KEMENTERIAN KEWANGAN
MALAYSIA

LAPORAN STOK HARTA TANAH
Property Stock Report

H1 2024

Sambutan Jubli Perak NAPIC
PUSAT MAKLUMAT HARTA TANAH NEGARA

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:

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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.

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Laporan Stok Harta Tanah H1 2024
Property Stock Report H1 2024

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Ringkasan Stok Harta Tanah H1 2024

Property Stock Summary H1 2024

State	Residential		
	Existing Stock	Incoming Supply	Planned Supply
WP Kuala Lumpur	552,576	49,081	66,050
WP Putrajaya	18,396	2,512	3,252
WP Labuan	13,276	873	196
Selangor	1,712,272	82,880	79,873
Johor	916,888	40,167	42,944
Pulau Pinang	555,549	26,733	18,640
Perak	537,544	39,154	41,866
Negeri Sembilan	308,823	16,826	26,784
Melaka	217,303	25,897	24,467
Kedah	354,025	17,485	12,428
Pahang	307,550	13,873	34,245
Terengganu	117,688	11,553	8,486
Kelantan	91,213	11,105	3,984
Perlis	27,709	1,056	2,021
Sabah	244,999	19,548	20,415
Sarawak	292,795	15,598	7,990
MALAYSIA	**6,268,606**	**374,341**	**393,641**

State	Shop		
	Existing Stock	Incoming Supply	Planned Supply
WP Kuala Lumpur	32,734	986	1,609
WP Putrajaya	538	0	0
WP Labuan	1,059	50	0
Selangor	114,849	5,665	3,422
Johor	98,808	4,901	5,130
Pulau Pinang	40,754	1,084	1,809
Perak	64,225	2,147	3,260
Negeri Sembilan	27,553	958	2,332
Melaka	23,509	1,459	1,663
Kedah	33,100	853	790
Pahang	26,408	1,335	3,429
Terengganu	8,921	775	606
Kelantan	14,710	1,088	539
Perlis	5,828	301	851
Sabah	35,280	2,103	2,135
Sarawak	40,345	1,426	1,552
MALAYSIA	**568,621**	**25,131**	**29,127**

State	SOHO			Serviced Apartment		
	Existing Stock	Incoming Supply	Planned Supply	Existing Stock	Incoming Supply	Planned Supply
WP Kuala Lumpur	9,435	3,947	5,247	129,890	46,326	51,584
WP Putrajaya	0	0	0	1,204	323	940
WP Labuan	0	0	0	0	0	0
Selangor	46,042	15,959	5,320	120,110	52,236	28,560
Johor	3,269	1,486	1,489	99,228	18,974	28,281
Pulau Pinang	4,257	1,809	626	9,202	6,055	8,227
Perak	1,043	573	3,089	1,567	710	1,221
Negeri Sembilan	104	0	0	14,498	2,462	460
Melaka	0	352	0	8,850	6,428	5,488
Kedah	0	0	0	637	0	0
Pahang	0	0	0	7,882	2,929	5,399
Terengganu	0	0	53	276	0	132
Kelantan	0	0	0	1,694	0	1,358
Perlis	0	0	0	0	0	0
Sabah	467	0	0	2,716	2,033	2,730
Sarawak	563	72	0	1,447	2,099	2,414
MALAYSIA	**65,180**	**24,198**	**15,824**	**399,201**	**140,575**	**136,794**

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	77	3,029,566	30	274,829	7	166,821	6	225,910	3	196,691
WP Putrajaya	2	78,364	1	1,380	0	0	2	29,277	0	0
WP Labuan	1	26,197	1	2,417	0	0	0	0	0	0
Selangor	89	3,002,765	16	114,612	50	835,914	5	331,202	0	0
Johor	69	1,833,420	39	101,543	48	520,339	1	3,716	0	0
Pulau Pinang	40	1,211,751	48	374,502	18	277,886	3	190,552	2	96,421
Perak	38	589,461	9	41,599	36	395,444	2	10,338	0	0
Negeri Sembilan	30	318,200	41	79,906	23	215,029	1	7,345	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	1	6,276	2	15,373
Terengganu	8	110,729	28	40,789	5	58,770	2	120,796	0	0
Kelantan	9	237,418	14	75,819	8	106,841	0	0	0	0
Perlis	4	22,110	18	30,362	1	8,220	4	34,256	0	0
Sabah	35	695,693	10	27,427	10	73,738	2	44,470	1	23,509
Sarawak	72	1,016,807	2	1,517	7	65,906	2	41,676	0	0
MALAYSIA	**557**	**13,464,200**	**279**	**1,195,865**	**243**	**3,100,652**	**33**	**1,103,059**	**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	418	9,650,040	48	606,738	11	564,971	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	255	4,324,663	22	327,601	3	60,243	0	0
Johor	127	995,591	94	451,187	5	144,481	1	33,817
Pulau Pinang	148	790,840	60	291,134	4	76,693	2	28,975
Perak	78	301,537	148	366,360	4	20,072	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	132,315	85	296,685	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	72	543,698	35	288,224	2	11,067	2	37,498
Sarawak	79	537,755	42	290,998	2	55,925	0	0
MALAYSIA	**1,591**	**18,756,588**	**1,013**	**6,177,222**	**41**	**1,073,387**	**29**	**938,457**

State	Industrial		
	Existing Stock	Incoming Supply	Planned Supply
WP Kuala Lumpur	5,138	0	37
WP Putrajaya	48	0	0
WP Labuan	649	41	0
Selangor	42,601	1,217	2,064
Johor	19,241	477	168
Pulau Pinang	9,863	292	24
Perak	8,507	79	327
Negeri Sembilan	5,574	283	570
Melaka	7,214	773	1,917
Kedah	3,873	86	339
Pahang	3,686	33	263
Terengganu	910	46	84
Kelantan	630	19	32
Perlis	297	76	142
Sabah	6,335	221	360
Sarawak	7,585	171	166
MALAYSIA	**122,151**	**3,814**	**6,493**

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	253	47,177	16	3,646	8	1,344
WP Putrajaya	7	1,769	0	0	1	270
WP Labuan	41	1,697	1	116	0	0
Selangor	210	26,089	0	0	1	200
Johor	485	31,334	12	2,937	8	3,178
Pulau Pinang	244	24,034	13	2,970	10	1,266
Perak	330	16,429	9	835	3	664
Negeri Sembilan	144	9,584	4	1,498	4	406
Melaka	177	18,223	1	336	5	1,558
Kedah	175	13,154	6	756	4	430
Pahang	303	25,624	0	0	7	697
Terengganu	248	11,139	3	538	1	280
Kelantan	91	4,360	1	144	1	10
Perlis	32	1,245	2	120	1	120
Sabah	420	24,019	13	3,142	11	2,957
Sarawak	386	21,142	0	0	0	0
MALAYSIA	**3,546**	**277,019**	**81**	**17,038**	**65**	**13,380**

1.0 HARTA TANAH KEDIAMAN

Stok sedia ada melebihi 6.27 juta unit pada separuh pertama 2024 meningkat 2.3% berbanding separuh pertama 2023. Penawaran akan datang merekodkan sebanyak jumlah 374,341 unit, kurang 5.6% berbanding tempoh yang sama tahun sebelumnya. Walau bagaimanapun penawaran yang dirancang meningkat 4.4% (393,641 unit).

Selangor menerajui penawaran kediaman dengan bilangan tertinggi merentasi ketiga-tiga peringkat pembangunan.

Kediaman bertanah menguasai stok sedia ada melebihi 60.0% berbanding strata. Namun begitu, stok strata di penawaran akan datang dan penawaran yang dirancang dilihat memberangsangkan dengan peratusan masing-masing hampir 50.0%.

Siap dibina, mula dibina dan penawaran baharu dirancang merekodkan peningkatan berbanding tempoh yang sama pada tahun 2023 di mana peningkatan masing-masing sebanyak 11.1%, 1.1% dan 30.1%.

1.0 RESIDENTIAL PROPERTY

The existing stock exceeds 6.27 million units in the first half of 2024, reflecting a 2.3% increase compared to the first half of 2023. Incoming supply is recorded at 374,341 units, which is a decrease of 5.6% compared to the same period last year. However, the planned supply shows an increase of 4.4%, amounting to 393,641 units.

Selangor leads in residential supply with the highest number across all three stages of development.

Landed properties dominate the existing stock, accounting for over 60.0% compared to strata properties. Nevertheless, the stock of strata properties in both incoming and planned supply appears promising, with percentages nearing 50.0% respectively.

Completion, under construction, and new planned supply recorded an increment compared to the same period in 2023, with respective growth rates of 11.1%, 1.1%, and 30.1%.

Chart 1: Residential Existing Stock by State H1 2024

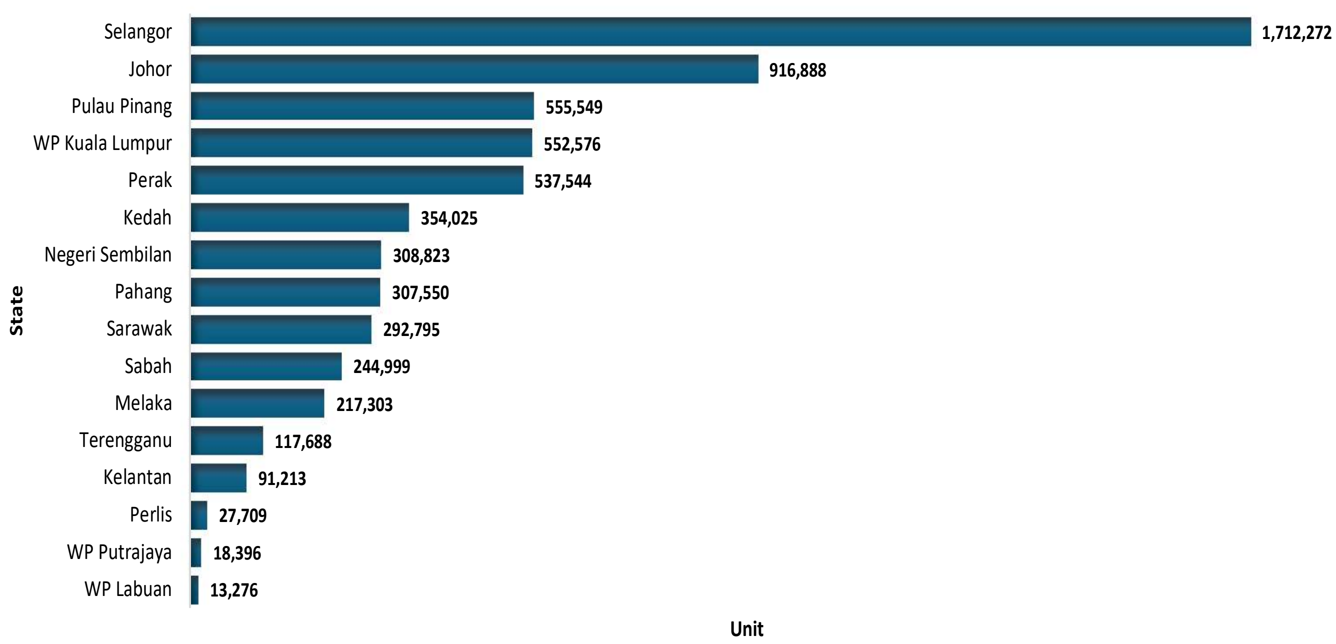


Chart 2: Residential Incoming Supply and Planned Supply by State H1 2024

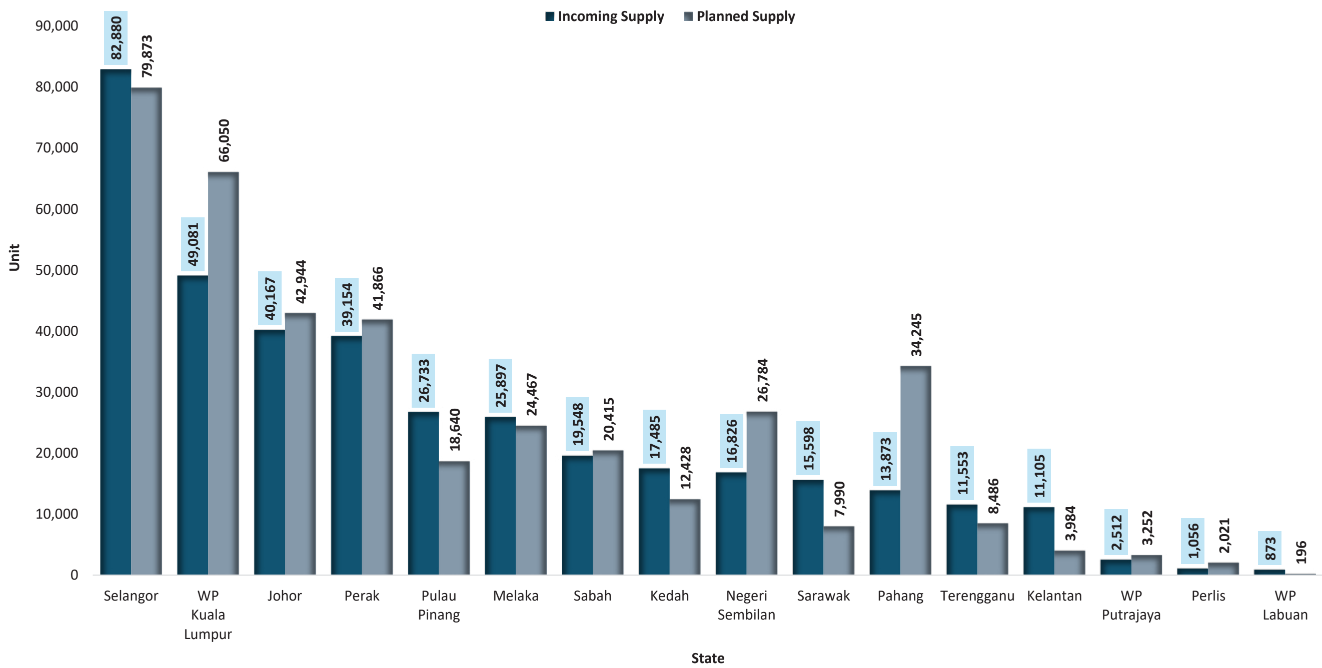
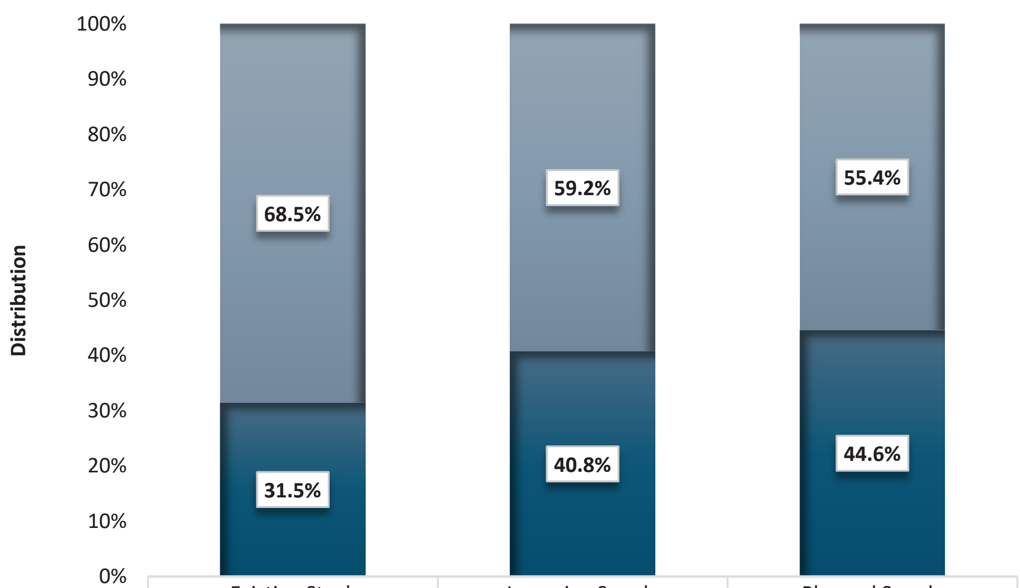
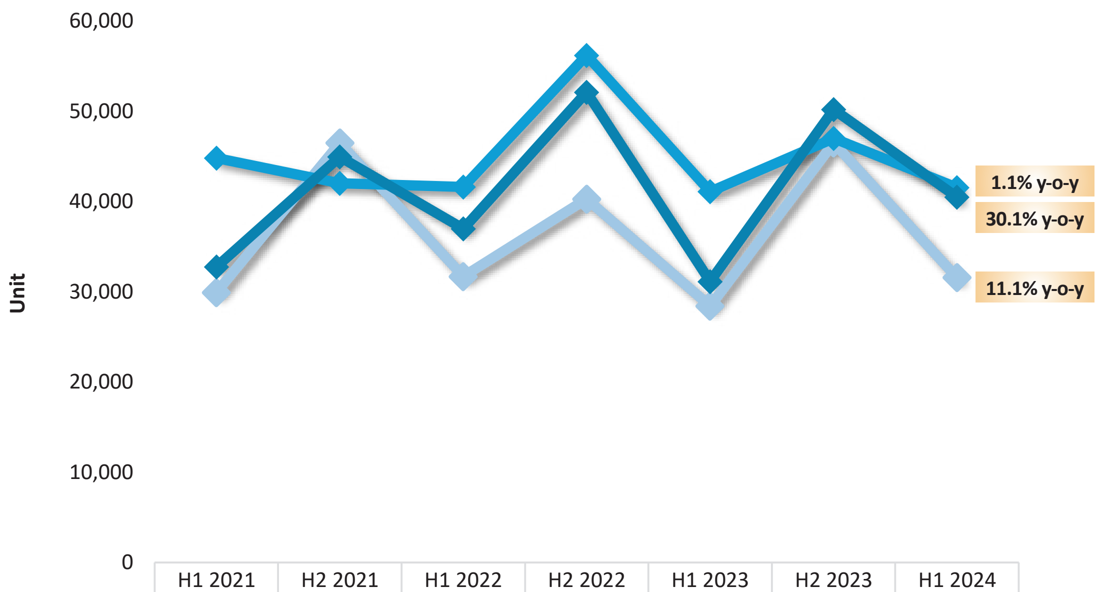


Chart 3: Distribution of Landed and Stratified Residential Supply by Development Stage H1 2024



	Existing Stock	Incoming Supply	Planned Supply
Landed	4,294,547	221,729	217,931
Stratified	1,974,059	152,612	175,710

Chart 4: Trends of Completion, Starts and New Planned Supply for Residential Supply from H1 2021 to H1 2024



	H1 2021	H2 2021	H1 2022	H2 2022	H1 2023	H2 2023	H1 2024
Completion	29,919	46,496	31,699	40,282	28,412	46,501	31,572
Starts	44,807	42,039	41,600	56,204	41,101	47,013	41,555
New Planned Supply	32,766	44,965	36,997	52,118	31,139	50,192	40,505

2.0 KEDAI

Separuh pertama 2024 merekodkan sejumlah 568,621 unit kedai sedia ada, 25,131 unit di penawaran akan datang dan 29,127 unit di 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.

Segment unit kedai siap dibina menunjukkan pengurangan 34.6% pada separuh pertama 2024 berbanding tempoh yang sama 2023. Walau bagaimanapun peningkatan yang ketara dilihat bagi unit mula dibina dan penawaran baharu dirancang di mana masing-masing meningkat 33.7% (1,618 unit, H1 2023) dan 26.0% (1,280 unit, H1 2023).

2.0 SHOP

The first half of 2024 recorded a total of 568,621 existing retail units, 25,131 units in incoming supply and 29,127 units in planned supply. Two and two-and-a-half-story terrace shops dominate the inventory across all stages of development.

Selangor, Johor, and Perak lead in both existing inventory and incoming supply. Pahang has swapped positions with Perak, joining the two aforementioned states as the three largest contributors to the planned supply.

The completion unit segment has demonstrated a decrease of 34.6% in the first half of 2024 compared to the same period in 2023. However, a significant increase is observed in the units start and the new planned supply, which have risen by 33.7% (1,618 units, H1 2023) and 26.0% (1,280 units, H1 2023), respectively.

Chart 5: Shop Existing Stock by State H1 2024

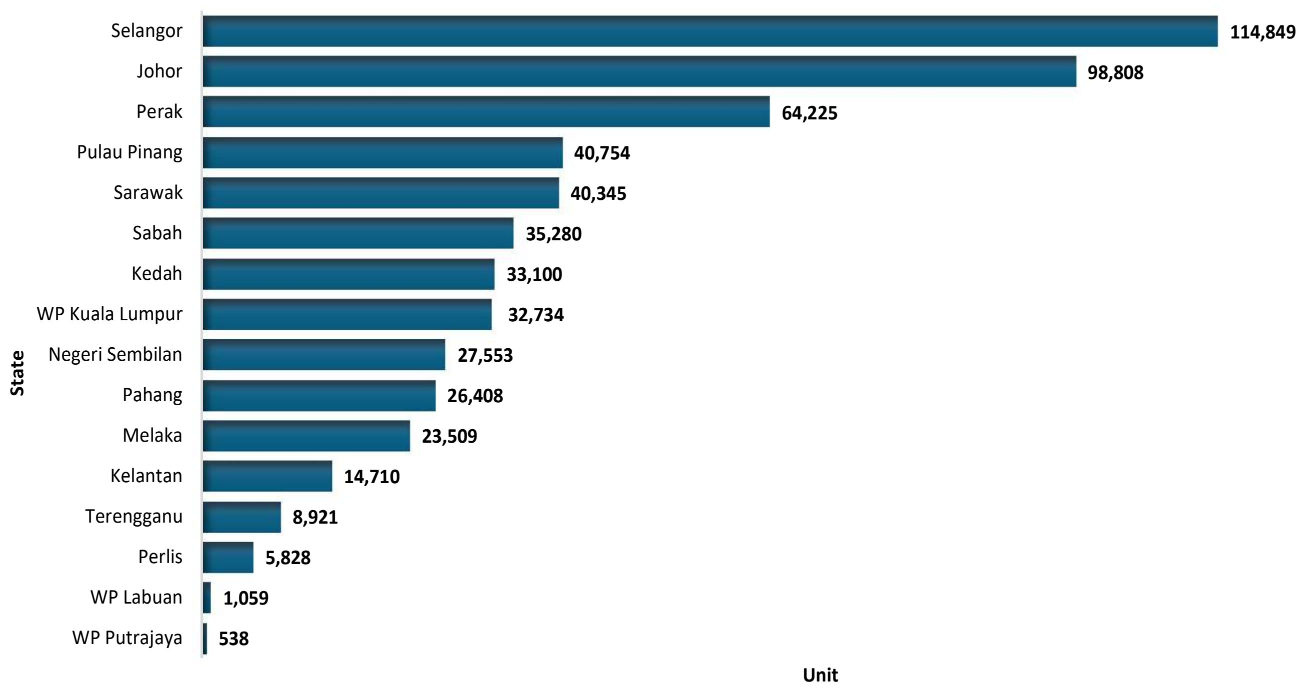


Chart 6: Shop Incoming Supply and Planned Supply by State H1 2024

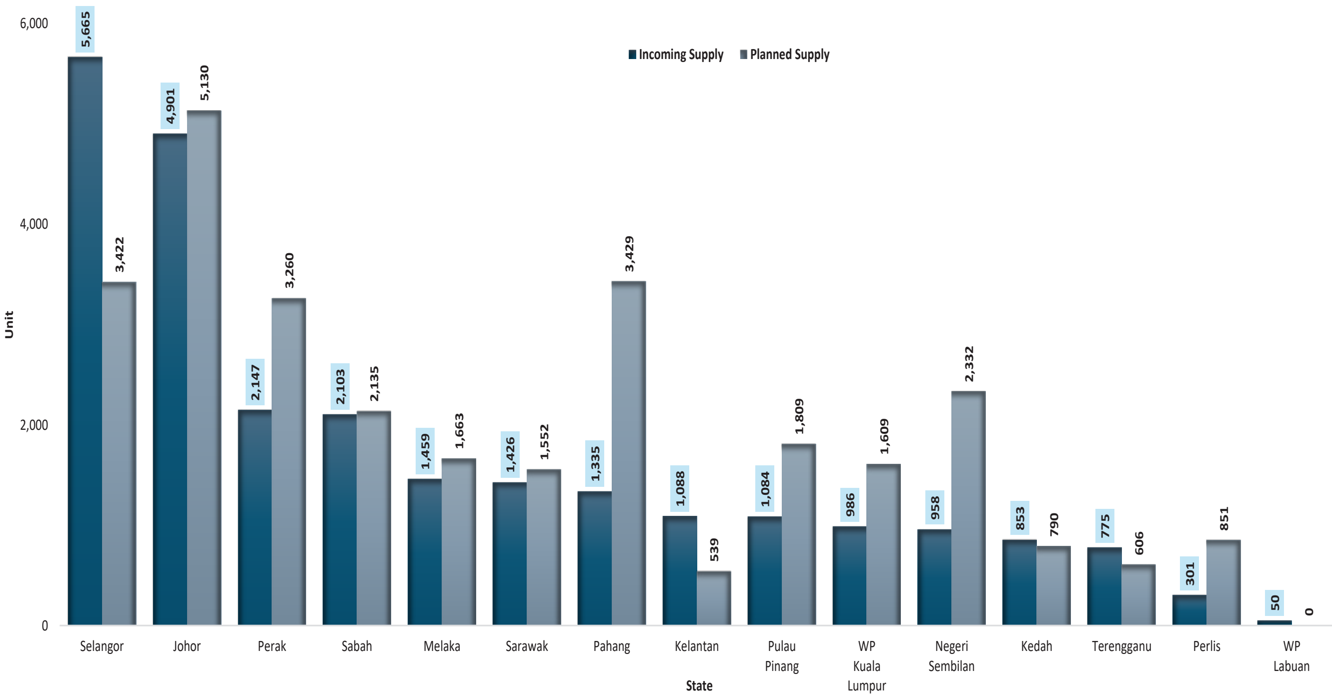
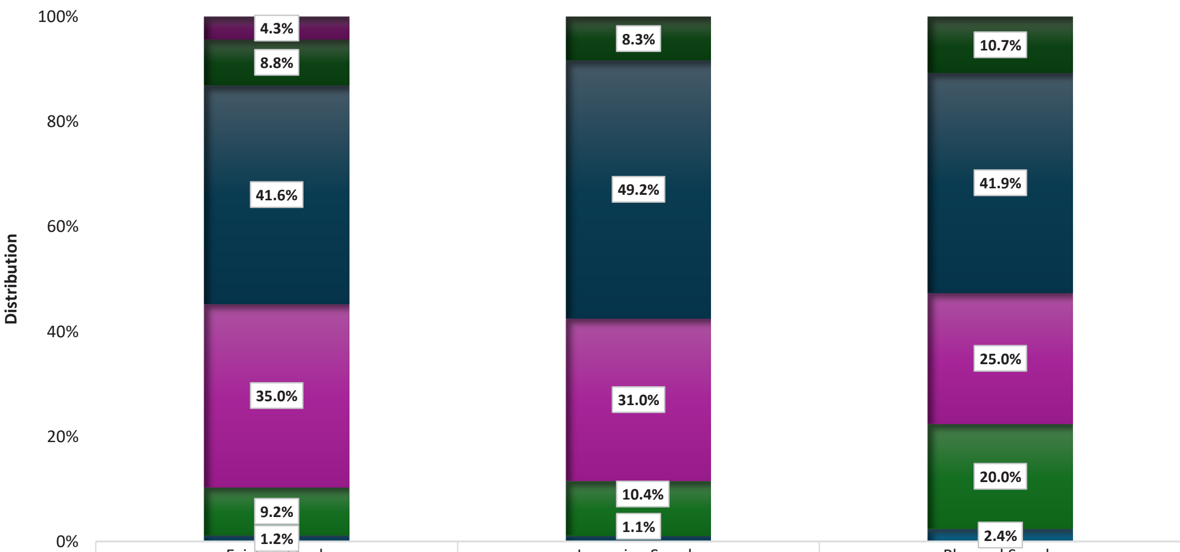
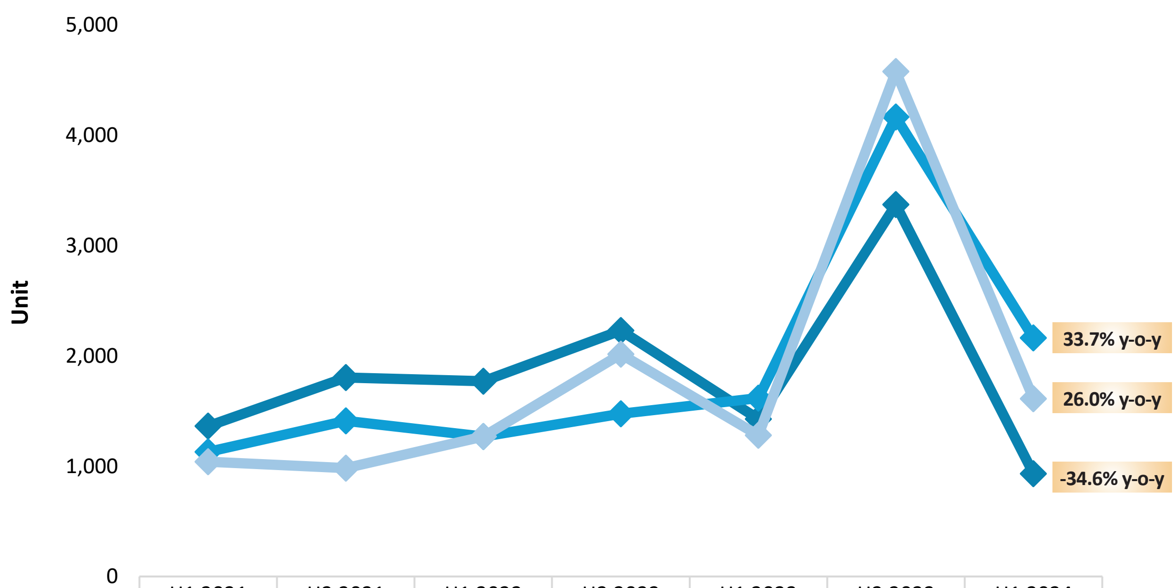


Chart 7: Distribution of Shop by Building Type H1 2024



	Existing Stock	Incoming Supply	Planned Supply
Prewar	24,459	0	0
< 2 storey terrace	49,846	2,088	3,105
2 - 2 1/2 storey terrace	236,787	12,353	12,217
> 2 1/2 storey terrace	198,815	7,792	7,279
Stratified	52,075	2,617	5,816
Others	6,639	281	710

Chart 8: Trends of Completion, Starts and New Planned Supply for Shop from H1 2021 to H1 2024



	H1 2021	H2 2021	H1 2022	H2 2022	H1 2023	H2 2023	H1 2024
Completion	1,364	1,805	1,771	2,229	1,427	3,371	933
Starts	1,130	1,411	1,270	1,476	1,618	4,165	2,163
New Planned Supply	1,041	983	1,268	2,017	1,280	4,578	1,613

SERVICED APARTMENT PROPERTY STOCK REPORT

3.0 PANGSAPURI KHIDMAT

Separuh pertama 2024, telah merekodkan sejumlah 399,201 unit sedia ada pangsapuri khidmat, 140,575 unit penawaran akan datang dan 136,794 unit penawaran yang dirancang.

Majoriti pangsapuri khidmat tertumpu di WP Kuala Lumpur, Selangor dan Johor dengan gabungan syer pasaran 87.5% stok sedia ada (349,228 unit), 83.6% penawaran akan datang (117,536 unit) dan 79.3% penawaran yang dirancang (108,425 unit).

Aktiviti pembinaan menunjukkan trend meningkat yang sangat ketara melebihi 100% bagi unit siap dibina sebanyak 15,518 unit (7,684 unit, H1 2023) dan unit mula bina sebanyak 10,363 unit (4,967 unit, H1 2023). Penawaran baru dirancang pula merekodkan kenaikan yang sangat drastik kepada 13.311 unit berbanding hanya 2,842 unit pada tempoh yang sama pada tahun lepas.

3.0 SERVICED APARTMENT

In the first half of 2024, a total of 399,201 existing serviced apartment units, 140,575 incoming units, and 136,794 planned units have been recorded.

Majority of serviced apartments are concentrated in WP Kuala Lumpur, Selangor, and Johor, accounting for a combined market share of 87.5% of existing stock (349,228 units), 83.6% of incoming supply (117,536 units), and 79.3% of planned supply (108,425 units).

The construction activities exhibit a significant upward trend, surpassing 100% increased with a total of 15,518 completion units (compared to 7,684 units in H1 2023) and 10,363 units starts (4,967 units in H1 2023). The planned new supply has recorded a remarkable surge to 13,311 units, in contrast of only 2,842 units during the same period last year.

Chart 9: Serviced Apartment Existing Stock by State H1 2024

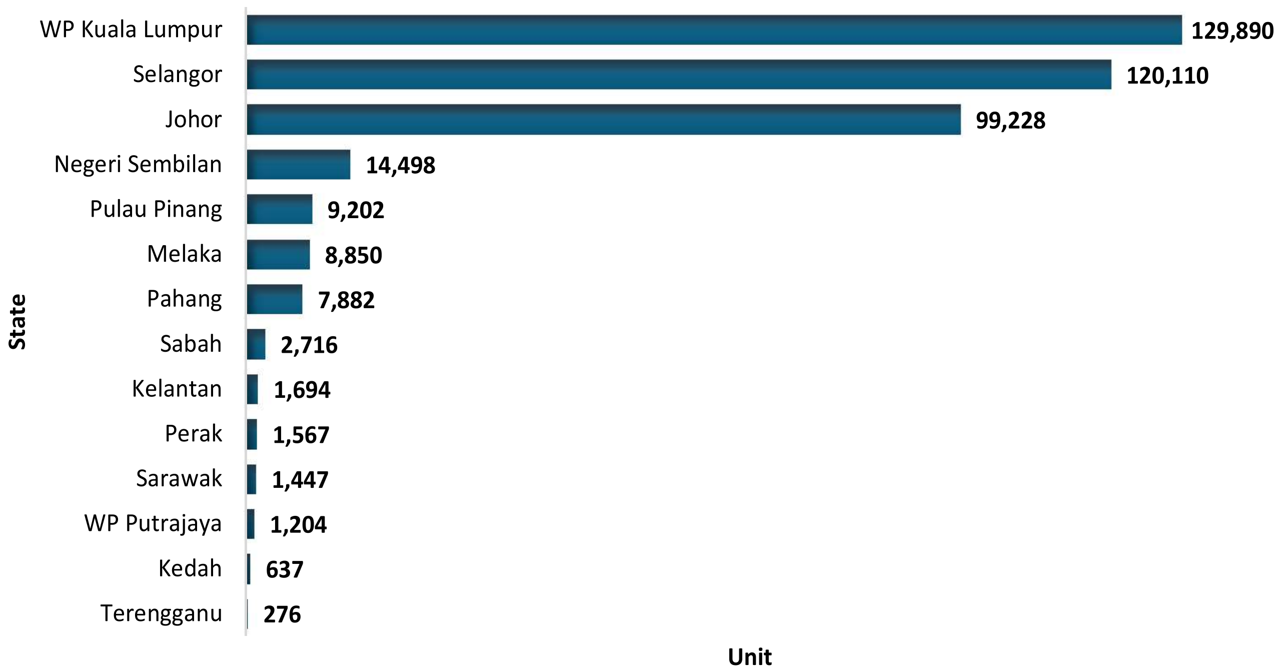


Chart 10: Serviced Apartment Incoming Supply and Planned Supply by State H1 2024

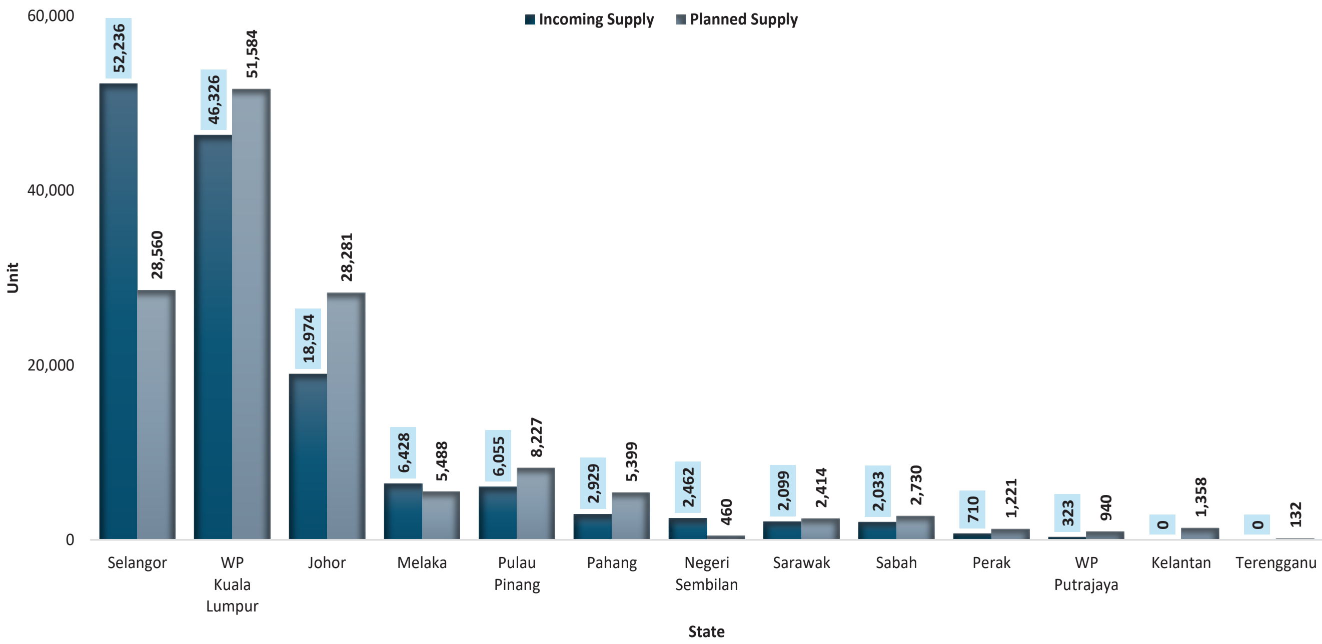
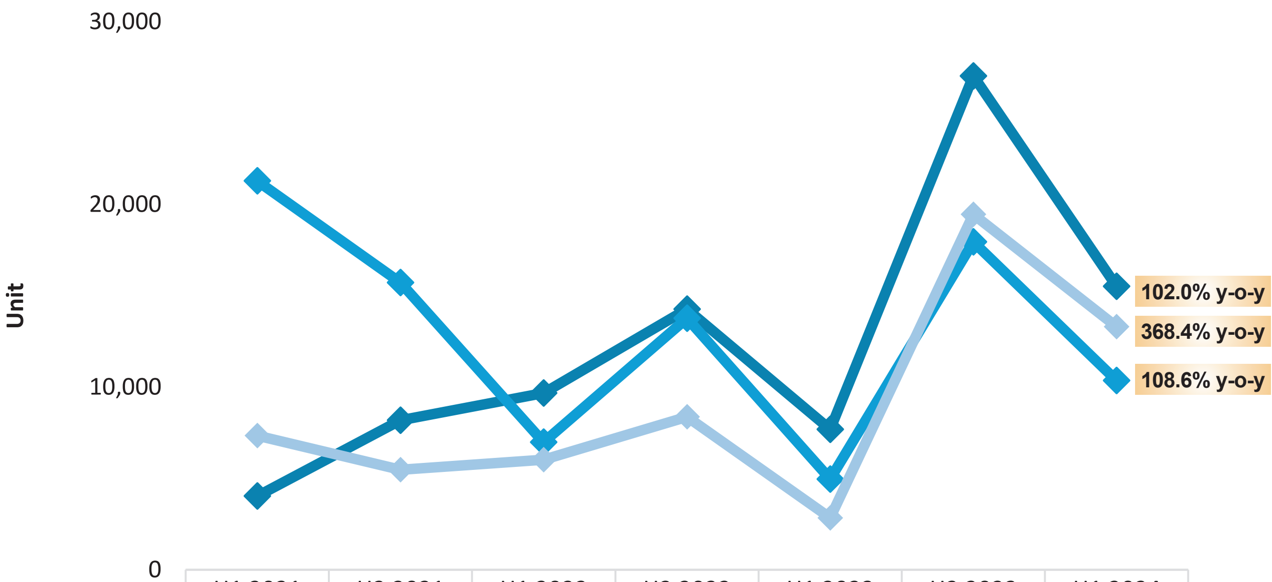


Chart 11: Trends of Completion, Starts and New Planned Supply for Serviced Apartment from H1 2021 to H1 2024



	H1 2021	H2 2021	H1 2022	H2 2022	H1 2023	H2 2023	H1 2024
Completion	4,030	8,183	9,677	14,270	7,684	27,032	15,518
Starts	21,278	15,719	6,982	13,757	4,967	17,952	10,363
New Planned Supply	7,339	5,481	6,022	8,369	2,842	19,452	13,311

4.0 KOMPLEKS PERNIAGAAN

Kompleks perniagaan sedia ada merekodkan sejumlah 1,079 bangunan dengan keluasan ruang niaga 17.76 juta m.p ditawarkan pada separuh pertama 2024. Stok ini terdiri daripada 557 pusat beli-belah (13.46 juta m.p.), 279 arked (1.20 juta m.p.) dan 243 pasaraya besar (3.10 juta m.p.).

Selangor mendahului pasaran dari segi penawaran ruang dengan syer 22.3% (3.95 juta m.p.) diikuti oleh WP Kuala Lumpur dengan 19.5% (3.47 juta m.p.) dan Johor dengan 13.8% (2.46 juta m.p.).

Sejumlah 33 bangunan (1.10 juta m.p.) berada di penawaran akan datang dengan sembilan bangunan lagi (0.35 juta m.p.) di penawaran yang dirancang. Selangor menguasai penawaran akan datang sebanyak 30.0% (0.33 juta m.p.) diikuti oleh WP Kuala Lumpur sebanyak 20.5% (0.23 juta m.p.) dan Pulau Pinang 17.3% (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 pada separuh pertama 2024. Sementara itu, terdapat tiga bangunan kompleks perniagaan mula dibina yang terdiri daripada satu arked dan dua pasaraya besar.

Senarai kompleks perniagaan yang siap dibina pada separuh pertama 2024 adalah seperti di **Jadual 1.**

4.0 SHOPPING COMPLEX

The existing shopping complex has recorded a total of 1,079 buildings, offering a retail space of 17.76 million s.m in the first half of 2024. This inventory includes 557 shopping malls (13.46 million s.m), 279 arcades (1.20 million s.m), and 243 hypermarkets (3.10 million s.m).

Selangor leads the market in terms of space supply, holding a share of 22.3% (3.95 million s.m.), followed by WP Kuala Lumpur with 19.5% (3.47 million s.m.) and Johor with 13.8% (2.46 million s.m.).

A total of 33 buildings (1.10 million s.m.) are in the incoming supply, with an additional nine buildings (0.35 million s.m.) in planned supply. Selangor dominates the incoming supply with 30.0% (0.33 million s.m.), followed by WP Kuala Lumpur at 20.5% (0.23 million s.m.) and Pulau Pinang at 17.3% (0.19 million square s.m.). Furthermore, 56.7% of the total planned supply is concentrated in WP Kuala Lumpur (0.20 million s.m.) and an additional 27.8% (0.10 million s.m.) in Pulau Pinang.

Four shopping complexes were completed in the first half of 2024. Meanwhile, three new shopping complex buildings are under construction, comprising one arcade and two hypermarkets.

The list of shopping complexes completed in first half 2024 is detailed in ***Table 1.***

Table 1: Completion of Shopping Complex in H1 2024

No	State	Name of Building	Location	Category	Total Space (s.m.)
1.	WP Kuala Lumpur	Bloomsvale Mall	Jalan Puchong	Shopping Centre	27,871
2.	Perak	Econsave Tasek	Jalan Kuala Kangsar	Hypermarket	5,310
3.	Terengganu	Pasar Payang (Baru)	Jalan Bandar	Arcade	5,724
4.	Kelantan	G-Orange Homemart	Bandar Gua Musang	Hypermarket	16,603
Total Completion in H1 2024					**55,508**

Chart 12: Shopping Complex Existing Stock by State H1 2024

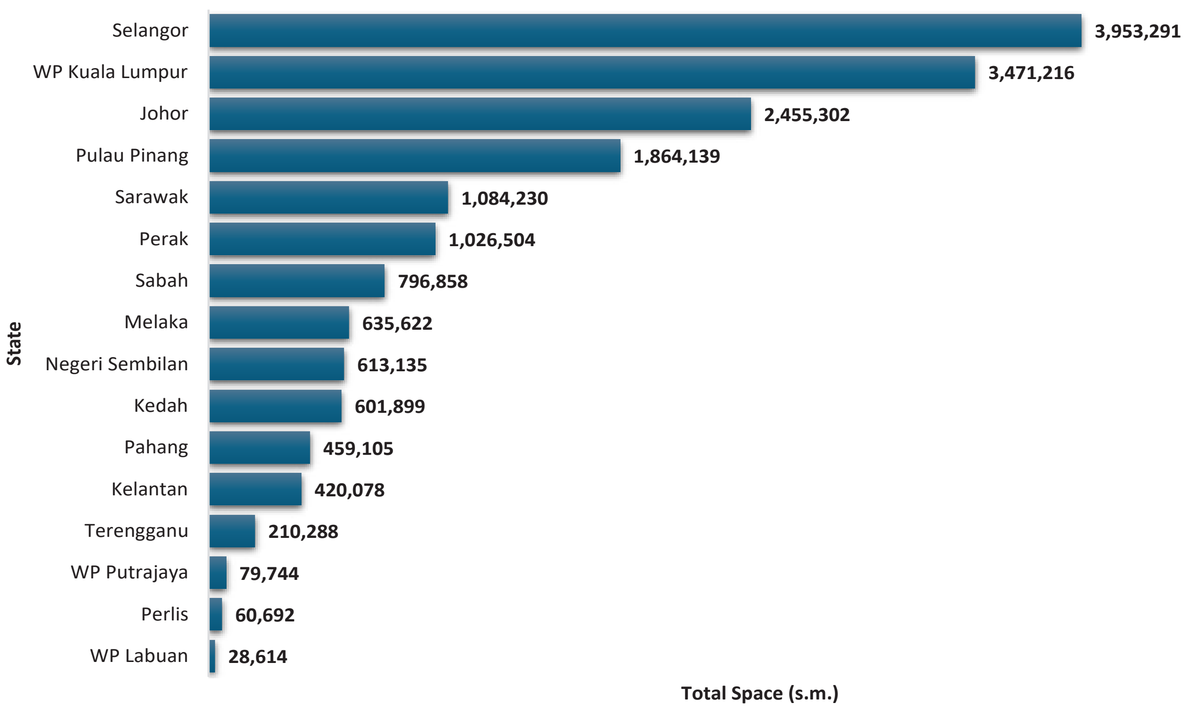


Chart 13: Shopping Complex Incoming Supply and Planned Supply by State H1 2024

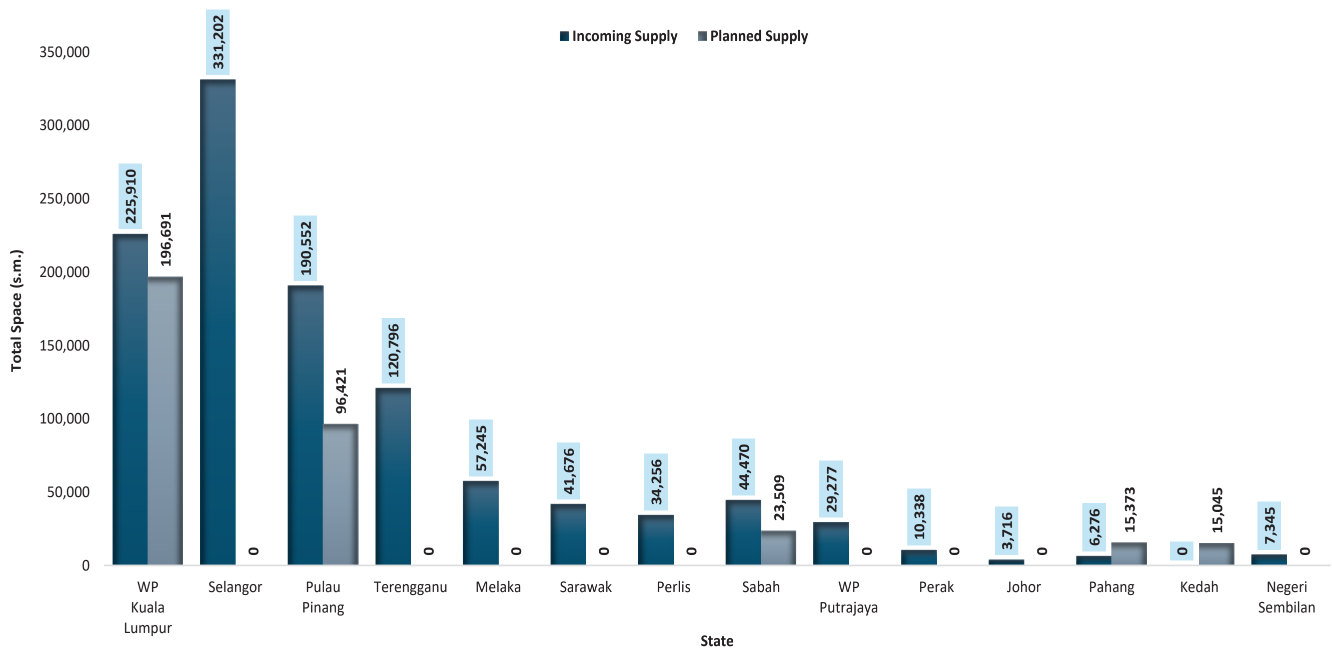
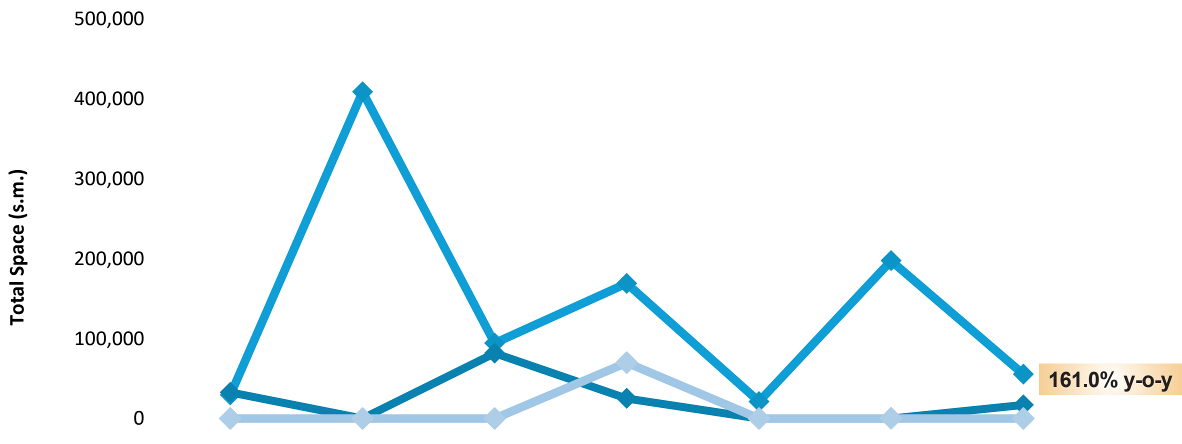


Chart 14: Trends of Completion, Starts and New Planned Supply for Shopping Complex from H1 2021 to H1 2024



	H1 2021	H2 2021	H1 2022	H2 2022	H1 2023	H2 2023	H1 2024
Completion	29,469	408,808	94,482	168,997	21,268	197,560	55,508
Starts	32,886	0	81,772	25,165	0	0	17,170
New Planned Supply	0	0	0	69,960	0	0	0

5.0 PEJABAT BINAAN KHAS

Pada separuh pertama 2024, sub-sektor pejabat binaan khas mencatatkan 2,604 bangunan yang menawarkan jumlah ruang sebanyak 24.93 juta m.p. merangkumi 1,591 bangunan swasta (18.76 juta m.p.) dan 1,013 bangunan kerajaan (6.18 juta m.p.).

WP Kuala Lumpur menerajui pasaran pejabat dengan syer 41.4% (10.26 juta m.p.) stok sedia ada, 52.6% (0.56 juta m.p.) di penawaran akan datang dan 81.2% (0.76 juta m.p.) di penawaran yang dirancang. Mengikuti di tempat kedua bagi stok sedia ada ialah Selangor dengan 18.7% (4.65 juta m.p.), Johor di penawaran akan datang dengan 13.5% (0.14 juta m.p.) dan WP Putrajaya di penawaran yang dirancang dengan 4.2% (39,875 m.p.).

Dua pejabat binaan khas (swasta) siap dibina pada separuh pertama 2024, menambah jumlah ruang pejabat sebanyak 56,948 m.p. Terdapat dua bangunan pejabat binaan khas mula dibina yang terdiri daripada swasta dan kerajaan.

Senarai pejabat binaan khas yang siap dibina pada separuh pertama 2024 adalah seperti di **Jadual 2.**

5.0 PURPOSE-BUILT OFFICE

In the first half of 2024, the purpose built office sub-sector recorded a total of 2,604 buildings, offering a total space of 24.93 million s.m., which includes 1,591 private buildings (18.76 million s.m.) and 1,013 government buildings (6.18 million s.m.).

WP Kuala Lumpur leads the office market with a share of 41.4% (10.26 million s.m.) of the existing stock, 52.6% (0.56 million s.m.) of incoming supply, and 81.2% (0.76 million s.m.) of planned supply. Following in second place for existing stock is Selangor with 18.7% (4.65 million s.m.), Johor for incoming supply with 13.5% (0.14 million s.m.) and WP Putrajaya for planned supply with 4.2% (39,875 s.m.).

Two private office buildings were completed in the first half of 2024, adding a total office space of 56,948 s.m. Additionally, there are two purpose building office building under construction, comprising both private and government owned.

*The list of purpose built office completed in first half 2024 is detailed in **Table 2.***

Table 2: Completion Of Purpose Built Office In H1 2024

No	State	Name of Building	Location	Category	Total Space (s.m.)
1.	WP Kuala Lumpur	Menara Felcra @ Semarak20	Jalan Semarak	Private	19,788
2.	Johor	Menara Bank Rakyat @ Coronation Square	Jalan Trus	Private	37,160
Total Completion in H1 2024					**56,948**

Chart 15: Purpose Built Office Existing Stock by State H1 2024

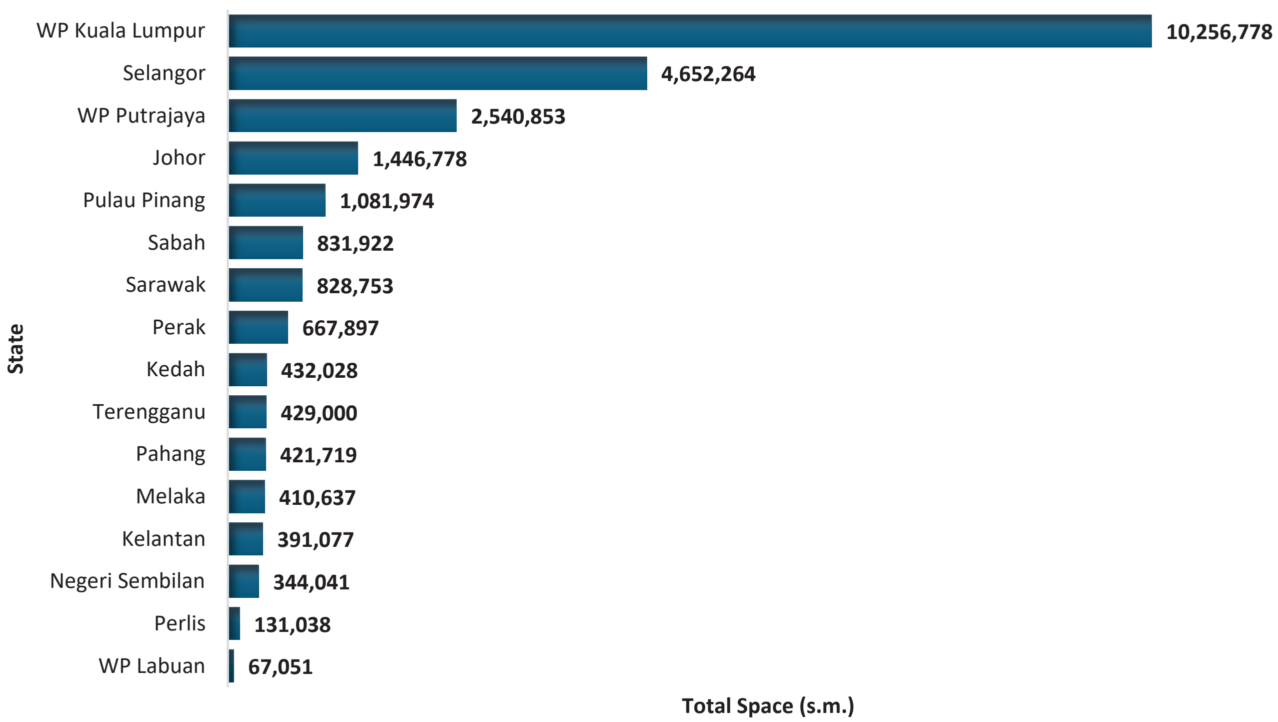


Chart 16: Purpose Built Office Incoming Supply and Planned Supply by State H1 2024

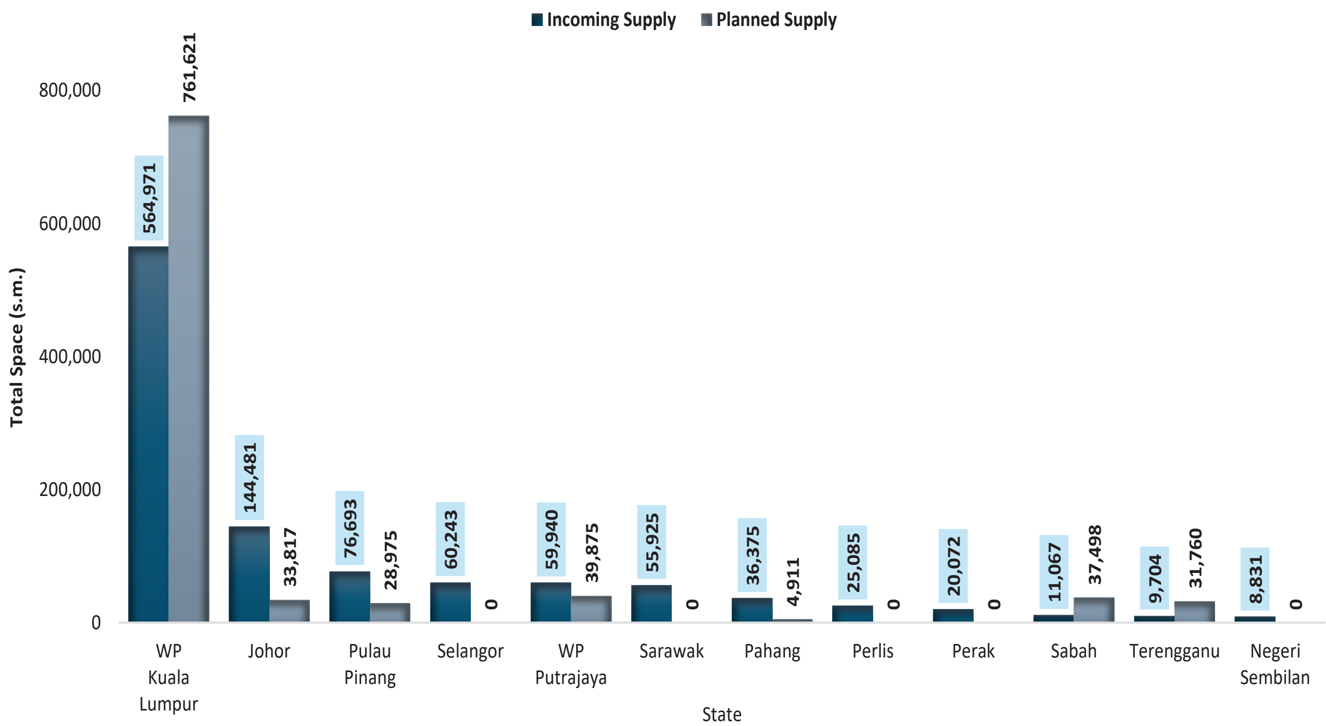
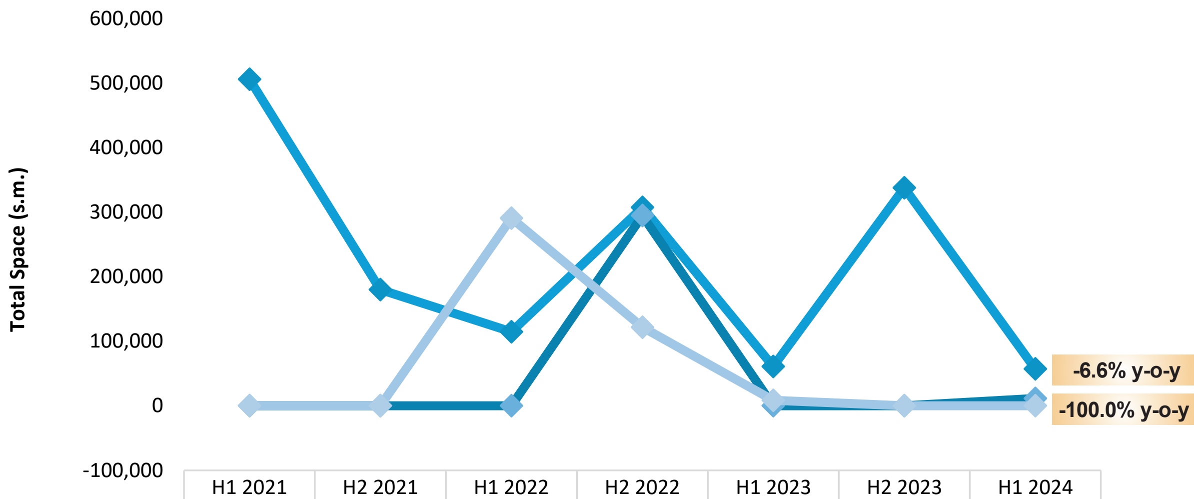


Chart 17: Trends of Completion, Starts and New Planned Supply for Purpose Built Office from H1 2021 - H1 2024



	H1 2021	H2 2021	H1 2022	H2 2022	H1 2023	H2 2023	H1 2024
Completion	505,842	180,026	114,716	307,257	60,990	337,745	56,948
Starts	0	0	0	294,560	0	0	11,305
New Planned Supply	0	0	290,610	121,812	8,330	0	0

6.0 HARTA TANAH INDUSTRI

Separuh pertama 2024, menyaksikan stok sedia ada industri berjumlah 122,151 unit direkodkan. Penawaran akan datang dan penawaran yang dirancang masing-masing merekodkan 3,814 unit dan 6,493 unit.

Selangor mendominasi stok sedia ada melebihi 40,000 unit dengan syer pasaran 34.9%, diikuti Johor 19,241 unit (15.8%) dan Pulau Pinang 9,863 unit (8.1%).

Selangor masih mengekalkan penawaran akan datang tertinggi sebagaimana separuh pertama 2023 tetapi menurun 32.3% dari segi bilangan kepada 1,217 unit. Melaka berada di kedudukan kedua dengan 773 unit dan diikuti dengan Johor 477 unit bagi penawaran akan datang.

Aktiviti pembinaan dilihat agak perlahan berbanding separuh pertama 2023 di mana siap dibina, mula dibina dan penawaran baharu dirancang masing-masing menurun sebanyak 42.7% (149 unit), 27.1% (301 unit) dan 69.0% (148 unit).

6.0 INDUSTRIAL PROPERTY

In the first half of 2024, the existing stock industry was recorded at 122,151 units. Incoming supply and planned supply were recorded at 3,814 units and 6,493 units, respectively.

Selangor leads in existing stock with over 40,000 units, holding a market share of 34.9%, followed by Johor with 19,241 units (15.8%) and Penang 9,863 units (8.1%).

Selangor continues to maintain the highest incoming supply, similar to the first half of 2023, although it has decreased by 32.3% in terms of quantity to 1,217 units. Melaka ranks second with 773 units, followed by Johor with 477 units in incoming supply.

Construction activity appears to be relatively slow compared to the first half of 2023, with completion, under construction, and new planned supply decreasing by 42.7% (149 units), 27.1% (301 units), and 69.0% (148 units) respectively.

Chart 18: Industrial Existing Stock by State H1 2024

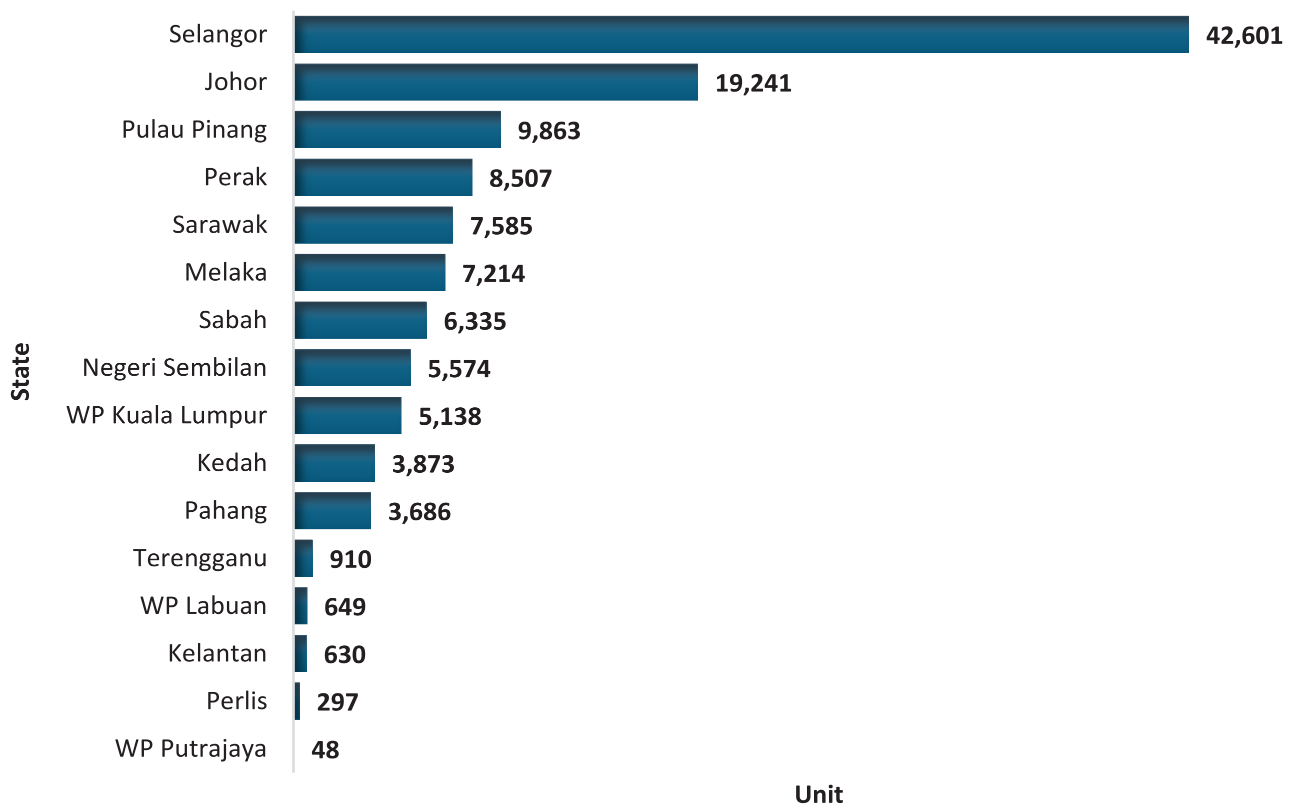


Chart 19: Industrial Incoming Supply and Planned Supply by State H1 2024

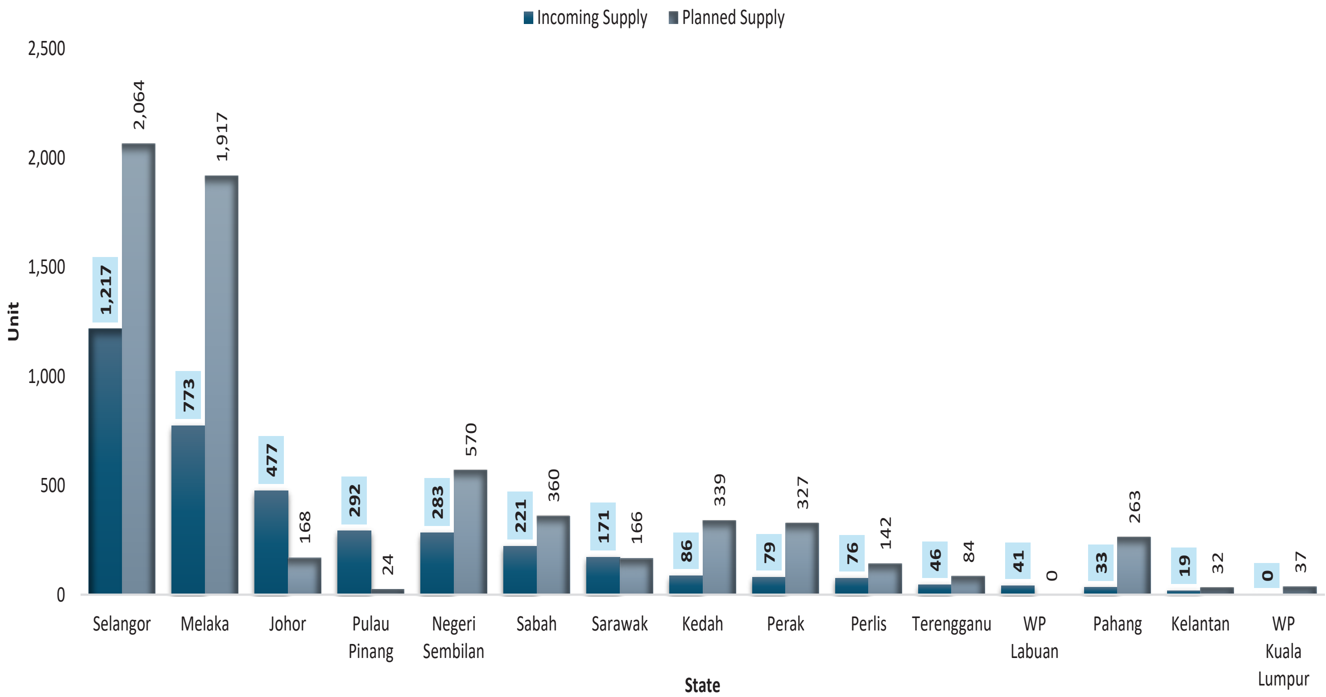
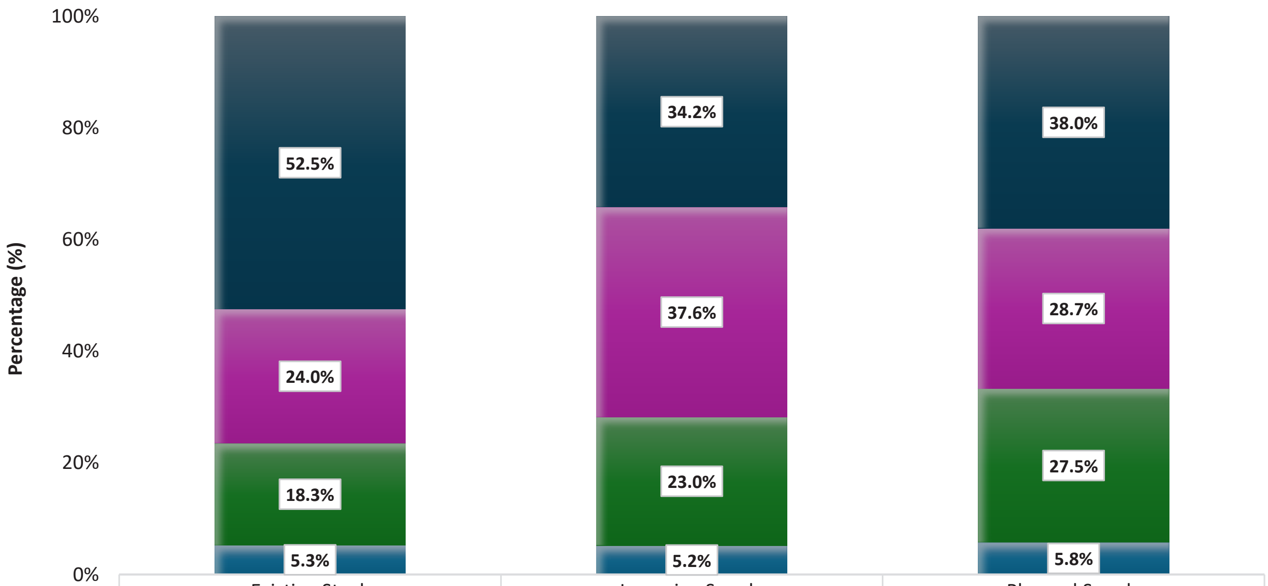
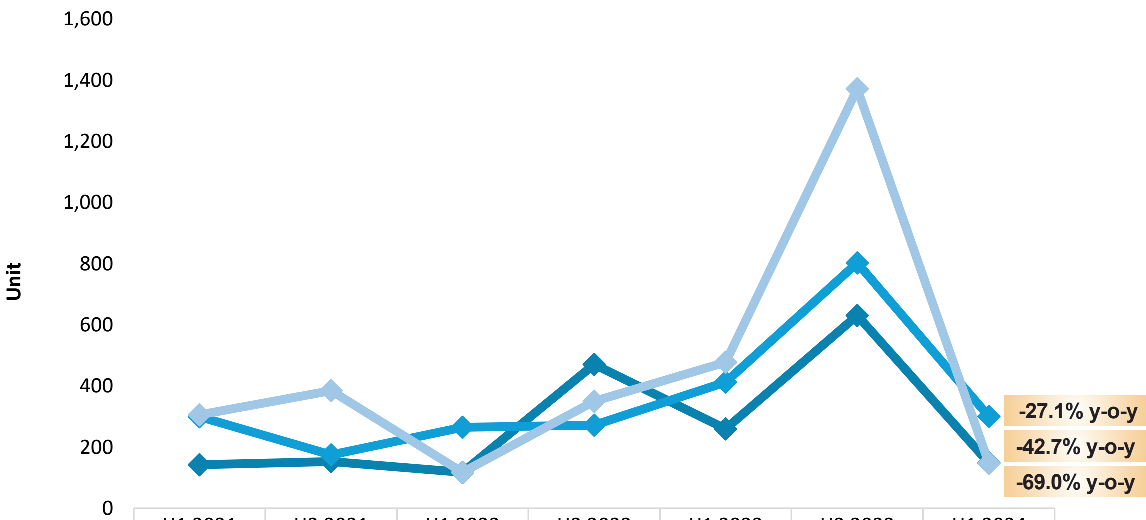


Chart 20: Distribution of Industrial by Building Type H1 2024



	Existing Stock	Incoming Supply	Planned Supply
Terraced	64,105	1,304	2,467
Semi-Detached	29,324	1,434	1,864
Detached	22,302	878	1,788
Others	6,420	198	374

Chart 21: Trends of Completion, Starts and New Planned Supply for Industrial from H1 2021 - H1 2024



	H1 2021	H2 2021	H1 2022	H2 2022	H1 2023	H2 2023	H1 2024
Completion	143	153	118	471	260	631	149
Starts	300	175	265	272	413	803	301
New Planned Supply	306	385	118	350	478	1,372	148

7.0 HARTA TANAH RIADAH

Separuh pertama 2024, merekodkan sejumlah 277,019 bilik (3,546 hotel) sedia ada berada di pasaran manakala 17,038 bilik (81 hotel) dalam penawaran akan datang dan 13,380 bilik (65 hotel) dalam penawaran yang dirancang.

WP Kuala Lumpur menyumbang jumlah tertinggi bilik hotel sedia ada (47,177 bilik) dan penawaran akan datang (3,646 bilik). Johor menawarkan bilangan bilik tertinggi di penawaran yang dirancang sebanyak 3,178 bilik.

Tiga hotel baharu (327 bilik) di Perak, Pahang dan Kelantan direkodkan sebagai penawaran baharu dirancang. Tiga hotel (637 bilik) dicatatkan siap dibina pada separuh pertama 2024 sebagaimana **Jadual 3.**

7.0 LEISURE PROPERTY

First half of 2024 recorded a total of 277,019 rooms (3,546 hotels) are currently available in the market while there are 17,038 rooms (81 hotels) in incoming supply and 13,380 rooms (65 hotels) in planned supply.

WP Kuala Lumpur contributes the highest number of existing hotel rooms (47,177 rooms) and incoming supply (3,646 rooms). Johor has the largest number of rooms in planned supply, totalling 3,178 rooms.

Three new hotels (327 rooms) have been recorded as planned in Perak, Pahang, and Kelantan. Three hotels (with a total of 637 rooms) have been noted as completed in the first half of 2024, as detailed in ***Table 3.***

Table 3: Completion of Hotel in H1 2024

No	State	Name of Hotel	Location	No. of Room
1.	Johor	Permas City	Bandar Baru Permas	150
2.	Sabah	Hotel Kapalai	Bandar Kapalai, Semporna	199
3.	Sabah	Citadines Waterfront Kota Kinabalu	Jalan Tun Fuad Stephens, Kota Kinabalu	288
Total Completion in H1 2024				**637**

Chart 22: Hotel Existing Stock by State H1 2024

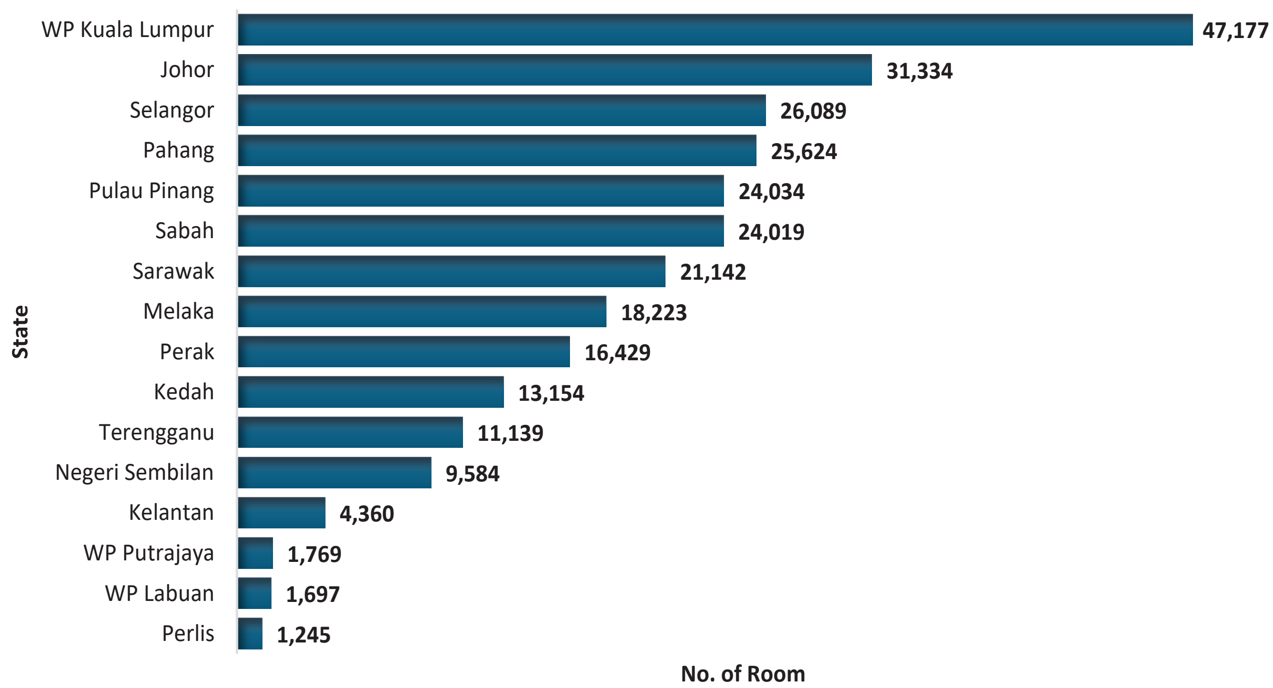


Chart 23: Hotel Incoming Supply and Planned Supply by State H1 2024

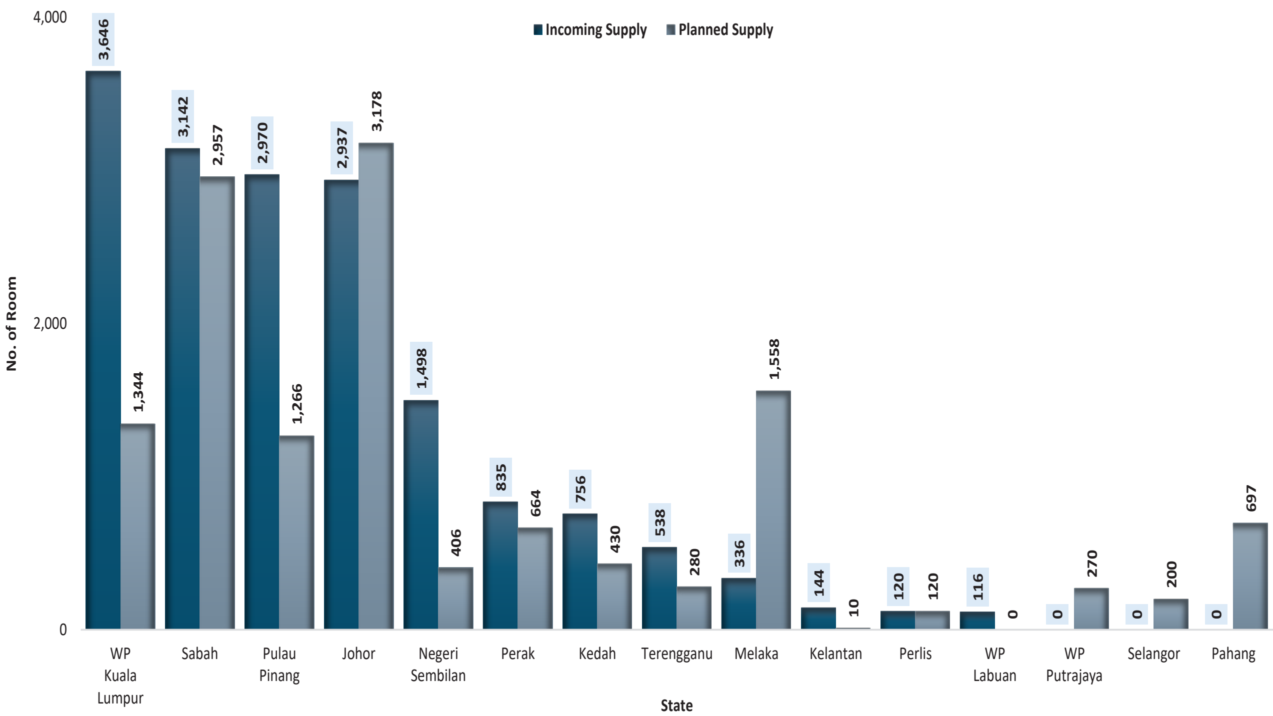
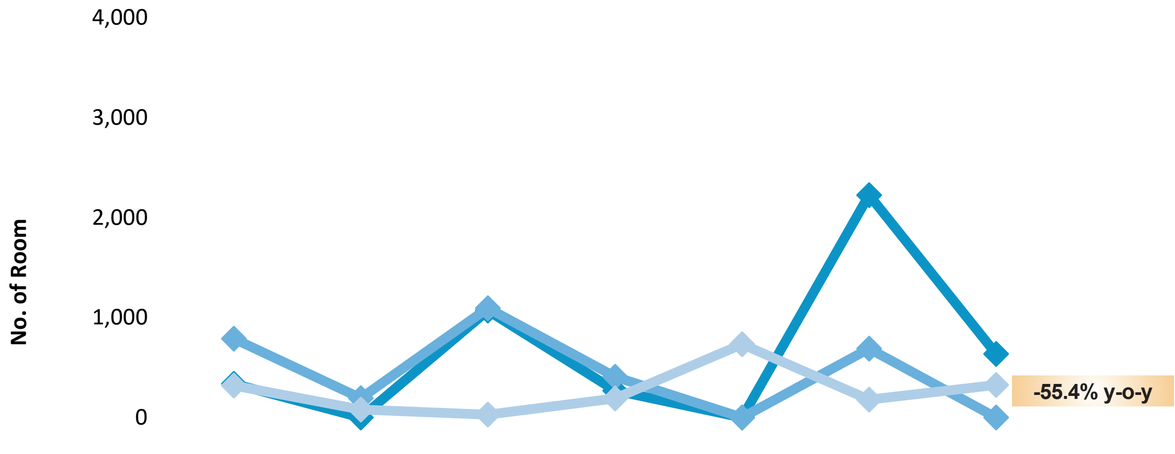


Chart 24: Trends of Completion, Starts and New Planned Supply for Hotel from H1 2021 - H1 2024



	H1 2021	H2 2021	H1 2022	H2 2022	H1 2023	H2 2023	H1 2024
Completion	337	0	1,071	270	0	2,225	637
Starts	790	195	1,094	407	0	690	0
New Planned Supply	320	80	29	190	733	178	327

Catatan Teknikal

Technical Notes

CATATAN TEKNIKAL

1.0 Tempoh kajian

Laporan Stok Harta Tanah pada tahun 2024 adalah seperti berikut:

Q1 : 1 Januari 2024 - 31 Mac 2024
Q2 : 1 April 2024 - 30 Jun 2024
Q3 : 1 Julai 2024 - 30 September 2024
Q4 : 1 Oktober 2024 - 31 Disember 2024

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 2024 of the Property Stock Report is as follows:

Q1 : 1 January 2024 - 31 March 2024
Q2 : 1 April 2024 - 30 June 2024
Q3 : 1 July 2024 - 30 September 2024
Q4 : 1 October 2024 - 31 December 2024

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***
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*

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