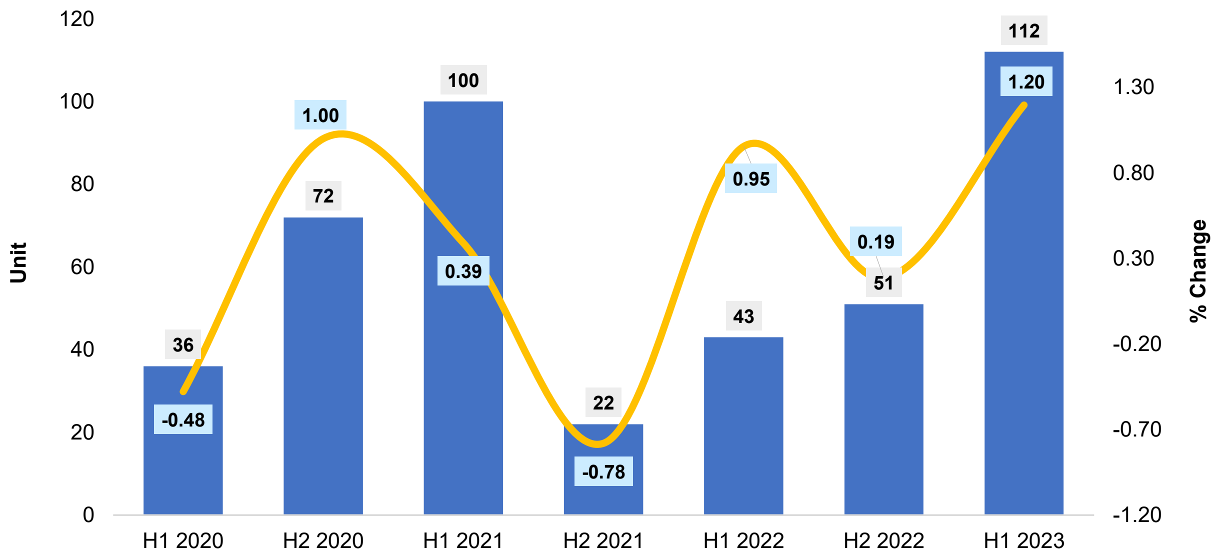
Unit belum dibina belum terjual merekodkan 112 unit berbanding 51 unit direkodkan pada separuh pertama tahun 2023.

The unsold not constructed recorded 112 units, compared to 51 units recorded in the first half of 2023.

Sebanyak 40 unit dibina belum terjual direkodkan di Selangor dan Sabah (34 unit). Kesemua unit belum terjual merupakan unit berkembar dalam lingkungan harga melebihi RM1.0 juta.

The unsold units were recorded in Selangor (40 units) and Sabah (34 units). All of the unsold units were semi-detached units priced at more than RM1.0 million.

Chart 44: Trend of Unsold Not Constructed Industrial Property H1 2020 – H1 2023

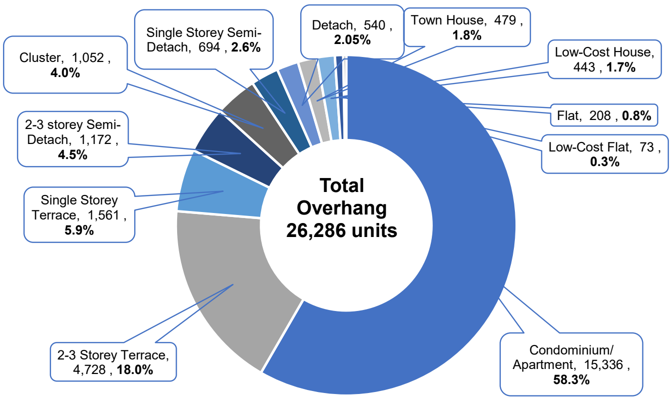


Lampiran

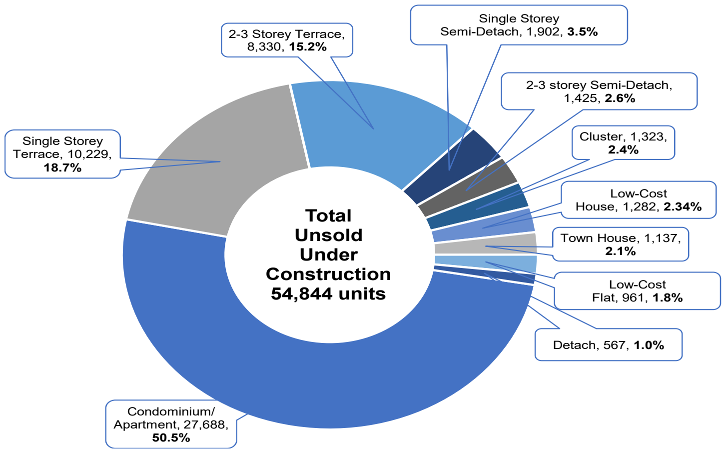
Appendix

APPENDIX 1

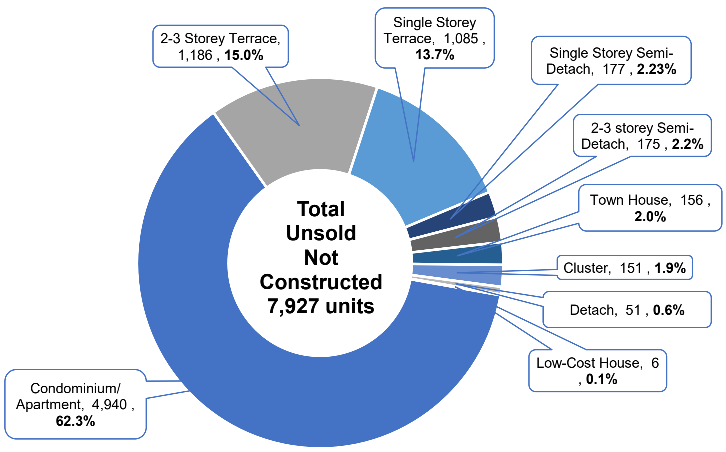
1.1 Residential Overhang by Property Type in H1 2023



1.2 Residential Unsold Under Construction by Property Type H1 2023

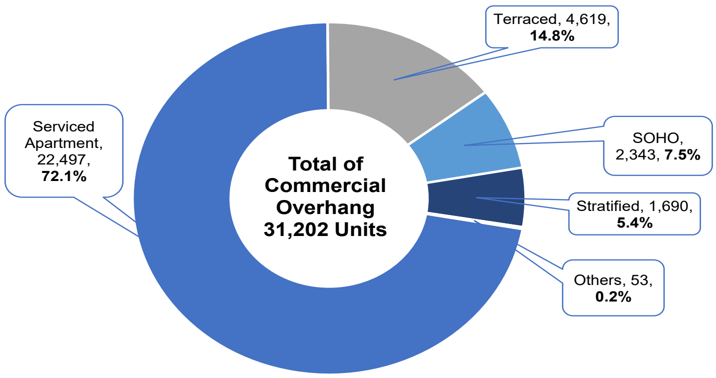


1.3 Residential Unsold Not Constructed by Property Type H1 2023

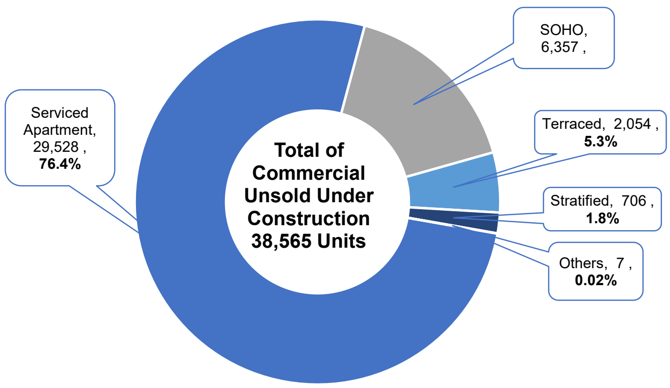


APPENDIX 2

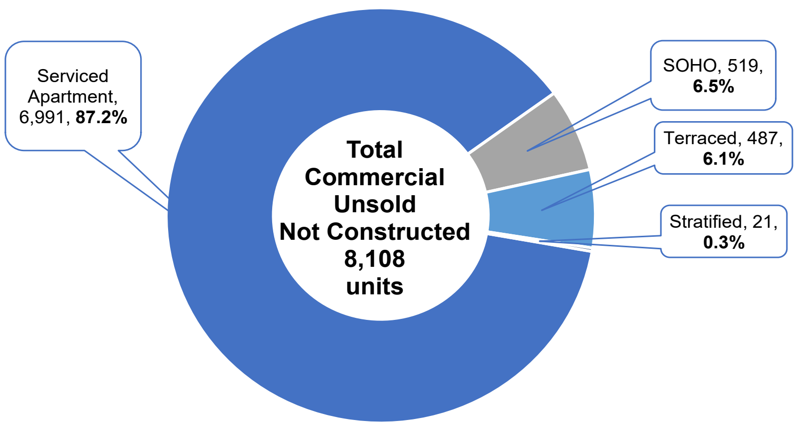
2.1 Commercial Overhang by Property Type in H1 2023



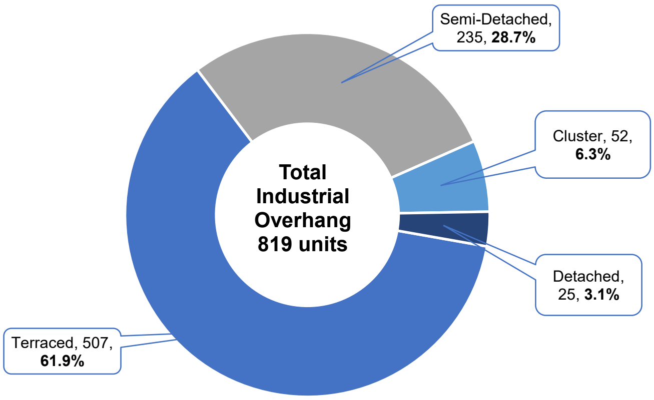
2.2 Commercial Unsold Under Construction by Property Type H1 2023



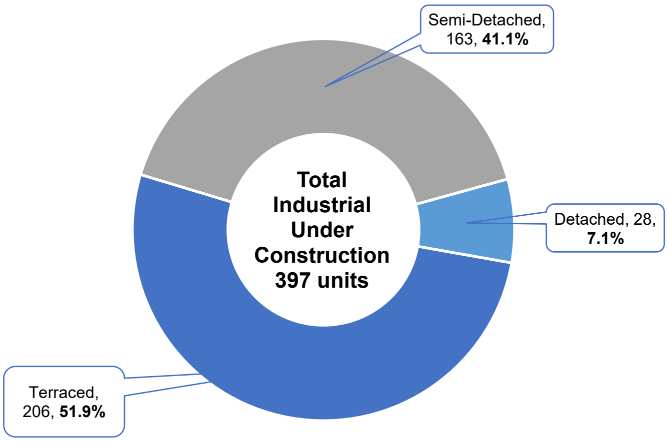
2.3 Commercial Unsold Not Constructed by Property Type H1 2023



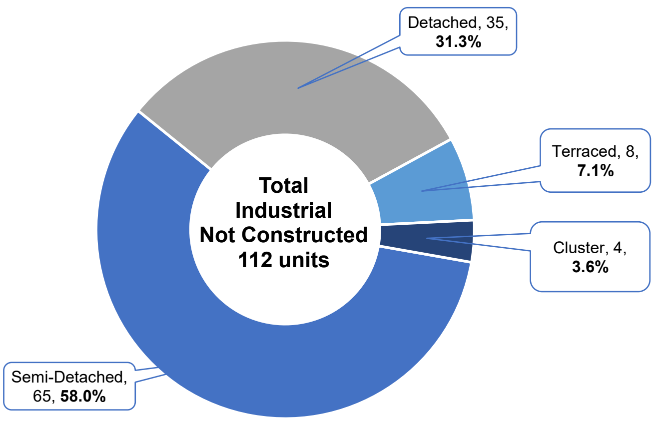
3.1 Industrial Overhang by Property Type H1 2023



3.2 Industrial Unsold Under Construction by Property Type H1 2023



3.3 Industrial Unsold Not Constructed by Property Type H1 2023



Catatan Teknikal

Technical Notes

CATATAN TEKNIKAL

1. Tempoh kajian laporan ini adalah meliputi separuh tahun pertama 2023 berakhir pada 30 Jun 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/ Sijl Layak Menduduki Sementara tetapi kekal tidak terjual melebihi tempoh sembilan bulan selepas ianya dilancarkan untuk jualan pada atau selepas 1 Januari 1997.

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

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

TECHNICAL NOTES

1. *The review period of this report covers the first half of the year 2023 ending on 30th June 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.*

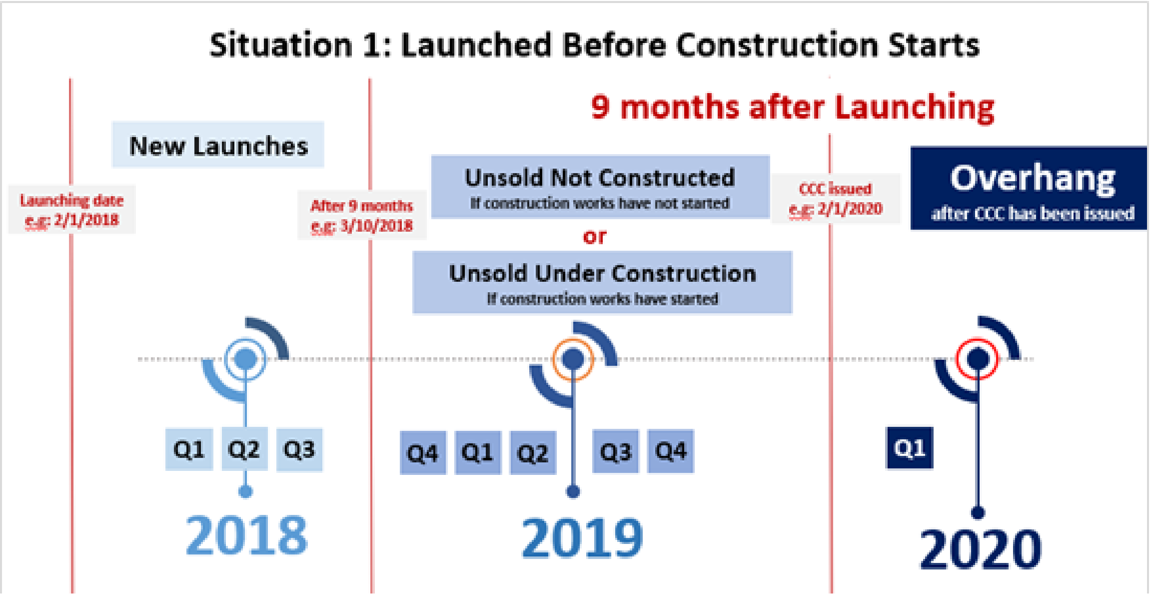
   ***Sales performance** refers to the percentage of number of units sold from the total units launched for a specific type of property in the review period. Two types of sales performance are computed in this publication namely quarterly sales performance and accumulated sales performance.*

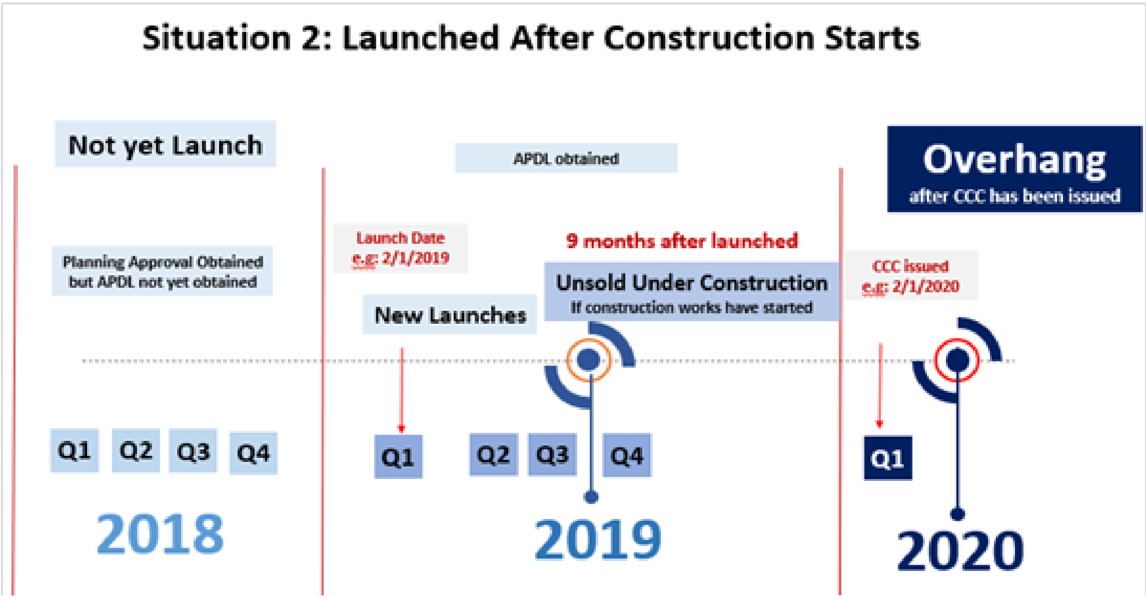
5. *Starting January 1, 2003 “property overhang” has been defined as residential, commercial and industrial units that have been completed and issued with a Certificate of Completion and Compliance / Temporary Certificate of Fitness for Occupation but remained unsold for more than nine months after it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

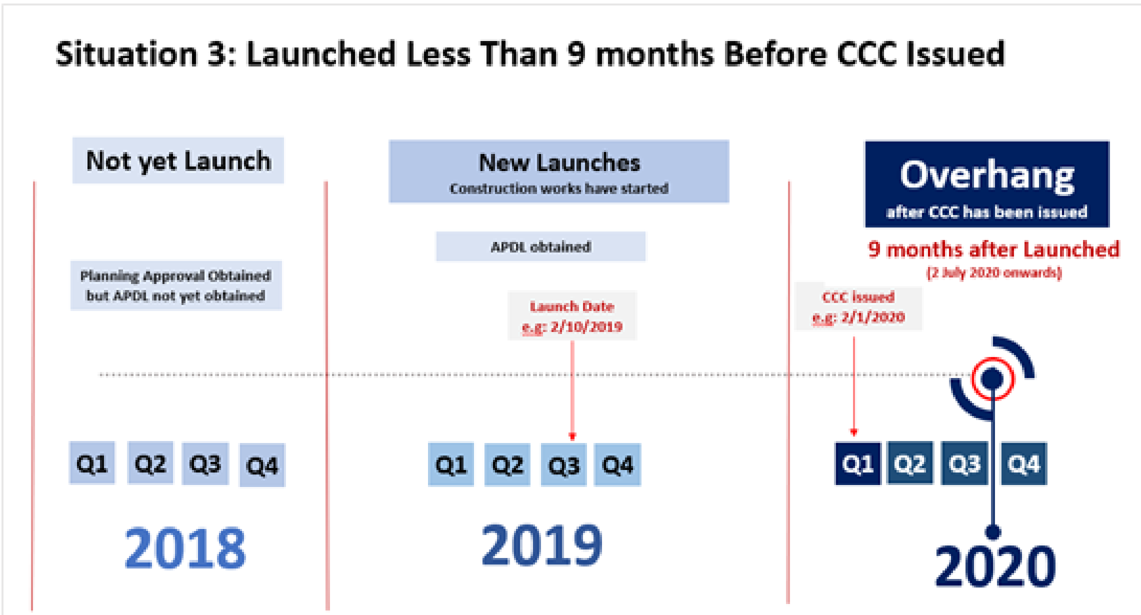
6. ***Property overhang** comprises residential units, commercial units and industrial units that are completed with Certificate of Completion and Compliance/ Temporary Certificate of Fitness for Occupation in the review period. These units remained unsold for more than nine months from the date of launching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