KEMENTERIAN KEWANGAN

LAPORAN STOK HARTA TANAH
Property Stock Report

2024

Sambutan Jubli Perak NAPIC

PUSAT MAKLUMAT HARTA TANAH NEGARA

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

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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Property Stock Report 2024

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State	Residential		
	Existing Stock	Incoming Supply	Planned Supply
WP Kuala Lumpur	561,102	53,654	65,437
WP Putrajaya	20,251	685	3,224
WP Labuan	14,039	373	196
Selangor	1,727,701	85,085	62,546
Johor	928,421	36,121	45,462
Pulau Pinang	565,105	28,853	21,447
Perak	542,826	39,042	41,449
Negeri Sembilan	311,209	18,768	26,928
Melaka	223,469	24,279	23,977
Kedah	356,692	18,709	15,458
Pahang	310,143	14,226	35,129
Terengganu	119,376	12,277	7,844
Kelantan	93,675	9,876	3,889
Perlis	27,978	964	2,206
Sabah	245,690	18,885	21,178
Sarawak	296,310	16,553	7,126
MALAYSIA	**6,343,987**	**378,350**	**383,496**

State	Shop		
	Existing Stock	Incoming Supply	Planned Supply
WP Kuala Lumpur	33,432	301	1,087
WP Putrajaya	538	0	0
WP Labuan	1,051	50	0
Selangor	115,315	5,127	3,454
Johor	99,646	4,802	5,113
Pulau Pinang	41,159	1,057	2,085
Perak	64,288	2,178	3,399
Negeri Sembilan	27,553	1,166	2,438
Melaka	23,518	1,719	1,777
Kedah	33,240	686	1,157
Pahang	26,486	1,345	3,483
Terengganu	9,048	659	620
Kelantan	14,877	894	497
Perlis	5,842	300	838
Sabah	35,454	2,271	2,269
Sarawak	40,519	1,249	1,062
MALAYSIA	**571,966**	**23,804**	**29,279**

State	SOHO			Serviced Apartment		
	Existing Stock	Incoming Supply	Planned Supply	Existing Stock	Incoming Supply	Planned Supply
WP Kuala Lumpur	9,800	3,582	5,585	134,788	41,859	56,989
WP Putrajaya	0	0	0	1,204	323	940
WP Labuan	0	0	0	0	0	0
Selangor	47,472	15,726	4,379	130,439	57,515	29,283
Johor	3,269	1,486	2,349	108,449	23,759	27,852
Pulau Pinang	4,696	1,524	1,267	9,711	8,523	9,008
Perak	1,043	617	3,052	1,567	710	1,096
Negeri Sembilan	104	0	0	14,498	2,657	598
Melaka	0	352	0	9,688	7,538	5,488
Kedah	0	0	0	637	0	0
Pahang	0	0	0	9,767	3,323	6,736
Terengganu	0	0	53	276	33	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	2,729
Sarawak	563	72	11	1,447	3,494	4,328
MALAYSIA	**67,414**	**23,359**	**16,696**	**426,881**	**151,767**	**146,537**

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	91	3,071,940	16	114,612	50	835,914	4	280,202	0	0
Johor	69	1,833,420	39	101,543	48	520,339	2	17,716	0	0
Pulau Pinang	41	1,288,523	48	374,502	18	277,886	2	107,123	2	96,421
Perak	38	589,461	9	41,599	36	395,444	3	15,572	0	0
Negeri Sembilan	30	318,200	42	80,234	23	215,029	1	7,345	0	0
Melaka	21	437,974	0	0	10	194,380	2	57,245	0	0
Kedah	37	471,214	12	21,760	11	108,925	0	0	2	20,031
Pahang	24	377,867	10	7,471	10	73,767	1	6,276	2	15,373
Terengganu	9	176,597	28	40,789	5	58,770	1	7,845	0	0
Kelantan	9	237,418	14	75,819	8	106,841	0	0	0	0
Perlis	4	22,110	19	31,384	1	8,220	3	30,418	0	0
Sabah	35	699,862	10	27,427	10	73,738	3	61,415	1	23,509
Sarawak	72	1,016,706	2	1,639	7	65,885	2	41,676	0	0
MALAYSIA	**560**	**13,675,419**	**281**	**1,197,405**	**244**	**3,101,959**	**32**	**888,020**	**10**	**352,025**

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	419	9,657,110	48	606,738	9	551,461	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	257	4,352,000	23	332,373	3	123,160	0	0
Johor	128	1,005,810	94	451,187	4	134,262	1	33,817
Pulau Pinang	149	811,055	60	291,134	4	58,031	0	0
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	84	264,729	0	0	1	4,911
Terengganu	39	132,315	85	296,685	1	9,704	1	31,760
Kelantan	123	173,043	166	218,034	1	46,988	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	80	555,153	43	351,308	2	17,517	0	0
MALAYSIA	**1,597**	**18,838,827**	**1,016**	**6,278,679**	**38**	**1,066,118**	**27**	**909,482**

State	Industrial		
	Existing Stock	Incoming Supply	Planned Supply
WP Kuala Lumpur	5,138	0	37
WP Putrajaya	48	0	0
WP Labuan	650	41	0
Selangor	43,133	1,651	898
Johor	19,290	591	303
Pulau Pinang	9,953	226	0
Perak	8,524	80	542
Negeri Sembilan	5,574	298	766
Melaka	7,289	716	1,899
Kedah	3,887	86	404
Pahang	3,686	32	233
Terengganu	910	74	56
Kelantan	633	18	30
Perlis	301	72	143
Sabah	6,420	203	317
Sarawak	7,641	133	269
MALAYSIA	**123,077**	**4,221**	**5,897**

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	254	47,525	16	3,636	9	1,432
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	488	31,971	9	2,300	9	3,196
Pulau Pinang	250	25,389	12	2,415	12	1,471
Perak	330	16,429	10	1,106	2	363
Negeri Sembilan	145	9,607	4	1,498	4	406
Melaka	177	18,268	1	336	5	1,558
Kedah	175	13,154	6	756	4	430
Pahang	303	25,624	0	0	8	770
Terengganu	250	11,487	2	410	3	352
Kelantan	91	4,360	1	144	1	10
Perlis	32	1,285	2	120	1	120
Sabah	424	24,329	22	4,091	11	2,791
Sarawak	387	21,194	0	0	0	0
MALAYSIA	**3,564**	**280,177**	**86**	**16,928**	**71**	**13,369**

RESIDENTIAL PROPERTY STOCK REPORT

1.0 HARTA TANAH KEDIAMAN

Stok sedia ada kediaman seluruh negara pada tahun 2024 mencecah 6.34 juta dengan pembangunan bertanah mendominasi 68.5% berbanding pembangunan strata sebanyak 31.5%. Stok yang sedang dalam perancangan juga menunjukkan lebih 55.0% didominasi oleh pembangunan bertanah. Jumlah keseluruhan penawaran akan datang dan penawaran yang dirancang masing-masing merekodkan 378,350 dan 383,496 unit.

Selangor merekodkan bilangan stok sedia ada dan kediaman sedang dalam pembinaan tertinggi di mana stok sedia ada mencecah 1.73 juta dan penawaran akan datang melebihi 85,000 unit. Walau bagaimanapun dari segi bilangan pembangunan yang telah mendapat kelulusan, WP Kuala Lumpur merekodkan bilangan lebih tinggi berbanding Selangor iaitu 65,437 yang merupakan perancangan akan datang tertinggi negara pada tahun 2024.

Aktiviti pembinaan tahun 2024 merekodkan bilangan unit siap dibina, bilangan baru bina dan bilangan kelulusan perancangan yang tertinggi sejak lima tahun yang lepas.

Rekod menunjukkan 82,135 unit siap dibina, 106,037 unit yang baru memulakan pembinaan manakala unit yang telah mendapat kelulusan pembinaan mencecah 100,461 unit. Jika dibandingkan dengan tahun 2023, peningkatan yang ketara direkodkan antara 20.3% dan 24.1% bagi unit-unit dalam perancangan dan telah memulakan pembinaan.

1.0 RESIDENTIAL PROPERTY

The housing stock across the nation in 2024 is reaching 6.34 million units, with landed developments accounting for 68.5% compared to 31.5% for stratified developments. The stock currently in the planning stage also indicates that over 55.0% is dominated by landed developments. The total incoming and planned supply are recorded at 378,350 and 383,496 units, respectively.

Selangor has recorded the highest number of existing stock and residential units under construction, with existing stock reaching 1.73 million and upcoming offerings exceeding 85,000 units. However, in terms of the number of developments that have received approval, WP Kuala Lumpur surpasses Selangor, with a total of 65,437 approved projects, marking the highest planned developments in the country for the year 2024.

The construction activities in 2024 have recorded the highest number of completed units, new constructions, and planning approvals in the past five years.

Records show that the number of Completion units are 82,135, Starts are 106,037 and New Plan Supply reaching 100,461 units. When compared to 2023, a significant increase of between 20.3% and 24.1% has been recorded for units in planning and those that have begun construction.

Chart 1: Residential Existing Stock by State 2024

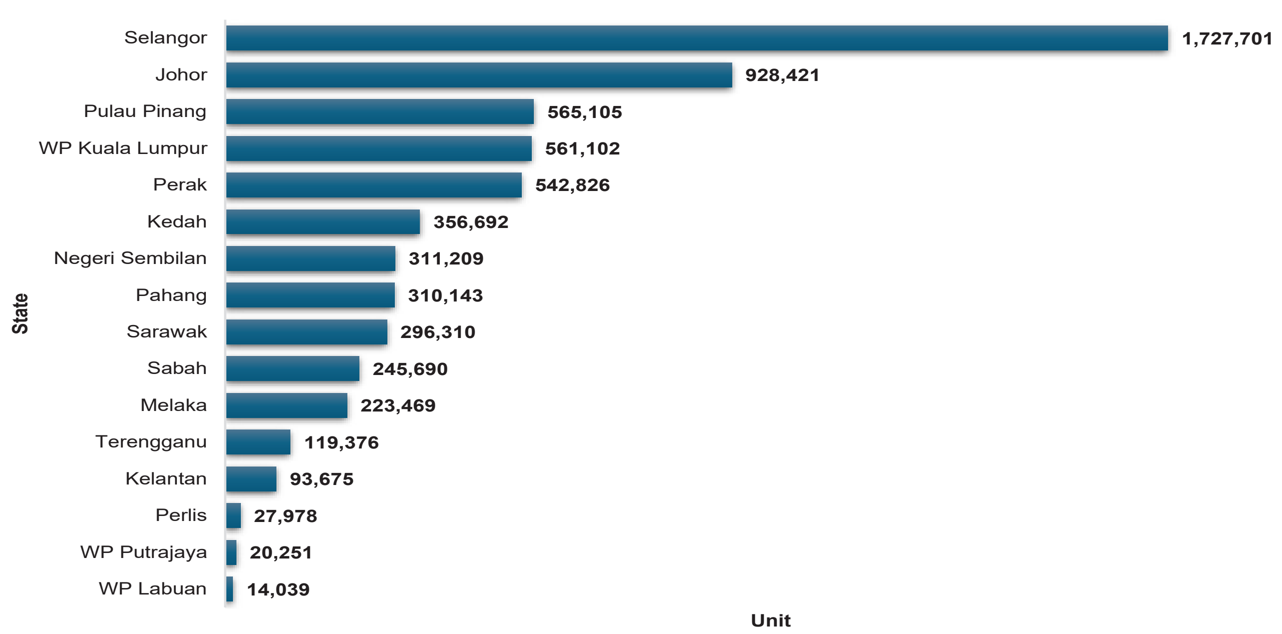


Chart 2: Residential Incoming Supply and Planned Supply by State 2024

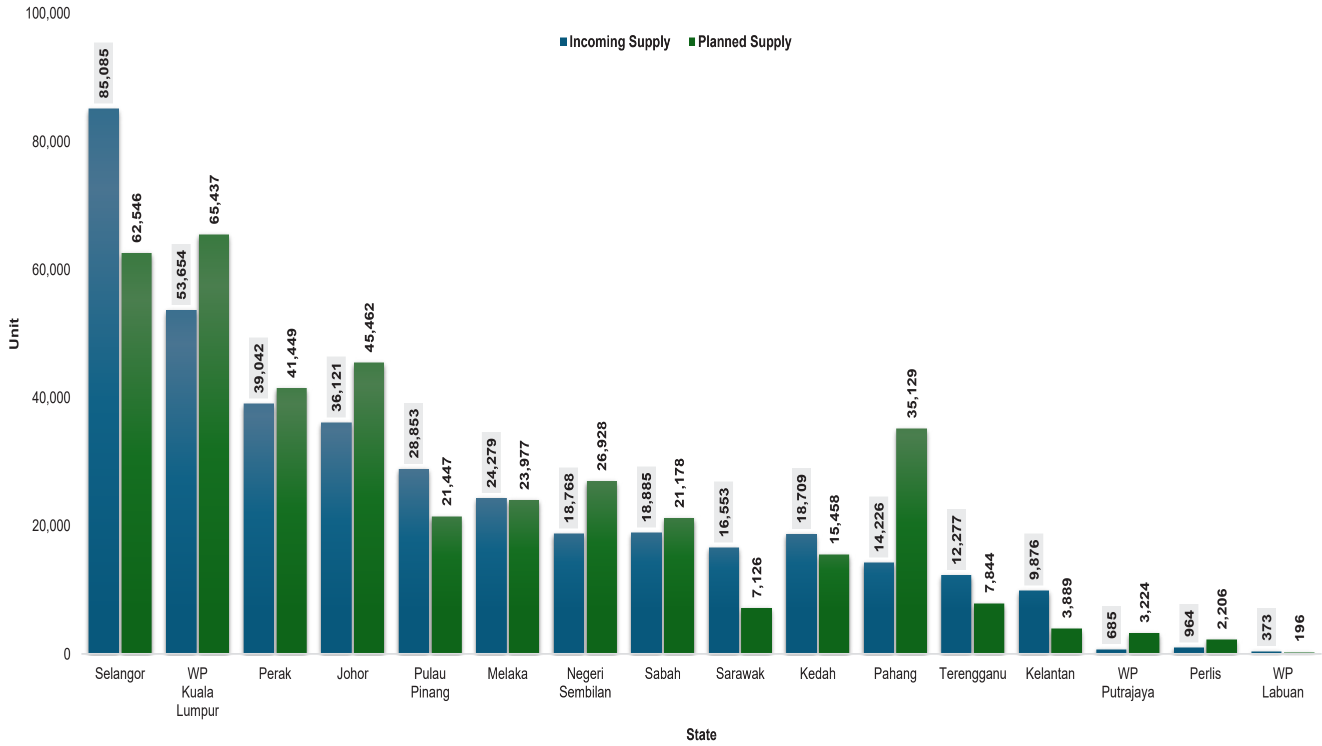
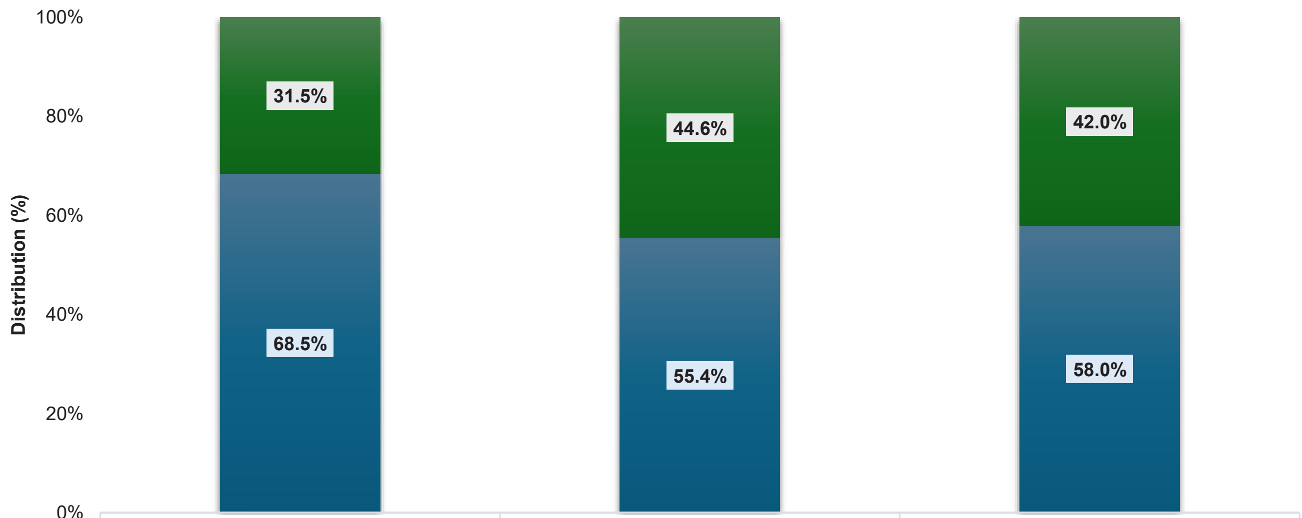


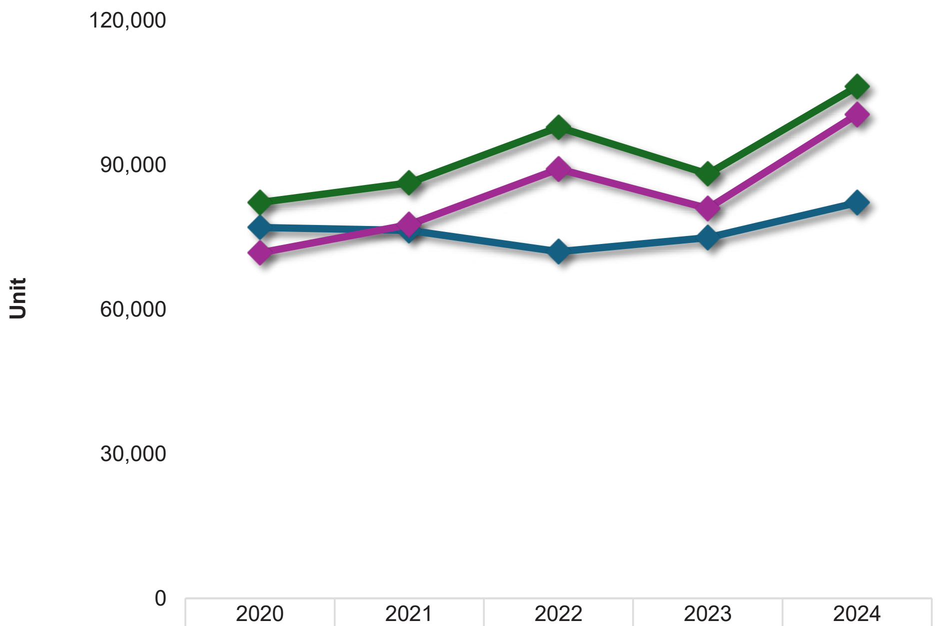
Chart 3: Distribution of Landed and Stratified Residential Supply by Development Stage 2024



	Existing Stock	Incoming Supply	Planned Supply
Stratified	2,000,772	168,715	161,141
Landed	4,343,215	209,635	222,355

Development Stage

Chart 4: Trends of Completion, Starts and New Planned Supply for Residential Supply from 2020 - 2024



	2020	2021	2022	2023	2024
Completion	77,009	76,393	71,981	74,893	82,135
Starts	82,188	86,258	97,804	88,114	106,236
New Planned Supply	71,725	77,585	89,111	80,964	100,461

2.0 KEDAI

Pada 2024, sebanyak 571,966 unit kedai sedia ada direkodkan, 23,804 unit dalam peringkat penawaran akan datang dan 29,279 unit penawaran yang dirancang.

Selangor mendahului jumlah stok sedia ada (115,315 unit), diikuti Johor dan Perak di mana masing-masing melebihi 99,000 dan 64,000 unit.

Jumlah stok sedia ada kedai dijangka akan terus meningkat dengan pertambahan jumlah unit yang sedang dalam pembinaan khususnya bagi Selangor dan Johor yang menunjukkan peningkatan penawaran akan datang yang masing-masing melebihi 5,000 dan 4,800 unit.

Teres dua hingga dua setengah tingkat mendominasi pembangunan dengan menyumbang lebih daripada 40.0% daripada jumlah inventori dalam perancangan dan sedia ada.

Walaupun bilangan unit siap menurun berbanding 2023 (13.6%), aktiviti pembinaan terus bertambah baik dan meningkat di mana bagi projek baru bina dan penawaran baru dirancang menyaksikan peningkatan masing-masing sebanyak 18.9% (4,952 unit) dan 24.0% (5,677 unit).

2.0 SHOP

In 2024, a total of 571,966 existing shop units were recorded, along with 23,804 units in the incoming supply stage and 29,279 units in plan supply.

Selangor leads in the existing stock with a total of 115,315 units, followed by Johor and Perak, which each exceed 99,000 and 64,000 units, respectively.

The existing stock for shops are expected to continue rising due to the increase in the number of units under construction, particularly in Selangor and Johor, which are projected to see incoming supply increases of over 5,000 and 4,800 units, respectively.

Two to two-and-a-half storey terraced dominated the development with contributed more than 40.0% of total inventory in the pipeline and existing.

Although the number of completed unit has decreased compared to 2023 (13.6%), construction activities continue to improve, with Starts and New Planned Supply witnessing increases of 18.9% (4,952 units) and 24.0% (5,677 units), respectively.

Chart 5: Shop Existing Stock by State 2024

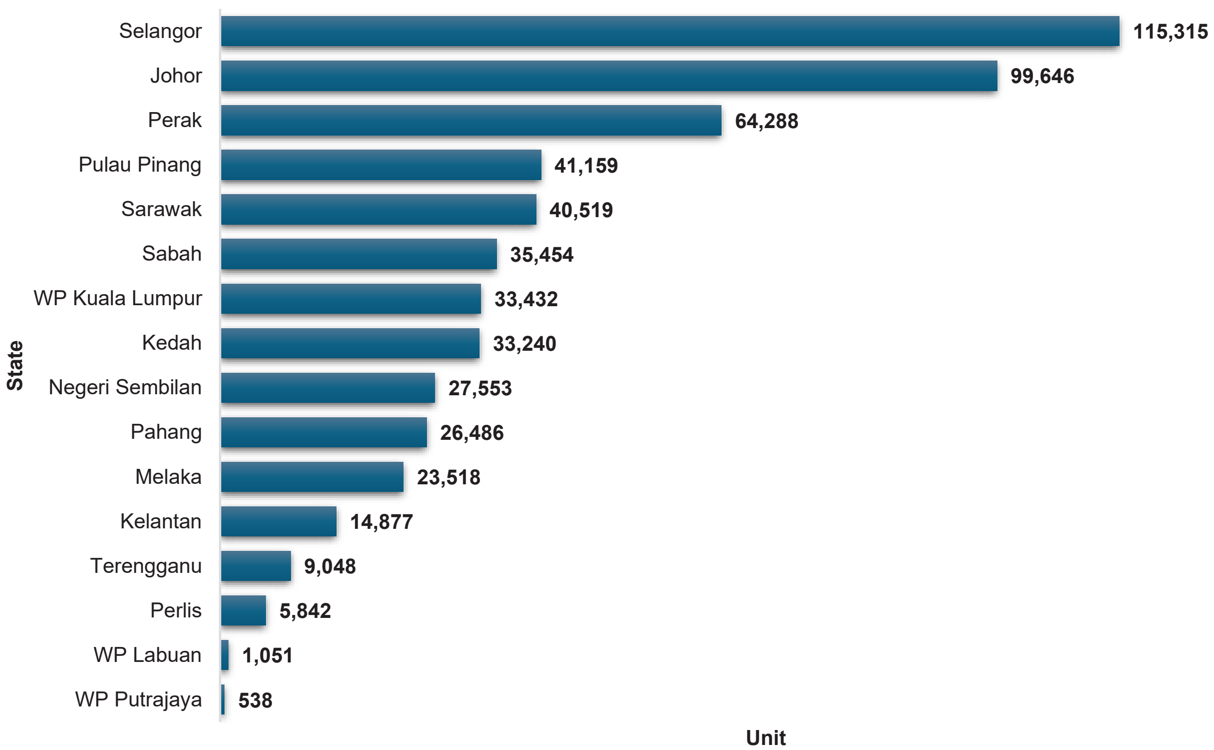


Chart 6: Shop Incoming Supply and Planned Supply by State 2024

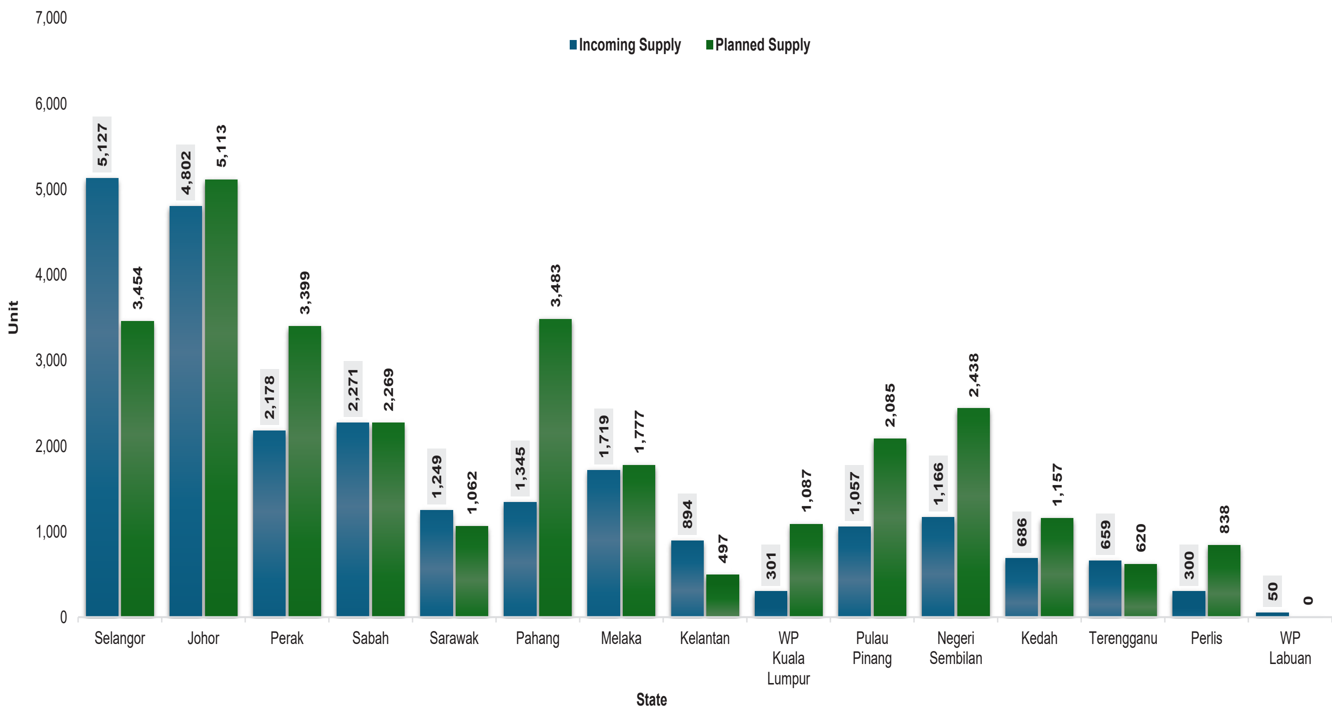
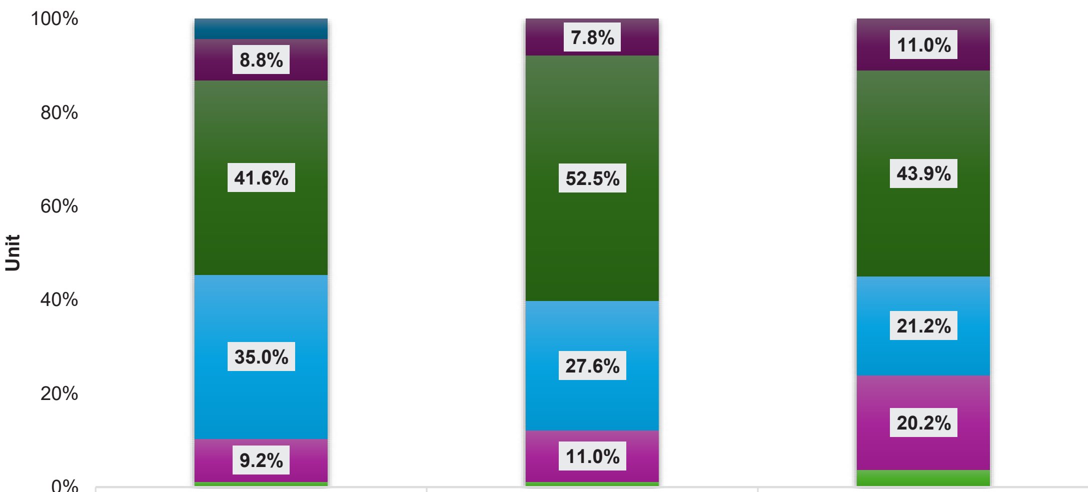


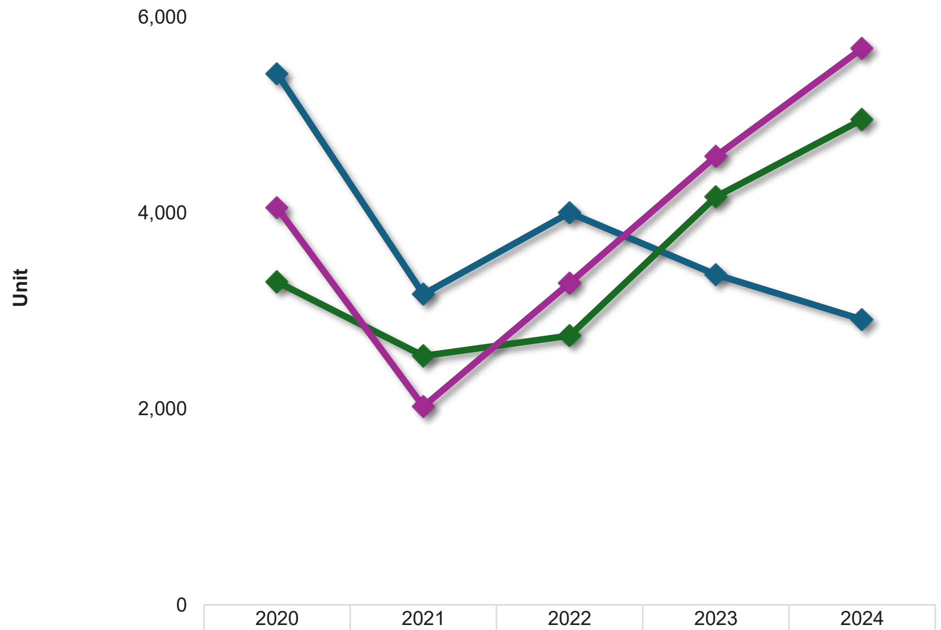
Chart 7: Distribution of Shop by Building Type 2024



	Existing Stock	Incoming Supply	Planned Supply
Prewar	24,459	0	0
< 2 storey terrace	50,132	1,845	3,219
2 - 2 1/2 storey terrace	237,785	12,487	12,860
> 2 1/2 storey terrace	200,468	6,576	6,206
Stratified	52,433	2,615	5,901
Others	6,689	281	1,093

Development Stage

Chart 8: Trends of Completion, Starts and New Planned Supply for Shop from 2020 - 2024



	2020	2021	2022	2023	2024
Completion	5,421	3,169	4,000	3,371	2,911
Starts	3,294	2,540	2,746	4,165	4,952
New Planned Supply	4,053	2,024	3,285	4,578	5,677

3.0 PANGSAPURI KHIDMAT

Sejumlah 426,881 unit sedia ada pangsapuri khidmat telah direkodkan pada tahun 2024 manakala sejumlah 151,767 unit penawaran akan datang dan 146,537 unit penawaran yang dirancang.

Majoriti pangsapuri khidmat terletak di WP Kuala Lumpur, Selangor dan Johor dengan gabungan syer pasaran 87.5% stok sedia ada (373,676 unit), 81.1% penawaran akan datang (123,133 unit) dan 77.9% penawaran yang dirancang (114,124 unit).

Tahun 2024 menandakan titik perubahan di mana pasaran pangsapuri perkhidmatan mencapai rekod tertinggi dalam aktiviti pembinaan dalam tempoh lima tahun. Projek siap mencatatkan peningkatan 24.9% berbanding tahun 2023. Peningkatan yang sangat ketara juga direkodkan bagi unit yang baru memulakan pembinaan dan unit yang telah memperoleh kelulusan pelan bangunan di mana unit memulakan pembinaan dan penawaran yang dirancang masing-masing meningkat 117.3% dan 106.2% berbanding tahun 2023.

3.0 SERVICED APARTMENT

A total of 426,881 units of existing serviced apartments were recorded in year 2024 whilst another 151,767 units in the incoming supply and 146,537 units in the planned supply.

Majority of serviced apartments located in WP Kuala Lumpur, Selangor and Johor, with a combined market share of 87.5% in the existing stock (373,676 units), 81.1% incoming supply (123,133 units) and 77.9% planned supply (114,124 units).

The year 2024 signifies a turning point as the serviced apartment market reaches a record high in construction activity over the past five years. Completed projects have shown a remarkable increase of 24.9% compared to 2023. Additionally, there has been a significant rise in units that have recently commenced construction and those that have received building plan approvals where Starts and New Plan Supply increasing by 117.3% and 106.2%, respectively, compared to the previous year.

Chart 9: Serviced Apartment Existing Stock by State 2024

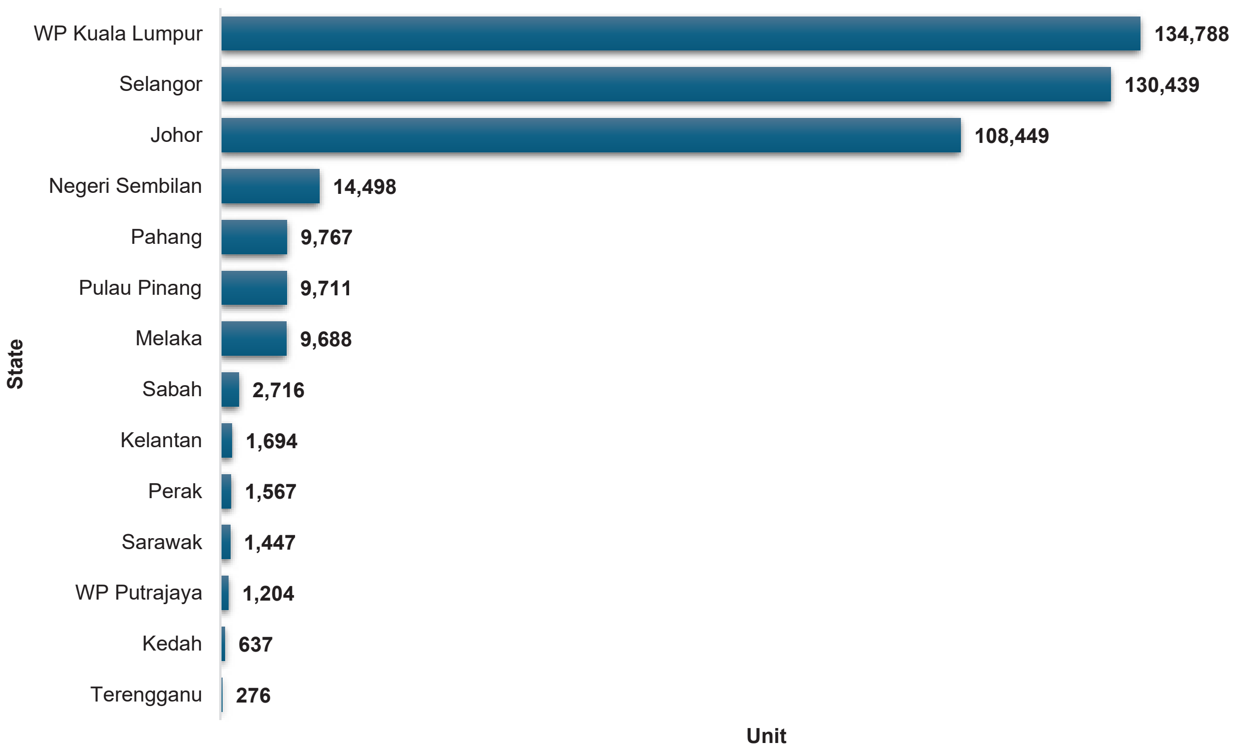


Chart 10: Serviced Apartment Incoming Supply and Planned Supply by State 2024

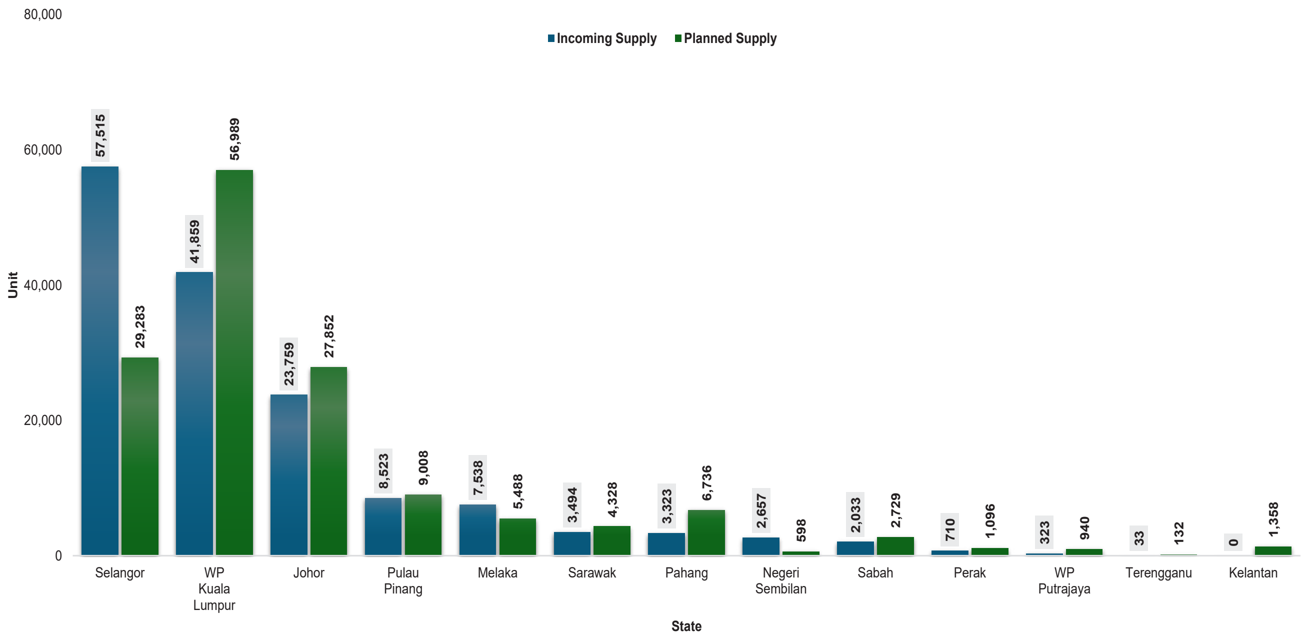
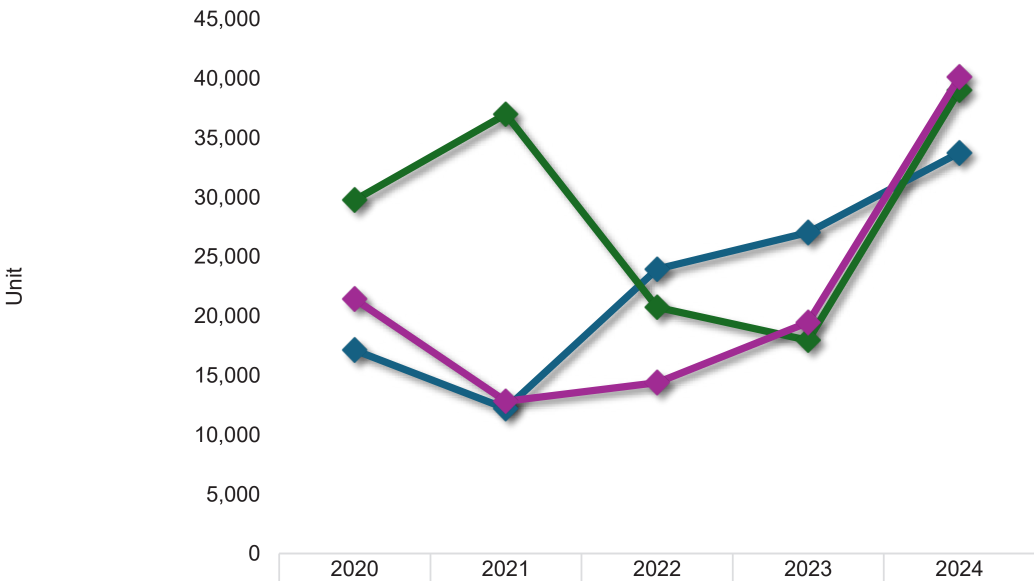


Chart 11: Trends of Completion, Starts and New Planned Supply for Serviced Apartment from 2020 - 2024



	2020	2021	2022	2023	2024
Completion	17,114	12,213	23,947	27,032	33,750
Starts	29,761	36,979	20,739	17,952	39,011
New Planned Supply	21,420	12,820	14,391	19,452	40,105

4.0 KOMPLEKS PERNIAGAAN

Pada tahun 2024, hampir 18 juta m.p. ruang kompleks perniagaan sedia ada direkodkan di seluruh negara. Daripada jumlah ini, 76.1% merupakan ruang pusat beli belah, 17.3% ruang pasaraya besar dan selebihnya merupakan ruang arked.

Lebih 40.0% daripada ruang kompleks perniagaan sedia ada seluruh negara didominiasi oleh Selangor dan WP Kuala Lumpur dengan kombinasi keluasan 7.49 juta m.p.

Inventori kompleks perniagaan akan terus meningkat dengan pertambahan 32 kompleks membeli-belah dalam penawaran akan datang di mana secara kolektifnya akan menyediakan ruang kira-kira 0.89 juta m.p. Selain itu, terdapat 10 kompleks perniagaan dalam peringkat perancangan, yang dijangka akan menambah seluas 352,025 m.p. ruang komples perniagaan pada masa akan datang.

Sebanyak 10 kompleks perniagaan telah siap dibina pada tahun 2024 yang melibatkan jumlah keseluruhan ruang 271,489 m.p.

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

4.0 SHOPPING COMPLEX

In 2024, nearly 18 million s.m. of existing retail space shopping complexes were recorded nationwide. Of this total, 76.1% comprises shopping centres space, 17.3% consists of hypermarkets space, and the remaining portion is allocated to arcades space.

Over 40.0% of the existing shopping complex space nationwide is dominated by Selangor and WP Kuala Lumpur, with a combined area of 7.49 million s.m.

The inventory of shopping complexes is expected to continue growing with the addition of 32 shopping complexes in the incoming supply, which will collectively provide approximately 0.89 million s.m. of space. Furthermore, there are 10 shopping complexes currently in the planning stage, anticipated to contribute an additional 352,025 s.m. of commercial space in the future.

A total of 10 commercial complexes were completed in 2024, encompassing a total area of 271,489 s.m.

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

Table 1: Completion of Shopping Complex in 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.	Selangor	Elmina Lakeside Mall	Urban Park, Elmina	Shopping Centre	18,175
3.	Selangor	168 Retail Park	Persiaran 3, Baru Selayang	Shopping Centre	51,000
4.	Pulau Pinang	Sunshine Tower Mall	Jalan Thean Teik	Shopping Centre	76,772
5.	Perak	Econsave Tasek	Jalan Kuala Kangsar	Hypermarket	5,310
6.	Negeri Sembilan	BizBox Nilai	Pekan Nilai	Arcade	328
7.	Terengganu	Mayang Mall	Off Jalan Sultan Zainal Abidin	Shopping Centre	65,868
8.	Terengganu	Pasar Payang (Baru)	Jalan Bandar	Arcade	5,724
9.	Kelantan	G-Orange Mall	Bandar Gua Musang	Hypermarket	16,603
10.	Perlis	Padang Besar Street	Jalan Kangar - Padang Besar	Arcade	3,838
Total Completion in 2024					**271,489**

Chart 12: Shopping Complex Existing Stock by State 2024

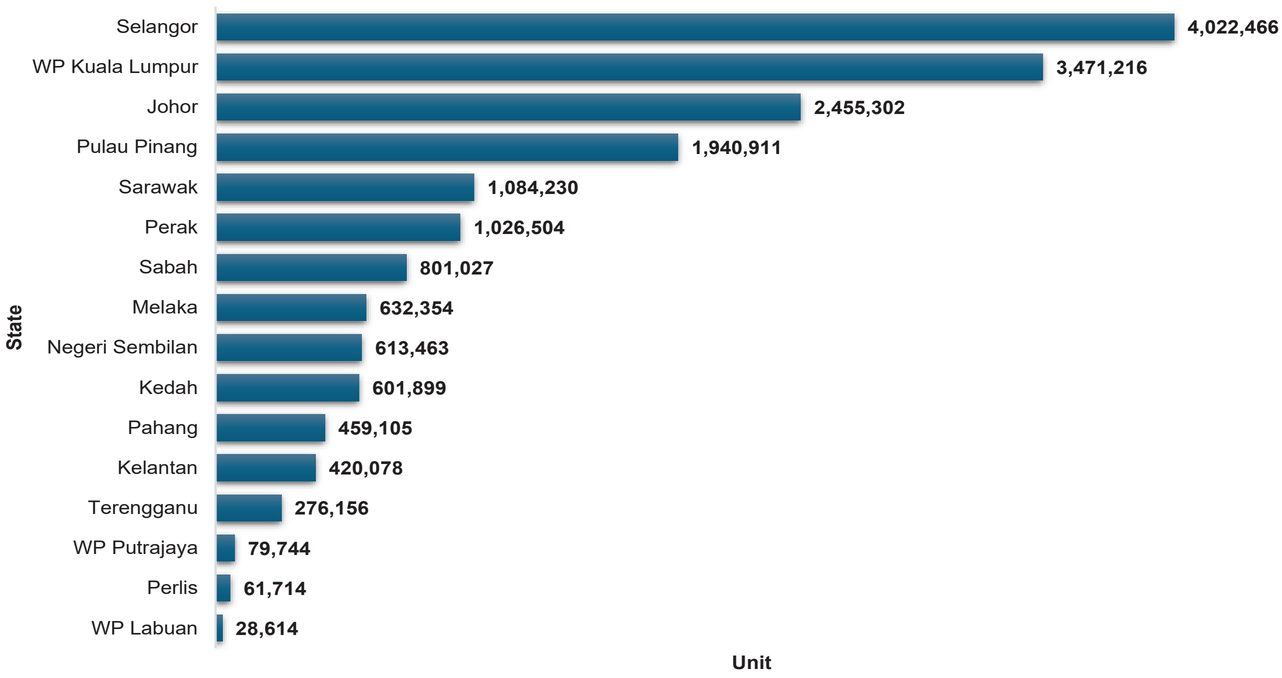


Chart 13: Shopping Complex Incoming Supply and Planned Supply by State 2024

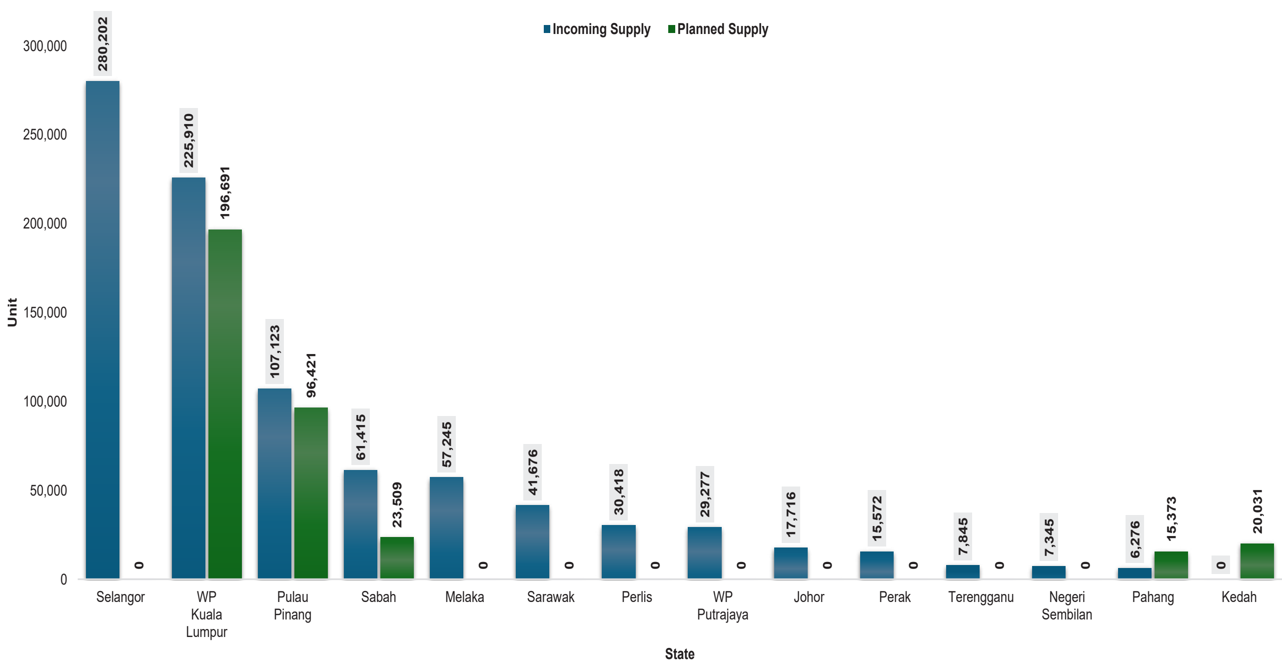
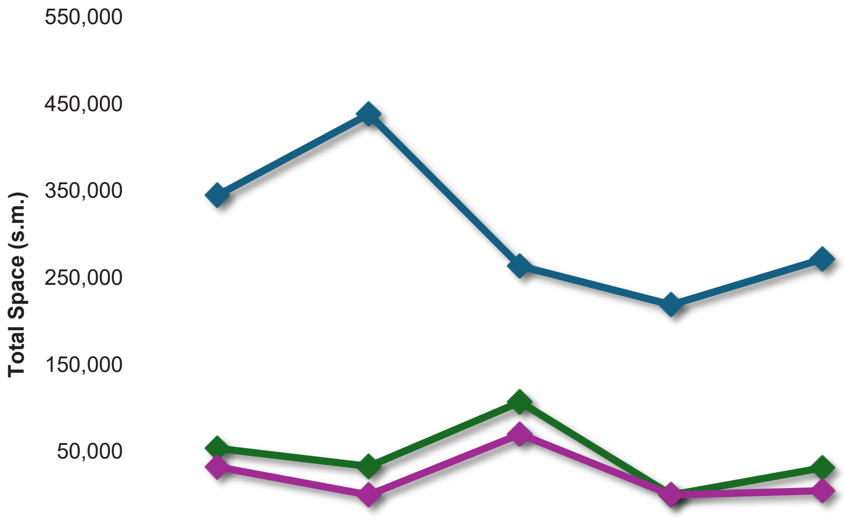


Chart 14: Trends of Completion, Starts and New Planned Supply for Shopping Complex from 2020 - 2024



	2020	2021	2022	2023	2024
Completion	344,859	438,277	263,479	218,828	271,489
Starts	53,648	32,886	106,937	0	31,170
New Planned Supply	32,242	0	69,960	0	4,986

5.0 PEJABAT BINAAN KHAS

Kira-kira 2,613 bangunan pejabat binaan khas dengan keluasan keseluruhan 25.12 juta m.p. sedia ada direkodkan pada 2024. Daripada jumlah ini, 75.0% adalah terdiri bangunan milik swasta (18.84 juta m.p.) dan selebihnya bangunan milik kerajaan (6.28 juta m.p.).

WP Kuala Lumpur menerajui inventori pejabat binaan khas seluruh negara dengan komposisi 40.9% stok sedia ada (10.26 juta m.p.), 51.7% di penawaran akan datang (0.55 juta m.p.) dan 83.7% di penawaran yang dirancang (0.76 juta m.p.).

Di segmen pembinaan, lapan bangunan milik swasta dan tiga bangunan milik kerajaan yang siap dibina pada tahun 2024 telah menambah ruang sedia ada pejabat binaan khas sebanyak 229,270 m.p.

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

5.0 PURPOSE-BUILT OFFICE

A total of 2,613 existing purpose-built office buildings, covering an overall area of 25.12 million s.m., were recorded in 2024. Of this total, 75.0% consists of private-owned buildings (18.84 million s.m.), while the remainder comprise public-owned buildings (6.28 million s.m.).

WP Kuala Lumpur leads the inventory of purpose-built office spaces nationwide, comprising 40.9% of existing stock (10.26 million s.m.), 51.7% in incoming supply (0.55 million s.m.), and 83.7% in planned supply (0.76 million s.m.).

In the construction segment, eight privately owned buildings and three government-owned buildings are set to be completed in 2024, contributing an additional 229,270 s.m. to the existing space of purpose-built office.

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

Table 2: Completion Of Purpose Built Office In 2024

No	State	Name of Building	Location	Category	Total Space (s.m.)
1.	WP Kuala Lumpur	Menara Felcra @ Semarak 20	Jalan Semarak	Private	19,788
2.	WP Kuala Lumpur	Bloomsvale Menara Vista	Jalan Puchong, Off Jalan Klang Lama	Private	7,070
3.	Selangor	Atwater Seksyen 13 (Tower A)	Seksyen 13, Petaling Jaya	Private	14,683
4.	Selangor	Atwater Seksyen 13 (Tower B)	Seksyen 13, Petaling Jaya	Private	12,654
5.	Selangor	Menara Lembaga Zakat Selangor	Seksyen 14, Shah Alam	Government	4,772
6.	Johor	Menara Bank Rakyat @ Coronation Square	Jalan Trus	Private	37,160
7.	Johor	UMCITY Corporate Tower	Medini, Iskandar Puteri	Private	10,219
8.	Pulau Pinang	Sunshine Tower	Jalan Thean Teik	Private	20,215
9.	Pahang	Pusat Pentadbiran Sultan Haji Ahmad Shah	Kotasas, Bandar Indera Mahkota	Government	36,375
10.	Sarawak	One Shell Square Building	Jalan Marina 1	Private	17,398
11.	Sarawak	Hikmah Exchange	Jalan Haji Taha	Government	48,936
Total Completion in 2024					**229,270**

Chart 15: Purpose Built Office Existing Stock by State 2024

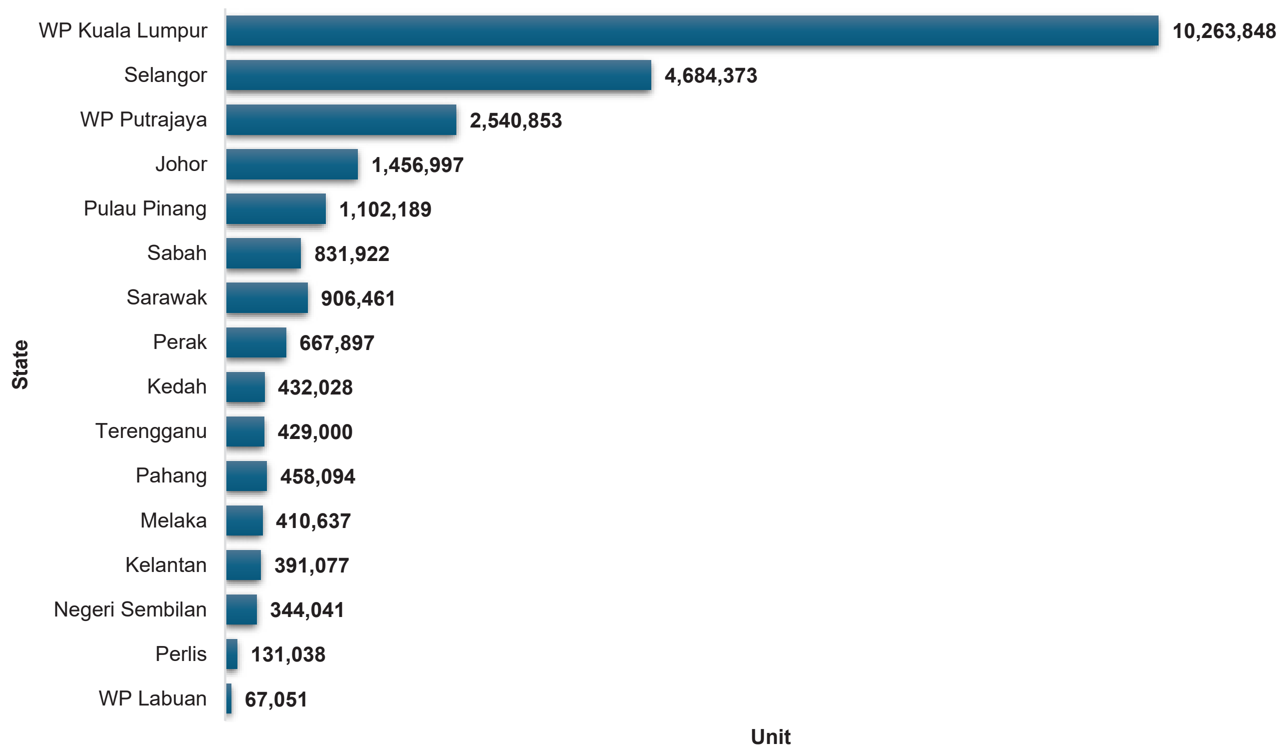


Chart 16: Purpose Built Office Incoming Supply and Planned Supply by State 2024

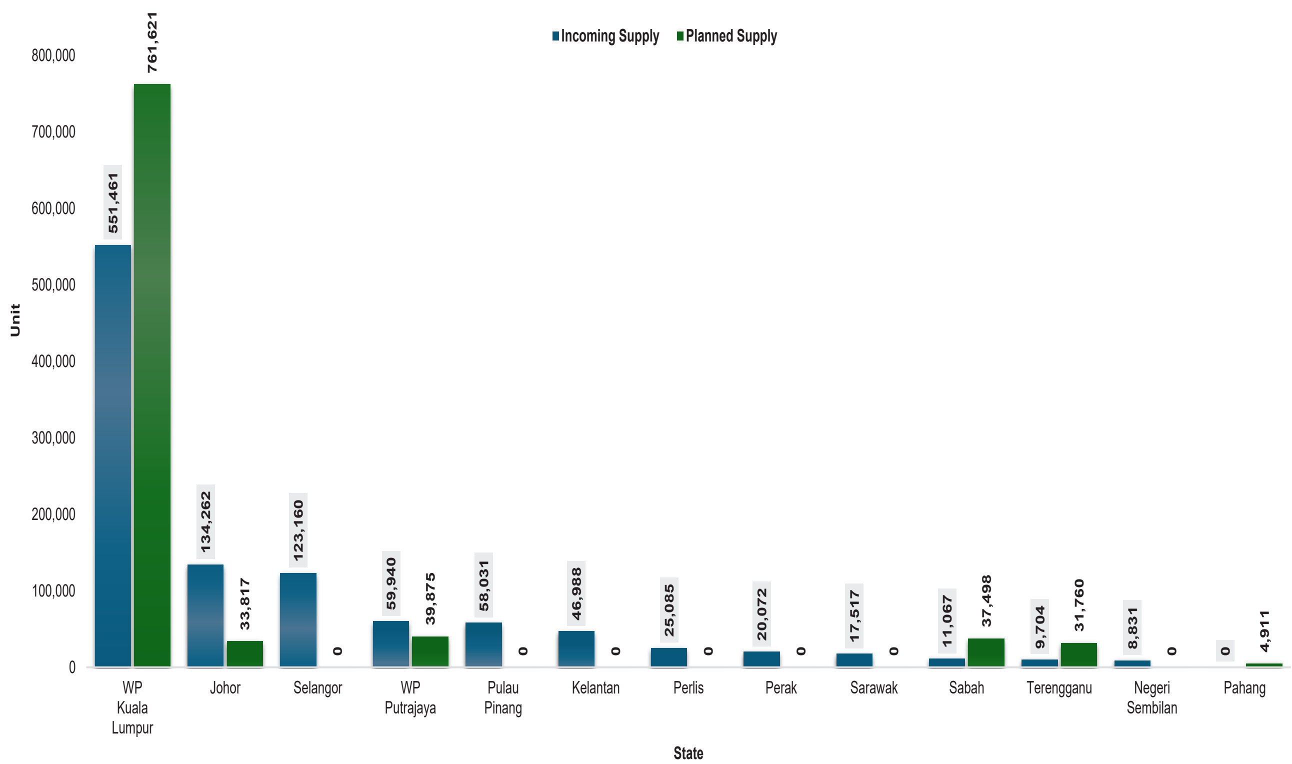
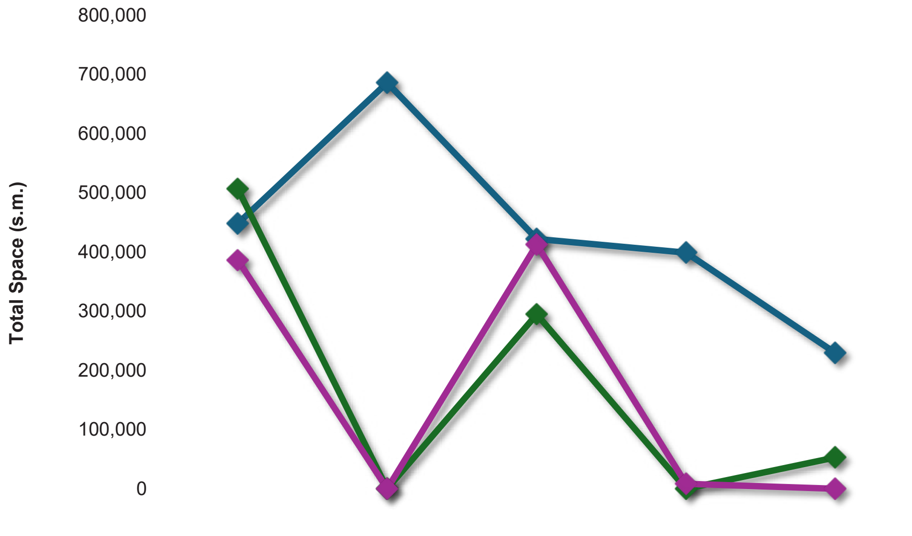


Chart 17: Trends of Completion, Starts and New Planned Supply for Purpose Built Office from 2020 - 2024



	2020	2021	2022	2023	2024
Completion	448,152	685,868	421,973	398,735	229,270
Starts	506,184	0	294,560	0	53,030
New Planned Supply	385,965	0	412,422	8,330	0

6.0 HARTA TANAH INDUSTRI

Pada tahun 2024, unit industri merekodkan sejumlah 123,077 stok sedia ada, 4,221 unit di penawaran akan datang dan 5,897 unit di penawaran yang dirancang.

Selangor mendahului jumlah stok industri dengan syer 35.0% di stok sedia ada (43,133 unit) dan 39.1% di penawaran akan datang (1,651 unit). Di peringkat penawaran yang dirancang, Melaka merekodkan bilangan tertingi di mana sebanyak 1,899 unit mendapat kelulusan pembangunan iaitu kira-kira 32.2% dari keseluruhan penawaran yang dirancang.

Stok sedia ada kebanyakannya terdiri daripada jenis teres iaitu 53.3% daripada jumlah unit keseluruhan (64,338 unit). Unit yang sedang dalam perancangan juga menunjukkan lebih 30.0% didominasi oleh pembangunan jenis teres.

Walaupun bilangan unit siap sedikit menurun berbanding 2023 (8.0%), aktiviti pembinaan terus bertambah baik dan meningkat di mana bagi projek yang baru memulakan pembinaan menyaksikan peningkatan sebanyak 26.2% (1,013 unit) berbanding tahun sebelumnya.

6.0 INDUSTRIAL PROPERTY

In the year 2024, the industrial unit recorded a total of 123,077 units in existing stock, with 4,221 units in the incoming supply and 5,897 units in planned supply.

Selangor leads the industrial stock with a share of 35.0% of the existing stock (43,133 units) and 39.1% of the incoming supply (1,651 units). In terms of planned supply, Melaka recorded the highest number, with 1,899 units receiving development approval, which accounts for approximately 32.2% of the total planned supply.

The existing stock predominantly comprises terraced types, accounting for 53.3% of the total units (64,338 units). Additionally, the stock currently in planning also indicates that over 30.0% is also dominated by the terraced type.

Although the number of completed units has slightly decreased compared to 2023 (8.0%), construction activities continue to improve and increase, with a Starts experiencing a rise of 26.2% (1,013 units) compared to the previous year.

Chart 18: Industrial Existing Stock by State 2024

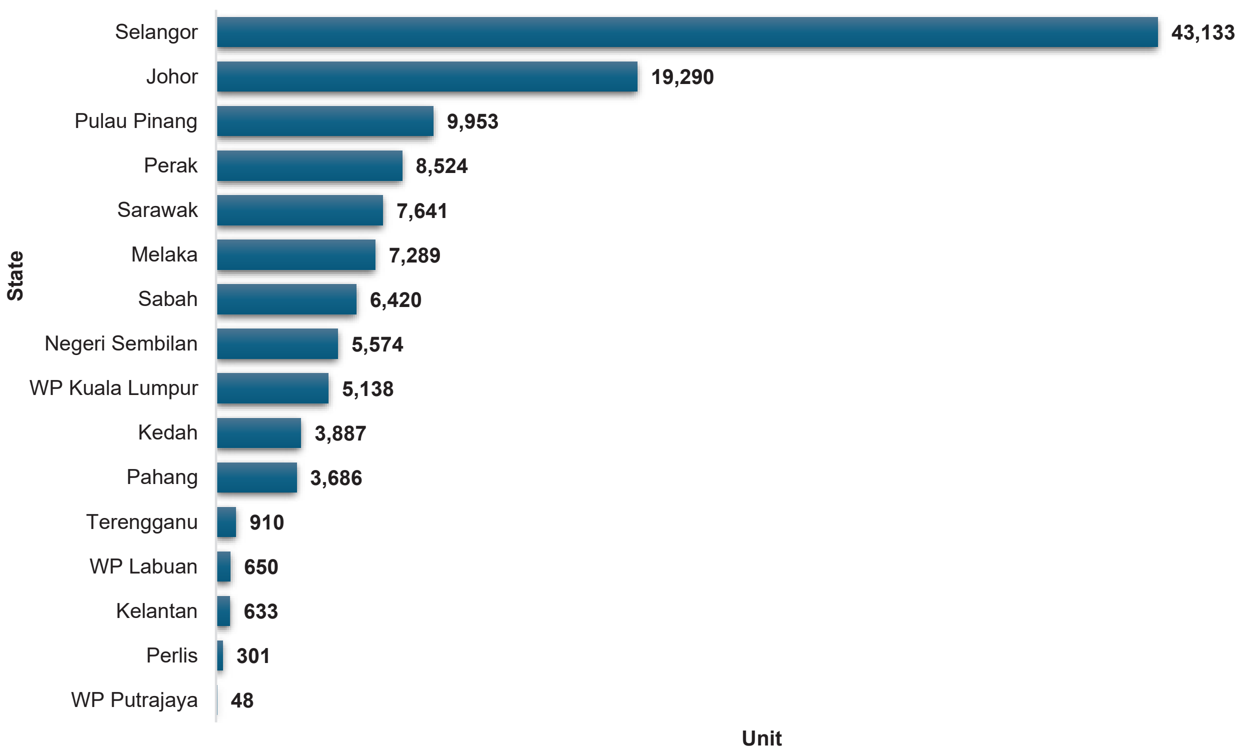


Chart 19: Industrial Incoming Supply and Planned Supply by State 2024

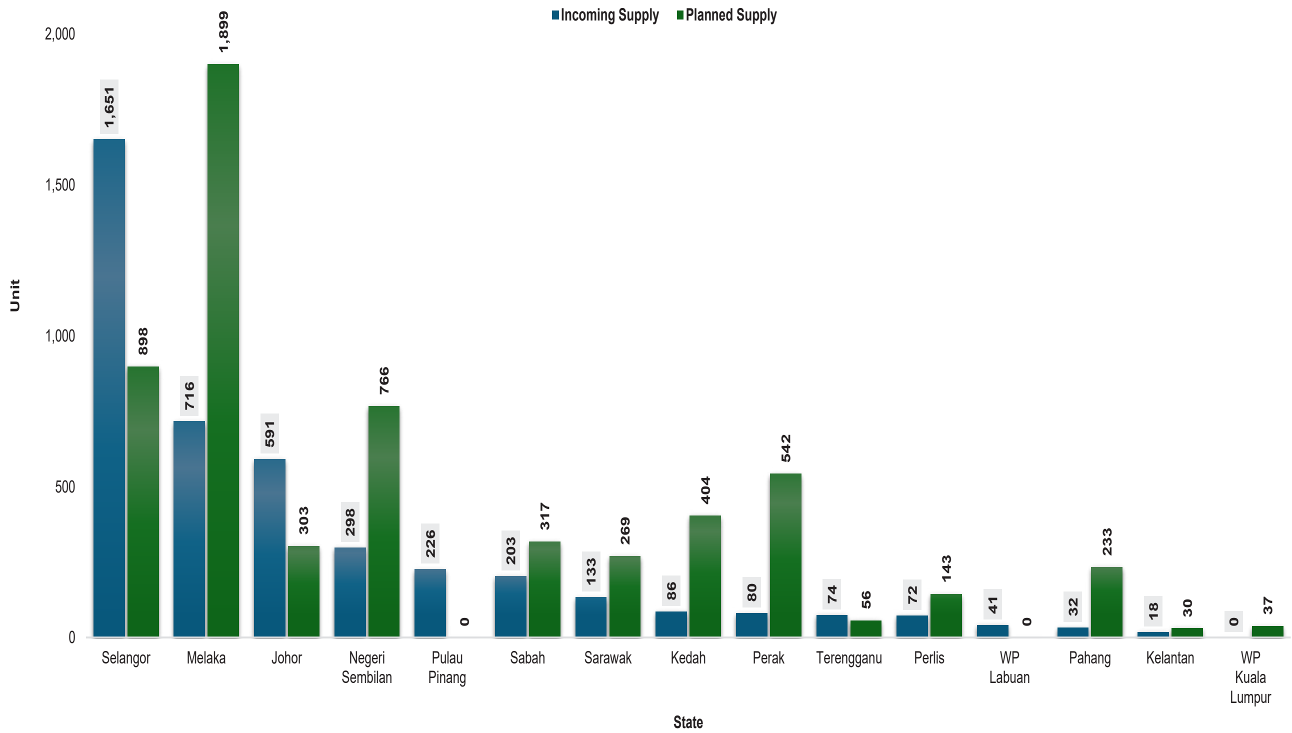
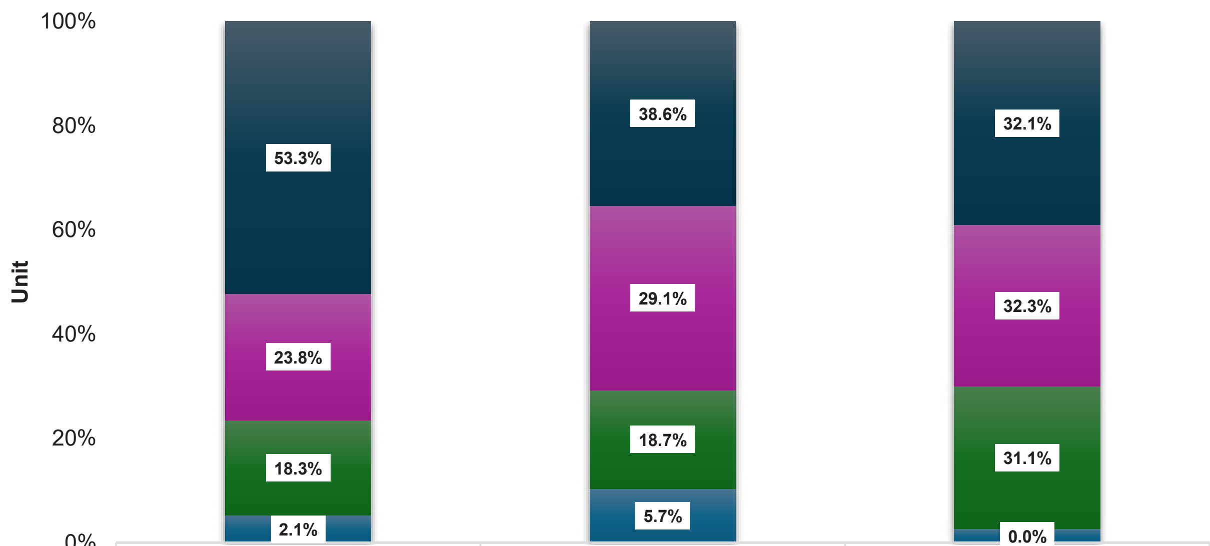


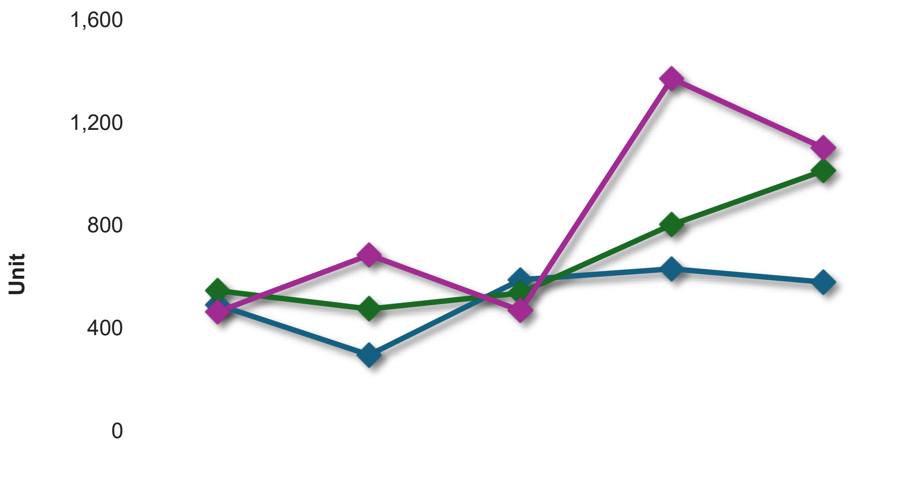
Chart 20: Distribution of Industrial by Building Type 2024



	Existing Stock	Incoming Supply	Planned Supply
Terraced	64,338	1,491	2,303
Semi-Detached	29,790	1,494	1,824
Detached	22,519	798	1,615
Others	6,430	438	155

Development Stage

Chart 21: Trends of Completion, Starts and New Planned Supply for Industrial from 2020 - 2024



	2020	2021	2022	2023	2024
Completion	491	296	589	631	580
Starts	546	475	537	803	1,013
New Planned Supply	464	685	468	1,372	1,102

7.0 HARTA TANAH RIADAH

Pada tahun 2024, sebanyak 280,177 bilik (3,564 hotel) direkodkan di dalam stok sedia ada harta tanah riadah. Inventori harta tanah riadah dijangka akan terus meningkat dengan pertambahan 86 hotel dalam penawaran akan datang dengan jumlah bilik 16,928. Selain itu, terdapat 71 hotel dalam peringkat penawaran yang dirancang, yang dijangka akan menambah jumlah bilik dalam lingkungan 13,369 pada masa akan datang.

WP Kuala Lumpur mendahului bilangan stok sedia ada dengan jumlah bilik sedia ada 47,525 (254 hotel). Di peringkat pembinaan, Sabah menjadi penyumbang terbesar bilangan bilik dalam penawaran akan datang dengan 4,091 bilangan bilik dalam pembinaan melibatkan 22 buah hotel.

Sebanyak 12 hotel telah siap dibina pada tahun 2024 direkodkan dengan jumlah bilik 2,390.

Berikut hotel yang telah direkodkan siap dibina pada tahun 2024 sebagaimana **Jadual 3**.

7.0 LEISURE PROPERTY

In 2024, a total of 280,177 rooms (3,564 hotels) were recorded in the existing stock of leisure properties. The inventory of leisure properties is expected to continue growing with the addition of 86 hotels in the incoming supply, which will contribute a total of 16,928 rooms. Furthermore, there are 71 hotels in the planned supply stage, anticipated to increase the room count by approximately 13,369 in the future.

WP Kuala Lumpur leads in the number of existing stock, boasting a total of 47,525 rooms across 254 hotels. At the construction stage, Sabah emerges as the largest contributor to the incoming supply, with 4,091 rooms currently under construction across 22 hotels.

12 hotels are set to be completed in 2024, offering a total of 2,390 rooms.

*The hotels listed below have been noted as completed in 2024 as detailed in **Table 3**.*

Table 3: Completion of Hotel in 2024

No	State	Name of Hotel	Location	No. of Room
1.	WP Kuala Lumpur	Park Hyatt Hotel (PNB 118)	Jalan Hang Tuah, Kuala Lumpur	348
2.	Johor	Permas City	Bandar Baru Permas, Johor Bahru	150
3.	Pulau Pinang	Crowne Plaza Penang Straits City Hotel	Butterworth	364
4.	Pulau Pinang	Green City Garden @ Hotel	Jalan Macalister, Georgetown	100
5.	Pulau Pinang	Iconic Marjorie Hotel	Bayan Baru	304
6.	Pulau Pinang	Sunshine Tower Hotel	Jalan Thean Teik, Pulau Pinang	320
7.	Pulau Pinang	The Bagan Suite	Butterworth	92
8.	Terengganu	Fairfield By Marriot Kuala Besut (Hotel)	Besut	128
9.	Sabah	Citadines Waterfront Kota Kinabalu	Jalan Tun Fuad Stephens, Kota Kinabalu	288
10.	Sabah	Green World Hotel	Semporna	49
11.	Sabah	Hotel Kapalai	Tawau	199
12.	Sabah	Lighthouse Hotel	Semporna	48
Total Completion in 2024				**2,390**

Chart 22: Hotel Existing Stock by State H1 2024

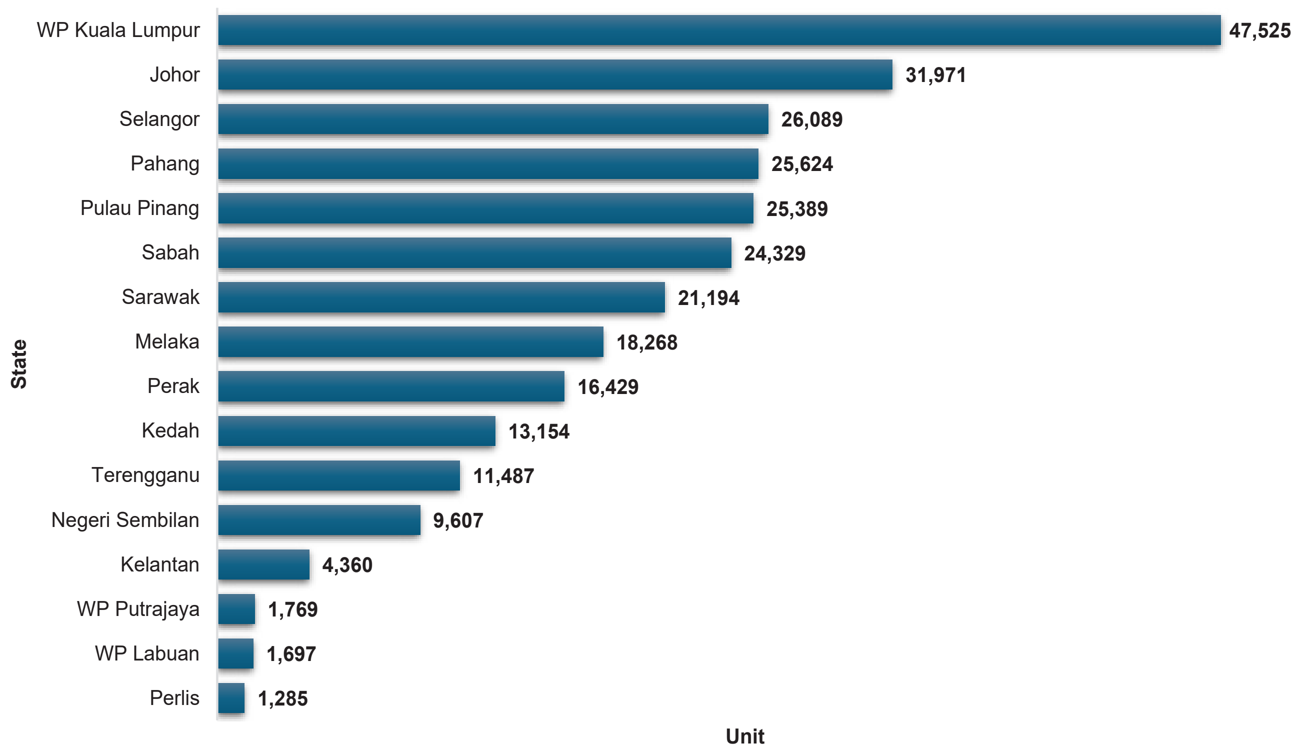


Chart 23: Hotel Incoming Supply and Planned Supply by State 2024

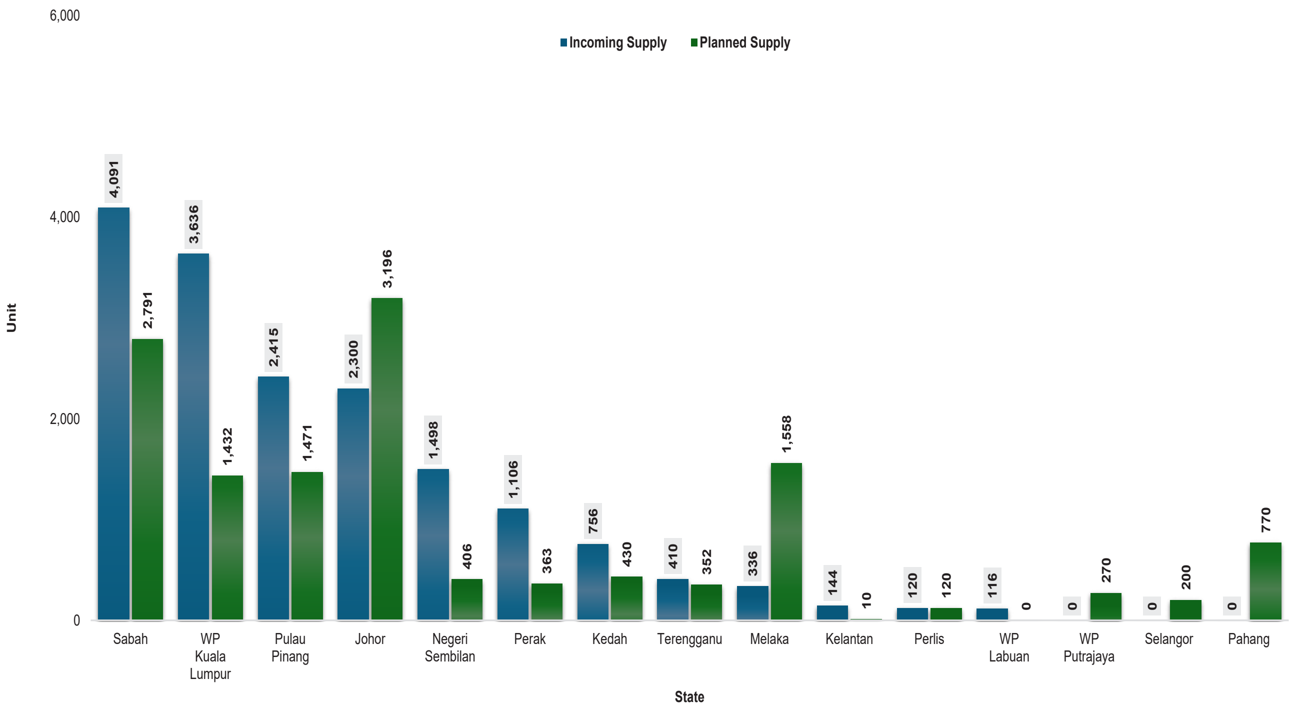
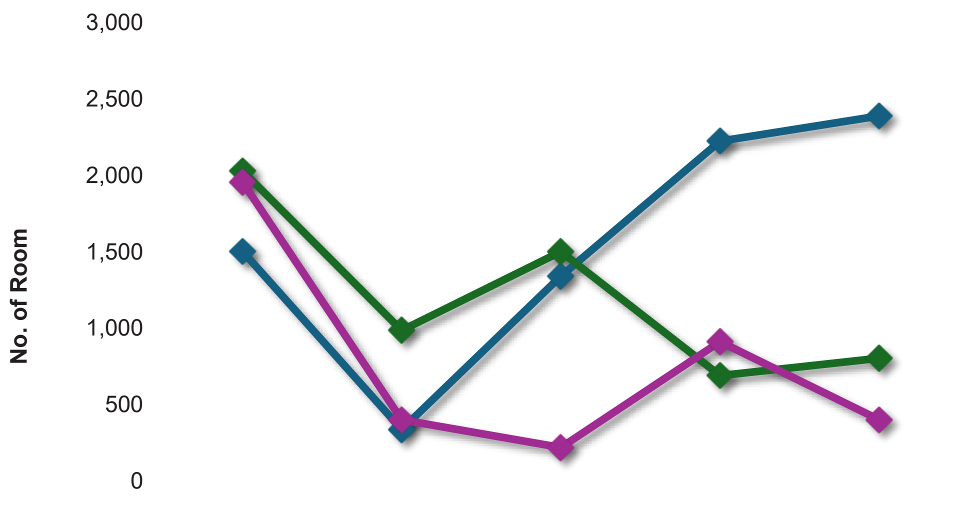


Chart 24: Trends of Completion, Starts and New Planned Supply for Hotel from 2020 - 2024



	2020	2021	2022	2023	2024
Completion	1,503	337	1,341	2,225	2,390
Starts	2,030	985	1,501	690	804
New Planned Supply	1,956	400	219	911	400

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

2.4 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 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.

2.5 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 Kelulusan Pelan Bangunan (Penawaran baharu dirancang)

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

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

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

4.0 Terma Am

4.0 General Terms

4.1 Struktur

Struktur termasuk kekal, separuh kekal dan sementara.

4.1 Structures

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

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.

4.2 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 **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.

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 Harta Tanah Kediaman

5.0 Residential Property

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.

5.1 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 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.

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.

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

Included within the inventory are:
- *Office space within integrated development*
- *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.*

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

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.

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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