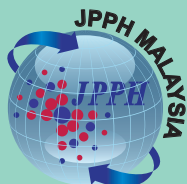


# LAPORAN PASARAN HARTA

## Property Market Report

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# 2019



**JABATAN PENILAIAN DAN PERKHIDMATAN HARTA MALAYSIA**  
*VALUATION AND PROPERTY SERVICES DEPARTMENT MALAYSIA*

**KEMENTERIAN KEWANGAN MALAYSIA**  
*MINISTRY OF FINANCE MALAYSIA*

**LAPORAN  
PASARAN HARTA  
2019**

***PROPERTY  
MARKET REPORT  
2019***

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MINISTRY OF FINANCE MALAYSIA***





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## GLOSARI GLOSSARY

% Pecahan	: % Breakdown
% Perubahan	: % Change
“Purata” Semua Rumah	: “Average” All Houses
Ambilan Ruang	: Take-up Space
Bandar	: Town
Berkembar	: Semi-Detached
Bilangan	: Number
Bilangan Transaksi	: Number Of Transactions
Bilangan Unit	: Number Of Units
Blok Pejabat/Lot Pejabat	: Office Block/Office Lot
Durian	: Durian
Dusun	: Orchard
Fasa	: Phase
Getah	: Rubber
Harga Purata	: Average Price
Hektar	: Hectare
Indeks Harga Semua Rumah	: All House Price Index
Indeks Keyakinan Perniagaan	: Business Condition Index
Industri	: Industrial
Jenis	: Type
Juta	: Million
Kadar Ambilan	: Take-Up Rate
Kadar Asas Pinjaman (BLR)	: Base Lending Rate (BLR)
Kadar Dasar Semalaman (OPR)	: Overnight Policy Rate (OPR)
Kadar Penghunan Purata (pejabat/kompleks perniagaan)	: Average Occupancy Rate (office/shopping complex)
Kadar Penginapan Purata (hotel)	: Average Occupancy Rate (hotel)
Kadar Pinjaman Purata (ALR)	: Average Lending Rate (ALR)
Kadar Pulangan Kasar Purata	: Average Gross Yield
Kadar Serapan	: Absorption Rate
Kawasan Sekunder Pusat Bandar	: Central Town Secondary Area
Kawasan Sekunder Pinggir Bandar	: Suburban Secondary Area
Kawasan Utama Pusat Bandar	: Central Town Prime Area
Kawasan Utama Pinggir Bandar	: Suburban Prime Area
Kedai	: Shop
Kedai Industri	: Industrial Shop
Kedai Sebelum Perang	: Pre-war Shop
Kedai Tanpa Inap	: Lock-up Shop
Kediaman	: Residential
Kedudukan/lokasi	: Location
Kelapa	: Coconut

Kelapa Sawit	: <i>Oil Palm</i>
Keluaran Dalam Negara Kasar (KDNK)	: <i>Gross Domestic Product (GDP)</i>
Kilang Berkembar/Gudang	: <i>Semi-Detached Factory/Warehouse</i>
Kilang Sesebuah/Gudang	: <i>Detached Factory/Warehouse</i>
Kilang Teres/Gudang	: <i>Terraced Factory/Warehouse</i>
Koko	: <i>Cocoa</i>
Kompleks	: <i>Complex</i>
Kompleks Industri/Unit	: <i>Industrial Complex/Unit</i>
Kompleks Perniagaan	: <i>Shopping Complex</i>
Kondominium	: <i>Condominium</i>
Kopi	: <i>Coffee</i>
Ladang	: <i>Estate</i>
Lingkungan Harga	: <i>Price Range</i>
Lingkungan Sewa Sebulan	: <i>Rental Range Per Month</i>
Lot Niaga Di Dalam Kompleks Perniagaan	: <i>Retail Lot In Shopping Complex</i>
Luas Lantai Purata	: <i>Average Floor Area</i>
Luas Tanah Purata	: <i>Average Land Area</i>
m.p. (Meter Persegi)	: <i>s.m. (Square Meter)</i>
vi Nilai	: <i>Value</i>
Nilai Pindah Milik	: <i>Value of Transactions</i>
Padi	: <i>Paddy</i>
Padi Dua Kali Setahun	: <i>Double Cropping Paddy</i>
Padi Sekali Setahun	: <i>Single Cropping Paddy</i>
Pajakan	: <i>Lease</i>
Pangsapuri	: <i>Apartment</i>
Paras Ambang	: <i>Threshold Level</i>
Pasaran Sewa	: <i>Rental Market</i>
Pecahan Lot	: <i>Subdivision of Lot</i>
Pedalaman	: <i>Interior</i>
Penawaran Akan Datang	: <i>Incoming Supply</i>
Penawaran Baru Dirancang	: <i>New Planned Supply</i>
Penawaran Dalam Perancangan	: <i>Planned Supply</i>
Penghunian (pejabat/kompleks perniagaan)	: <i>Occupancy (office/shopping complex)</i>
Penginapan (hotel)	: <i>Occupancy (hotel)</i>
Perniagaan/Perdagangan/Komersial	: <i>Commercial</i>
Pertanian	: <i>Agricultural</i>
Perubahan % Dari Tahun Ke Tahun	: <i>Year on Year % Change</i>
Perubahan Harga Purata	: <i>Average Price Change</i>
Perubahan Sewaan Purata	: <i>Average Rental Change</i>
Plot Kosong	: <i>Vacant Plot</i>
Plot Perniagaan	: <i>Commercial Plot</i>
Prestasi Jualan	: <i>Sales Performance</i>

Rumah Bandar	:	<i>Townhouse</i>
Rumah Berkelompok/Kluster	:	<i>Cluster House</i>
Rumah Kos Rendah	:	<i>Low-Cost House</i>
Rumah Pangsa	:	<i>Flat</i>
Rumah Pangsa Kos Rendah	:	<i>Low-Cost Flat</i>
Saiz Sampel	:	<i>Sample Size</i>
Sayur-sayuran	:	<i>Vegetable</i>
Sesebuah	:	<i>Detached</i>
Sewa	:	<i>Rent</i>
Sewaan	:	<i>Rental</i>
Sewaan Tingkat Bawah Kedai	:	<i>Rentals of Ground Floor Shop</i>
Skim Perumahan Bertingkat Tinggi	:	<i>High-Rise Residential Schemes</i>
Skim Perumahan Konvensional	:	<i>Conventional Housing Schemes</i>
Stabil	:	<i>Stable</i>
Stok Sedia Ada	:	<i>Existing Stock</i>
Tahun Siap (dibina)	:	<i>Year of Completion</i>
Taman Perindustrian Ringan	:	<i>Light Industrial Park</i>
Tanah Adat Melayu	:	<i>Malay Customary Land</i>
Tanah Kampung	:	<i>Kampung Land</i>
Tanah Kosong	:	<i>Vacant Land</i>
Tanah Pembangunan	:	<i>Development Land</i>
Tanah Rezab Melayu	:	<i>Malay Reservation Land</i>
Tarif	:	<i>Tariff</i>
Tembakau	:	<i>Tobacco</i>
Tempoh Kajian	:	<i>Review Period</i>
Tempoh Sebelumnya/Sebelum ini	:	<i>Preceeding Period</i>
Tempoh Yang Sama Tahun Lalu	:	<i>Corresponding Period</i>
Teres	:	<i>Terraced</i>
Berkelompok/Kluster	:	<i>Cluster</i>
Tidak Didefinisikan (ND)	:	<i>Not Definable (ND)</i>
Tidak Boleh Dipindah Milik	:	<i>Not Transferable</i>
Tidak Diperolehi (NA)	:	<i>NA (Not Available)</i>
Tingkat Bawah	:	<i>Ground Floor</i>
Tingkat Bawah Tanah	:	<i>Lower Ground Floor</i>
Trend / Aliran	:	<i>Trend</i>
Trend / Aliran Menaik	:	<i>Upward Trend</i>
Trend / Aliran Menurun	:	<i>Downward Trend</i>
Belum Dibina Belum Terjual	:	<i>Unsold Not Constructed</i>
Dalam Pembinaan Belum Terjual	:	<i>Unsold Under Construction</i>
Mula Dibina	:	<i>Starts</i>
Siap Dibina	:	<i>Completion</i>
Siap Dibina Tidak Terjual	:	<i>Overhang</i>



# **GAMBARAN KESELURUHAN *OVERVIEW***





## 1.0 GAMBARAN KESELURUHAN PASARAN HARTA TANAH

Ekonomi Malaysia berkembang 3.6% pada Q4 2019, mengheret pertumbuhan tahunan KDNK kepada 4.3%. (2018: 4.7%). Pertumbuhan disokong oleh perbelanjaan sektor swasta yang lebih kukuh, dalam keadaan terdapat gangguan bekalan di sektor komoditi. Indeks Pengeluaran Perindustrian Malaysia (IPI) bagi tahun 2019 mencatatkan pertumbuhan 2.4% berbanding 2018. Peningkatan ini disumbangkan oleh pertumbuhan sektor perkilangan dan elektrik masing-masing sebanyak 3.6% dan 3.3%. Penurunan prestasi sektor pertanian pada Q4 2019 disebabkan terutamanya oleh penurunan kelapa sawit, -16.9% (Q3 2019: 8.4%) dan perhutanan & pembalakan, -14.15% (Q3 2019: -12.3%). Walau bagaimanapun, ternakan dan pertanian lain mencatatkan pertumbuhan yang lebih baik masing-masing sebanyak 7.6% dan 5.2%.

Year	2018	Q1 18	Q2 18	Q3 18	Q4 18	2019	Q1 19	Q2 19	Q3 19	Q4 19
GDP	4.7	5.3	4.5	4.4	4.7	4.3	4.5	4.9	4.4	3.6

Pelaburan Langsung Asing (FDI) ke Malaysia meningkat kepada RM32.76 bilion pada 2019 berbanding RM32.65 bilion pada 2018. FDI disalurkan terutamanya ke sektor perkhidmatan, pembinaan dan pembuatan, terutamanya dari Singapura, Ireland dan Hong Kong. Nilai kerja pembinaan dibuat untuk 2019 berjumlah RM146.4 bilion, meningkat sebanyak 0.6% berbanding RM145.5 bilion pada tahun 2018.

Menurut Institut Penyelidikan Ekonomi Malaysia (MIER), Indeks Sentimen Pengguna (CSI) dan Indeks Keadaan Perniagaan (BCI) masing-masing mencatat 88.3 mata (Q4 2019) dan 82.4 mata (Q4 2019), di bawah ambang 100 mata. Walaupun kedua-dua petunjuk rendah, pasaran harta tanah terus berdaya tahan dengan peningkatan kecil dalam bilangan dan nilai transaksi.

Walaupun terdapat tekanan ekonomi, industri pelancongan negara mencatat pertumbuhan ketibaan pelancong antarabangsa yang positif sebanyak 3.7% bagi tempoh sembilan bulan pertama tahun ini (Januari-September 2019), mencatatkan sejumlah 20.1 juta ketibaan pelancong antarabangsa berbanding 19.4 juta dalam tempoh yang sama tahun lepas. Walau bagaimanapun, kaji selidik penghunian hotel dalaman merekodkan penurunan sebanyak -4.71% kepada 60.8% bagi sembilan bulan pertama tahun ini berbanding tempoh yang sama pada tahun 2018 pada 65.51%. Senario ini disebabkan terutamanya oleh peningkatan dalam inventori bilik hotel terutamanya di bandar-bandar utama disamping peningkatan penginapan jangka pendek (STA) seperti Airbnb.

## 1.0 OVERVIEW OF THE PROPERTY MARKET

*The Malaysian economy expanded by 3.6% in Q4 2019, dragging the full-year GDP growth to 4.3%. (2018: 4.7%). Growth was underpinned by stronger private sector expenditure, amid supply disruptions in the commodities sector. The Malaysia's Industrial Production Index (IPI) for the year of 2019 recorded a growth of 2.4% as compared to 2018. The increase was contributed by the growth in manufacturing and electricity sector which were 3.6% and 3.3% respectively. The decline in agriculture sector performance in Q4 2019 was mainly due to the decrease in oil palm, -16.9% (Q3 2019: 8.4%) and forestry & logging, -14.15% (Q3 2019: -12.3%). Nevertheless, livestock and other agriculture recorded a better growth of 7.6% and 5.2% respectively.*

*Foreign Direct Investment (FDI) into Malaysia increased to RM32.76 billion in 2019 as compared to RM32.65 billion in 2018. The FDI was channelled mainly into services, construction and manufacturing sectors, particularly from Singapore, Ireland and Hong Kong. The value of construction work done for 2019 amounted to RM146.4 billion, grew by 0.6% as compared to RM145.5 billion in 2018.*

*According to Malaysian Institute of Economic Research (MIER), the Consumer Sentiments Index (CSI) and Business Condition Index (BCI) were recorded at 88.3 points (Q4 2019) and 82.4 points (Q4 2019) respectively, below the 100-point threshold. Despite the low note in both indicators, the property market remained resilient with a marginal increase in volume and value of transactions.*

*Despite economic headwinds, the nation's tourism industry recorded a positive international tourist arrivals growth of 3.7% for the first nine months of this year (January -September 2019), registering a total of 20.1 million international tourist arrivals compared to 19.4 million in the same period last year. Nevertheless, internal hotel occupancy survey recorded a drop of -4.71% to 60.8% for the first nine months of the year compared to the same period in 2018 at 65.51%. This scenario is mainly attributed to the increase in hotel room inventory especially in major cities coupled with the rise of short-term accommodations (STA) like Airbnb.*

Dalam segmen harta tanah, terdapat beberapa tanda positif dalam prestasi pasaran harta tanah. Pelbagai insentif oleh kerajaan masih menyokong sektor ini, antaranya :

1. Insentif Kempen Pemilikan Rumah (HOC) dari 1 Jan 2019 hingga 31 Dis 2019. Kempen ini direka untuk meningkatkan pemilikan rumah di kalangan rakyat Malaysia dan mengurangkan bilangan rumah tidak terjual.
2. Untuk pembeli rumah kali pertama terdapat dua tahun (dari 1 Jan 2019 hingga 31 Dis 2020) Pengecualian Duti Setem ke atas instrumen pindahmilik untuk rumah berharga sehingga RM300,000, terpakai bagi kedua-dua pembelian sama ada secara langsung dari pemaju perumahan atau dari pasaran sekunder. Mulai 1 Julai 2019, insentif ini diperluaskan kepada rumah berharga sehingga RM500,000 di mana pengecualian terhad kepada RM300,000 pertama harga rumah.
3. Peruntukkan RM1.5 bilion untuk membina rumah mampu milik.
4. Dasar Perumahan Negara 2018-2025 dilancarkan pada awal tahun 2019, menyasarkan untuk membina satu juta rumah mampu milik dalam tempoh 10 tahun untuk kumpulan B40 dan bertujuan untuk menyelesaikan masalah ketidakcocokan permintaan dan penawaran.
5. Dana untuk Rumah Mampu Milik - Bank Negara Malaysia menyediakan pembiayaan harta tanah sebanyak RM1 bilion untuk membantu pembeli rumah kali pertama membeli rumah mampu milik sehingga RM150,000 pada kadar faedah yang lebih rendah sebanyak 3.5%. Mulai September 2019, program dana disemak semula untuk memasukkan pendapatan isi rumah bulanan maksimum yang lebih tinggi sebanyak RM4,360 (sebelum ini RM2,300) dan harga harta tanah maksimum dinaikkan ke RM300,000 (sebelumnya RM150,000). Dana ini tersedia selama dua tahun dari Januari 2019 atau sehingga ia digunakan sepenuhnya.
6. Skim Perumahan Belia oleh Bank Simpanan Nasional (BSN) - menyediakan jaminan pinjaman perumahan melalui Cagamas bagi membolehkan peminjam mendapatkan pembiayaan lebih tinggi dan bantuan kewangan bulanan RM200 untuk 2 tahun pertama.
7. Pengurangan Kadar Dasar Semalaman (OPR) sebanyak 25 mata asas kepada 3.00% pada 5 Mei 2019.

*In the property segment, there appear to be some positive signs in the property market performance. Various incentives by the government remained supportive of this sector, among others:*

1. *Home Ownership Campaign (HOC) that ran from 1st January 2019 to 31st December 2019 is aimed at increasing home ownership among Malaysians and reducing the number of unsold houses.*
2. *For the first-time homebuyers, there is a two-year (from 1 Jan 2019 to 31 Dec 2020) Stamp Duty exemption on instrument of transfer for houses priced up to RM300,000, applicable to both purchases either direct from housing developer or from the secondary market. Starting from 1 July 2019, the incentive was extended to houses priced up to RM500,000 where exemption is limited to the first RM300,000 of the house's price.*
3. *Allocation of RM1.5 billion for the construction of affordable homes.*
4. *National Housing Policy 2018–2025 launched in early 2019, targets to build one million affordable homes within 10 years for B40 groups and aims to solve the demand and supply mismatch problem.*
5. *Fund for Affordable Home – Bank Negara Malaysia to provide RM1 billion property funding to help first time home buyers to purchase affordable home of up to RM150,000 at a lower interest rate of 3.5%. From Sept. 2019, the fund programme was revised to include a higher maximum monthly household income of RM4,360 (previously at RM2,300) and an increased maximum property price of RM300,000 (previously at RM150,000). The fund is available for two years from January 2019 or until it is fully utilised.*
6. *Youth Housing Scheme by Bank Simpanan Nasional (BSN) - to provide home loan guarantees via Cagamas to enable borrowers to obtain higher financing and RM200 monthly financial assistance for the first 2 years.*
7. *The reduction in the Overnight Policy Rate (OPR) by 25 basis points to 3.00% on 5th May 2019.*

Beberapa langkah juga diperkenalkan iaitu pengenaan Cukai Keuntungan Harta Tanah (RPGT) mengenai pelupusan harta tanah atau saham dalam syarikat pemegang harta pada tahun ke-6 dan seterusnya. Kadar ini meningkat dari 5% ke 10% untuk syarikat/ warga asing dan dari 0% ke 5% untuk individu Malaysia dan Penduduk Tetap. Satu lagi ialah kenaikan kadar Duti Setem untuk pindahmilik harta tanah bernilai melebihi RM1 juta, meningkat dari 3% ke 4%.

Dari segi permintaan, jumlah permohonan pinjaman dan jumlah kelulusan pinjaman untuk pembelian harta kediaman pada tahun 2019 masing-masing meningkat 8.3% dan 8.6%. Bagi harta bukan kediaman, jumlah permohonan pinjaman dan kelulusan pinjaman masing-masing meningkat sebanyak 0.6% dan 4.0%. Nisbah kelulusan pinjaman terhadap permohonan pinjaman untuk pembelian harta tanah kediaman dan bukan kediaman berada pada 43.2% dan 37.5% pada 2019 berbanding 43.1% dan 36.3% pada tahun 2018.

Several measures were also introduced namely the imposition of the Real Property Gains Tax (RPGT) on the disposal of properties or shares in property-holding companies in the 6th year onwards. The rate was increased from 5% to 10% for companies/foreigners and from 0% to 5% for Malaysian individuals and Permanent Resident. Another is the raise in the Stamp Duty rate for transaction of properties value above RM1 million, up from 3% to 4%.

On the demand-side, the amount of loan application and total loan approval for the purchase of residential property in 2019 increased by 8.3% and 8.6% respectively. For the non-residential property, the amount of loan application and total loan approval increased by 0.6% and 4.0% respectively. The ratio of loans approvals against loans applications for the purchase of residential property and non-residential property stood at 43.2% and 37.5% in 2019 versus 43.1% and 36.3% in 2018.

Table 2

## Loan Application and Loan Approval for Purchase of Residential

Purchase of Residential (RM Billion)					
Year	Loan Application	Loan Approval	% Change Loan Application	% Change Loan Approval	Ratio Approval/ Application (%)
2011	186.79	95.16	12.2	13.0	50.9
2012	193.74	92.83	3.7	-2.4	47.9
2013	245.90	121.00	26.9	30.3	49.2
2014	223.85	121.09	-9.0	0.1	54.1
2015	206.03	103.41	-8.0	-14.6	50.2
2016	208.55	87.57	1.2	-15.3	42.0
2017	239.81	101.52	15.0	15.9	42.3
2018	240.9	103.7	0.4	-4.7	43.1
<b>2019</b>	<b>260.77</b>	<b>112.57</b>	<b>8.3</b>	<b>8.6</b>	<b>43.2</b>

Source: Bank Negara Malaysia

Table 3

## Loan Application and Loan Approval for Purchase of Non-Residential

Purchase of Non-Residential (RM Billion)					
Year	Loan Application	Loan Approval	% Change Loan Application	% Change Loan Approval	Ratio Approval/ Application (%)
2011	99.32	52.23	24.4	31.7	52.6
2012	98.89	52.77	-0.4	1.0	53.4
2013	119.23	51.36	20.6	-2.7	43.1
2014	103.39	50.94	-13.3	-0.8	49.3
2015	90.98	38.41	-12.0	-24.6	42.2
2016	79.94	32.91	-12.1	-14.3	41.2
2017	86.04	31.12	7.6	-5.4	36.2
2018	96.93	35.15	12.7	4.6	36.3
<b>2019</b>	<b>97.52</b>	<b>36.54</b>	<b>0.6</b>	<b>4.0</b>	<b>37.5</b>

Source: Bank Negara Malaysia

## 2.0 AKTIVITI PASARAN HARTA TANAH

Prestasi pasaran harta tanah mencatat peningkatan kecil pada 2019 berbanding 2018. Pada tahun 2019, sejumlah 328,647 transaksi bernilai RM141.40 bilion dicatatkan, menunjukkan kenaikan 4.8% dalam bilangan dan 0.8% dalam nilai berbanding 2018, yang mencatatkan 313,710 transaksi bernilai RM140.33 bilion.

Prestasi aktiviti pasaran sektoral meningkat sedikit: kediaman (6.0%), komersial (7.2%), perindustrian (3.8%) dan pertanian (2.0%) dengan pengecualian subsektor tanah pembangunan, penurunan sedikit -1.2%. Dari segi nilai transaksi, subsektor kediaman merekodkan pertumbuhan sebanyak 5.3%, manakala subsektor komersial, perindustrian, pertanian dan tanah pembangunan mencatatkan sebaliknya, masing-masing menurun sebanyak -1.8%, -1.1%, -4.4% dan -9.1% .

Subsektor kediaman menerajui pasaran harta tanah keseluruhan, dengan sumbangan 63.7%. Ini diikuti oleh subsektor pertanian (20.9%), komersial (7.8%), tanah pembangunan (5.7%) dan industri (1.9%). Dari segi nilai, kediaman memimpin dengan syer 51.2%, diikuti oleh komersial (20.5%), industri (10.5%), tanah pembangunan (9.0%) dan pertanian (8.8%).

## 2.0 PROPERTY MARKET ACTIVITY

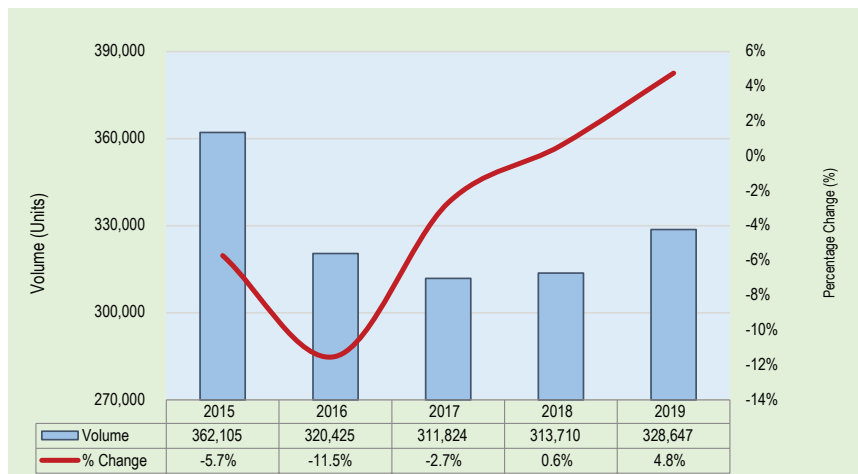
The property market performance recorded a slight improvement with a marginal increase in 2019. A total of 328,647 transactions worth RM141.40 billion were recorded, showing an increase of 4.8% in volume and 0.8% in value compared to 2018, which recorded 313,710 transactions worth RM140.33 billion.

Sectoral market activity performance improved marginally: residential (6.0%), commercial (7.2%), industrial (3.8%) and agriculture (2.0%) with the exception of development land sub-sector, which declined slightly by 1.2%. In terms of value of transactions, residential sub-sector recorded a 5.3% growth, whereas commercial, industrial, agriculture and development land sub-sectors recorded otherwise, decreased by -1.8%, -1.1%, -4.4% and -9.1% respectively.

The residential sub-sector led the overall property market, with 63.7% contribution. This was followed by agriculture sub-sector (20.9%), commercial (7.8%), development land (5.7%) and industrial (1.9%). In terms of value, residential took the lead with 51.2% share, followed by commercial (20.5%), industrial (10.5%), development land (9.0%) and agriculture (8.8%).

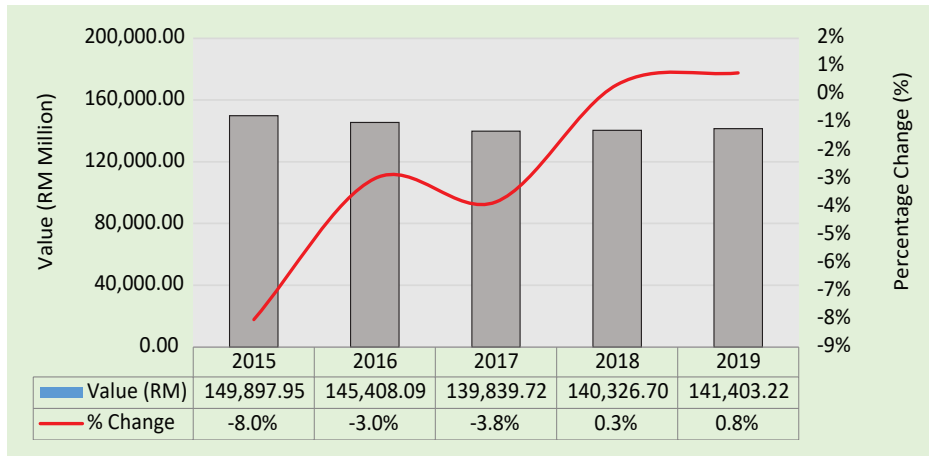
Chart 1

Overall Volume of Transactions 2015 – 2019



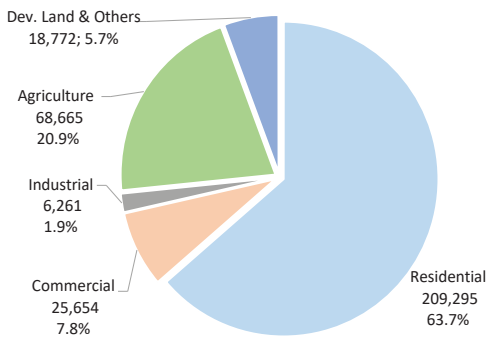
**Chart 2**

**Overall Value of Transactions 2015 - 2019**



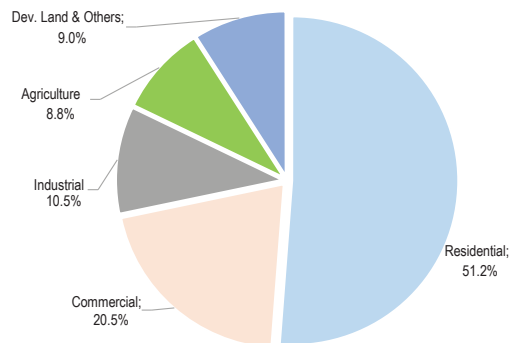
**Chart 3**

**Contribution to Transaction Volume by Sub-sector 2019**



**Chart 4**

**Contribution to Transaction Value by Sub-sector 2019**



## 2.1 Harta Tanah Kediaman

### Transaksi

Terdapat 209,295 transaksi bernilai RM72.41 bilion dicatatkan dalam tempoh kajian, meningkat sebanyak 6.0% dalam bilangan dan 5.3% dalam nilai berbanding dengan 2018 (197,386 transaksi bernilai RM68.75 bilion). Prestasi di seluruh negara bertambah baik dalam tempoh kajian. Semua negeri mencatatkan bilangan pasaran yang lebih tinggi kecuali Negeri Sembilan dan Perak. Arah aliran menaik di negeri-negeri utama iaitu Kuala Lumpur (1.1%), Selangor (8.9%), Johor (7.5%) dan Pulau Pinang (1.3%) membawa kepada peningkatan keseluruhan dalam subsektor. Empat negeri utama ini membentuk 50% daripada jumlah bilangan kediaman negara.

## 2.1 Residential Property

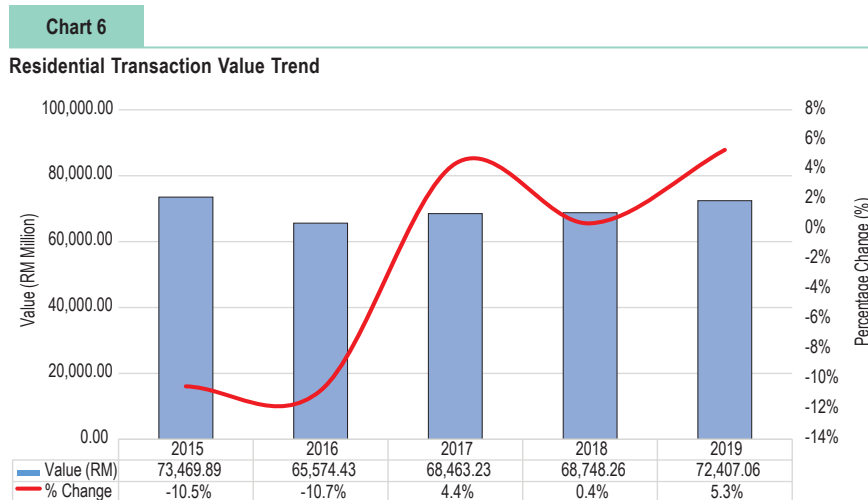
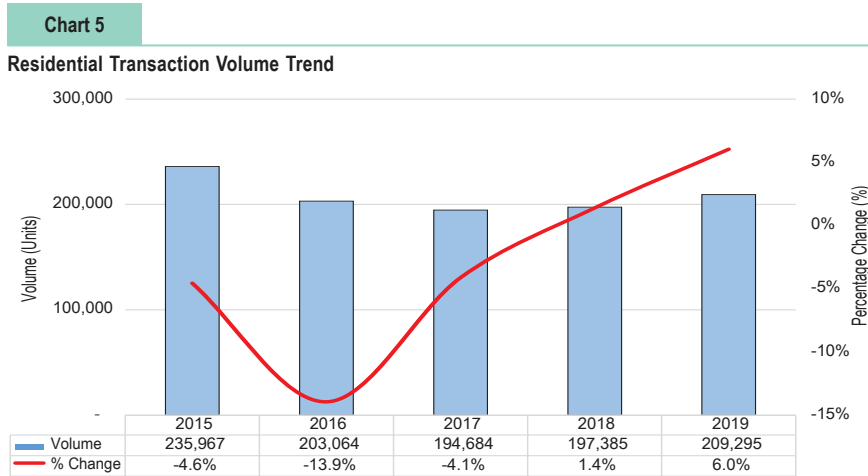
### Transaction

*There were 209,295 transactions worth RM72.41 billion recorded in the review period, increased by 6.0% in volume and 5.3% in value as compared with 2018 (197,385 transactions worth RM68.75 billion). Performance across the states improved in the review period. All states recorded higher market volume except for Negeri Sembilan and Perak. The uptrend in major states namely Kuala Lumpur (1.1%), Selangor (8.9%), Johor (7.5%) and Pulau Pinang (1.3%) supported the overall increase in the sub-sector. These four major states formed 50% of the total national residential volume.*



Mengikut jenis, tumpuan permintaan ke atas rumah teres, membentuk kira-kira 40% daripada jumlah keseluruhan, diikuti oleh harta tanah bertingkat tinggi lebih kurang 15% daripada jumlah bilangan transaksi. Mengikut julat harga, permintaan terus memberi tumpuan kepada RM300,000 dan ke bawah, membentuk 61.7% daripada transaksi kediaman, diikuti dengan RM300,000 hingga RM500,000 (21.3%), RM500,000 - RM1,000,000 (13.3%) dan lebih daripada RM1,000,000 (3.7%).

*By types, demand focus on terraced houses, formed around 40% of the total, followed by high-rise units around 15% of the total volume of transactions. By price range, demand continued to focus on RM300,000 and below, accounting for 61.7% of the residential transaction, followed by RM300,000 to RM500,000 (21.3%), RM500,000 – RM1,000,000 (13.3%) and more than RM1,000,000 (3.7%).*



### Pelancaran Baharu

Pasaran utama menyaksikan pelancaran baharu yang lebih rendah. Terdapat hampir 60,000 unit yang dilancarkan pada 2019, berbanding 66,040 unit pada 2018. Kemerosotan ini dijangka kerana pemaju menangguhkan pelancaran baharu disebabkan oleh pasaran harta tanah yang semakin lembap ketika cuba menghabiskan jualan stok yang belum dijual yang dibawa dari projek yang dilancarkan pada tahun sebelumnya.

### New Launches

*The primary market saw lesser release of new launches. There were nearly 60,000 units launched in 2019, against 66,040 units in 2018. The decline was expected as developers were holding back on the new launches due to the softening property market while trying to clear the unsold stock carried forward from the projects launched in the previous years.*

Prestasi jualan untuk pelancaran baharu dicatatkan pada 40.4%, sedikit lebih baik berbanding 2018 (34.6%). Peningkatan sedikit ini boleh dikaitkan dengan pelbagai insentif dan bantuan yang diberikan oleh kerajaan untuk menggalakkan pemilikan rumah.

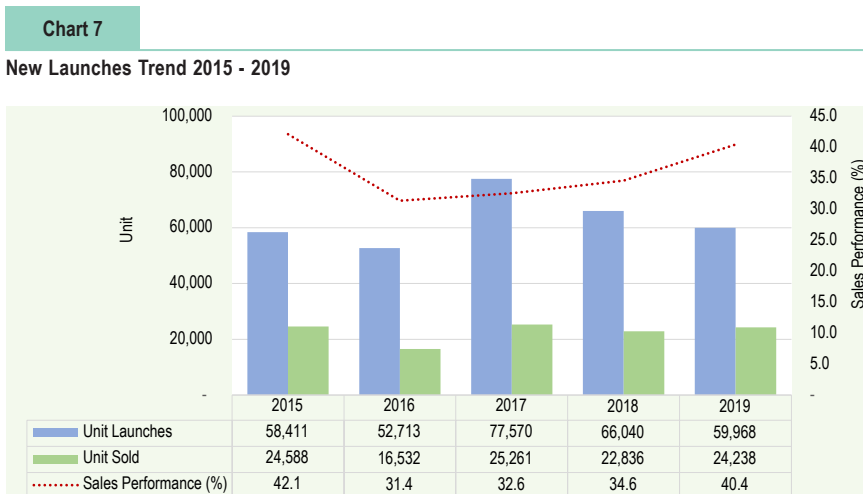
*Sales performance for new launches recorded at 40.4%, slightly better compared to 2018 (34.6%). The slight improvement could be attributed to the various incentives and assistance given by the government to promote home ownership.*

Selangor merekodkan bilangan pelancaran baharu yang tertinggi di negara ini, menguasai hampir 17% (9,970 unit) daripada jumlah nasional. Johor merekodkan tertinggi kedua (9,711 unit), dengan syer 16.2%. Perak menduduki tempat ketiga dengan 15.8% (9,504 unit) dan WPKL 14.8% (8,865 unit).

*Selangor recorded the highest number of new launches in the country, capturing nearly 17% (9,970 units) of the national total. Johor recorded the second highest (9,711 units), with 16.2% share. Perak came third with 15.8% (9,504 units) and WPKL 14.8% (8,865 units).*

Mengikut jenis, rumah teres menguasai pelancaran baharu. Teres satu tingkat (10,690 unit) dan 2-3 tingkat (18,809 unit) bersama menyumbang 49% daripada jumlah unit, diikuti unit kondominium / pangsapuri sebanyak 36% (21,325 unit).

*By property type, terraced houses dominated the new launches. Single storey (10,690 units) and 2-3 storey (18,809 units) together contributed 49% of the total units, followed by condominium/apartment units 36% (21,325 units).*



**Status Pasaran**

**Market Status**

Penurunan bilangan pelancaran baharu pada tahun 2019 dan prestasi jualan yang lebih baik menyebabkan penurunan bilangan kediaman siap dibina tidak terjual, dalam pembinaan belum terjual dan belum dibina belum terjual. Selepas empat tahun berturut-turut meningkat, unit siap dibina tidak terjual mencatatkan penurunan pada 2019. Terdapat 30,664 unit tidak terjual bernilai RM18.82 bilion, menurun sebanyak 5.1% dalam bilangan dan 5.2% dalam nilai berbanding 2018 (32,313 unit bernilai RM19.86 bilion).

*Fewer new launches in 2019 and better sales performance led to the decrease in residential overhang and unsold under construction and not constructed. After four consecutive years of increase, the overhang recorded a decline in 2019. There were 30,664 overhang units worth RM18.82 billion, decreased by 5.1% in volume and 5.2% in value against 2018 (32,313 units worth RM19.86 billion).*

Mengikut negeri, Johor mengekalkan bilangan dan nilai unit siap tidak terjual tertinggi di negara ini dengan 5,627 unit bernilai RM4.7 bilion, masing-masing membentuk 18.4% dan 25% daripada jumlah keseluruhan negara. Walau bagaimanapun, keadaan negeri ini bertambah

*By state, Johor retained the highest number and value of overhang in the country with 5,627 units worth RM4.7 billion, accounting to 18.4% and 25% respectively of the national total. Nevertheless, the state's overhang situation improved as the numbers*



baik kerana bilangan unit siap dibina tidak terjual menurun sebanyak 7.2% walaupun nilai meningkat sebanyak 2.1%. Perak menduduki tempat kedua dengan 5,024 unit bernilai RM1.52 bilion, diikuti oleh Selangor (4,687 unit bernilai RM3.75 bilion) dan Pulau Pinang (3,353 unit bernilai RM2.59 bilion). Bagi WPKL, walaupun hanya 2,605 unit dicatatkan, nilai unit siap dibina tidak terjual adalah ketiga tertinggi pada RM2.6 bilion.

reduced by 7.2% though value increased by 2.1%. Perak came second with 5,024 units worth RM1.52 billion, followed by Selangor (4,687 units worth RM3.75 billion) and Pulau Pinang (3,353 units worth RM2.59 billion). As for WPKL, though only 2,605 units were recorded, the overhang value was the third highest at RM2.6 billion.

Mengikut jenis, unit kondominium/pangsapuri membentuk 46.6% (14,276 unit) daripada jumlah bilangan siap dibina tidak terjual negara dan kebanyakannya berada dalam lingkungan harga antara RM200,000 - RM300,000 (3,863 unit). Rumah teres dua hingga tiga tingkat (8,591 unit) membentuk 28% daripada jumlah keseluruhan dan kebanyakannya berada dalam julat harga RM300,000 - RM400,000 (1,771 unit). Mengikut harga, rumah berharga RM300,000 - RM500,000 (7,883 unit) membentuk 25.7% manakala berharga melebihi RM500,000 (12,528 unit) membentuk 40.9% daripada jumlah kediaman siap dibina tidak terjual.

By type, condominium/apartment units formed 46.6% (14,276 units) of the national's overhang and mostly were in the price range of RM200,000 – RM300,000 (3,863 units). Two to three storey terrace (8,591 units) formed another 28% of the total and mostly were in the price range of RM300,000 – RM400,000 (1,771 units). By price range, those priced RM300,000 to RM500,000 (7,883 units) formed 25.7% while priced above RM500,000 (12,528 units) formed 40.9% of the total residential overhang.

Unit dalam pembinaan belum terjual dan belum dibina belum terjual bertambah baik kerana bilangan berkenaan menurun ke 72,692 unit dan 16,774 unit, masing-masing turun sebanyak 10.2% dan 15.6%.

The unsold under construction and not constructed improved as the number dropped to 72,692 units and 16,774 units, down by 10.2% and 15.6% respectively.

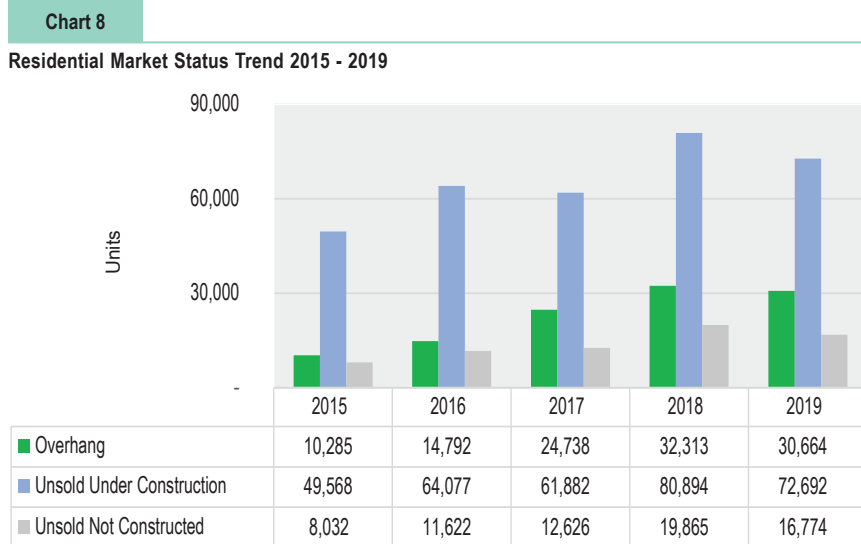
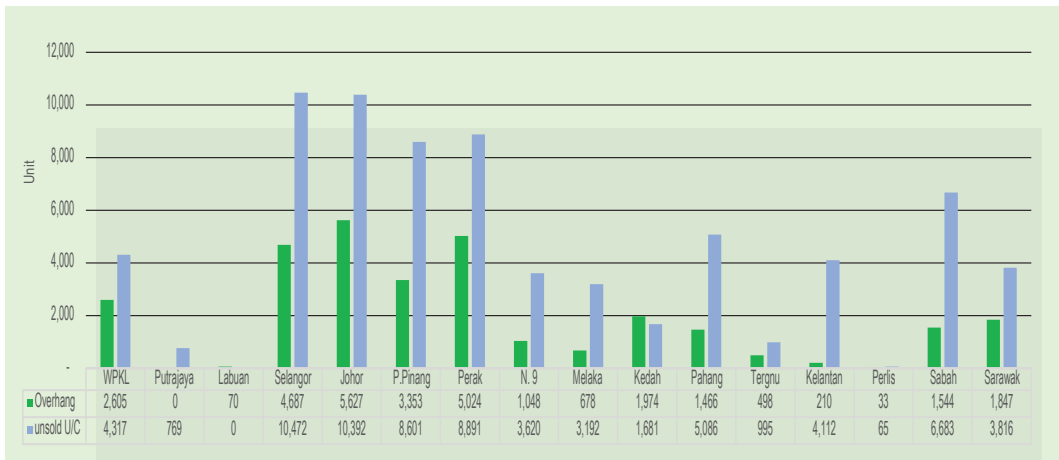


Chart 9

Residential Overhang and Unsold Under Construction across the states 2019



**Aktiviti Pembinaan**

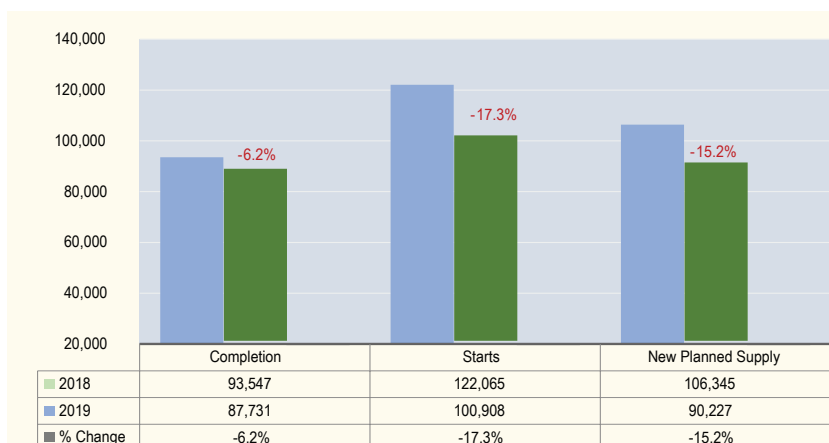
Aktiviti pembinaan kekal rendah kerana kediaman baru siap dibina, mula dibina dan penawaran baru dirancang merosot. Jumlah keseluruhan kediaman baru siap dibina merosot sebanyak 6.2% ke 87,731 unit (2018: 93,547 unit) walaupun Johor dan Pulau Pinang mencatatkan bilangan baru siap dibina yang lebih tinggi berbanding 2018. Kediaman mula dibina menurun sebanyak 17.3% ke 100,908 unit pada 2019 (2018: 122,065 unit) kerana kesemua negeri utama mengambil pendekatan penangguhan. Begitu juga, penawaran baru dirancang menurun sebanyak 15.2% ke 90,227 unit (2018: 106,345 unit). Walaubagaimanapun, Selangor, Johor dan Pulau Pinang merekodkan penawaran baru dirancang yang lebih tinggi, masing-masing meningkat sebanyak 0.5%, 2.8% dan 15.0%. Pada akhir tahun, terdapat 5.73 juta unit kediaman sedia ada dengan hampir 0.45 juta dalam penawaran akan datang dan 0.44 juta dalam penawaran yang dirancang.

**Construction Activity**

Construction activities remained on a low tone as completion, starts and new planned supply declined. Completions were down by 6.2% to 87,731 units (2018: 93,547 units) though Johor and Pulau Pinang recorded higher completion against 2018. Starts reduced by 17.3% to 100,908 units in 2019 (2018: 122,065 units) as all major states took a laid-back approach. Likewise, new planned supply dropped by 15.2% to 90,227 units (2018: 106,345 units). Nevertheless, Selangor, Johor and Pulau Pinang recorded higher new planned supply, increased by 0.5%, 2.8% and 15.0% respectively. As at year-end, there were 5.73 million existing residential units with nearly 0.45 million in the incoming supply and 0.44 million in the planned supply.

Chart 10

Residential Construction Activity Trend 2015 – 2019



## Pergerakan Harga

Indeks Harga Rumah Malaysia (MHPI) terus meningkat pada arah aliran sederhana. Indeks Harga Rumah Malaysia berada pada 197.5 mata (pada tahun asas 2010), meningkat sebanyak 1.9% (3.8 mata) setiap tahun (2018: 193.7 mata). Pertumbuhan tahunan paling lemah yang dicatatkan sejak tahun 2010.

Semua negeri mencatat pertumbuhan tahunan yang positif kecuali Kuala Lumpur, menurun sebanyak 0.4% ke RM785,000 (2018: RM788,000). Selangor, Johor dan Pulau Pinang masing-masing menikmati pertumbuhan tahunan sederhana sebanyak 1.8%, 3.8% dan 1.9%. Mengikut jenis, rumah teres mengalami pertumbuhan tahunan tertinggi sebanyak 3.0%.

## Price Movements

The Malaysian House Price Index (MHPI) continued to increase at a moderating trend. The Malaysian House Price Index stood at 197.5 points (at base year 2010), increased by 1.9% (3.8 points) on annual basis (2018: 193.7 points), the lowest annual growth recorded since year 2010.

All states recorded positive annual growth except for Kuala Lumpur, decreased by 0.4% to RM785,000 (2018: RM788,000). Selangor, Johor and Pulau Pinang enjoyed moderate annual growth at 1.8%, 3.8% and 1.9% respectively. By type, terraced houses commanded the highest annual growth of 3.0%.

Chart 11

MHPI: Point and Annual Changes by Type 2010 – 2019

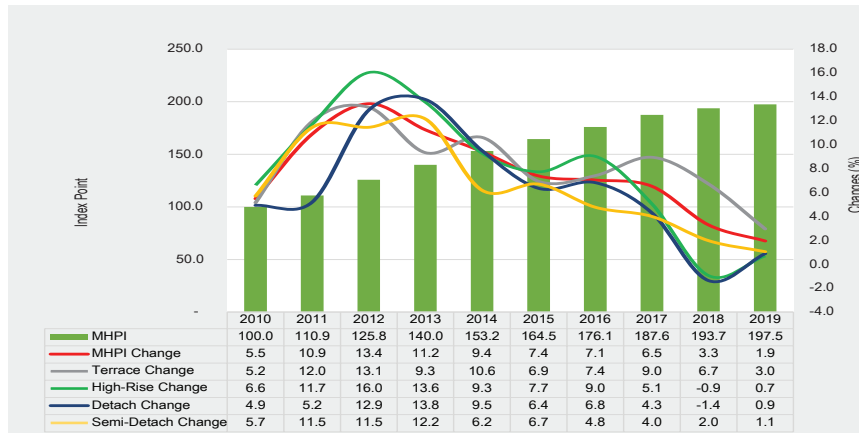
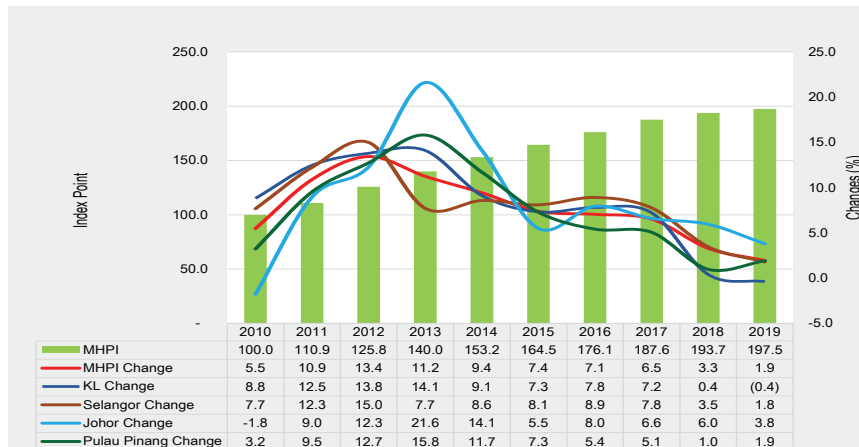


Chart 12

MHPI: Point and Annual Changes in Major States 2010 - 2019



## Sewa

Pasaran sewa secara amnya stabil dengan pergerakan menaik dicatatkan di kawasan tertentu dengan perhubungan yang cekap, bersebelahan dengan stesen LRT dan MRT serta yang terletak berhampiran institusi pengajian tinggi. Di Selangor, sewa umumnya stabil untuk teres dua tingkat di USJ 1 - USJ 20, dengan beberapa pergerakan menaik, dalam lingkungan antara RM1,200 hingga RM2,200 sebulan. Di Johor, sewa teres dua tingkat stabil, Taman Laguna dan Horizon Hills adalah antara sewa tertinggi yang dicatatkan, dari RM2,200 hingga RM3,000 sebulan.

### 2.2 Harta Tanah Komersial

#### Transaksi

Prestasi subsektor ini sederhana pada 2019. Terdapat 25,654 transaksi bernilai RM28.99 bilion dicatatkan, meningkat sebanyak 7.2% dalam bilangan tetapi nilai menurun sebanyak -1.8%. Semua negeri mencatatkan bilangan transaksi yang lebih tinggi kecuali WPKL, Negeri Sembilan dan Perlis. Sebaliknya, nilai transaksi komersial mencatatkan penurunan kerana separuh daripada negeri di negara ini mengalami penurunan.

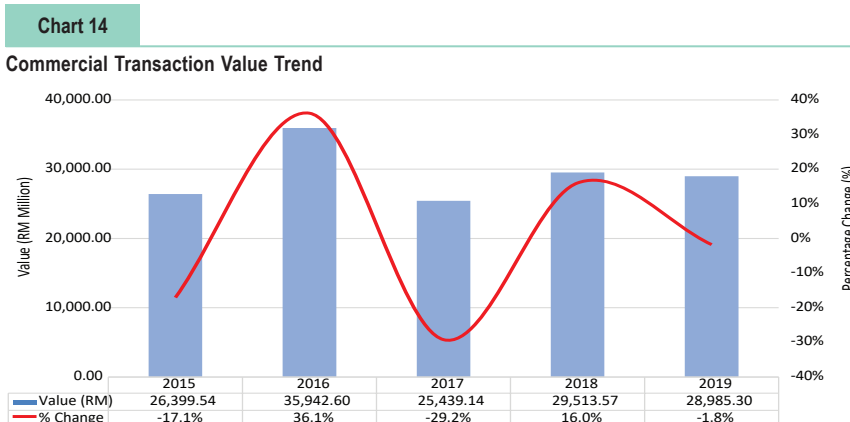
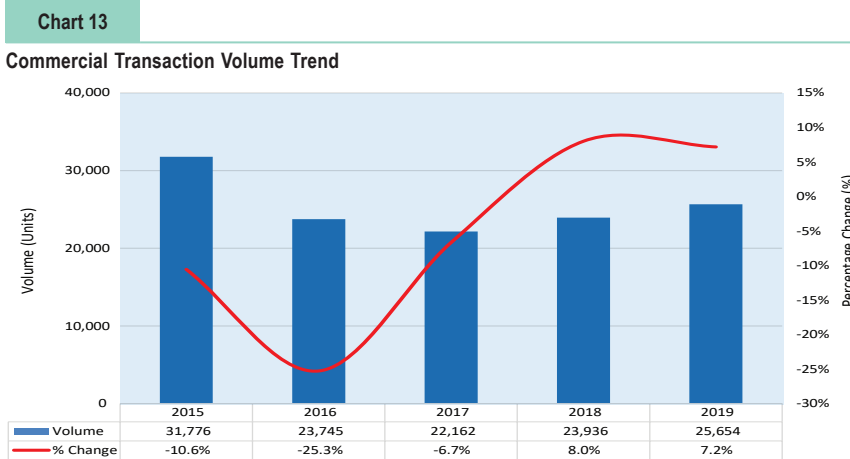
## Rental

The rental market was generally stable with upward movements recorded in choice areas served with efficient connectivity, adjacent to LRT and MRT stations as well as those located nearby higher learning institutions. In Selangor, rental was generally stable for double storey terrace house in USJ 1 – USJ 20, with some upward movements, range from RM1,200 to RM2,200 per month. In Johor, rental of double storey terrace was stable, Taman Laguna and Horizon Hills were among the highest rental recorded, ranging from RM2,200 to RM3,000 per month.

### 2.2 Commercial Property

#### Transaction

The sub-sector performed moderately in 2019. There were 25,654 transactions worth RM28.99 billion recorded, up by 7.2% in volume but value declined by -1.8%. All states recorded higher market volume except for WPKL, Negeri Sembilan and Perlis. On the contrary, the total commercial transactions value recorded a decline as half the states in the country saw a decline.



## 2.2.1 Kedai

### Transaksi

Subsektor kedai mencatatkan 13,280 transaksi bernilai RM11.28 bilion, menguasai 51.8% daripada bilangan transaksi harta komersial dan 38.9% daripada jumlah nilai. Prestasi pasaran mencatatkan kenaikan 2.7% dalam bilangan (2018: 12,934 transaksi) dan 5.1% dalam nilai (2018: RM10.74 bilion).

Mengikut negeri, Selangor menyumbang bilangan dan nilai transaksi tertinggi dalam pasaran negara, dengan 18.9% dalam bilangan (2,514 transaksi) dan 29.3% dalam nilai transaksi (RM3.1 bilion); diikuti oleh Johor dengan 17.4% dalam bilangan (2,308 transaksi) dan 16.8% dalam nilai transaksi (RM1.7 bilion).

Mengikut jenis, kedai dua hingga dua setengah tingkat adalah yang paling aktif, menangkap 51.6% (6,852 transaksi) syer bilangan transaksi kedai. Bilangan transaksi tertinggi kedua ialah kedai tiga hingga tiga setengah tingkat, mencatat 28.2%.

### Status Pasaran

Subsektor kedai siap dibina tidak terjual terus meningkat, mencatatkan sejumlah 6,024 unit bernilai RM4.87 bilion, meningkat sebanyak 19.2% dalam bilangan dan 19.3% dalam nilai berbanding 2018. Walau bagaimanapun, Senario dalam pembinaan belum terjual dan belum dibina belum terjual bertambah baik, bilangan berkurangan ke 6,232 unit dan 336 unit, masing-masing turun sebanyak 13.8% dan 12.7%.

Mengikut negeri, Johor kekal sebagai negeri mempunyai bilangan kedai siap dibina tidak terjual yang paling tinggi dengan syer 21.4% (1,288 unit bernilai RM1.37 bilion) dan dalam pembinaan belum terjual dengan syer 35.2% (2,193 unit).

## 2.2.1 Shop

### Transaction

Shop sub-sector recorded 13,280 transactions worth RM11.28 billion, dominating 51.8% of the commercial property transactions and 38.9% of the total value. Market performance recorded an increase of 2.7% in volume (2018: 12,934 transactions) and 5.1% in value (2018: RM10.74 billion).

By state, Selangor contributed the highest volume and value to the national market share, with 18.9% in volume (2,514 transactions) and 29.3% in value (RM3.1 billion); followed by Johor with 17.4% in volume (2,308 transactions) and 16.8% in value (RM1.7 billion).

By type, two to two and a-half storey shops were the most active, capturing 51.6% (6,852 transactions) of the shops' market share. The second highest volume of transactions were three to three and a-half storey shops, registering 28.2%.

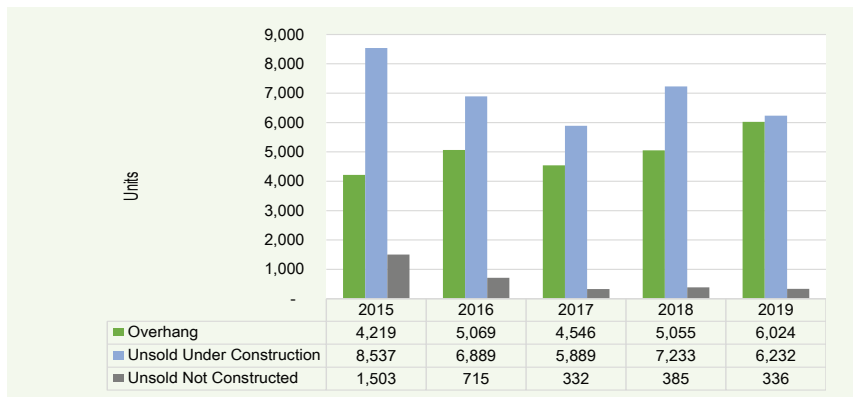
### Market Status

Shop sub-sector overhang continued to increase, recording a total of 6,024 units with a value of RM4.87 billion, up by 19.2% in volume and 19.3% in value against 2018. The unsold under construction and not constructed scenario however, improved with volume declined to 6,232 units and 336 units, down by 13.8% and 12.7% respectively.

By state, Johor retained its reign as the highest shop overhang state with 21.4% share (1,288 units worth RM1.37 billion) and the unsold under construction with 35.2% share (2,193 units).

Chart 15

Shop Market Status Trend 2015 – 2019



## Aktiviti Pembinaan

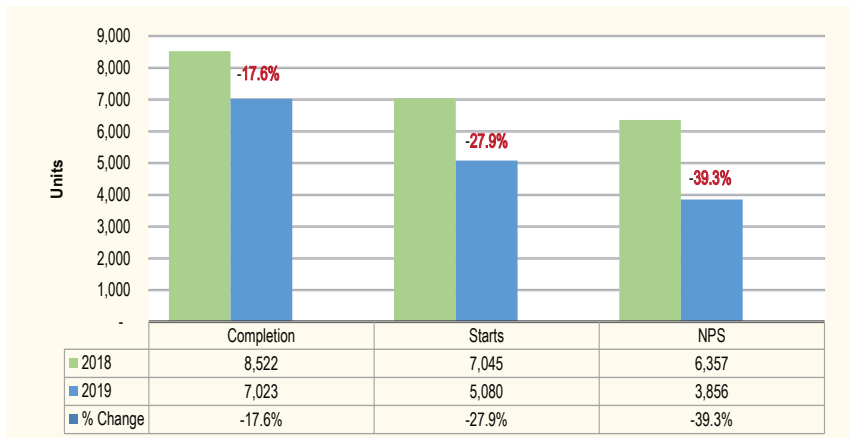
Di peringkat penawaran, aktiviti pembinaan terus perlahan sebagaimana yang ditunjukkan oleh penurunan dalam baru siap dibina, mula dibina dan penawaran baru dirancang, masing-masing menurun sebanyak 17.6% (7,023 unit), 27.9% (5,080 unit) dan 39.3% (3,856 unit). Pada akhir tahun, terdapat lebih 526,000 kedai sedia ada dengan hampir 37,400 unit dalam penawaran akan datang dan hampir 35,200 unit dalam penawaran yang dirancang.

## Construction Activity

On the supply front, construction activity continued to be slow as indicated by the contraction in completions, starts and new planned supply, each down by 17.6% (7,023 units), 27.9% (5,080 units) and 39.3% (3,856 units) respectively. As at year-end, there were slightly more 526,000 existing shops with almost 37,400 units in the incoming supply and nearly 35,200 units in the planned supply.

Chart 16

Shops Construction Activity Trend 2015 – 2019



## Harga

Secara keseluruhan harga kedai menyaksikan prestasi bercampur. Di Kuala Lumpur, kedai dua tingkat di Lucky Garden dan Taman Bangsar masing-masing dipindahkan pada RM4.2 juta dan RM5.5 juta. Kedai yang sama di Taman Midah menyaksikan penurunan harga, menurun sebanyak 5.4% pada julat harga RM1,680,000 - RM2,000,000. Kedai tiga tingkat di Taman Tun Dr Ismail mencatatkan peningkatan kecil sebanyak 5.0% pada julat harga RM4.1 juta - RM5.05 juta. Di Selangor, kedai dua tingkat di Denai Alam mencatatkan pertumbuhan dua angka, pada julat harga RM2.0 juta - RM2.1 juta. Di Johor Bahru, kedai dua tingkat di Taman Johor Jaya (Jalan Dedap), (Jalan Bakawali) dan (Jalan Rosmerah) masing-masing dipindahkan pada harga RM1.35 juta, RM630,000 - RM800,000 dan RM755,000 - RM920,000, meningkat sebanyak 4.2%, 7.5% dan 10.3%.

## Sewa

Sewa kedai di tingkat bawah secara umumnya stabil. Di Kuala Lumpur, sewa kekal tinggi di Jalan Tuanku Abdul Rahman pada RM17,000 - RM33,000 sebulan manakala di Changkat Bukit Bintang dalam lingkungan RM22,000 -

## Price

Prices of shops witnessed mixed performance across the board. In Kuala Lumpur, two storey shops in Lucky Garden and Bangsar Park were transacted at RM4.2 million and RM5.5 million respectively. Similar shops in Taman Midah saw prices softening, declined by 5.4% at a price range of RM1,680,000 - RM2,000,000. Three storey shops in Taman Tun Dr Ismail recorded marginal increase by 5.0% at a price range of RM4.1 million - RM5.05 million. In Selangor, double storey shops located in Denai Alam recorded double-digit growth, at a price range of RM2.0 million - RM2.1 million. In Johor Bahru, double storey shops in Taman Johor Jaya (Jalan Dedap), (Jalan Bakawali) and (Jalan Rosmerah) were transacted at RM1.35 million, RM630,000 - RM800,000 and RM755,000 - RM920,000, increased by 4.2%, 7.5% and 10.3% respectively.

## Rental

The ground floor shops' rentals were generally stable. In Kuala Lumpur, rentals remained high in Jalan Tuanku Abdul Rahman at RM17,000 to RM33,000 per month whilst in Changkat Bukit Bintang ranged from



RM30,000 sebulan, meningkat sebanyak 10.6%. Di Selangor, sewa adalah agak stabil dengan pertumbuhan marginal yang dicatatkan di Seksyen 7 dan Seksyen 9 Shah Alam pada 5% hingga 6% dengan sewa bulanan antara RM4,000 dan RM7,500. Di Johor Bahru, kedai-kedai di tingkat bawah di Jalan Wong Ah Fook dan Jalan Station memperoleh sewa tinggi pada RM6,900 - RM12,000 sebulan.

## 2.2.2 Pangsapuri Khidmat

### Transaksi

Subsektor Pangsapuri khidmat mencatatkan 4,180 transaksi bernilai RM2.89 bilion, membentuk 16.3% daripada jumlah transaksi harta komersial dan 10.0% daripada jumlah nilai. Prestasi pasaran mencatatkan peningkatan transaksi sebanyak 17.6% (2018: 3,553 transaksi) dalam bilangan dan 3.0% (2018: RM2.80 bilion) dalam nilai. Mengikut negeri, WPKL dan Selangor menyumbang jumlah pasaran negara yang lebih tinggi kepada jumlah nasional, masing-masing dengan syer pasaran sebanyak 48.5% (2,029 transaksi) dan 30.7% (1,285 transaksi).

### Status Pasaran

Pangsapuri khidmat siap dibina tidak terjual terus meningkat dan membentuk sebahagian besar daripada harta tanah yang tidak terjual, merekodkan sejumlah 17,142 unit dengan nilai RM15.04 bilion, meningkat 50.8% dalam bilangan dan 64.2% dalam nilai berbanding 2018. Sebaliknya, senario bertambah baik bagi yang dalam pembinaan belum terjual dan belum dibina belum terjual kerana masing-masing berkurangan ke 33,827 unit dan 7,659 unit, turun sebanyak 9.3% dan 40.5%.

Mengikut negeri, Johor mengekalkan kedudukannya sebagai negeri mempunyai pangsapuri khidmat siap dibina tidak terjual yang paling tinggi dengan syer 71.2% dalam bilangan (12,207 unit) dan 76.9% dalam nilai (RM11.56 bilion). Kebanyakan unit siap dibina tidak terjual ini terletak di daerah Johor Bahru, mencatatkan 99.2% daripada jumlah tidak terjual negeri (12,105 unit bernilai RM11.5 bilion). Johor juga menguasai syer 34.0% (11,490 unit) daripada jumlah unit dalam pembinaan belum terjual negara.

Mengikut harga, unit melebihi RM1 juta membentuk 37.4% daripada jumlah siap dibina tidak terjual, 20.3% daripada jumlah keseluruhan yang dalam pembinaan belum terjual dan 19.5% daripada jumlah yang belum dibina belum terjual. Untuk yang belum dibina belum terjual, unit dalam julat harga sebanyak RM300,000 - RM400,000 membentuk 33.0% daripada jumlah keseluruhan.

*RM22,000 to RM30,000 per month increased by 10.6%. In Selangor, rentals were fairly stable with a marginal growth noted in Seksyen 7 and Seksyen 9 Shah Alam at 5% to 6% with monthly rental between RM4,000 and RM7,500. In Johor Bahru, ground floor shops at Jalan Wong Ah Fook and Jalan Station fetched high rental at RM6,900 – RM12,000 per month.*

## 2.2.2 Serviced Apartment

### Transaction

*Serviced apartment sub-sector recorded 4,180 transactions worth RM2.89 billion, formed 16.3% of the commercial property transactions volume and 10.0% of the total value. Market performance recorded an increase of 17.6% in volume (2018: 3,553 transactions) and 3.0% in value (2018: RM2.80 billion) of transactions. By state, WPKL and Selangor contributed higher national market volume to the national total, each with 48.5% (2,029 transactions) and 30.7% (1,285 transactions) market share.*

### Market Status

*Serviced apartment sub-sector overhang continued to increase and forming the bulk of the property overhang, recording a total of 17,142 units with a value of RM15.04 billion, up by 50.8% in volume and 64.2% in value against 2018. On the contrary, the unsold under construction and not constructed improved with volume declined to 33,827 units and 7,659 units, down by 9.3% and 40.5% respectively.*

*By state, Johor retained its reign as the highest serviced apartment overhang state with 71.2% share in volume (12,207 units) and 76.9% share in value (RM11.56 billion). Majority of these overhang units is in Johor Bahru district, accounting for 99.2% of the state's overhang (12,105 units worth RM11.5 billion). The state also held 34.0% share (11,490 units) of the country's unsold under construction.*

*By price, units above RM1 million formed 37.4% of the total overhang, 20.3% of the total unsold under construction and 19.5% of the total unsold not constructed. For unsold not constructed, units in the price range of RM300,000 – RM400,000 formed 33.0% of the total.*

Chart 17

## Serviced Apartment Market Status

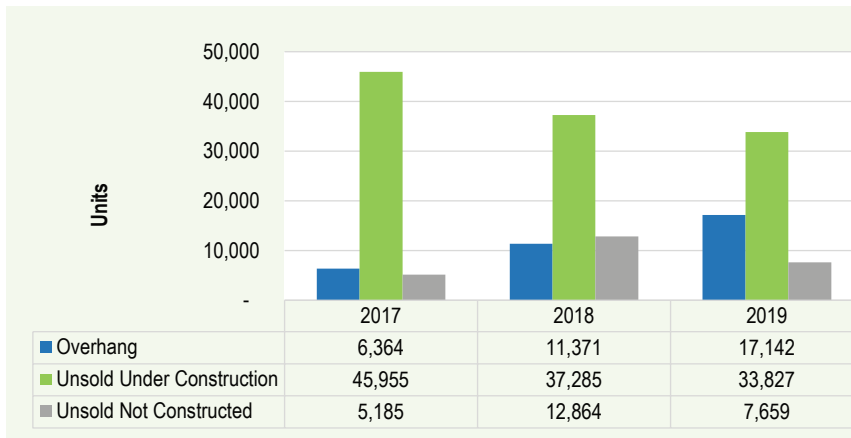
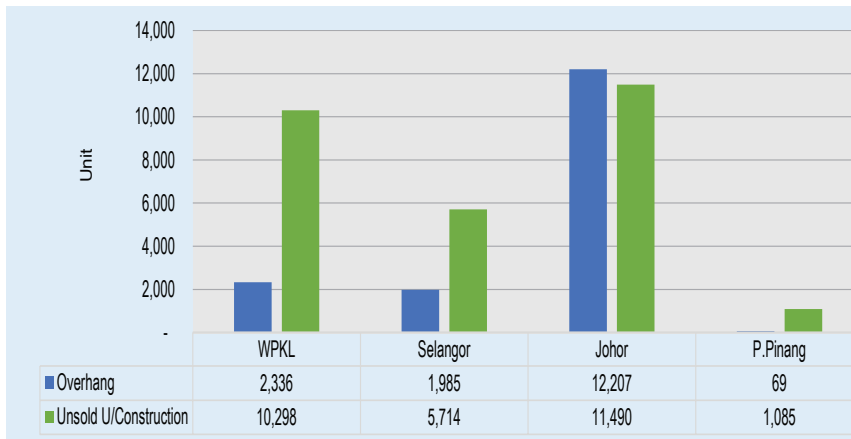


Chart 18

## Serviced Apartment Overhang and Unsold Under Construction in Major States 2019



### Aktiviti Pembinaan

Di peringkat penawaran, aktiviti pembinaan terus aktif seperti yang ditunjukkan oleh peningkatan yang ketara dalam baru siap dibina dan mula dibina, masing-masing meningkat sebanyak 33.0% (41,452 unit) dan 31.6% (33,853 unit), manakala penawaran baru dirancang menurun hampir 30% ke 38,362 unit. Pada akhir tahun, terdapat 0.25 juta unit pangsapuri khidmat sedia ada dengan hampir 0.12 juta dalam penawaran akan datang dan 0.18 juta dalam penawaran yang dirancang.

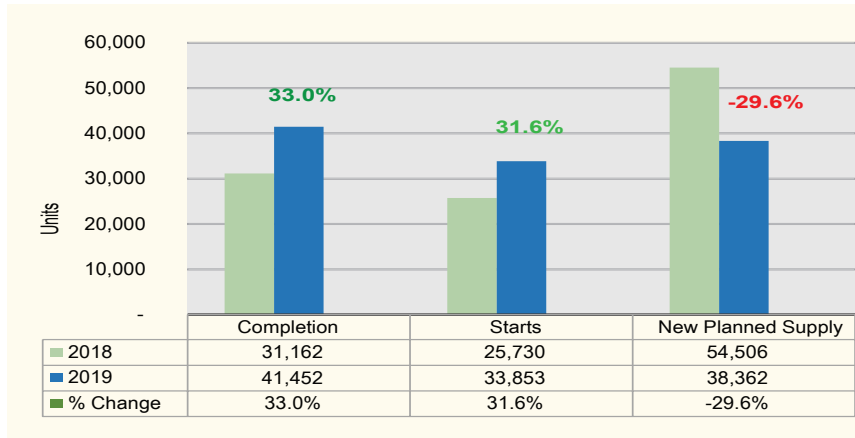
### Construction Activity

*On the supply front, construction activity continued to be active as indicated by the significant increase in completion and starts, each up by 33.0% (41,452 units) and 31.6% (33,853 units) respectively, whereas new planned supply dropped by nearly 30% to 38,362 unit. As at year-end, there were 0.25 million existing serviced apartments units with nearly 0.12 million in the incoming supply and 0.18 million in the planned supply.*



Chart 19

Serviced Apartment Construction Activity Trend 2015 – 2019



### Harga

Harga pangsapuri khidmat menunjukkan trend yang lebih stabil di seluruh negeri dengan trend menurun disaksikan di lokasi tertentu. Di WPKL, harga pangsapuri khidmat di pasaran sekunder secara amnya berada dalam trend menurun kerana lebih banyak unit baru siap dibina masuk ke pasaran. Pangsapuri khidmat berharga lebih dari RM1 juta seperti Laman Ceylon, Hampshire Residences, Pavilion Residences dan Platinum Suites menurun sebanyak 5% - 14%.

### Price

Prices of serviced apartments showed a more stable trend across the states with downward trend witnessed in certain locations. In WPKL, prices of secondary market serviced apartment were generally on a downward trend as more newly completed units came onto market. Serviced apartment priced at above RM1 million such as Laman Ceylon, Hampshire Residences, Pavilion Residences and Platinum Suites contracted by 5% to 14%.

### Sewa

Pasaran sewa secara amnya stabil dalam negeri utama dengan pergerakan menaik yang dicatatkan di lokasi yang diminati. Di Selangor, Pangsapuri khidmat di Oasis Damansara dan Plaza Azalea mencatat pertumbuhan sewa dua digit. Purata kadar pulangan kasar di seluruh negara adalah dalam lingkungan 3% hingga 6%.

### Rental

The rental market was generally stable in major sates with upward movements recorded in favourable locations. In Selangor, serviced apartment at Oasis Damansara and Plaza Azalea recorded double-digit rental growth. Average gross rental yield across the states were in the range of 3% to 6%.

## 2.2.2 Kompleks Perniagaan

### Transaksi

Tahun ini mencatatkan enam transaksi kompleks perniagaan; masing-masing di WPKL, Johor, Pulau Pinang, Melaka, Perak dan Kedah. Empat telah dijual dengan perjanjian jual beli yang ditandatangani pada 2018 tetapi disempurnakan pada tahun 2019. Ringkasan transaksi seperti yang disenaraikan di bawah:

No	State	Name of Property	Location	Year of SPA	Consideration (RM)
1	WPKL	Pavilion Bukit Jalil	Persiaran Jalil Utama	2019	148,000,000
2	Johor	Mydin Mutiara Rini	Tmn Mutiara Rini	2018	220,000,000
3	Pulau Pinang	Econsave @ Jalan Sungai Jawi	Taman Sungai Jawi	2018	14,000,000
4	Perak	AEON Kinta City	Jalan Teh Lean Swee, Off Jalan Sultan Azlan Shah Utara	2018	208,000,000
5	Melaka	Mydin Hypermarket	MITC, Ayer Keroh, Melaka	2019	-
6	Kedah	Pasaraya Billion	Pekan Pulaui, Baling	2018	8,500,000

### Penghunian dan Ketersediaan Ruang

Prestasi subsektor ruang niaga adalah stabil, mencatatkan kadar penghunian keseluruhan pada 79.2%, sedikit penurunan dari 79.3% yang dicatatkan pada 2018. Kuala Lumpur mencatatkan prestasi menggalakkan, memperoleh lebih daripada 83.0% kadar penghunian; manakala Selangor menurun sedikit ke 82%. Johor dan Pulau Pinang masing-masing berjaya memperoleh purata penghunian sebanyak 75.3% dan 73.7%. Empat negeri ini mencatatkan ketersediaan ruang yang lebih tinggi (kekosongan) diketuai oleh Selangor (0.65 juta m.p.), Johor (0.59 juta m.p.), Kuala Lumpur (0.54 juta m.p.), dan Pulau Pinang (0.48 juta m.p.).

## 2.2.2 Shopping Complex

### Transaction

The year recorded six shopping complex transactions; each one in WPKL, Johor, Pulau Pinang, Melaka, Perak and Kedah. Four were sold with sale and purchase agreement dated in 2018 but concluded in 2019. The summary of transaction is as listed below:

### Occupancy and Space Availability

The retail sub-sector recorded a stable performance, recording an overall occupancy rate of 79.2%, attributed to decreased slightly from 79.3% recorded in 2018. Kuala Lumpur recorded an encouraging performance, securing more than 83.0% occupancy rate whereas Selangor slightly dropped to 82%. Johor and Pulau Pinang managed to secure an average occupancy of 75.3% and 73.7% respectively. These four states recorded higher available space (vacancy), led by Selangor (0.65 million s.m.), Johor (0.59 million s.m.), Kuala Lumpur (0.54 million s.m.), and Pulau Pinang (0.48 million s.m.).

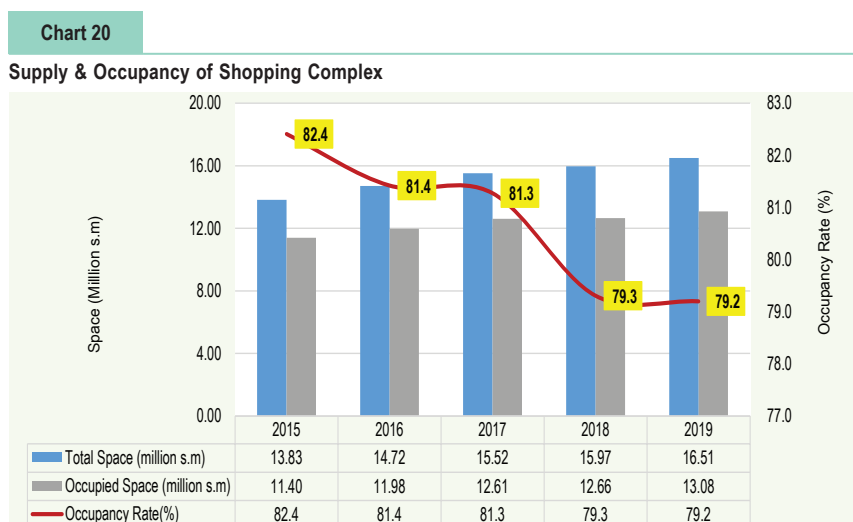
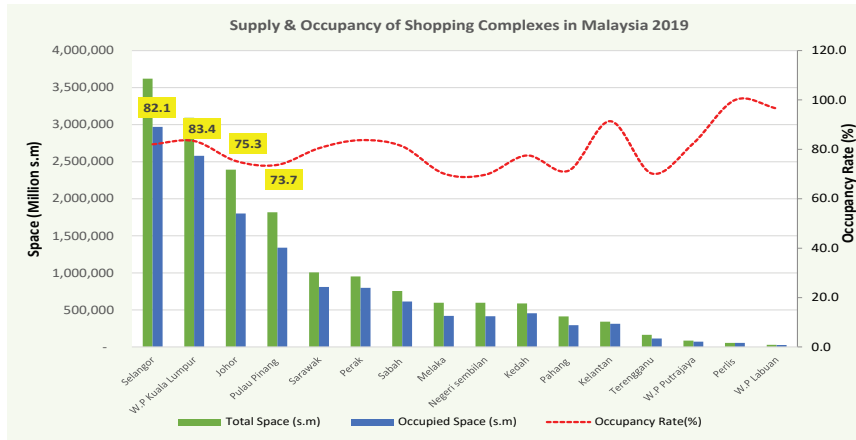


Chart 21

Supply & Occupancy of Shopping Complex by State



Aktiviti Pembinaan

Di peringkat pembangunan, terdapat 23 kompleks yang baru siap dibina dengan CCC, menambah lebih daripada 0.56 juta m.p. ruang niaga ke pasaran pada 2019. Pada akhir tahun, terdapat lebih daripada 16.5 juta m.p. ruang niaga sedia ada daripada 1,036 kompleks perniagaan. Selangor mendominasi ruang niaga sedia ada dengan 151 kompleks perniagaan yang menawarkan 3.62 juta m.p. Terdapat 40 lagi kompleks dengan 1.95 juta m.p. dalam penawaran akan datang dan 14 kompleks dengan 0.51 juta m.p. dalam penawaran yang dirancang. WP Kuala Lumpur dan Selangor mendominasi penawaran akan datang manakala Kuala Lumpur menguasai penawaran yang dirancang.

Construction Activity

On the development front, there were 23 complexes completed with CCC, adding more than 0.56 million s.m. of retail space into the market in 2019. As at year-end, there were more than 16.5 million s.m. existing retail space from 1,036 shopping complexes. Selangor dominated the existing retail space with 151 shopping complexes offering 3.62 million s.m. There were another 40 complexes with 1.95 million s.m. in the incoming supply and 14 complexes with 0.51 million s.m. in the planned supply. WP Kuala Lumpur and Selangor dominated the incoming supply while Kuala Lumpur dominated planned supply.

Kompleks perniagaan berikut telah siap pada 2019:

The following shopping complexes were completed in 2019:

State	Name of Building	Location	Floor area (s.m.)
<b>WP Putrajaya</b>			
Presint 1	Shaftsbury Avenue	Jalan Alamanda	24,880
<b>Selangor</b>			
Shah Alam	Central I-City Shopping Centre	Shah Alam	87,320
Banting	Eco Sanctuary Mall	Persiaran Eco Sanctuary	9,085
<b>Johor</b>			
Johor Bahru	Tesco Taman Setia Tropika	Setia Tropika	5,147
Johor Bahru	Southkey Mega Mall	Jalan Bakar Bata	126,029
Johor Bahru	Helious Cove Shopping Mall	Bandar Baru Permas Jaya	13,567
Johor Bahru	R&F Mall	Tanjung Puteri	39,102
Johor Bahru	Toppen Shoping Centre	Taman Desa Tebrau	46,713
Johor Bahru	Sunway Big Box	Medini	46,452
Kluang	Pasaraya Songmart	Taman Muhibbah	2,553
<b>Pulau Pinang</b>			
Simpang Ampat	Ikea Batu Kawan	Jalan Cassia Barat 2	39,979
Butterworth	Tesco Bagan Ajam	Jalan Bagan Ajam	9,290

State	Name of Building	Location	Floor area (s.m.)
<b>Kedah</b>			
Pokok Sena	Sena Central	Jalan Pokok Sena-Kuala Nerang	4,182
Kota Setar	Kompleks Pekan Rabu	Jalan Tunku Ibrahim	3,234
<b>Pahang</b>			
Kuantan	TMG Mall, Bandar Indera Mahkota	Bandar Indera Mahkota	4,974
Kuantan	Cowboyz Supermarket	Jalan Kuantan-Gambang	4,819
Kuantan	TMG Mall, Tg. Lumpur	Jalan Kuantan-Tg. Lumpur	7,709
Maran	Pasaraya Eonsave	Bandar Tun Razak, Jengka	5,454
<b>Terengganu</b>			
Besut	Jerteh Square	Kampung Tanduk	1,403
<b>Negeri Sembilan</b>			
Putra Nilai	Mantin Supermarket (Eonsave)	Jalan Besar Mantin	3,584
Seremban	UNICITY Mall, Seremban 3	Persiaran Seremban 3	15,042
<b>Sarawak</b>			
Kuching	Aeroville Shopping Mall	Jalan Stutong Baru	29,286
Bintulu	The Spring Mall	Jalan Tun Razak	36,357
<b>TOTAL MALAYSIA</b>	<b>23</b>		<b>566,161</b>

## Sewa

Sewa ruang niaga secara umumnya stabil dengan pergerakan meningkat di kompleks tertentu. Suria KLCC mengekalkan keunggulannya, mencatatkan pertumbuhan sewa dua angka dengan julat sewa tertinggi sebulan dari RM337 s.m.p. sehingga RM2,066 s.m.p. Mid Valley Mega Mall mencatat pertumbuhan sewa marginal dengan sewa bulanan dari RM120 s.m.p. - RM782 s.m.p. Di Selangor, Central I-City memperoleh sewa RM65 s.m.p - RM323 s.m.p. bergantung kepada aras dan kedudukan. Di Johor, Southkey Mid Valley Mall yang baru siap dibina menyaksikan unit di tingkat bawahnya memperoleh sewa dari RM26.91 s.m.p. hingga RM425 s.m.p

## Rental

*Rentals of retail space were generally stable with upwards movements in selected complexes. Suria KLCC sustained its prominence, recorded double-digit rental growth and fetching the highest rental range per month from RM337 p.s.m. to as high as RM2,066 p.s.m. Mid Valley Mega Mall recorded marginal rental growth with monthly rental ranging from RM120 p.s.m. to RM782 p.s.m. In Selangor, Central I-City secured rental ranging from RM65 p.s.m. to RM323 p.s.m. depending on level and siting. In Johor newly completed Southkey Mid Valley Mall saw its ground floor units securing rental ranging from RM26.91 p.s.m. to as high as RM425 p.s.m.*

### 2.2.3 Pejabat Binaan Khas

#### Transaksi

Dua puluh transaksi bangunan pejabat bernilai lebih RM1 bilion dicatatkan pada tahun 2019. Ringkasan transaksi adalah seperti yang disenaraikan di bawah:

No.	State	Name of Property	Location	Transaction Year
1	Kuala Lumpur	Wisma Amanah Raya	Jalan Ampang	2018
2	Kuala Lumpur	Menara AIMS	Jalan Changkat Raja Chulan	2019
3	Kuala Lumpur	Wisma Gurcharan	Jalan Tuanku Abd Rahman	2018
4	Kuala Lumpur	Wisma KFC	Jalan Sultan Ismail	2018
5	Kuala Lumpur	Wisma MPL	Jalan Raja Chulan	2019
6	Kuala Lumpur	Blok 3 The Horizon,	Bangsar South	2018
7	Kuala Lumpur	13, Avenue 5	Bangsar South	2018
8	Kuala Lumpur	Balai Berita Bangsar	Off Jalan Bangsar	2018
9	Kuala Lumpur	Blok 6, Jalan Klang Lama	Southbank Residence	2019
10	Kuala Lumpur	Blok 3A, Jalan Klang Lama	Southbank Residence	2019
11	Kuala Lumpur	Blok 5, Jalan Klang Lama	Southbank Residence	2019
12	Kuala Lumpur	Blok 3, Jalan Klang Lama	Southbank Residence	2019
13	Kuala Lumpur	Menara PNB	Jalan Tun Razak	2019
14	Kuala Lumpur	Wisma Tune, Lrg Dungun	Damansara Heights	2019
15	Kuala Lumpur	Menara IWK (Setia 2)	Damansara Heights	2019
16	Selangor	Bgn Kurnia	Leisure Commerce Square	2018
17	Selangor	Casa Klang	Jln Meru, Bdr Klang	2019
18	Johor	Bangunan Tim Jaya	Off Jln Skudai	2019
19	Perak	Bgn Mayban Trust	Jalan Tun Sambanthan	2019
20	Sarawak	Wisma MAA	Jalan Central Timur	2019

### 2.2.3 Purpose-built Office

#### Transaction

Twenty office buildings transactions worth more than RM1 billion were recorded in 2019. The summary of transactions is as listed below:

### Penghunian dan Ketersediaan Ruang

Prestasi keseluruhan subsektor pejabat kurang menjanjikan kerana kadar penghunian keseluruhan menurun ke 80.6% pada 2019, dari 82.4% pada tahun 2018. Bangunan pejabat swasta merekodkan purata kadar penghunian pada 74.8%; WPKL dan Pulau Pinang memperoleh kadar penghunian yang lebih tinggi masing-masing pada 76.9% dan 76.5%; manakala Selangor dan Johor lebih rendah berbanding dengan aras nasional masing-masing sebanyak 70.0% dan 65.7%. Bangunan pejabat swasta di Putrajaya merekodkan kadar penghunian paling rendah pada 37.6%.

### Occupancy and Space Availability

The overall performance of office sub-sector was less promising as the overall occupancy rate declined to 80.6% in 2019, down from 82.4% in 2018. The private office buildings recorded average occupancy rate at 74.8%; WPKL and Pulau Pinang secured higher occupancy rate at 76.9% and 76.5% respectively; whereas Selangor and Johor lower than national level at 70.0% and 65.7% respectively. Private office buildings in Putrajaya recorded the lowest occupancy rate at 37.6%.

Chart 22

Supply & Occupancy of Purpose-Built Office

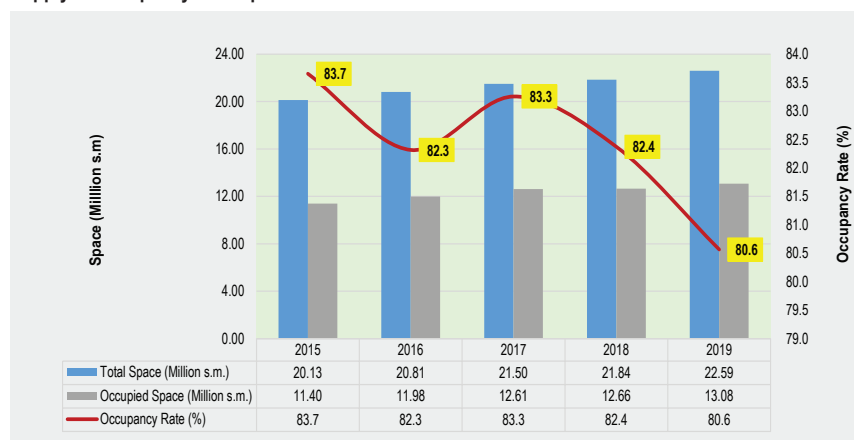
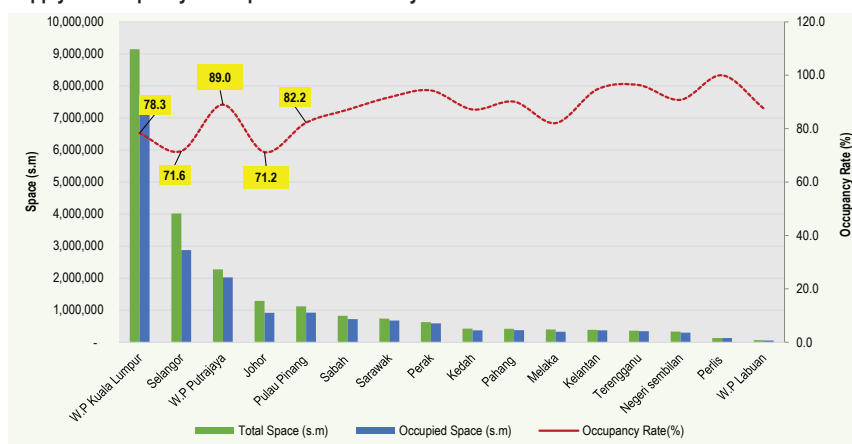


Chart 23

## Supply &amp; Occupancy of Purpose-Built Office by State 2019



### Aktiviti Pembinaan

Terdapat 21 bangunan baru siap dibina menawarkan ruang sebanyak 576,179 m.p., peningkatan yang ketara berbanding 2018 (250,938 m.p.). Hanya lapan daripada baru siap dibina adalah bangunan kerajaan manakala baki 13 adalah bangunan swasta. Bangunan pejabat swasta adalah seperti berikut:

### Construction Activity

There were 21 new completions offering a total space of 576,179 s.m., a significant increase compared to 2018 (250,938 s.m.). Only eight of the new completions were Government buildings whilst the remaining 13 are private buildings. The private office buildings are as follows:

State	Name of Building	Location	Floor Area (s.m.)
WPKL	Menara Prudential	TRX, Jalan Tun Razak	38,282
	The Exchange 106	TRX, Jalan Tun Razak	213,680
	Eko Cheras Office Suite	Jalan Cheras	17,493
Putrajaya Selangor	Menara MRCB	Persiaran Perdana, Precint 2	39,949
	KYM Tower	Mutiara Damansara	14,081
	Menara Symphony	Jalan Semangat	23,506
	Menara BSN	Seksyen 14, Shah Alam	14,068
	Wisma Conlay	USJ 10	35,312
	1 Power House @ Bandar Utama	Bandar Utama	37,440
Johor	Pejabat Lembaga Hasil Dalam Negeri Malaysia (LHDNM) Kluang	Jalan Batu Pahat	13,254
	D'Pristine Tower	Medini, Iskandar Puteri	44,436
Terengganu	Rimbun Tekad	Jalan Tengku Ampuan Intan Zaharah	1,335
Sabah	I-Office Tower (ITCC)	Jalan Pintas Panampang	10,050
<b>Total Malaysia</b>	<b>13 private office buildings</b>		<b>502,886</b>

Pada akhir tahun 2019, terdapat sejumlah 22.59 juta m.p. ruang pejabat sedia ada daripada 2,549 bangunan, 51 lagi bangunan dengan 2.38 juta m.p. dalam penawaran akan datang dan 15 bangunan dengan hampir 0.4 juta m.p. dalam penawaran yang dirancang. WP Kuala Lumpur menguasai ketiga-tiga kategori penawaran.

As at end-2019, there was a total of 22.59 million s.m. existing office space from 2,549 buildings, while another 51 buildings with 2.38 million s.m. in the incoming supply and 15 buildings with nearly 0.4 million s.m. in the planned supply. WP Kuala Lumpur dominated all three categories of supplies.

### Sewa

Pasaran sewa pejabat pada umumnya stabil dengan pergerakan campuran yang minima di bangunan tertentu. Ruang pejabat di Intermark, Kuala Lumpur memperoleh kadar sewa tinggi dari RM99 s.m.p. ke RM129 s.m.p.

### Rental

The office rental market was generally stable with minimal mixed movements in selected buildings. Office space in the Intermark, Kuala Lumpur commanded higher rental range of RM99 p.s.m. to RM129 p.s.m. In

Di KL Sentral, pasaran umumnya stabil dengan ruang pejabat di 1 Sentrum dan Q Sentral masing-masing memperoleh kadar sewa dari RM70-RM86 s.m.p. dan RM55-RM75 p.s.m. Di Selangor, blok menara Jaya 33 memperoleh kadar sewa dalam lingkungan RM41-RM53 s.m.p.; manakala ruang pejabat di Century Squares dan Wisma Mustapha Kamal, kedua-duanya di Cyberjaya telah disewa pada RM40 - RM52 s.m.p.

## 2.2.4 Harta Tanah Riadah

### Transaksi

Sepuluh hotel dan dua resort transaksi direkodkan pada 2019 bernilai lebih RM0.5 bilion. Transaksi ini bertarikh pada 2018 dan 2019. Ringkasan transaksi adalah seperti yang disenaraikan di bawah:

No	State	Name of Property	Location	Year of SPA	Consideration (RM)
1	Kuala Lumpur	Brisdale Hotel	Jln Haji Hussin Off Jln Tunku Abd Rahman	2018	26,000,000
2	Kuala Lumpur	Q-Hotel	Jln Tiong Nam Off Jln Raja Laut	2019	27,900,000
3	Selangor	Hotel Marriot	Bdr Damansara Perdana	2019	125,000,000
4	Selangor	Mtree Hotel	Bdr Puchong Jaya	2019	95,000,000
5	Johor	Garden Hotel	Batu Pahat	2018	8,000,000
6	Perak	Impiana Hotel	Jalan Raja Nazrin Shah, Ipoh	2018	44,000,000
7	Perak	Yeob Bay Hotel & Resort	Jalan Teluk Senangin Lumut	2018	-
8	Sabah	WINNER Hotel	Kpg Air, Kota Kinabalu	2018	13,000,000
9	Sabah	Century Hotel	Bandaran Berjaya, Kota Kinabalu	2018	11,500,000
10	Sabah	Hotel Mb	Bandar Tawau	2019	12,500,000
11	Sabah	Mimpian Jadi Resorts	Off Jln Tuaran	2019	18,559,673
12	Kedah	Hotel Tabung Haji	Jln Anak Bukit	2019	160,625,749

### Aktiviti Pembinaan

Terdapat 24 hotel baru siap dibina pada 2019 yang menawarkan 3,934 bilik, turun sebanyak 34.4% berbanding 2018 dari segi bilik (2018: 29 hotel; 5,994 bilik). Kebanyakan hotel baru siap dibina terletak di Kuala Lumpur (tujuh hotel) dan Pulau Pinang (enam hotel). Hotel mula dibina menunjukkan peningkatan ketara dengan 29 hotel mengandungi 5,377 bilik (2018: 14 hotel; 2,567 bilik). Kebanyakan hotel mula dibina terletak di Pulau Pinang (11 otel; 1,968 bilik), diikuti oleh Johor (lima hotel; 1,488 bilik). Penawaran baru dirancang berkurang sebanyak 27% ke 2,420 bilik (2018: 21 hotel; 3,330 bilik). Hotel yang baru siap dibina pada tahun 2019 seperti berikut:

*KL Sentral, market was generally stable with office space in 1 Sentrum and Q Sentral securing rental rates ranging from RM70-RM86 p.s.m. and RM55-RM75 p.s.m. respectively. In Selangor, Jaya 33's tower block secured rental range of RM41 p.s.m. to RM53 p.s.m., while office space in Century Square and Wisma Mustapha Kamal, both in Cyberjaya were rented at the range of RM40 – RM52 p.s.m.*

## 2.2.4 Leisure Property

### Transaction

*Ten hotels and two resorts transactions were recorded in 2019 worth more than RM0.5 billion. These transactions dated in 2018 and 2019. The summary of transactions is as listed below:*

### Construction Activity

*There were 24 new hotels completed in 2019 offering 3,934 rooms, down by 34.4% against 2018 in terms of rooms (2018: 29 hotels; 5,994 rooms). Majority of the new completions are in Kuala Lumpur (seven hotels) and Pulau Pinang (six hotels). Starts showed a significant increase with 29 hotels consisting of 5,377 rooms (2018: 14 hotels; 2,567 rooms). Most starts were in Pulau Pinang (11 hotels; 1,968 rooms), followed by Johor (five hotels; 1,488 rooms). New planned supply contracted by 27% to 2,420 rooms (2018: 21 hotels; 3,330 rooms). The newly completed hotels in 2019 as follows:*



State	Name of Hotel	Rooms
WP Kuala Lumpur	CitizenM Bukit Bintang	198
	Dorsett Hartamas	290
	EQ Hotel	440
	J-Hotel	150
	Momo's Hotel	99
	Ormond Hotels	113
	Four Point By Sheraton	318
Johor	Anantara Desaru Coast Resort & Villas	123
	Forest City Golf Hotel	315
Pulau Pinang	D Mansion Hotel	45
	Frame Hotel	49
	Le Embassy Hotel (HP Hotel)	33
	LooP On Leith	140
	Prestige Hotel	85
	Wow Hotel	45
Kedah	T Hotel Lebuhraya Sultan Abdul Halim	96
Melaka	Hotel Armes	301
Pahang	Chalet Lot 106038 Kampung Cherating	80
	Geo Resort & Hotel	252
	Swiss-Garden Hotel & Resort Genting Highlands	561
Perak	Hotel Casa Meru	45
	O & G Boutique Hotel	50
	Sojourn Guest House Ipoh	41
	Tourist Hotel Pangkor	65
<b>Grand Total</b>	<b>24 hotels</b>	<b>3,934</b>

Pada akhir tahun 2019, terdapat 3,405 hotel di seluruh negara yang menawarkan 267,290 bilik. Terdapat 113 lagi hotel (23,843 bilik) dalam penawaran akan datang, yang diketuai oleh WPKL (5,350 bilik) dan Pulau Pinang (5,089 bilik). Terdapat 74 hotel lain (14,810 bilik) di peringkat penawaran yang dirancang, yang juga diketuai oleh WPKL (4,370 bilik).

### 2.3 Harta Tanah Industri

#### Transaksi

Subsektor industri mencatatkan 6,261 transaksi bernilai RM14.85 bilion pada 2019. Berbanding dengan tempoh yang sama tahun lepas, pasaran aktiviti meningkat sebanyak 3.8% dalam bilangan tetapi menurun sebanyak 1.1% dalam nilai transaksi. Selangor terus menguasai pasaran, dengan 35.3% daripada bilangan negara, diikuti oleh Johor (16.2%), Perak dan Sarawak, masing-masing dengan 7.6% daripada bahagian pasaran.

*As at end-2019, there were 3,405 hotels across the country offering 267,290 rooms. Another 113 hotels (23,843 rooms) were in the incoming supply led by WPKL (5,350 rooms) and Pulau Pinang (5,089 rooms). There were another 74 hotels (14,810 rooms) at the planned supply stage, also led by WPKL (4,370 rooms).*

### 2.3 Industrial Property

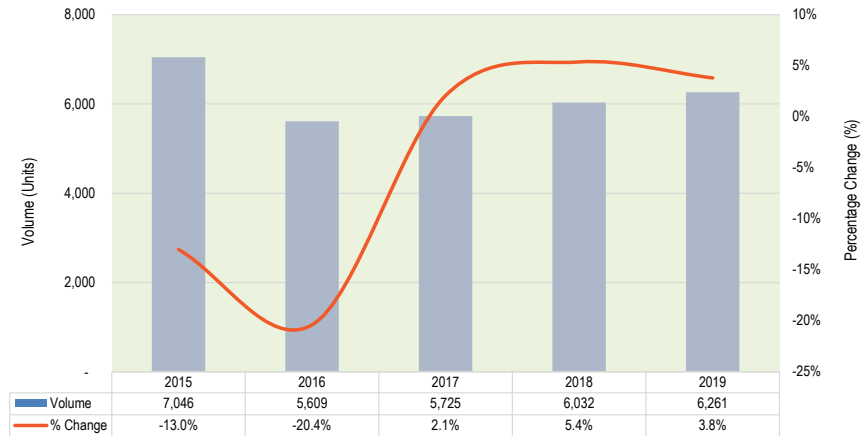
#### Transaction

*The industrial sub-sector recorded 6,261 transactions worth RM14.85 billion in 2019. Compared to the same period last year, the market activity increased by 3.8% in volume but declined by 1.1% in value. Selangor continued to dominate the market, with 35.3% of the nation's volume, followed by Johor (16.2%), Perak and Sarawak, each with 7.6% of the market share.*



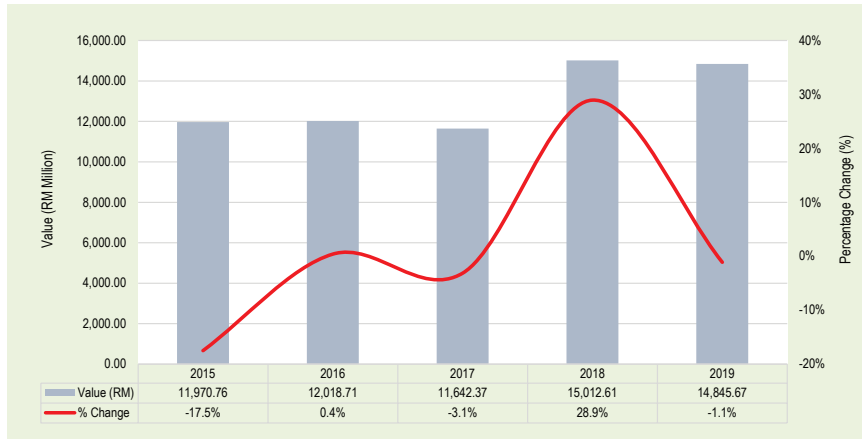
**Chart 24**

**Industrial Transaction Volume Trend**



**Chart 25**

**Industrial Transaction Value Trend**

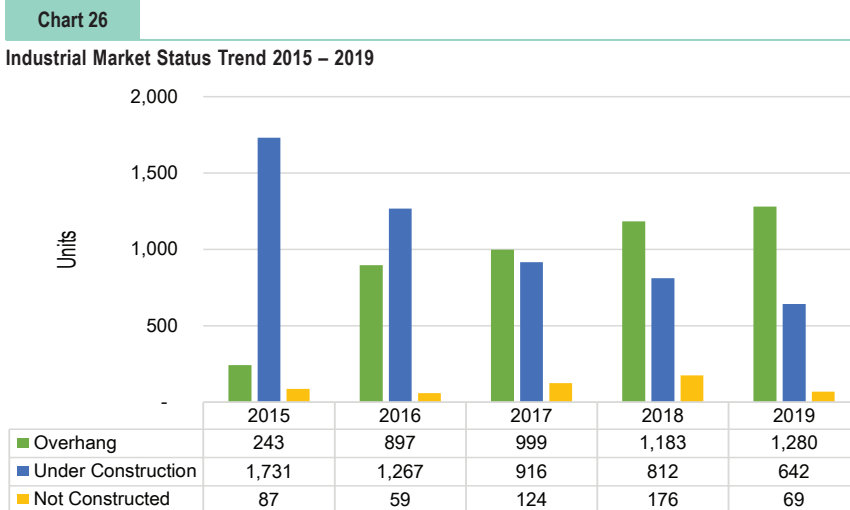


**Status Pasaran**

Berbanding 2018, industri siap dibina tidak terjual meningkat sedikit ke 1,280 unit bernilai RM1.87 bilion, meningkat sebanyak 8.2% dalam bilangan manakala turun 5.5% dalam nilai. Sebaliknya, unit dalam pembinaan belum terjual dan belum dibina belum terjual masing-masing berkurang ke 642 unit dan 69 unit, turun sebanyak 20.9% dan 60.8%. Mengikut negeri, Johor memegang kebanyakan unit siap dibina tidak terjual dengan syer 43.3%, diikuti oleh Sarawak (25.2%). Mengikut jenis, unit berkembar membentuk sebahagian besar siap dibina tidak terjual, diikuti oleh teres.

**Market Status**

Against 2018, the industrial overhang slightly increased to 1,280 units worth RM1.87 billion, up by 8.2% volume whilst down by 5.5% in value. On the contrary, the unsold under construction and not constructed declined to 642 units and 69 units, down by 20.9% and 60.8% respectively. By state, Johor held most of the overhang, with 43.3% share, followed by Sarawak (25.2%). By type, semi-detach units formed the bulk of the overhang, followed by terraced.

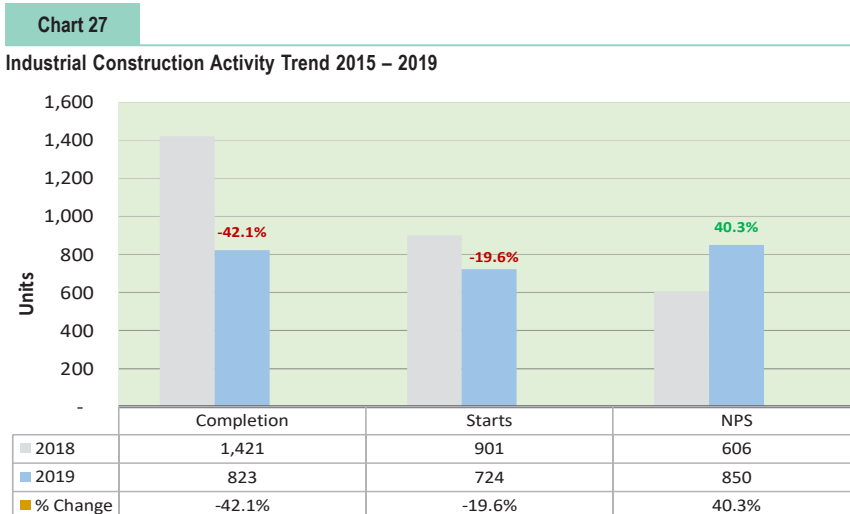


### Aktiviti Pembinaan

Di peringkat pembinaan, subsektor industri menyaksikan pergerakan bercampur. Industri baru siap dibina dan mula dibina masing-masing turun sebanyak 42.1% ke 823 unit dan 19.6% ke 724 unit, manakala penawaran baru dirancang meningkat sebanyak 40.3% ke 850 unit. Pada akhir tahun 2019, terdapat hampir 117,000 unit industri sedia ada, 4,343 unit dalam penawaran akan datang dan 7,169 unit dalam penawaran yang dirancang.

### Construction Activity

*On the construction front, the industrial sub-sector saw a mixed movement. Completions and starts were down by 42.1% to 823 units and 19.6% to 724 units respectively, whilst new planned supply increased by 40.3% to 850 units. As at end-2019, there were nearly 117,000 existing industrial units, 4,343 units in the incoming supply and 7,169 units in the planned supply.*



### Harga

Harga harta tanah industri menunjukkan prestasi yang bercampur-campur. Plot industri dengan saiz tanah dari 2,400 m.p. - 16,000 m.p. di Klang Selangor dipindahmilik pada harga antara RM500 s.m.p. - RM2,000 s.m.p. Plot industri di Worldwide Izone, Sungai Kapar Indah and Kawasan Perusahaan Selat Klang Utara masing-masing mencatatkan peningkatan sebanyak 26.9%,

### Price

*Prices of industrial property showed a mixed performance. Vacant industrial plot with land size ranging from 2,400 s.m. to 16,000 s.m. in Klang Selangor were transacted at RM500 p.s.m. to RM2,000 p. s. m. Vacant industrial plot in Worldwide Izone, Sungai Kapar Indah and Kawasan Perusahaan Selat Klang Utara recorded increased of 26.9%, 10.4% and*

10.4% dan 9.2%. Peningkatan ini boleh dikaitkan dengan permintaan yang semakin meningkat untuk gudang kerana perkembangan e-dagang.

9.2% respectively. The increase could be attributed to growing demand for warehouse due to expansion of e-commerce.

## 2.4 Harta Tanah Pertanian

## 2.4 Agriculture Property

### Transaksi

### Transaction

Subsektor pertanian menyaksikan peningkatan dalam pasaran aktiviti. Terdapat 68,665 transaksi bernilai RM12.42 bilion, meningkat sebanyak 2.0% dalam bilangan tetapi turun sebanyak 4.4% dalam nilai transaksi berbanding 2018. Subsektor ini berada di kedudukan kedua dari segi sumbangan kepada bilangan pasaran keseluruhan dengan syer 20.9%. Mengikut negeri, Kedah dan Perak menyumbang bilangan pasaran yang lebih tinggi kepada jumlah nasional, masing-masing dengan syer 18.4% dan 16.2%, diikuti oleh Sarawak (13.4%) dan Johor (11.4%).

Agriculture sub-sector saw a marginal increase in market activity. There were 68,665 transactions worth RM12.42 billion, up by 2.0% in volume but down by 4.4% in value against 2018. The sub-sector ranked second in terms of contribution to the overall market volume with 20.9% share. By state, Kedah and Perak contributed higher market volume to the national total, each with 18.4% and 16.2% market share, followed by Sarawak (13.4%) and Johor (11.4%).

Terdapat 46 transaksi tanah estet bernilai RM1.6 bilion dicatatkan pada 2019. Dua puluh lapan di Sabah, masing-masing lima di Perak dan Pahang, tiga di Sarawak, dua di Melaka dan Negeri Sembilan dan satu di Selangor. Daripada 46 transaksi, 25 ladang dijual pada tahun 2019; manakala 20 ladang tanah dijual pada 2018 dan satu dijual pada 2017 tetapi disempurnakan pada 2019.

There were 46 estate land transactions worth RM1.6 billion recorded in 2019. Twenty-eight in Sabah, five each in Perak and Pahang, three in Sarawak, two each in Melaka and Negeri Sembilan and one in Selangor. Out of 46 transactions, 25 estates were sold in 2019; whilst 20 estates land were sold in 2018 and one sold in 2017 but concluded in 2019.

Chart 28

Agriculture Transaction Volume Trend

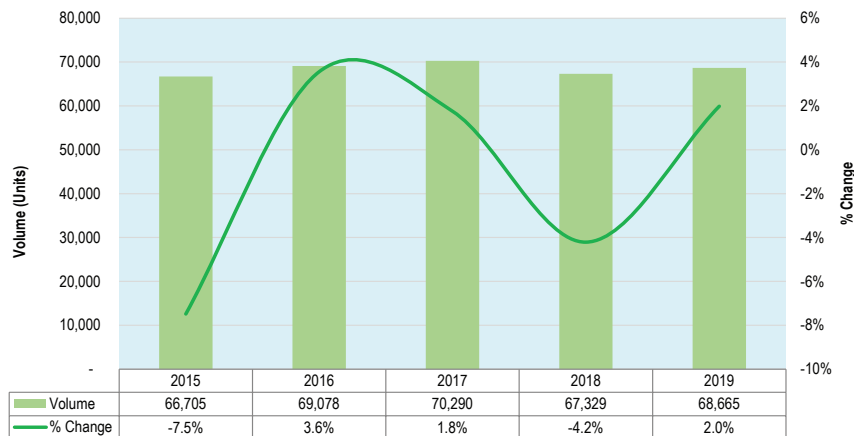
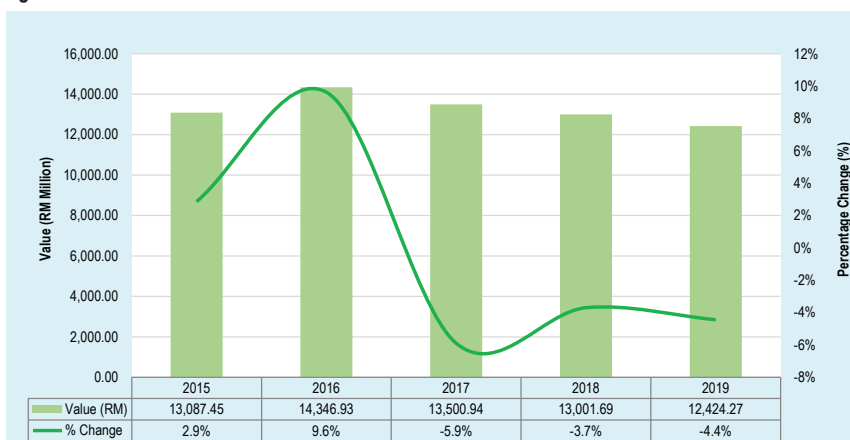


Chart 29

## Agriculture Transaction Value Trend



### Harga

Harga tanah pertanian umumnya stabil. Di Kedah, tanah pendalaman tanaman padi dua kali setahun di Kubang Pasu dipindahmilik antara RM105,000 - RM202,000 sehektar, manakala tanah tanaman padi di tepi jalan dipindahmilik antara RM163,000 - RM464,000 sehektar. Di Johor, tanah tanaman durian di Kluang dan Segamat masing-masing dipindahmilik pada harga RM186,000 sehektar dan RM131,000 hingga RM403,000 sehektar. Tanah Orchard di Kinta, Perak dijual dalam lingkungan RM110,000 hingga RM670,000 sehektar.

### 3.0 PROSPEK 2020

Ekonomi Malaysia berkembang sebanyak 4.3% pada 2019. Laporan Bank Negara Malaysia meramalkan bahawa pertumbuhan ekonomi akan meningkat pada tahun 2020 secara beransur-ansur, dengan sokongan berterusan daripada perbelanjaan isi rumah dan prestasi eksport yang lebih baik. Walau bagaimanapun, kemungkinan terdapat risiko penurunan jangka pendek yang tinggi hasil daripada jangkitan coronavirus (COVID-19) di seluruh dunia. Ini boleh menjejaskan pertumbuhan ekonomi yang dijangkakan, terutamanya bagi separuh pertama tahun 2020.

Wabak Covid-19 dijangka akan mencederakan ekonomi dunia dan ekonomi Malaysia, khususnya sektor yang berkaitan dengan pelancongan seperti syarikat penerbangan, runcit, makanan dan minuman dan perhotelan; serta sektor perkilangan dan perkhidmatan tertentu. Magnitud impak ke atas ekonomi Malaysia bergantung kepada tempoh dan penyebaran wabak ini bukan sahaja di Malaysia tetapi juga di negara lain, terutamanya rakan perdagangan utama Malaysia.

### Price

*Prices of agriculture land were generally stable. In Kedah, interior double cropping paddy lands in Kubang Pasu were transacted between RM105,000 and RM202,000 per hectare, whilst the road frontage paddy lands were transacted between RM163,000 and RM464,000 per hectare. In Johor, durian lands in Kluang and Segamat were transacted at RM186,000 per hectare and RM131,000 to RM403,000 per hectare respectively. Orchard lands in Kinta, Perak were sold in the range of RM110,000 to RM670,000 per hectare.*

### 3.0 2020 OUTLOOK

*The Malaysian economy expanded by 4.3% in 2019. Bank Negara Malaysia's report forecast that economic growth would gradually improve in 2020, with continued support from household spending and better export performance. However, there may be high near-term downside risks resulting from the unforeseeable outbreak of coronavirus (COVID-19) worldwide. This may dampen the anticipated economic growth, particularly for the first half year of 2020.*

*The Covid-19 outbreak is expected to take its toll on the world economies and the Malaysian economy, in particular tourism-related sectors such as airlines, retail, food and beverage and hospitality; as well as the manufacturing and selected services sector. The magnitude of the impact on the Malaysian economy would depend on the duration and spread of the outbreak not only in Malaysia but also in other countries, especially those that are Malaysia's major trading partners.*

Walau bagaimanapun, kerajaan telah memperkenalkan beberapa insentif yang dapat membantu mengurangkan impak ke atas pasaran harta tanah iaitu:

1. Semakan semula tahun asas untuk CKHT ke 1 Jan 2013 (pada asalnya 1 Jan 2000) untuk harta yang dibeli sebelum tarikh tersebut.
2. Pengurangan ambang harga bagi pembeli asing dari RM1 juta kepada RM600,000 untuk harta tanah bertingkat tinggi yang siap dibina tidak terjual di kawasan bandar. Sehubungan ini, beberapa negeri telah mengubah harga minimum untuk pembeli asing seperti yang dinyatakan di bawah:

*Nevertheless, government have introduced several incentives which to help cushion-off the impact on the property market namely:*

1. *The revision of the base year for RPGT to 1 Jan 2013 (initially 1 Jan 2000) for property purchased before the date.*
2. *The reduction of price threshold for foreign purchasers from RM1 million to RM600,000 for unsold completed high-rise properties in urban areas. Consequently, several states have revised the minimum price for foreign purchasers as stated below:*

State	Price Threshold		Type of property	Remarks
	Year 2019	Year 2020		
WPKL	RM1,000,000	RM600,000	high-rise properties.	Overhang units (unsold completed unit.)
Selangor	RM2,000,000	RM1,500,000	high-rise / stratified properties	Overhang units (located in Zones 1 & 2: Petaling, Gombak, Hulu Langat, Sepang, Klang & Kuala Selangor, Kuala Langat)
Johor	RM1,000,000	RM600,000	high-rise properties: apartments / condominium, serviced apartments and SOHO	1. Overhang units (unsold for more than 9 onths.) 2. Only for the first nine months of 2020
Pulau Pinang	RM1,000,000	RM800,000	high rise properties	Overhang units located on the island
Sabah	RM1,000,000	RM750,000	Residential properties	Completed units and unsold for more than 9 months (overhang units)

3. Pengurangan OPR sebanyak 25 mata asas kepada 2.75% pada 22 Jan 2020, akan menyebabkan kos pinjaman yang lebih rendah bagi pinjaman rumah, kekal akomodatif dan menyokong pasaran harta tanah.

3. *The reduction of OPR by 25 basis points to 2.75% on 22 Jan 2020, will lead to lower borrowing cost for home loans, to remain accommodative and supportive of property market.*

Di peringkat pembangunan infrastruktur, terdapat beberapa projek mega yang dicadangkan dan semasa yang dijangka akan memacu pasaran harta tanah dan mengubah landskap pembangunan harta tanah termasuk:

*On the infrastructure development front, there are several proposed and on-going mega projects which are expected to drive the property market and change the property development landscape including:*

Infrastructure project	Descriptions	Status / Commencement/ Completion Year
Damansara – Shah Alam Elevated Expressway (DASH)	i) 20 km highway ii) connecting Penchala Link, LDP, NKVE with Guthrie Corridor Expressway (GCE)	i) Under construction ii) Completion 2020
Sungai Besi – Ulu Kelang Elevated Expressway (Suke):	i) 24.4 km highway ii) Start in Sri Petaling and ending in Ulu Kelang	i) Under construction ii) Completion 2020
East Klang Valley Expressway (EKVE)	i) 39.5 km highway ii) connecting Ukay Perdana, Ampang and Bandar Sungai Long, Kajang.	i) Under construction ii) Completion in stages: 2019, 2020, 2021, 2022
West Coast Expressway (WCE)	i) 233 km highway ii) Taiping – Banting	i) Under construction ii) Completion 2020
Setiawangsa – Pantai Expressway (SPE) (formerly known as DUKE3)	i) 29.8 km highway ii) KL City Bypass	i) Under construction ii) Completion 2020

Infrastructure project	Descriptions	Status / Commencement/ Completion Year
Lebuhraya Putrajaya -KLIA (MEX II)	i) 18 km highway extension from the existing Putrajaya MEX highway ii) Putrajaya – KLIA – KLIA2	i) Under construction ii) Completion 2020
Pan Borneo Highway	iii) Sabah : 706 km iv) Sarawak : 1,077 km	i) Under construction i) Completion 2022 / 2023
East Coast Rail Link (ECRL)	i) 640 km railway ii) Kelantan- Terengganu- Pahang-Negeri Sembilan- Selangor-Putrajaya- Port Klang	i) Under construction ii) Realignment iii) Completion 2026
MRT 2	i) Sungai Buluh – Putrajaya	i) Under construction ii) Completion 2022
LRT 3	i) 37 km railway ii) Bandar Utama – Klang Selangor	i) Under construction ii) Completion 2024
High Speed Rail (HSR)	i) 350 km railway ii) Bandar Malaysia – Jurong East Singapore	i) Under Review
Rapid Transit System (RTS)	i) iBukit Chagar, Johor Bahru – Woodlands, Singapore	i) Under Review/ revised

Satu lagi projek mega yang penting dijangka akan memberi kesan positif yang tinggi terhadap landskap pasaran harta tanah adalah pemuliharaan projek Bandar Malaysia. Bandar Malaysia adalah projek pembangunan harta tanah bersepadu seluas 196 hektar yang terletak di Sungai Besi yang digantung pada tahun 2017. Pelan pembangunan ini telah disemak semula dan secara rasmi disambung semula pada Disember 2019 dengan menandatangani perjanjian antara TRX City Sdn. Bhd. dan IWH CREC Sdn. Projek ini merupakan pembangunan jangka panjang lebih dari 20 tahun yang dijangka bermula pada 2020 dan memacu pasaran harta tanah dalam jangka panjang.

### 3.1 Harta Tanah Kediaman

Subsektor kediaman dijangka mencabar pada tahun 2020. Dengan penurunan dalam Indeks Sentimen Pengguna pada 82.3 mata pada Q4 2019, ditambah dengan ketidakpastian dalam pekerjaan dan pendapatan isi rumah, kemungkinan besar pembelian untuk barangan besar seperti rumah mungkin perlu ditunda oleh bakal pembeli.

Bilangan kediaman yang tidak terjual kemungkinan akan meningkat pada 2020. Penyerapan pasaran mungkin lebih perlahan melihat kepada keadaan ekonomi dan kewangan semasa. Masalah yang banyak diperdebatkan mengenai kediaman siap dibina tidak terjual berkisar pada ketidakpadanan produk perumahan, lokasi dan kemampuan kononnya lebih sukar untuk diselesaikan. Walau bagaimanapun, kerajaan telah memberi sokongan berterusan, dengan tumpuan khas kepada segmen mampu milik dan rumah lebih murah di bawah RM300,000 akan dibina untuk kumpulan B40 dan M40 di bawah Program Perumahan Kebangsaan 2.0.

*Another significant mega-project which is expected to have high positive impact on the property market landscape is the revival of Bandar Malaysia project. Bandar Malaysia is a 196-hactare integrated property development project located in Sungai Besi which was suspended in 2017. The development plan was revised and officially resumed in Dec 2019 with the signing of an agreement between TRX City Sdn. Bhd. and IWH CREC Sdn. Bhd. The project is a long-term development of over 20 years which is expected to start in 2020 and spur the property market in the long run.*

### 3.1 Residential Property

*The residential sub-sector is expected to be challenging in 2020. With the downside in the Consumer Sentiment Index at 82.3 points as at Q4 2019, coupled with the insecurity of employment and household income, there is a high likelihood that the purchase for big-ticket items such as houses may have to be put on hold by prospective purchasers.*

*The reducing numbers of overhang and unsold may probably level up in 2020. Market absorption may be slower given the current economic and financial situation. The much-debated issue on overhang which revolves on mismatch of housing product, location and affordability appear to be more challenging to resolve. Nevertheless, government has given continuous support, with special focus on the affordable segment and more affordable homes priced below RM300,000 would be built for B40 and M40 groups under the National Housing Policy 2.0 programmes.*



Pelbagai insentif diadakan untuk menangani isu mampu milik dan pemilikan rumah bagi negara, khususnya kumpulan B40 dan M40, yang merangkumi:

1. Skim Perumahan Belia oleh BSN - melanjutkan skim ini dari 1 Januari 2020 hingga 31 Disember 2021.
2. Skim Rent-to-own (RTO) untuk pembeli rumah pertama untuk projek perumahan berharga sehingga RM500,000. Pemohon akan menyewa harta sehingga 5 tahun dan selepas tahun pertama, penyewa akan mempunyai pilihan untuk membeli rumah tersebut berdasarkan harga yang ditetapkan pada masa perjanjian penyewaan ditandatangani.
3. Property Crowdfunding - Pada September 2019, Suruhanjaya Sekuriti Malaysia (SC) mengumumkan bahawa EdgeProp Sdn Bhd (EdgeProp) telah didaftarkan sebagai pengendali pasaran pertama yang diiktiraf untuk menubuhkan dan mengendalikan platform crowdfunding (PCF) harta tanah di Malaysia.
4. MyKNP (Khidmat Nasihat Pembiayaan) yang dilancarkan oleh Bank Negara Malaysia (BNM) untuk menyediakan khidmat nasihat percuma kepada pemohon yang gagal mendapatkan pinjaman rumah.

Sementara itu, pelancaran baharu untuk segmen mewah dijangka perlahan kerana pemaju akan menangguhkan pelancaran baharu untuk membolehkan pasaran menyerap unit kediaman yang tidak terjual. Kajian semula ke atas ambang minimum pembelian warga asing seharusnya dilihat sebagai langkah sementara untuk mengurangkan bilangan kediaman mewah yang siap dibina tidak terjual di kawasan bandar. Ini akhirnya dapat mengurangkan bilangan siap dibina tidak terjual walaupun mungkin memerlukan lebih lama daripada yang diharapkan.

### 3.2 Harta Tanah Komersial

Subsektor komersial, khususnya kompleks membeli-belah, pejabat dan hotel yang dibina khas dijangka tidak akan terhindar dari tekanan angin di pasaran global, ditambah pula dengan kesan wabak COVID-19 dan jangkaan kelembapan di PR China.

Segmen pejabat diramalkan terus berada di bawah tekanan pada tahun 2020. Sekiranya kesemua 11 bangunan pejabat yang dalam pembinaan di Lembah Klang disiapkan pada tahun 2020 seperti yang dijadualkan, lebih kurang 0.5 juta m.p. ruang pejabat bersih yang boleh disewakan akan dilepaskan ke pasaran dalam jangka masa terdekat, yang mungkin akan mengakibatkan kadar penghunian yang lebih rendah; dengan itu, sewa juga

*Various incentives are initiated to tackle the affordability and home ownership issues for the nation, B40 and M40 groups in particular, which include:*

1. *Youth Housing Scheme by BSN - to extend the scheme from January 1, 2020 until December 31, 2021.*
2. *Rent-to-own (RTO) financing scheme for first-time homebuyers for housing projects priced up to RM500,000. The applicant will rent the property for up to 5 years and after the first year, the tenant will have the option to purchase the house based on the price fixed at the time the tenancy agreement is signed.*
3. *Property Crowdfunding - In September 2019, the Securities Commission Malaysia (SC) announced that EdgeProp Sdn Bhd (EdgeProp) has been registered as the first recognised market operator to establish and operate a property crowdfunding (PCF) platform in Malaysia.*
4. *MyKNP (Khidmat Nasihat Pembiayaan) launched by Bank Negara Malaysia (BNM) to provide free of charge advisory service to applicants who failed to secure home loan.*

*Meanwhile, new launches for high-end segment are expected to slow down as developers is expected to hold back on new launches so as to allow market to absorb the overhang and unsold units. The downward revise on foreign purchase minimum threshold should be seen as a temporary measure to reduce the overhang of high-end properties in urban areas. This may eventually lower the overhang though it may take longer than expected.*

### 3.2 Commercial Property

*The commercial sub-sector, in particular shopping complex, purpose-built office and hotel is expected will not be spared from the headwinds in the global markets, coupled with the impact of COVID-19 outbreak and expected slowdown in PR China.*

*The office segment is forecasted to remain under pressure in 2020. If all the 11 under construction office buildings in Klang Valley were to be completed in 2020 as scheduled, around 0.5 million s.m. of net lettable office space will be released into the market in the near term, which will likely lead to lower occupancy rates; thus, further downward rental pressure. As a result, some of the older buildings with high vacancy rate might be*

menerima tekanan penurunan. Akibatnya, sesetengah bangunan lama dengan kadar kekosongan yang tinggi mungkin ditutup untuk menaik taraf, pembaikan, penukaran ke lain kegunaan atau pembangunan semula.

Pada keseluruhannya prestasi ruang niaga adalah lembab dan berada di bawah jangkaan pasaran pada 2019. Segmen pasar raya dan pasar raya besar mencatat pertumbuhan negatif pada 2019, menyebabkan penutupan beberapa gedung membeli-belah di negara ini. Kompleks perniagaan akan menghadapi risiko lebih penawaran kerana lebih banyak kompleks perniagaan baru akan memasuki pasaran dalam tempoh dua hingga lima tahun akan datang. Purata kadar penghunian dijangka akan lemah jika tiada penyewa berjenama baru masuk ke pasaran dan pemilik kompleks perlu bersaing untuk penyewa yang sama. Sementara itu, kesan wabak Covid-19 serta peningkatan populariti membeli-belah dalam talian juga memberi cabaran kepada perniagaan ruang niaga. Untuk kesinambungan di masa depan, segmen ruang niaga harus lebih inovatif untuk menarik minat pengunjung secara umum dan milenium khususnya. Bagi kompleks lama dengan kadar penghunian dan sewa yang rendah, mungkin ada keperluan dibuat pilihan untuk pengubahsuaian, penempatan semula perniagaan atau pembangunan semula.

Tinjauan untuk segmen hotel/resort agak mengecewakan. Visit Malaysia 2020, yang disasarkan untuk menarik 30 juta kedatangan pelancong dan dijangka menghasilkan jumlah penerimaan sebanyak RM100 bilion mungkin terbukti sia-sia. Kementerian Pelancongan, Kesenian & Kebudayaan (MOTAC) telah merancang untuk kempen agresif untuk menyokong program ini. Walau bagaimanapun, segmen hotel dijangka lebih mencabar terutamanya disebabkan oleh kesan wabak Covid-19, yang menyebabkan penurunan ketara pelancong di seluruh rantau ini pada Q1 2020.

Untuk menangani isu ini, kerajaan telah mengumumkan Pakej Rangsangan Ekonomi sebanyak RM20 bilion kepada risiko ekonomi yang dikaitkan dengan wabak Covid-19, yang akan dilaksanakan dalam pendekatan tiga-arah: memudahkan aliran tunai bagi perniagaan yang terjejas, membantu individu yang terlibat dan merangsangkan permintaan untuk pelancongan.

Prospek untuk industri perhotelan secara keseluruhannya masih menjanjikan dalam jangka masa pertengahan hingga jangka panjang walaupun terdapat senario yang mencabar dalam masa terdekat. Lebih banyak hotel mewah dan antarabangsa akan memasuki ke pasaran seperti Double Tree by Hilton di I-City, Park Hyatt di PNB 118, Kempinski di 8 Conlay dan Sheraton di Kota

*closed down for upgrading, refurbishment, conversion to other usage or redevelopment.*

*The overall retail performance has been sluggish and below market expectation in 2019. Supermarket and hypermarket segments had reported negative growth in 2019, led to closure of some department stores in the country. Shopping complexes will be at risk of oversupply as more new shopping complexes will be entering into the market in the next two to five years. The average occupancy rate is expected to soften if no new branded tenants enter into the market and the complexes owners have to compete for the same tenants. Meanwhile, the impact of Covid-19 outbreak coupled with increasing popularity of online shopping also pose challenges to retail storefront. For future survival, the retail segment has to be more innovative to attract shoppers in general and millennials in particular. As for older complexes with low occupancy and low rental rate, there may be a need to opt for refurbishment, business brepositioning or redevelopment.*

*The outlook for hotel/leisure segment is quite discouraging. The Visit Malaysia 2020, which is targeted to attract 30 million tourists arrivals and expected to generate total receipts of RM100 billion may prove to be futile. The Ministry of Tourism, Arts & Culture (MOTAC) has planned for an aggressive campaign to support the programme. However, the hotel segment is expected to be more challenging mainly due to the impact of Covid-19 outbreak, which had caused the sharp decline in tourist arrivals throughout the region in Q1 2020.*

*To address this issue, the government has announced RM20 billion Economic Stimulus Package to economic risks associated with Covid-19 outbreak, which will be implemented in three-pronged approach: to ease the cash flow of affected businesses, to assist affected individuals and to stimulate demand for travel and tourism.*

*The outlook for hotel industry overall remains promising in middle to long term despite challenging scenario in the near term. More luxury and international hotels will be entering into the market such as Double Tree by Hilton at I-City, Park Hyatt at PNB 118, Kempinski at 8 Conlay and Sheraton in Kota Kinabalu. Meanwhile, Club Med has announced its plan to open its first resort*



Kinabalu. Sementara itu, Club Med telah mengumumkan rancangannya untuk membuka resort pertamanya di Kuala Penyu, Sabah pada tahun 2022. Resort ini akan dikenali sebagai Club Med Borneo KK akan mempunyai 360 bilik dan 40 suite.

### 3.3 Harta Tanah Industri

Lembaga Kemajuan Pelaburan Malaysia (MIDA) menjangka sentimen perniagaan di Malaysia akan tetap baik dalam keadaan ketidakpastian pasaran global semasa, termasuk kebimbangan Covid-19. Menjelang 2020, permintaan untuk kemudahan logistik dan pergudangan akan bertambah seiring dengan prestasi kukuh sektor perkilangan dan platform e-dagang. Bajet 2020 juga memperuntukkan RM50 juta bagi pembaikan dan penyelenggaraan jalan raya ke Pelabuhan Klang untuk menyokong sektor logistik. Zon Bebas Pelabuhan Klang (PKFZ) akan dibangunkan di bawah pelan induk transformasi, yang akan melibatkan 404 hektar industri dan kemudahan perdagangan, zon perindustrian ini bertujuan membangunkan PKFZ menjadi hab serantau untuk menyokong pertumbuhan e-dagang dan ekonomi digital. Projek-projek industri lain yang menyediakan perkhidmatan yang serupa ialah: Logistik Hub di KLIA, Logistik Hub @ Ampang di Kuala Lumpur, I-Park @ Indahpura di Johor dan Sendayan Technology Valley di Negeri Sembilan. Selangor dan Johor dijangka memimpin subsektor perindustrian pada tahun 2020.

### 3.5 Kesimpulan

Walaupun terdapat tekanan ekonomi, pasaran harta tanah Malaysia dijangka kekal berdaya tahan pada tahun hadapan. Perumahan mampu milik dan mencari penyelesaian yang tepat untuk harta tanah siap dibina tidak terjual akan terus menjadi agenda utama kerajaan. Pemantauan rapi terhadap pelaksanaan program di bawah Dasar Perumahan Nasional 2.0 (2018 - 2025) dan pelbagai insentif yang diperkenalkan untuk mempromosikan pemilikan rumah di kalangan rakyat Malaysia, diharapkan dapat mengatasi keadaan harta tanah siap dibina tidak terjual pada tahun akan datang. Di peringkat pembangunan, pemulihan projek mega Bandar Malaysia dijangka memberi kesan positif terhadap landskap pasaran harta tanah dalam jangka masa pertengahan dan panjang. Sementara itu, projek infrastruktur besar yang berimpak tinggi seperti Lebuhraya Pantai Barat (WCE) dan Laluan Rel Pantai Timur (ECRL) akan membuka kawasan pembangunan baru untuk menarik Pelaburan Langsung Asing, yang akan membawa peluang perniagaan dan pekerjaan serta pemangkin pertumbuhan pembangunan.

*in Kuala Penyu, Sabah in 2022. The resort would be known as Club Med Borneo KK will feature 360 rooms and 40 suites.*

### 3.3 Industrial Property

*The Malaysian Investment Development Authority (MIDA) expects business sentiment in Malaysia to remain good amid the current global market uncertainties, including Covid-19 concerns. Heading into 2020, demand for logistics and warehousing facilities is set to grow in tandem with the robust performance of the manufacturing sector and the e-commerce platform. Budget 2020 has also allocated RM50 million for the repair and maintenance of roads leading to Klang Port to support the logistics sector. The Port Klang Free Zone (PKFZ) will be redeveloped under a transformation master plan, which will involve 404 hectares of industrial and commercial facilities, the industrial zone is aimed at developing PKFZ into a regional hub to support the growth of e-commerce and digital economy. Other industrial projects that provide the similar service are: Logistics Hub at KLIA, Logistic Hub @ Ampang in Kuala Lumpur, I-Park @ Indahpura in Johor and Sendayan Technology Valley in Negeri Sembilan. Selangor and Johor are expected to lead the industrial sub-sector in 2020.*

### 3.5 Conclusion

*Despite the economic headwinds, Malaysian property market is expected to remain resilient in the coming year. Affordable housing and finding the right solutions to the property overhang will continue to be the main agenda of the government. The close monitoring on the implementation of programmes under the National Housing Policy 2.0 (2018 – 2025) and various incentives introduced to promote home ownership among Malaysians, are expected to contain the overhang situation in the coming year. On the development front, the revival of Bandar Malaysia mega project is expected to have positive impact on the property market landscape in the medium and long term. Meanwhile, high-impact major infrastructure projects such as West Coast Expressway (WCE) and East Coast Rail Link (ECRL) will open up new development areas to attract Foreign Direct Investment, which will entail business and employment opportunities as well as catalyst for development growth.*

**Jadual I / Table I**  
**Penunjuk Utama Ekonomi Malaysia**  
*Key Indicators of the Malaysian Economy*

Pendapatan Negara dan Pengeluaran Dalam Negeri	2017 <sup>P</sup>		2018 <sup>a</sup>		2019 <sup>P</sup>		
	RM Juta/ RM Million	% Pertumbuhan Growth					
Jumlah Penduduk (Juta)	32.0	1.2	32.4	1.1	32.7	1.0	Total Population (Million)
Keluaran Dalam Negara Kasar (KDNK) (pada harga tetap 2015)	1,299.9	5.7	1,361.5	4.7	1,420.5	4.3	Gross Domestic Product (GDP) (2015 constant prices)
<b>Sektor Utama yang menyumbang kepada KDNK</b>							<b>Key Sectors Contributing to GDP</b>
• Pertanian	99.4	5.7	99.5	0.1	101.3	1.8	• Agriculture, forestry and fishery
• Perlombongan	105.8	0.4	103.1	-2.6	101.6	-1.5	• Mining
• Perkilangan	290.5	6.0	304.8	5.0	316.4	3.8	• Manufacturing
• Pembinaan	63.5	6.7	66.2	4.2	66.3	0.1	• Construction
• Perkhidmatan	722.6	6.2	771.9	6.8	819.2	6.1	• Services
- Utiliti	27,630	2.0	28,860	4.4	30,482	5.6	- Utilities
- Pengangkutan dan penyimpanan	47,227	6.2	50,231	6.4	53,651	6.8	- Transport and storage
- Maklumat dan komunikasi	72,987	8.4	79,081	8.3	84,277	6.6	- Wholesale, and retail trade
- Perdagangan borong dan runcit	186,818	8.0	203,048	8.7	217,244	7.0	- Wholesale, and retail trade
- Penginapan	8,704	5.4	9,230	6.0	9,842	6.6	- Accommodation
- Kewangan dan insurans	84,471	4.3	89,269	7.5	93,486	4.8	- Finance and insurance
- Harta tanah dan perkhidmatan perniagaan	59,036	6.8	63,527	6.8	68,475	7.0	- Real estate and business services
- Perkhidmatan kerajaan	109,485	4.7	114,357	4.5	118,566	3.7	- Government services
- Perkhidmatan-perkhidmatan lain	44,171	4.6	46,508	5.3	49,050	5.5	- Other services
<b>Pendapatan Negara Kasar (KNK) (pada harga semasa)</b>	<b>1,333.0</b>	<b>9.7</b>	<b>1,395.0</b>	<b>4.7</b>	<b>1,467.3</b>	<b>5.2</b>	<b>Gross National Income (GNI) (at current prices)</b>
<b>Pendapatan Negara Kasar (KNK) (pada harga tetap 2010)</b>	<b>1,280.8</b>	<b>5.7</b>	<b>1,327.1</b>	<b>3.6</b>	<b>1,394.9</b>	<b>5.1</b>	<b>Gross National Income (GNI) (2010 constant prices)</b>
<b>Guna Tenaga dan Buruh</b>							<b>Employment and Labour</b>
Tenaga buruh (ribu)	14,980.1	2.0	15,280.3	2.0	15,766.7	2.4	Labour force (thousand)
Penduduk bekerja (ribu)	14,476.8	2.1	14,776.0	2.1	15,254.5	2.4	Employment (thousand)
Kadar pengangguran (%)	3.4		3.3		3.2		Unemployment rate (%)
<b>Indeks Harga Pengguna</b>	<b>119.5</b>		<b>120.7</b>		<b>122.3</b>		<b>Consumer Price Index</b>
<b>Kadar Inflasi (% perubahan)</b>	<b>3.7</b>		<b>1.0</b>		<b>0.7</b>		<b>Inflation Rates (% Change)</b>

<sup>P</sup> Data Awal (Preliminary)

Sumber: Unit Perancang Ekonomi  
Jabatan Perangkaan Malaysia  
Kementerian Sumber Manusia Malaysia

Source: Economic Planning Unit  
Department of Statistics, Malaysia  
Ministry of Human Resource, Malaysia

Jadual III/ Table II  
Bilangan Transaksi Harta Tanah Mengikut Subsektor dan Lingkungan Harga  
Number of Property Transactions by Sub-Sector and Price Range

Time Period & Price Range	Residential		Commercial		Industrial		Agriculture		Development Land		Others		Total	
	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019
<b>Jan - Mar</b>														
0 - 50,000	4,536	4,474	179	290	71	112	8,209	8,051	1,459	1,543	1	0	14,455	14,470
50,001 - 100,000	6,669	6,495	332	387	59	69	4,186	3,923	982	898	0	0	12,228	11,772
100,001 - 150,000	5,728	6,130	330	390	43	123	1,955	1,849	468	524	1	0	8,525	9,016
150,001 - 200,000	5,263	6,235	359	430	67	82	1,200	1,203	341	321	0	0	7,230	8,271
200,001 - 250,000	4,143	4,650	332	414	34	59	722	656	197	227	0	0	5,428	6,006
250,001 - 300,000	4,074	4,504	330	376	33	73	534	529	168	173	1	0	5,140	5,655
300,001 - 400,000	6,316	6,690	638	725	87	122	736	612	233	265	0	0	8,010	8,414
400,001 - 500,000	3,716	4,513	596	700	85	126	447	424	165	186	0	1	5,009	5,950
500,001 - 1,000,000	6,164	6,544	1,462	1,856	271	328	779	694	416	459	6	0	9,098	9,881
1,000,001 & Above	1,963	1,968	1,009	1,399	509	760	348	306	528	520	0	0	4,357	4,953
<b>Total</b>	<b>48,572</b>	<b>52,203</b>	<b>5,567</b>	<b>6,967</b>	<b>1,259</b>	<b>1,854</b>	<b>19,116</b>	<b>18,247</b>	<b>4,957</b>	<b>5,116</b>	<b>9</b>	<b>1</b>	<b>79,480</b>	<b>84,388</b>
<b>Apr - June</b>														
0 - 50,000	5,537	3,452	330	267	80	59	6,158	7,173	1,060	1,308	1	1	13,166	12,260
50,001 - 100,000	5,776	6,068	229	307	63	59	3,117	3,523	747	770	0	0	9,932	10,727
100,001 - 150,000	5,695	5,383	308	401	50	67	1,391	1,709	392	481	2	0	7,838	8,041
150,001 - 200,000	4,735	5,725	396	299	72	40	894	1,039	258	298	0	0	6,355	7,401
200,001 - 250,000	3,816	4,442	323	323	47	38	572	626	175	193	0	0	4,933	5,622
250,001 - 300,000	3,969	4,229	270	331	27	25	486	453	132	156	0	0	4,884	5,194
300,001 - 400,000	5,603	6,098	541	674	85	104	519	551	178	203	0	0	6,926	7,630
400,001 - 500,000	3,319	4,229	568	681	81	78	331	354	151	161	0	0	4,450	5,503
500,001 - 1,000,000	5,347	6,191	1,277	1,541	258	282	626	558	340	409	3	1	7,851	8,982
1,000,001 & Above	1,831	1,911	951	1,171	492	532	329	299	441	502	3	2	4,047	4,417
<b>Total</b>	<b>45,628</b>	<b>47,728</b>	<b>5,193</b>	<b>5,995</b>	<b>1,255</b>	<b>1,284</b>	<b>14,423</b>	<b>16,285</b>	<b>3,874</b>	<b>4,481</b>	<b>9</b>	<b>4</b>	<b>70,382</b>	<b>75,777</b>
<b>Jul - Sept</b>														
0 - 50,000	3,748	3,760	173	235	66	60	7,083	7,747	1,392	1,392	1	0	12,463	13,194
50,001 - 100,000	6,246	6,417	289	345	82	78	3,461	3,813	893	937	0	1	10,971	11,591
100,001 - 150,000	5,742	6,156	317	301	55	83	1,627	1,801	452	473	2	0	8,195	8,814
150,001 - 200,000	5,924	6,647	337	374	52	56	1,048	1,046	317	307	1	0	7,679	8,430
200,001 - 250,000	4,463	4,985	421	357	48	33	615	618	185	210	2	2	5,734	6,205
250,001 - 300,000	4,628	4,914	335	344	64	64	518	499	169	151	1	2	5,715	5,974
300,001 - 400,000	6,641	6,798	682	743	87	100	588	584	229	211	1	0	8,228	8,436
400,001 - 500,000	4,114	4,460	636	648	89	110	419	380	168	151	1	1	5,427	5,750
500,001 - 1,000,000	6,370	7,059	1,700	1,637	307	394	699	639	431	371	0	0	9,507	10,100
1,000,001 & Above	2,056	1,951	1,184	1,295	719	588	340	264	556	492	2	1	4,857	4,591
<b>Total</b>	<b>49,932</b>	<b>53,147</b>	<b>6,074</b>	<b>6,279</b>	<b>1,569</b>	<b>1,566</b>	<b>16,398</b>	<b>17,391</b>	<b>4,792</b>	<b>4,695</b>	<b>11</b>	<b>7</b>	<b>78,776</b>	<b>83,085</b>
<b>Oct - Dec</b>														
0 - 50,000	5,259	4,569	180	241	76	79	7,269	7,283	1,498	1,311	1	0	14,283	13,483
50,001 - 100,000	6,547	6,446	337	354	99	101	3,737	3,613	942	889	1	0	11,663	11,403
100,001 - 150,000	5,929	5,850	407	329	81	89	1,766	1,601	492	424	0	0	8,675	8,293
150,001 - 200,000	5,919	6,931	381	426	58	50	1,110	1,073	346	309	1	0	7,815	8,789
200,001 - 250,000	4,767	5,490	407	405	85	41	712	666	220	196	0	1	6,191	6,799
250,001 - 300,000	4,611	5,209	344	335	61	52	552	548	206	113	1	0	5,775	6,257
300,001 - 400,000	6,688	7,072	725	686	144	103	610	604	293	242	2	1	8,462	8,708
400,001 - 500,000	4,334	4,642	733	640	117	74	443	380	217	153	0	0	5,844	5,889
500,001 - 1,000,000	6,702	8,023	1,801	1,717	382	293	778	673	496	347	1	0	10,160	11,053
1,000,001 & Above	2,497	1,985	1,787	1,280	846	675	415	301	659	481	0	1	6,204	4,723
<b>Total</b>	<b>53,253</b>	<b>56,217</b>	<b>7,102</b>	<b>6,413</b>	<b>1,949</b>	<b>1,557</b>	<b>17,392</b>	<b>16,742</b>	<b>5,369</b>	<b>4,465</b>	<b>7</b>	<b>3</b>	<b>85,072</b>	<b>85,397</b>

Jadual III/ Table II  
 Bilangan Transaksi Harta Tanah Mengikut Subsektor dan Lingkungan Harga  
 Number of Property Transactions by Sub-Sector and Price

JABATAN PENILAIAN &  
 PERKHIDMATAN HARTA

Time Period & Price Range	Residential		Commercial		Industrial		Agriculture		Development Land		Others		Total	
	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019
<b>Jan - June</b>														
0 - 50,000	10,073	7,926	509	557	151	171	14,367	15,224	2,519	2,851	2	1	27,621	26,730
50,001 - 100,000	12,445	12,563	561	694	122	128	7,303	7,446	1,729	1,668	0	0	22,160	22,499
100,001 - 150,000	11,423	11,513	638	791	93	190	3,346	3,558	860	1,005	3	0	16,363	17,057
150,001 - 200,000	9,998	11,960	755	729	139	122	2,094	2,242	599	619	0	0	13,585	15,672
200,001 - 250,000	7,959	9,092	655	737	81	97	1,294	1,282	372	420	0	0	10,361	11,628
250,001 - 300,000	8,043	8,733	600	707	60	98	1,020	982	300	329	1	0	10,024	10,849
300,001 - 400,000	11,919	12,788	1,179	1,399	172	226	1,255	1,163	411	468	0	0	14,936	16,044
400,001 - 500,000	7,035	8,742	1,164	1,381	166	204	778	778	316	347	0	1	9,459	11,453
500,001 - 1,000,000	11,511	12,735	2,739	3,397	529	610	1,405	1,252	756	868	9	1	16,949	18,863
1,000,001 & Above	3,794	3,879	1,960	2,570	1,001	1,292	677	605	969	1,022	3	2	8,404	9,370
<b>Total</b>	<b>94,200</b>	<b>99,931</b>	<b>10,760</b>	<b>12,962</b>	<b>2,514</b>	<b>3,138</b>	<b>33,539</b>	<b>34,532</b>	<b>8,831</b>	<b>9,597</b>	<b>18</b>	<b>5</b>	<b>149,862</b>	<b>160,165</b>
<b>Jan - Sept</b>														
0 - 50,000	13,821	11,686	682	792	217	231	21,450	22,971	3,911	4,243	3	1	40,084	39,924
50,001 - 100,000	18,691	18,980	850	1,039	204	206	10,764	11,259	2,622	2,605	0	1	33,131	34,090
100,001 - 150,000	17,165	17,669	955	1,092	148	273	4,973	5,359	1,312	1,478	5	0	24,558	25,871
150,001 - 200,000	15,922	18,607	1,092	1,103	191	178	3,142	3,288	916	926	1	0	21,264	24,102
200,001 - 250,000	12,422	14,077	1,076	1,094	129	130	1,909	1,900	557	630	2	2	16,095	17,833
250,001 - 300,000	12,671	13,647	935	1,051	124	162	1,538	1,481	469	480	2	2	15,739	16,823
300,001 - 400,000	18,560	19,586	1,861	2,142	259	326	1,843	1,747	640	679	1	0	23,164	24,480
400,001 - 500,000	11,149	13,202	1,800	2,029	255	314	1,197	1,158	484	498	1	2	14,886	17,203
500,001 - 1,000,000	17,881	19,794	4,439	5,034	836	1,004	2,104	1,891	1,187	1,239	9	1	26,456	28,963
1,000,001 & Above	5,850	5,830	3,144	3,865	1,720	1,880	1,017	869	1,525	1,514	5	3	13,261	13,961
<b>Total</b>	<b>144,132</b>	<b>153,078</b>	<b>16,834</b>	<b>19,241</b>	<b>4,083</b>	<b>4,704</b>	<b>49,937</b>	<b>51,923</b>	<b>13,623</b>	<b>14,292</b>	<b>29</b>	<b>12</b>	<b>228,638</b>	<b>243,250</b>
<b>Jan - Dec</b>														
0 - 50,000	19,080	16,255	862	1,033	293	310	28,719	30,254	5,409	5,554	4	1	54,367	53,407
50,001 - 100,000	25,238	25,426	1,187	1,393	303	307	14,501	14,872	3,564	3,494	1	1	44,794	45,493
100,001 - 150,000	23,094	23,519	1,362	1,421	229	362	6,739	6,960	1,804	1,902	5	0	33,233	34,164
150,001 - 200,000	21,841	25,538	1,473	1,529	249	228	4,252	4,361	1,262	1,235	2	0	29,079	32,891
200,001 - 250,000	17,189	19,567	1,483	1,499	214	171	2,621	2,566	777	826	2	3	22,286	24,632
250,001 - 300,000	17,282	18,856	1,279	1,386	185	214	2,090	2,029	675	593	3	2	21,514	23,080
300,001 - 400,000	25,248	26,658	2,586	2,828	403	429	2,453	2,351	933	921	3	1	31,626	33,188
400,001 - 500,000	15,483	17,844	2,533	2,669	372	388	1,640	1,538	701	651	1	2	20,730	23,092
500,001 - 1,000,000	24,583	27,817	6,240	6,751	1,218	1,297	2,882	2,564	1,683	1,586	10	1	36,616	40,016
1,000,001 & Above	8,347	7,815	4,931	5,145	2,566	2,555	1,432	1,170	2,184	1,995	5	4	19,465	18,684
<b>Total</b>	<b>197,385</b>	<b>209,295</b>	<b>23,936</b>	<b>25,654</b>	<b>6,032</b>	<b>6,261</b>	<b>67,329</b>	<b>68,665</b>	<b>18,992</b>	<b>18,757</b>	<b>36</b>	<b>15</b>	<b>313,710</b>	<b>328,647</b>

Jadual III/ Table III  
 Nilai Transaksi Harta Tanah Mengikut Subsektor dan Lingkungan Harga (RM Juta)  
 Value of Property Transactions by Sub-Sector and Price Range (RM Million)

Time Period & Price Range	Residential		Commercial		Industrial		Agriculture		Development Land		Others		Total	
	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019
<b>Jan - Mar</b>														
0 - 50,000	147.33	139.49	5.53	10.00	2.33	3.85	200.34	189.93	38.14	40.25	0.02	0.00	393.68	383.51
50,001 - 100,000	508.68	499.24	25.93	30.41	4.41	5.35	309.58	290.63	73.76	67.26	0.00	0.00	922.36	892.89
100,001 - 150,000	744.73	795.11	43.12	48.96	5.63	15.04	246.35	231.64	58.37	66.83	0.13	0.00	1,098.32	1,157.59
150,001 - 200,000	938.52	1,108.97	64.39	76.92	12.05	14.56	212.74	212.67	60.01	56.54	0.00	0.00	1,287.71	1,469.66
200,001 - 250,000	951.33	1,066.73	76.36	94.79	7.95	13.44	164.56	150.06	44.42	52.03	0.00	0.00	1,244.62	1,377.05
250,001 - 300,000	1,139.01	1,261.80	92.19	105.73	9.20	20.33	149.05	146.41	46.51	47.89	0.27	0.00	1,436.24	1,582.16
300,001 - 400,000	2,230.37	2,366.84	228.85	258.66	30.90	43.57	259.11	215.68	81.67	93.28	0.00	0.00	2,830.90	2,978.03
400,001 - 500,000	1,684.65	2,050.73	272.84	322.50	39.33	57.70	201.79	191.69	74.64	83.93	0.00	0.46	2,273.26	2,707.01
500,001 - 1,000,000	4,210.69	4,439.44	1,046.24	1,348.91	198.10	241.87	551.23	480.76	295.90	333.24	3.93	0.00	6,306.10	6,844.22
1,000,001 & Above	3,925.06	4,498.24	6,967.22	4,461.88	2,553.58	3,758.82	1,234.54	1,038.22	2,699.84	4,013.81	0.00	0.00	17,380.24	17,770.97
<b>Total</b>	<b>16,480.39</b>	<b>18,226.58</b>	<b>8,822.66</b>	<b>6,758.74</b>	<b>2,863.47</b>	<b>4,174.53</b>	<b>3,529.29</b>	<b>3,147.70</b>	<b>3,473.28</b>	<b>4,855.06</b>	<b>4.35</b>	<b>0.46</b>	<b>35,173.44</b>	<b>37,163.07</b>
<b>Apr - June</b>														
0 - 50,000	142.42	112.34	8.35	8.63	2.07	1.69	151.07	172.50	27.48	34.48	0.01	0.03	331.40	329.67
50,001 - 100,000	445.85	467.64	17.58	23.80	4.71	4.36	231.43	259.74	56.03	57.31	0.00	0.00	755.60	812.85
100,001 - 150,000	753.90	703.77	38.96	49.79	6.04	8.44	174.21	214.22	48.37	60.62	0.21	0.00	1,021.68	1,036.85
150,001 - 200,000	841.42	1,024.85	73.28	54.19	12.66	7.11	158.26	183.49	45.32	52.87	0.00	0.00	1,130.93	1,322.50
200,001 - 250,000	873.41	1,020.58	74.91	74.18	11.03	8.82	130.28	142.80	39.68	44.16	0.00	0.00	1,129.32	1,290.55
250,001 - 300,000	1,113.06	1,187.45	75.59	93.03	7.63	7.08	135.64	126.10	37.02	43.37	0.00	0.00	1,368.93	1,457.03
300,001 - 400,000	1,975.71	2,154.35	194.92	242.69	30.70	36.61	180.66	193.36	63.41	71.59	0.00	0.00	2,445.40	2,698.61
400,001 - 500,000	1,507.85	1,919.58	261.11	311.74	37.18	35.90	149.55	160.53	69.16	73.05	0.00	0.00	2,024.86	2,500.79
500,001 - 1,000,000	3,636.97	4,186.44	903.28	1,103.17	189.73	200.91	438.78	396.39	248.39	293.37	2.39	0.83	5,419.53	6,181.10
1,000,001 & Above	3,885.00	3,652.90	5,349.36	4,026.56	4,244.18	2,532.49	1,509.77	1,776.64	1,906.63	1,741.56	39.43	2.85	16,934.37	13,733.00
<b>Total</b>	<b>15,175.59</b>	<b>16,429.89</b>	<b>6,997.35</b>	<b>5,987.78</b>	<b>4,545.93</b>	<b>2,843.41</b>	<b>3,259.64</b>	<b>3,625.79</b>	<b>2,541.48</b>	<b>2,472.37</b>	<b>42.04</b>	<b>3.71</b>	<b>32,562.03</b>	<b>31,362.95</b>
<b>Jul - Sept</b>														
0 - 50,000	131.22	122.63	5.72	8.55	2.06	1.45	171.55	185.71	36.13	35.75	0.00	0.00	346.68	354.09
50,001 - 100,000	481.13	495.41	22.36	26.23	5.97	5.60	257.03	281.76	67.02	68.72	0.00	0.10	833.51	877.83
100,001 - 150,000	748.50	806.35	40.84	38.71	7.12	10.47	205.39	227.09	56.68	59.11	0.26	0.00	1,058.79	1,141.73
150,001 - 200,000	1,056.13	1,187.44	60.77	67.41	9.32	9.82	184.61	184.68	56.15	53.66	0.20	0.00	1,367.17	1,503.01
200,001 - 250,000	1,026.59	1,148.03	98.05	83.04	11.03	7.63	140.54	141.27	42.14	47.68	0.48	0.47	1,318.84	1,428.12
250,001 - 300,000	1,294.01	1,376.12	94.19	96.62	17.78	18.19	144.23	138.69	47.11	42.08	0.27	0.55	1,597.59	1,672.25
300,001 - 400,000	2,340.69	2,404.29	246.53	265.52	31.53	36.10	205.18	204.72	79.59	73.73	0.40	0.00	2,903.92	2,984.36
400,001 - 500,000	1,870.21	2,024.06	294.14	297.57	41.14	50.22	188.82	173.00	75.25	68.04	0.49	0.44	2,470.05	2,613.33
500,001 - 1,000,000	4,342.63	4,796.97	1,220.47	1,165.33	227.61	294.91	485.29	450.03	315.48	272.00	0.00	0.00	6,591.48	6,979.24
1,000,001 & Above	4,485.69	3,759.95	3,449.43	5,806.57	3,182.73	2,703.35	878.54	739.30	2,601.07	2,056.33	3.42	1.99	14,600.88	15,067.49
<b>Total</b>	<b>17,776.81</b>	<b>18,121.25</b>	<b>5,532.51</b>	<b>7,855.56</b>	<b>3,536.30</b>	<b>3,137.73</b>	<b>2,861.18</b>	<b>2,726.25</b>	<b>3,376.61</b>	<b>2,777.10</b>	<b>5.51</b>	<b>3.55</b>	<b>33,088.92</b>	<b>34,621.44</b>
<b>Oct - Dec</b>														
0 - 50,000	174.22	139.72	5.89	7.83	2.20	2.21	177.82	175.87	37.47	34.22	0.04	0.00	397.64	359.84
50,001 - 100,000	500.11	497.66	25.72	27.43	7.38	8.05	289.93	266.99	70.44	66.53	0.05	0.00	893.63	866.67
100,001 - 150,000	771.75	765.53	52.14	42.32	10.23	11.17	221.93	200.51	61.85	53.14	0.00	0.00	1,117.90	1,072.67
150,001 - 200,000	1,055.13	1,236.07	68.61	77.64	10.45	9.15	196.14	190.17	61.36	55.02	0.17	0.00	1,391.86	1,568.04
200,001 - 250,000	1,097.81	1,264.90	93.91	95.90	19.48	9.49	161.45	151.50	49.26	44.85	0.00	0.25	1,421.92	1,566.89
250,001 - 300,000	1,290.80	1,460.94	96.39	94.36	17.16	14.59	153.89	153.02	57.82	31.33	0.28	0.00	1,616.34	1,754.25
300,001 - 400,000	2,364.57	2,498.36	260.60	245.84	51.18	36.78	214.89	213.43	102.11	85.48	0.65	0.32	2,994.00	3,080.20
400,001 - 500,000	1,972.75	2,110.82	337.29	292.55	53.75	34.16	201.36	171.96	97.71	69.69	0.00	0.00	2,662.85	2,679.19
500,001 - 1,000,000	4,579.00	5,400.42	1,290.05	1,235.35	285.40	218.83	547.13	472.03	367.10	247.73	0.74	0.00	7,069.43	7,574.36
1,000,001 & Above	5,509.33	4,254.92	5,930.44	6,263.99	3,609.69	4,345.58	1,187.03	929.06	3,700.25	1,936.21	0.00	3.90	19,936.74	17,733.66
<b>Total</b>	<b>19,315.47</b>	<b>19,629.34</b>	<b>8,161.04</b>	<b>8,383.22</b>	<b>4,066.92</b>	<b>4,689.99</b>	<b>3,351.57</b>	<b>2,924.54</b>	<b>4,605.38</b>	<b>2,624.21</b>	<b>1.92</b>	<b>4.46</b>	<b>39,502.31</b>	<b>38,255.76</b>

Jadual III/ Table III  
 Nilai Transaksi Harta Tanah Mengikut Subsektor dan Lingkungan Harga (RM Juta)  
 Value of Property Transactions by Sub-Sector and Price Range (RM Million)

JABATAN PENILAIAN &  
 PERKHIDMATAN HARTA

Time Period & Price Range	Residential		Commercial		Industrial		Agriculture		Development Land		Others		Total	
	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019
<b>Jan - June</b>														
0 - 50,000	289.75	251.82	13.88	18.63	4.39	5.54	351.41	362.43	65.62	74.73	0.03	0.03	725.08	713.18
50,001 - 100,000	954.53	966.89	43.51	54.21	9.12	9.71	541.01	550.37	129.79	124.57	0.00	0.00	1,677.96	1,705.74
100,001 - 150,000	1,498.63	1,498.89	82.07	98.75	11.66	23.48	420.56	445.87	106.73	127.45	0.34	0.00	2,120.00	2,194.43
150,001 - 200,000	1,779.94	2,133.81	137.67	131.11	24.71	21.67	371.00	396.16	105.33	109.40	0.00	0.00	2,418.65	2,792.16
200,001 - 250,000	1,824.74	2,087.30	151.27	168.97	18.98	22.27	294.84	292.86	84.11	96.19	0.00	0.00	2,373.94	2,667.60
250,001 - 300,000	2,252.07	2,449.25	167.78	198.76	16.83	27.41	284.69	272.51	83.53	91.26	0.27	0.00	2,805.17	3,039.19
300,001 - 400,000	4,206.08	4,521.19	423.77	501.35	61.60	80.18	439.77	409.04	145.08	164.87	0.00	0.00	5,276.30	5,676.63
400,001 - 500,000	3,192.51	3,970.31	533.96	634.23	76.51	93.60	351.34	352.23	143.81	156.98	0.00	0.46	4,298.12	5,207.80
500,001 - 1,000,000	7,847.66	8,625.88	1,949.52	2,452.08	387.83	442.77	990.00	877.16	544.29	626.61	6.32	0.83	11,725.63	13,025.32
1,000,001 & Above	7,810.06	8,151.14	12,316.58	8,488.44	6,797.77	6,291.31	2,744.31	2,814.86	4,606.47	5,755.37	39.43	2.85	34,314.61	31,503.97
<b>Total</b>	<b>31,655.98</b>	<b>34,656.47</b>	<b>15,820.01</b>	<b>12,746.52</b>	<b>7,409.40</b>	<b>7,017.94</b>	<b>6,788.94</b>	<b>6,773.48</b>	<b>6,014.76</b>	<b>7,327.43</b>	<b>46.39</b>	<b>4.17</b>	<b>67,735.47</b>	<b>68,526.02</b>
<b>Jan - Sept</b>														
0 - 50,000	420.97	374.46	19.60	27.17	6.45	6.99	522.96	548.14	101.75	110.48	0.03	0.03	1,071.76	1,067.27
50,001 - 100,000	1,435.67	1,462.29	65.87	80.44	15.08	15.32	798.04	832.13	196.81	193.28	0.00	0.10	2,511.48	2,583.57
100,001 - 150,000	2,247.13	2,305.24	122.92	137.46	18.79	33.95	625.95	672.96	163.41	186.56	0.60	0.00	3,178.80	3,336.16
150,001 - 200,000	2,836.07	3,321.25	198.44	198.53	34.03	31.49	555.61	580.84	161.47	163.06	0.20	0.00	3,785.81	4,295.16
200,001 - 250,000	2,851.34	3,235.34	249.32	252.01	30.02	29.90	435.38	434.13	126.24	143.88	0.48	0.47	3,692.78	4,095.72
250,001 - 300,000	3,546.08	3,825.37	261.97	295.38	34.61	45.60	428.92	411.20	130.65	133.34	0.54	0.55	4,402.76	4,711.44
300,001 - 400,000	6,546.77	6,925.48	670.30	766.87	93.13	116.28	644.95	613.76	224.67	238.61	0.40	0.00	8,180.22	8,660.99
400,001 - 500,000	5,062.72	5,994.37	828.10	931.81	117.65	143.82	540.16	525.22	219.05	225.02	0.49	0.90	6,768.17	7,821.13
500,001 - 1,000,000	12,190.30	13,422.84	3,169.99	3,617.41	615.44	737.68	1,475.29	1,327.19	859.77	898.60	6.32	0.83	18,317.11	20,004.55
1,000,001 & Above	12,295.75	11,911.09	15,766.01	14,295.01	9,980.49	8,994.66	3,622.85	3,554.15	7,207.54	7,811.70	42.84	4.84	48,915.49	46,571.46
<b>Total</b>	<b>49,432.79</b>	<b>52,777.72</b>	<b>21,352.52</b>	<b>20,602.08</b>	<b>10,945.69</b>	<b>10,155.67</b>	<b>9,650.12</b>	<b>9,499.73</b>	<b>9,391.37</b>	<b>10,104.53</b>	<b>51.90</b>	<b>7.72</b>	<b>100,824.39</b>	<b>103,147.46</b>
<b>Jan - Dec</b>														
0 - 50,000	595.19	514.17	25.49	35.00	8.66	9.19	700.77	724.01	139.22	144.70	0.07	0.03	1,469.40	1,427.11
50,001 - 100,000	1,935.78	1,959.95	91.59	107.88	22.46	23.37	1,087.97	1,099.13	267.25	259.82	0.05	0.10	3,405.11	3,450.24
100,001 - 150,000	3,018.88	3,070.77	175.06	179.78	29.02	45.11	847.88	873.47	225.26	239.70	0.60	0.00	4,296.70	4,408.83
150,001 - 200,000	3,891.19	4,557.32	267.05	276.16	44.48	40.63	751.75	771.01	222.83	218.09	0.37	0.00	5,177.67	5,863.20
200,001 - 250,000	3,949.15	4,500.24	343.23	347.91	49.50	39.38	596.83	585.63	175.50	188.72	0.48	0.71	5,114.70	5,662.60
250,001 - 300,000	4,836.89	5,286.31	358.36	389.74	51.77	60.19	582.81	564.22	188.46	164.67	0.82	0.55	6,019.10	6,465.69
300,001 - 400,000	8,911.33	9,423.84	930.91	1,012.71	144.31	153.06	859.84	827.19	326.79	324.09	1.05	0.32	11,174.23	11,741.20
400,001 - 500,000	7,035.46	8,105.19	1,165.39	1,224.36	171.40	177.98	741.52	697.19	316.76	294.71	0.49	0.90	9,431.02	10,500.32
500,001 - 1,000,000	16,769.30	18,823.26	4,460.04	4,852.76	900.85	956.51	2,022.43	1,799.22	1,226.87	1,146.33	7.06	0.83	25,386.54	27,578.91
1,000,001 & Above	17,805.08	16,166.01	21,696.45	20,559.00	13,590.18	13,340.24	4,809.88	4,483.21	10,907.80	9,747.91	42.84	8.74	68,852.23	64,305.12
<b>Total</b>	<b>68,748.26</b>	<b>72,407.06</b>	<b>29,513.57</b>	<b>28,985.30</b>	<b>15,012.61</b>	<b>14,845.67</b>	<b>13,001.69</b>	<b>12,424.27</b>	<b>13,996.75</b>	<b>12,728.74</b>	<b>53.82</b>	<b>12.19</b>	<b>140,326.70</b>	<b>141,403.22</b>

Horizontal and vertical total may not add up to the shown figures due to rounding off.

Jadual IV / Table IV  
Bilangan Transaksi Harta Tanah Mengikut Negeri dan Tempoh Masa  
Number of Property Transactions by State and Time Period

Time Period	Residential		Commercial		Industrial		Agriculture		Development Land		Others		Total	
	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019
<b>W.P. Kuala Lumpur</b>														
Jan - Mar	2,568	2,690	938	1,164	53	53	0	0	95	43	0	0	3,654	3,950
Apr - June	2,374	2,599	837	849	34	28	0	0	41	70	0	0	3,286	3,546
Jul - Sept	2,702	2,915	1,044	1,015	19	29	0	0	44	35	0	0	3,809	3,994
Oct - Dec	3,339	2,896	1,260	946	68	39	0	0	72	55	0	1	4,739	3,937
Jan - June	4,942	5,289	1,775	2,013	87	81	0	0	136	113	0	0	6,940	7,496
Jan - Sept	7,644	8,204	2,819	3,028	106	110	0	0	180	148	0	0	10,749	11,490
Jan - Dec	10,983	11,100	4,079	3,974	174	149	0	0	252	203	0	1	15,488	15,427
<b>W.P. Putrajaya</b>														
Jan - Mar	96	136	3	5	0	1	0	0	0	0	0	0	99	142
Apr - June	98	131	6	2	0	0	0	0	0	0	0	0	104	133
Jul - Sept	103	133	4	7	1	0	0	0	4	0	0	0	112	140
Oct - Dec	161	152	3	9	0	0	0	0	3	0	0	0	167	161
Jan - June	194	267	9	7	0	1	0	0	0	0	0	0	203	275
Jan - Sept	297	400	13	14	1	1	0	0	4	0	0	0	315	415
Jan - Dec	458	552	16	23	1	1	0	0	7	0	0	0	482	576
<b>W.P. Labuan</b>														
Jan - Mar	43	48	4	11	4	2	11	16	30	51	0	0	92	128
Apr - June	55	44	9	3	0	4	18	15	23	34	0	0	105	100
Jul - Sept	43	73	5	4	6	0	20	21	35	41	0	0	109	139
Oct - Dec	69	60	3	18	8	3	17	15	44	30	0	0	141	126
Jan - June	98	92	13	14	4	6	29	31	53	85	0	0	197	228
Jan - Sept	141	165	18	18	10	6	49	52	88	126	0	0	306	367
Jan - Dec	210	225	21	36	18	9	66	67	132	156	0	0	447	493
<b>Selangor</b>														
Jan - Mar	12,005	12,884	1,252	1,651	424	671	939	980	692	618	0	0	15,312	16,804
Apr - June	10,720	11,160	1,093	1,561	416	407	766	791	603	585	0	0	13,598	14,504
Jul - Sept	11,884	12,922	1,349	1,562	531	589	895	838	578	581	0	0	15,237	16,492
Oct - Dec	13,106	15,015	1,737	1,620	658	545	987	954	631	614	0	0	17,119	18,748
Jan - June	22,725	24,044	2,345	3,212	840	1,078	1,705	1,771	1,295	1,203	0	0	28,910	31,308
Jan - Sept	34,609	36,966	3,694	4,774	1,371	1,667	2,600	2,609	1,873	1,784	0	0	44,147	47,800
Jan - Dec	47,715	51,981	5,431	6,394	2,029	2,212	3,587	3,563	2,504	2,398	0	0	61,266	66,548
<b>Johor</b>														
Jan - Mar	6,367	7,253	757	916	146	282	2,351	1,937	436	451	1	0	10,058	10,839
Apr - June	7,518	6,793	960	803	173	245	1,900	1,866	382	429	1	0	10,934	10,136
Jul - Sept	6,456	7,545	894	976	266	221	2,089	1,991	438	536	2	0	10,145	11,269
Oct - Dec	6,544	7,313	893	1,011	281	268	2,262	2,066	534	412	2	0	10,516	11,070
Jan - June	13,885	14,046	1,717	1,719	319	527	4,251	3,803	818	880	2	0	20,992	20,975
Jan - Sept	20,341	21,591	2,611	2,695	585	748	6,340	5,794	1,256	1,416	4	0	31,137	32,244
Jan - Dec	26,885	28,904	3,504	3,706	866	1,016	8,602	7,860	1,790	1,828	6	0	41,653	43,314
<b>Pulau Pinang</b>														
Jan - Mar	2,949	2,965	339	347	88	105	559	398	340	281	2	0	4,277	4,096
Apr - June	3,057	3,091	290	336	101	96	329	378	244	262	5	1	4,026	4,164
Jul - Sept	3,206	3,240	323	378	117	112	359	389	285	283	3	3	4,293	4,405
Oct - Dec	3,339	3,422	352	387	152	79	323	316	323	249	2	0	4,491	4,453
Jan - June	6,006	6,056	629	683	189	201	888	776	584	543	7	1	8,303	8,260
Jan - Sept	9,212	9,296	952	1,061	306	313	1,247	1,165	869	826	10	4	12,596	12,665
Jan - Dec	12,551	12,718	1,304	1,448	458	392	1,570	1,481	1,192	1,075	12	4	17,087	17,118

Jadual IV / Table IV  
Bilangan Transaksi Harta Tanah Mengikut Negeri dan Tempoh Masa  
Number of Property Transactions by State and Time Period

JABATAN PENILAIAN &  
PERKHIDMATAN HARTA

Time Period	Residential		Commercial		Industrial		Agriculture		Development Land		Others		Total	
	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019
<b>Perak</b>														
Jan - Mar	5,377	5,315	459	573	153	122	3,119	3,070	176	157	6	0	9,290	9,237
Apr - June	5,007	4,595	427	454	147	105	2,270	2,543	130	131	1	1	7,982	7,829
Jul - Sept	5,682	5,622	475	464	165	95	2,768	2,868	184	137	3	2	9,277	9,188
Oct - Dec	5,980	6,395	543	445	170	152	2,450	2,662	142	126	1	0	9,286	9,780
Jan - June	10,384	9,910	886	1,027	300	227	5,389	5,613	306	288	7	1	17,272	17,066
Jan - Sept	16,066	15,532	1,361	1,491	465	322	8,157	8,481	490	425	10	3	26,549	26,254
Jan - Dec	22,046	21,927	1,904	1,936	635	474	10,607	11,143	632	551	11	3	35,835	36,034
<b>Negeri Sembilan</b>														
Jan - Mar	3,043	3,155	237	308	63	159	1,031	872	142	142	0	0	4,516	4,636
Apr - June	2,821	2,992	229	323	79	81	725	895	90	153	0	0	3,944	4,444
Jul - Sept	3,409	3,392	262	217	87	66	814	957	139	154	0	0	4,711	4,786
Oct - Dec	3,026	1,244	270	69	95	44	926	941	166	63	1	0	4,484	2,361
Jan - June	5,864	6,147	466	631	142	240	1,756	1,767	232	295	0	0	8,460	9,080
Jan - Sept	9,273	9,539	728	848	229	306	2,570	2,724	371	449	0	0	13,171	13,866
Jan - Dec	12,299	10,783	998	917	324	350	3,496	3,665	537	512	1	0	17,655	16,227
<b>Melaka</b>														
Jan - Mar	2,212	2,738	226	285	98	79	868	623	327	415	0	1	3,731	4,141
Apr - June	2,031	2,323	197	271	67	79	578	519	234	369	1	1	3,108	3,562
Jul - Sept	2,209	2,449	281	270	100	141	685	640	345	348	0	0	3,620	3,848
Oct - Dec	2,161	2,423	288	320	115	106	586	611	384	343	1	0	3,535	3,803
Jan - June	4,243	5,061	423	556	165	158	1,446	1,142	561	784	1	2	6,839	7,703
Jan - Sept	6,452	7,510	704	826	265	299	2,131	1,782	906	1,132	1	2	10,459	11,551
Jan - Dec	8,613	9,933	992	1,146	380	405	2,717	2,393	1,290	1,475	2	2	13,994	15,354
<b>Kedah</b>														
Jan - Mar	2,993	2,832	249	266	41	61	2,802	3,379	676	647	0	0	6,761	7,185
Apr - June	2,590	3,082	205	239	51	44	1,961	3,138	444	688	0	0	5,251	7,191
Jul - Sept	3,364	3,232	265	208	53	56	2,722	2,943	803	581	0	2	7,207	7,022
Oct - Dec	2,871	4,373	267	276	83	98	2,874	3,177	821	635	0	0	6,916	8,559
Jan - June	5,583	5,914	454	505	92	105	4,763	6,517	1,120	1,335	0	0	12,012	14,376
Jan - Sept	8,947	9,146	719	713	145	161	7,485	9,460	1,923	1,916	0	2	19,219	21,398
Jan - Dec	11,818	13,519	986	989	228	259	10,359	12,637	2,744	2,551	0	2	26,135	29,957
<b>Pahang</b>														
Jan - Mar	2,499	3,015	232	338	57	43	1,431	1,323	248	266	0	0	4,467	4,985
Apr - June	2,018	2,548	160	224	27	37	935	1,098	172	216	0	0	3,312	4,123
Jul - Sept	2,702	2,713	161	306	43	53	1,068	1,156	166	199	0	0	4,140	4,427
Oct - Dec	3,527	3,351	374	303	74	56	1,476	783	244	278	0	0	5,695	4,771
Jan - June	4,517	5,563	392	562	84	80	2,366	2,421	420	482	0	0	7,779	9,108
Jan - Sept	7,219	8,276	553	868	127	133	3,434	3,577	586	681	0	0	11,919	13,535
Jan - Dec	10,746	11,627	927	1,171	201	189	4,910	4,360	830	959	0	0	17,614	18,306
<b>Terengganu</b>														
Jan - Mar	3,213	3,259	115	122	6	6	801	713	810	889	0	0	4,945	4,989
Apr - June	2,691	3,318	59	101	11	7	623	746	667	645	0	0	4,051	4,817
Jul - Sept	2,874	3,406	105	86	6	8	606	682	642	758	1	0	4,234	4,940
Oct - Dec	3,412	3,807	87	93	12	3	676	737	829	701	0	0	5,016	5,341
Jan - June	5,904	6,577	174	223	17	13	1,424	1,459	1,477	1,534	0	0	8,996	9,806
Jan - Sept	8,778	9,983	279	309	23	21	2,030	2,141	2,119	2,292	1	0	13,230	14,746
Jan - Dec	12,190	13,790	366	402	35	24	2,706	2,878	2,948	2,993	1	0	18,246	20,087



Jadual IV / Table IV  
Bilangan Transaksi Harta Tanah Mengikut Negeri dan Tempoh Masa  
Number of Property Transactions by State and Time Period

Time Period	Residential		Commercial		Industrial		Agriculture		Development Land		Others		Total	
	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019
<b>Kelantan</b>														
Jan - Mar	1,524	1,475	100	95	1	24	1,715	1,639	391	432	0	0	3,731	3,665
Apr - June	1,201	1,430	54	80	2	4	1,154	1,387	287	333	0	0	2,698	3,234
Jul - Sept	1,448	1,420	154	71	15	4	1,313	1,661	413	453	0	0	3,343	3,609
Oct - Dec	1,398	1,776	118	207	3	8	1,275	1,398	361	418	0	0	3,155	3,807
Jan - June	2,725	2,905	154	175	3	28	2,869	3,026	678	765	0	0	6,429	6,899
Jan - Sept	4,173	4,325	308	246	18	32	4,182	4,687	1,091	1,218	0	0	9,772	10,508
Jan - Dec	5,571	6,101	426	453	21	40	5,457	6,085	1,452	1,636	0	0	12,927	14,315
<b>Perlis</b>														
Jan - Mar	199	213	14	32	2	3	677	527	14	23	0	0	906	798
Apr - June	128	203	42	25	4	4	342	465	0	16	0	0	516	713
Jul - Sept	222	191	32	18	6	10	421	468	15	13	0	0	696	700
Oct - Dec	228	246	36	23	15	6	535	438	16	22	0	1	830	736
Jan - June	327	416	56	57	6	7	1,019	992	14	39	0	0	1,422	1,511
Jan - Sept	549	607	88	75	12	17	1,440	1,460	29	52	0	0	2,118	2,211
Jan - Dec	777	853	124	98	27	23	1,975	1,898	45	74	0	1	2,948	2,947
<b>Sabah</b>														
Jan - Mar	1,341	1,591	272	318	52	91	486	398	83	116	0	0	2,234	2,514
Apr - June	1,081	1,090	183	239	44	36	458	286	84	66	0	0	1,850	1,717
Jul - Sept	1,279	1,361	279	273	63	62	311	390	128	121	0	0	2,060	2,207
Oct - Dec	1,290	1,326	294	237	91	55	343	347	109	77	0	1	2,127	2,043
Jan - June	2,422	2,681	455	557	96	127	944	684	167	182	0	0	4,084	4,231
Jan - Sept	3,701	4,042	734	830	159	189	1,255	1,074	295	303	0	0	6,144	6,438
Jan - Dec	4,991	5,368	1,028	1,067	250	244	1,598	1,421	404	380	0	1	8,271	8,481
<b>Sarawak</b>														
Jan - Mar	2,143	2,634	370	536	71	152	2,326	2,372	497	585	0	0	5,407	6,279
Apr - June	2,238	2,329	442	485	99	107	2,364	2,158	473	484	1	1	5,617	5,564
Jul - Sept	2,349	2,533	441	424	91	120	2,327	2,387	573	455	2	0	5,783	5,919
Oct - Dec	2,802	2,418	577	449	124	95	2,662	2,297	690	442	0	0	6,855	5,701
Jan - June	4,381	4,963	812	1,021	170	259	4,690	4,530	970	1,069	1	1	11,024	11,843
Jan - Sept	6,730	7,496	1,253	1,445	261	379	7,017	6,917	1,543	1,524	3	1	16,807	17,762
Jan - Dec	9,532	9,914	1,830	1,894	385	474	9,679	9,214	2,233	1,966	3	1	23,662	23,463
<b>MALAYSIA</b>														
Jan - Mar	48,572	52,203	5,567	6,967	1,259	1,854	19,116	18,247	4,957	5,116	9	1	79,480	84,388
Apr - June	45,628	47,728	5,193	5,995	1,255	1,284	14,423	16,285	3,874	4,481	9	4	70,382	75,777
Jul - Sept	49,932	53,147	6,074	6,279	1,569	1,566	16,398	17,391	4,792	4,695	11	7	78,776	83,085
Oct - Dec	53,253	56,217	7,102	6,413	1,949	1,557	17,392	16,742	5,369	4,465	7	3	85,072	85,397
Jan - June	94,200	99,931	10,760	12,962	2,514	3,138	33,539	34,532	8,831	9,597	18	5	149,862	160,165
Jan - Sept	144,132	153,078	16,834	19,241	4,083	4,704	49,937	51,923	13,623	14,292	29	12	228,638	243,250
Jan - Dec	197,385	209,295	23,936	25,654	6,032	6,261	67,329	68,665	18,992	18,757	36	15	313,710	328,647

Jadual V / Table V  
 Nilai Transaksi Harta Tanah Mengikut Negeri dan Tempoh Masa (RM Juta)  
 Value of Property Transactions by State and Time Period (RM Million)

JABATAN PENILAIAN &  
 PERKHIDMATAN HARTA

Time Period	Residential		Commercial		Industrial		Agriculture		Development Land		Others		Total	
	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019
<b>W.P. Kuala Lumpur</b>														
Jan - Mar	2,047.02	2,204.13	4,773.19	1,960.22	92.19	124.78	0.00	0.00	1,094.31	254.51	0.00	0.00	8,006.71	4,543.63
Apr - June	2,313.14	1,965.51	3,543.79	994.73	87.16	86.35	0.00	0.00	179.39	372.19	0.00	0.00	6,123.49	3,418.78
Jul - Sept	2,114.97	2,123.12	1,346.28	2,288.24	25.66	68.80	0.00	0.00	236.44	266.67	0.00	0.00	3,723.35	4,746.83
Oct - Dec	2,784.26	2,046.00	2,028.43	3,318.78	130.31	97.69	0.00	0.00	502.91	194.87	0.00	3.90	5,445.90	5,661.25
Jan - June	4,360.16	4,169.63	8,316.98	2,954.95	179.35	211.13	0.00	0.00	1,273.71	626.69	0.00	0.00	14,130.20	7,962.41
Jan - Sept	6,475.13	6,292.75	9,663.26	5,243.20	205.01	279.93	0.00	0.00	1,510.14	893.36	0.00	0.00	17,853.55	12,709.25
Jan - Dec	9,259.39	8,338.76	11,691.69	8,561.98	335.32	377.62	0.00	0.00	2,013.05	1,088.23	0.00	3.90	23,299.45	18,370.49
<b>W.P. Putrajaya</b>														
Jan - Mar	74.47	55.22	6.61	21.40	0.00	1.50	0.00	0.00	0.00	0.00	0.00	0.00	81.09	78.12
Apr - June	70.45	63.73	13.31	3.60	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	83.76	67.33
Jul - Sept	66.75	60.19	7.90	10.06	1.50	0.00	0.00	0.00	20.31	0.00	0.00	0.00	96.46	70.26
Oct - Dec	64.83	69.07	374.03	142.94	0.00	0.00	0.00	0.00	2.68	0.00	0.00	0.00	441.54	212.01
Jan - June	144.92	118.95	19.92	25.00	0.00	1.50	0.00	0.00	0.00	0.00	0.00	0.00	164.85	145.45
Jan - Sept	211.68	179.14	27.82	35.07	1.50	1.50	0.00	0.00	20.31	0.00	0.00	0.00	261.30	215.71
Jan - Dec	276.50	248.21	401.85	178.01	1.50	1.50	0.00	0.00	22.98	0.00	0.00	0.00	702.84	427.72
<b>W.P. Labuan</b>														
Jan - Mar	13.20	19.33	4.61	22.21	2.88	3.55	2.56	2.14	5.21	15.06	0.00	0.00	28.46	62.29
Apr - June	15.82	18.00	39.26	7.26	0.00	11.47	1.99	3.68	6.99	9.53	0.00	0.00	64.05	49.94
Jul - Sept	18.00	24.42	21.94	5.40	12.71	0.00	4.40	4.61	7.95	14.37	0.00	0.00	65.00	48.80
Oct - Dec	23.53	22.80	16.02	21.45	65.65	4.43	3.32	2.19	17.15	8.07	0.00	0.00	125.68	58.93
Jan - June	29.02	37.33	43.86	29.47	2.88	15.02	4.55	5.82	12.19	24.59	0.00	0.00	92.51	112.22
Jan - Sept	47.02	61.75	65.80	34.87	15.59	15.02	8.96	10.42	20.14	38.96	0.00	0.00	157.51	161.02
Jan - Dec	70.55	84.55	81.82	56.31	81.24	19.45	12.28	12.61	37.30	47.03	0.00	0.00	283.19	219.95
<b>Selangor</b>														
Jan - Mar	5,585.68	6,412.50	1,825.41	1,925.61	1,218.19	2,476.40	361.11	347.69	522.41	844.83	0.00	0.00	9,512.80	12,007.03
Apr - June	4,890.20	5,272.09	1,159.02	2,642.76	3,228.86	1,296.85	224.47	210.91	522.22	395.44	0.00	0.00	10,024.77	9,818.05
Jul - Sept	5,812.86	6,130.26	1,446.87	2,559.22	1,966.59	1,459.50	275.63	211.54	543.45	590.17	0.00	0.00	10,045.39	10,950.69
Oct - Dec	6,693.98	7,617.23	2,626.91	1,886.67	1,875.90	3,043.72	331.33	458.82	583.99	741.69	0.00	0.00	12,112.11	13,748.12
Jan - June	10,475.88	11,684.59	2,984.43	4,568.37	4,447.04	3,773.25	585.58	558.60	1,044.63	1,240.27	0.00	0.00	19,537.56	21,825.08
Jan - Sept	16,288.73	17,814.86	4,431.30	7,127.59	6,413.63	5,232.75	861.21	770.14	1,588.08	1,830.44	0.00	0.00	29,582.96	32,775.77
Jan - Dec	22,982.71	25,432.08	7,058.21	9,014.26	8,289.53	8,276.47	1,192.55	1,228.95	2,172.07	2,572.12	0.00	0.00	41,695.07	46,523.89
<b>Johor</b>														
Jan - Mar	2,157.46	2,470.23	729.07	970.67	438.95	462.32	703.02	567.08	309.86	293.03	0.27	0.00	4,338.62	4,763.33
Apr - June	1,943.59	2,434.30	745.56	628.29	371.80	571.03	659.37	525.27	780.74	389.92	0.60	0.00	4,501.65	4,548.80
Jul - Sept	2,304.27	2,651.34	846.66	759.28	634.56	415.16	705.18	548.20	440.19	496.34	0.43	0.00	4,931.29	4,870.32
Oct - Dec	2,366.07	2,560.79	911.50	807.62	782.99	611.03	663.72	626.52	828.80	359.92	0.50	0.00	5,553.59	4,965.89
Jan - June	4,101.04	4,904.53	1,474.63	1,598.96	810.75	1,033.35	1,362.39	1,092.35	1,090.60	682.95	0.87	0.00	8,840.27	9,312.13
Jan - Sept	6,405.32	7,555.87	2,321.28	2,358.24	1,445.31	1,448.50	2,067.57	1,640.54	1,530.79	1,179.29	1.30	0.00	13,771.57	14,182.45
Jan - Dec	8,771.39	10,116.66	3,232.78	3,165.86	2,228.30	2,059.53	2,731.29	2,267.07	2,359.59	1,539.22	1.80	0.00	19,325.15	19,148.34
<b>Pulau Pinang</b>														
Jan - Mar	1,242.71	1,208.98	256.85	240.38	219.90	124.97	152.52	264.81	283.61	194.97	0.15	0.00	2,155.74	2,034.10
Apr - June	1,215.05	1,251.25	241.84	270.86	319.48	187.80	144.65	129.66	210.15	164.98	2.30	1.60	2,133.48	2,006.16
Jul - Sept	1,545.62	1,215.54	315.90	467.60	215.08	339.14	128.16	228.76	981.98	220.87	2.15	0.74	3,188.89	2,472.64
Oct - Dec	1,461.82	1,284.58	297.36	291.10	413.35	213.01	147.93	101.78	391.02	229.77	0.09	0.00	2,711.57	2,120.24
Jan - June	2,457.76	2,460.22	498.69	511.24	539.38	312.77	297.18	394.47	493.76	359.95	2.45	1.60	4,289.21	4,040.25
Jan - Sept	4,003.39	3,675.76	814.58	978.83	754.47	651.90	425.34	623.23	1,475.74	580.82	4.59	2.34	7,478.11	6,512.89
Jan - Dec	5,465.21	4,960.34	1,111.94	1,269.93	1,167.82	864.91	573.27	725.01	1,866.76	810.59	4.68	2.34	10,189.68	8,633.13

Jadual V / Table V  
 Nilai Transaksi Harta Tanah Mengikut Negeri dan Tempoh Masa (RM Juta)  
 Value of Property Transactions by State and Time Period (RM Million)

Time Period	Residential		Commercial		Industrial		Agriculture		Development Land		Others		Total	
	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019
<b>Perak</b>														
Jan - Mar	1,020.34	1,038.86	279.98	294.29	287.19	122.45	489.63	355.44	33.94	64.96	3.93	0.00	2,115.00	1,876.01
Apr - June	941.13	940.79	208.41	234.74	72.92	88.07	300.97	849.37	64.13	47.83	3.00	0.03	1,590.56	2,160.82
Jul - Sept	1,209.58	1,168.80	251.50	461.25	126.27	70.52	309.11	303.29	146.63	38.69	0.64	0.38	2,043.73	2,042.93
Oct - Dec	1,154.44	1,368.24	300.94	296.12	140.48	106.58	443.08	377.36	65.13	27.59	0.32	0.00	2,104.40	2,175.89
Jan - June	1,961.47	1,979.65	488.39	529.03	360.10	210.52	790.59	1,204.81	98.07	112.79	6.93	0.03	3,705.56	4,036.83
Jan - Sept	3,171.05	3,148.44	739.90	990.28	486.38	281.04	1,099.70	1,508.10	244.70	151.49	7.57	0.41	5,749.29	6,079.76
Jan - Dec	4,325.48	4,516.68	1,040.84	1,286.40	626.86	387.62	1,542.79	1,885.46	309.83	179.08	7.89	0.41	7,853.69	8,255.65
<b>Negeri Sembilan</b>														
Jan - Mar	933.54	833.43	156.59	143.84	147.19	166.71	213.40	153.85	111.07	2,201.66	0.00	0.00	1,561.79	3,499.49
Apr - June	732.04	909.03	114.13	177.34	228.24	138.85	166.27	183.94	74.21	166.15	0.00	0.00	1,314.90	1,575.31
Jul - Sept	1,055.79	863.68	177.21	143.79	173.82	148.40	173.93	301.83	99.31	138.32	0.00	0.00	1,680.07	1,596.02
Oct - Dec	833.22	338.84	158.85	92.22	162.48	81.85	223.82	178.17	842.85	59.49	0.74	0.00	2,221.96	750.57
Jan - June	1,665.58	1,742.46	270.72	321.18	375.43	305.56	379.67	337.79	185.29	2,367.81	0.00	0.00	2,876.69	5,074.80
Jan - Sept	2,721.38	2,606.13	447.93	464.98	549.25	453.96	553.60	639.61	284.60	2,506.13	0.00	0.00	4,556.76	6,670.81
Jan - Dec	3,554.60	2,944.97	606.78	557.20	711.74	535.81	777.42	817.79	1,127.45	2,565.62	0.74	0.00	6,778.73	7,421.39
<b>Melaka</b>														
Jan - Mar	549.87	724.98	104.59	164.49	76.70	91.23	243.57	173.92	82.23	92.47	0.00	0.46	1,056.96	1,247.53
Apr - June	480.18	632.52	121.06	194.80	59.19	58.44	91.17	177.14	80.65	183.95	0.82	1.25	833.07	1,248.10
Jul - Sept	609.91	623.63	345.98	306.90	51.93	146.37	147.83	84.75	65.40	90.65	0.00	0.00	1,221.06	1,252.30
Oct - Dec	552.35	713.32	345.48	460.19	87.62	88.77	96.17	90.49	108.40	114.76	0.28	0.00	1,190.30	1,467.52
Jan - June	1,030.05	1,357.49	225.64	359.29	135.89	149.67	334.74	351.06	162.88	276.42	0.82	1.71	1,890.03	2,495.63
Jan - Sept	1,639.96	1,981.12	571.63	666.19	187.82	296.04	482.57	435.81	228.28	367.06	0.82	1.71	3,111.08	3,747.93
Jan - Dec	2,192.31	2,694.44	917.11	1,126.37	275.44	384.81	578.75	526.30	336.68	481.82	1.09	1.71	4,301.39	5,215.45
<b>Kedah</b>														
Jan - Mar	560.76	620.31	94.64	114.50	43.71	75.38	251.90	256.05	139.21	116.07	0.00	0.00	1,090.23	1,182.31
Apr - June	482.37	608.75	93.61	97.07	29.22	133.97	176.84	221.67	169.74	145.79	0.00	0.00	951.78	1,207.26
Jul - Sept	705.04	728.80	95.66	86.40	68.89	98.54	230.38	223.86	246.50	116.25	0.00	2.43	1,346.47	1,256.27
Oct - Dec	614.25	875.36	117.21	303.26	74.80	57.65	275.19	273.85	235.79	169.77	0.00	0.00	1,317.24	1,679.89
Jan - June	1,043.13	1,229.06	188.25	211.57	72.93	209.35	428.74	477.72	308.95	261.86	0.00	0.00	2,042.01	2,389.58
Jan - Sept	1,748.18	1,957.87	283.92	297.97	141.82	307.89	659.12	701.58	555.45	378.11	0.00	2.43	3,388.48	3,645.85
Jan - Dec	2,362.42	2,833.23	401.13	601.24	216.62	365.54	934.32	975.43	791.24	547.88	0.00	2.43	4,705.72	5,325.74
<b>Pahang</b>														
Jan - Mar	547.62	702.28	147.05	286.23	194.41	27.66	438.52	255.20	133.41	108.11	0.00	0.00	1,461.00	1,379.48
Apr - June	510.40	590.11	108.89	208.81	50.03	91.38	246.52	434.34	57.56	86.06	0.00	0.00	973.41	1,410.70
Jul - Sept	615.71	607.50	111.11	230.78	53.94	172.48	221.80	216.38	80.41	93.60	0.00	0.00	1,082.97	1,320.73
Oct - Dec	792.18	719.42	199.48	177.93	76.74	151.89	277.39	230.81	213.96	146.13	0.00	0.00	1,559.74	1,426.20
Jan - June	1,058.02	1,292.38	255.94	495.04	244.44	119.04	685.04	689.54	190.97	194.17	0.00	0.00	2,434.41	2,790.18
Jan - Sept	1,673.73	1,899.88	367.05	725.82	298.37	291.52	906.84	905.91	271.38	287.77	0.00	0.00	3,517.37	4,110.90
Jan - Dec	2,465.91	2,619.30	566.53	903.75	375.11	443.41	1,184.23	1,136.73	485.34	433.90	0.00	0.00	5,077.12	5,537.10
<b>Terengganu</b>														
Jan - Mar	413.47	419.22	53.67	78.34	10.62	8.99	60.57	48.75	69.33	72.62	0.00	0.00	607.66	627.92
Apr - June	377.65	454.83	227.97	65.38	4.18	7.97	47.47	53.39	67.61	70.11	0.00	0.00	724.88	651.68
Jul - Sept	359.91	457.87	49.50	38.14	7.81	17.57	47.09	49.45	66.32	73.90	0.40	0.00	531.04	636.94
Oct - Dec	452.95	501.01	217.11	36.42	13.31	4.10	49.73	66.39	71.94	67.55	0.00	0.00	805.04	675.47
Jan - June	791.11	874.05	281.65	143.72	14.80	16.97	108.03	102.14	136.94	142.73	0.00	0.00	1,332.54	1,279.60
Jan - Sept	1,151.03	1,331.91	331.15	181.86	22.61	34.54	155.12	151.59	203.26	216.63	0.40	0.00	1,863.58	1,916.54
Jan - Dec	1,603.98	1,832.92	548.26	218.28	35.92	38.64	204.85	217.99	275.21	284.17	0.40	0.00	2,668.62	2,592.01

Jadual V / Table V  
 Nilai Transaksi Harta Tanah Mengikut Negeri dan Tempoh Masa (RM Juta)  
 Value of Property Transactions by State and Time Period (RM Million)

JABATAN PENILAIAN &  
 PERKHIDMATAN HARTA

Time Period	Residential		Commercial		Industrial		Agriculture		Development Land		Others		Total	
	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019
<b>Kelantan</b>														
Jan - Mar	196.89	206.96	33.41	32.69	0.38	212.16	90.15	84.05	42.21	66.17	0.00	0.00	363.03	602.04
Apr - June	173.55	188.17	23.56	31.00	1.77	2.30	60.72	74.50	24.27	29.94	0.00	0.00	283.86	325.92
Jul - Sept	201.25	194.81	52.44	30.34	15.74	5.57	67.03	83.55	37.72	74.14	0.00	0.00	374.19	388.41
Oct - Dec	184.97	284.91	83.50	82.47	5.61	9.22	66.86	74.33	33.77	35.81	0.00	0.00	374.71	486.74
Jan - June	370.44	395.14	56.97	63.69	2.15	214.46	150.86	158.55	66.47	96.12	0.00	0.00	646.90	927.95
Jan - Sept	571.69	589.94	109.41	94.03	17.89	220.03	217.89	242.10	104.19	170.26	0.00	0.00	1,021.08	1,316.36
Jan - Dec	756.66	874.85	192.91	176.50	23.50	229.25	284.75	316.43	137.97	206.06	0.00	0.00	1,395.80	1,803.10
<b>Perlis</b>														
Jan - Mar	42.69	50.50	6.94	19.62	2.19	0.46	55.56	41.86	1.54	6.56	0.00	0.00	108.93	118.99
Apr - June	24.96	46.66	21.70	11.88	1.31	1.10	25.66	36.40	0.00	2.53	0.00	0.00	73.62	98.56
Jul - Sept	54.21	45.36	19.07	8.22	3.15	1.28	36.68	37.97	1.15	4.08	0.00	0.00	114.26	96.90
Oct - Dec	55.62	47.41	19.56	8.48	1.91	2.61	45.43	38.91	1.67	4.14	0.00	0.25	124.20	101.81
Jan - June	67.65	97.16	28.64	31.50	3.49	1.55	81.22	78.26	1.54	9.08	0.00	0.00	182.55	217.56
Jan - Sept	121.86	142.52	47.70	39.72	6.64	2.83	117.91	116.23	2.69	13.16	0.00	0.00	296.81	314.46
Jan - Dec	177.48	189.93	67.27	48.20	8.56	5.44	163.34	155.14	4.36	17.30	0.00	0.25	421.01	416.27
<b>Sabah</b>														
Jan - Mar	511.37	516.91	180.86	205.10	51.34	156.83	165.59	269.04	338.30	121.36	0.00	0.00	1,247.46	1,269.23
Apr - June	393.87	418.81	117.54	188.43	42.67	36.48	860.54	441.23	49.98	49.46	0.00	0.00	1,464.59	1,134.40
Jul - Sept	442.56	507.96	193.56	215.12	83.06	85.59	242.30	158.99	32.09	206.83	0.00	0.00	993.56	1,174.48
Oct - Dec	472.67	468.18	161.47	225.95	114.21	73.82	372.17	128.93	151.71	250.89	0.00	0.32	1,272.22	1,148.09
Jan - June	905.24	935.72	298.40	393.53	94.01	193.31	1,026.12	710.27	388.28	170.81	0.00	0.00	2,712.05	2,403.63
Jan - Sept	1,347.80	1,443.68	491.96	608.64	177.07	278.90	1,268.43	869.25	420.36	377.65	0.00	0.00	3,705.61	3,578.12
Jan - Dec	1,820.47	1,911.86	653.43	834.59	291.27	352.72	1,640.59	998.18	572.08	628.54	0.00	0.32	4,977.84	4,726.20
<b>Sarawak</b>														
Jan - Mar	583.30	742.76	169.20	279.14	77.64	119.15	301.19	327.83	306.63	402.67	0.00	0.00	1,437.96	1,871.55
Apr - June	611.19	635.36	217.71	230.83	49.10	131.35	253.00	284.30	253.84	358.50	35.33	0.83	1,420.18	1,641.16
Jul - Sept	660.37	717.97	250.92	244.83	95.58	108.82	271.65	273.08	370.77	352.23	1.90	0.00	1,651.19	1,696.93
Oct - Dec	808.32	712.18	303.19	231.61	121.58	143.63	355.42	275.99	553.60	213.75	0.00	0.00	2,142.10	1,577.16
Jan - June	1,194.49	1,378.12	386.91	509.97	126.74	250.50	554.19	612.13	560.47	761.17	35.33	0.83	2,858.13	3,512.71
Jan - Sept	1,854.86	2,096.09	637.83	754.80	222.32	359.32	825.84	885.20	931.24	1,113.40	37.23	0.83	4,509.32	5,209.64
Jan - Dec	2,663.18	2,808.27	941.01	986.41	343.89	502.95	1,181.26	1,161.19	1,484.84	1,327.15	37.23	0.83	6,651.42	6,786.80
<b>MALAYSIA</b>														
Jan - Mar	16,480.39	18,226.58	8,822.66	6,758.74	2,863.47	4,174.53	3,529.29	3,147.70	3,473.28	4,855.06	4.35	0.46	35,173.44	37,163.07
Apr - June	15,175.59	16,429.89	6,997.35	5,987.78	4,545.93	2,843.41	3,259.64	3,625.79	2,541.48	2,472.37	42.04	3.71	32,562.03	31,362.95
Jul - Sept	17,776.81	18,121.25	5,532.51	7,855.56	3,536.30	3,137.73	2,861.18	2,726.25	3,376.61	2,777.10	5.51	3.55	33,088.92	34,621.44
Oct - Dec	19,315.47	19,629.34	8,161.04	8,383.22	4,066.92	4,689.99	3,351.57	2,924.54	4,605.38	2,624.21	1.92	4.46	39,502.31	38,255.76
Jan - June	31,655.98	34,656.47	15,820.01	12,746.52	7,409.40	7,017.94	6,788.94	6,773.48	6,014.76	7,327.43	46.39	4.17	67,735.47	68,526.02
Jan - Sept	49,432.79	52,777.72	21,352.52	20,602.08	10,945.69	10,155.67	9,650.12	9,499.73	9,391.37	10,104.53	51.90	7.72	100,824.39	103,147.46
Jan - Dec	68,748.26	72,407.06	29,513.57	28,985.30	15,012.61	14,845.67	13,001.69	12,424.27	13,996.75	12,728.74	53.82	12.19	140,326.70	141,403.22



Jadual VI / Table VI  
 Bilangan Transaksi Harta Tanah Mengikut Kategori Pemberi dan Penerima Pindah Milik  
 Number of Property Transactions by Category of Transferor and Transferee

JABATAN PENILAIAN &  
 PERKHIDMATAN HARTA

Kedah		Pahang		Terengganu		Kelantan		Perlis		Sabah		Sarawak		MALAYSIA		=	
2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019		
<b>RESIDENTIAL</b>																	
7,282	7,996	5,217	5,792	10,769	12,215	4,850	5,316	434	483	4,305	4,520	8,152	8,588	138,154	147,092	Individual & Individual % Share	
61.6	59.1	48.5	49.8	88.3	88.6	87.1	87.1	55.9	56.6	86.3	84.2	85.5	86.6	70.0	70.3	Developer & Individual	
3,225	3,657	4,110	4,462	1,111	682	578	604	247	310	67	76	523	431	31,993	37,451	Company & Individual	
27.3	27.1	38.2	38.4	9.1	4.9	10.4	9.9	31.8	36.3	1.3	1.4	5.5	4.3	16.2	17.9	Company & Company	
486	738	626	590	166	390	65	103	84	17	438	398	754	774	13,959	14,129	Others	
4.1	5.5	5.8	5.1	1.4	2.8	1.2	1.7	10.8	2.0	8.8	7.4	7.9	7.8	7.1	6.8	Company & Company	
397	1,017	555	491	50	62	2	2	3	28	116	292	91	95	10,386	7,758	Others	
3.4	7.5	5.2	4.2	0.4	0.4	0.0	0.0	0.4	3.3	2.3	5.4	1.0	1.0	5.3	3.7	Total	
428	111	238	292	94	441	76	76	9	15	65	82	12	26	2,893	2,865		
3.6	0.8	2.2	2.5	0.8	3.2	1.4	1.2	1.2	1.8	1.3	1.5	0.1	0.3	1.5	1.4		
<b>11,818</b>	<b>13,519</b>	<b>10,746</b>	<b>11,627</b>	<b>12,190</b>	<b>13,790</b>	<b>5,571</b>	<b>6,101</b>	<b>777</b>	<b>853</b>	<b>4,991</b>	<b>5,368</b>	<b>9,532</b>	<b>9,914</b>	<b>197,385</b>	<b>209,295</b>		
<b>COMMERCIAL</b>																	
544	559	395	444	257	247	239	283	53	55	506	505	1,253	1,234	12,424	12,858	Individual & Individual % Share	
55.2	56.5	42.6	37.9	70.2	61.4	56.1	62.5	42.7	56.1	49.2	47.3	68.5	65.2	51.9	50.1	Developer & Individual	
63	71	113	144	34	2	30	28	27	14	5	14	139	112	1,468	1,601	Company & Individual	
6.4	7.2	12.2	12.3	9.3	0.5	7.0	6.2	21.8	14.3	0.5	1.3	7.6	5.9	6.1	6.2	Company & Company	
224	209	161	195	30	76	18	40	26	8	337	376	293	366	5,512	6,155	Others	
22.7	21.1	17.4	16.7	8.2	18.9	4.2	8.8	21.0	8.2	32.8	35.2	16.0	19.3	23.0	24.0	Company & Company	
141	119	198	251	34	28	129	92	16	16	146	139	123	161	4,016	4,409	Company & Company	
14.3	12.0	21.4	21.4	9.3	7.0	30.3	20.3	12.9	16.3	14.2	13.0	6.7	8.5	16.8	17.2	Others	
14	31	60	137	11	49	10	10	2	5	34	33	22	21	516	631	Company & Company	
1.4	3.1	6.5	11.7	3.0	12.2	2.3	2.2	1.6	5.1	3.3	3.1	1.2	1.1	2.2	2.5	Others	
<b>986</b>	<b>989</b>	<b>927</b>	<b>1,171</b>	<b>366</b>	<b>402</b>	<b>426</b>	<b>453</b>	<b>124</b>	<b>98</b>	<b>1,028</b>	<b>1,067</b>	<b>1,830</b>	<b>1,894</b>	<b>23,936</b>	<b>25,654</b>	Total	
<b>INDUSTRIAL</b>																	
45	45	65	70	13	9	5	7	2	2	76	93	192	245	1,491	1,608	Individual & Individual % Share	
19.7	17.4	32.3	37.0	37.1	37.5	23.8	17.5	7.4	8.7	30.4	38.1	49.9	51.7	24.7	25.7	Developer & Individual	
3	4	10	15	5	1	0	0	4	2	0	1	12	18	132	167	Company & Individual	
1.3	1.5	5.0	7.9	14.3	4.2	0.0	0.0	14.8	8.7	0.0	0.4	3.7	3.8	2.2	2.7	Company & Company	
74	67	58	39	2	2	2	3	12	7	124	78	104	105	1,637	1,557	Others	
32.5	25.9	28.9	20.6	5.7	8.3	9.5	7.5	44.4	30.4	49.6	32.0	27.0	22.2	27.1	24.9	Company & Company	
99	133	51	52	15	8	11	12	8	11	49	68	75	106	2,620	2,751	Company & Company	
43.4	51.4	25.4	27.5	42.9	33.3	52.4	30.0	29.6	47.8	19.6	27.9	19.5	22.4	43.4	43.9	Others	
7	10	17	13	0	4	3	18	1	1	1	4	2	0	152	178	Company & Company	
3.1	3.9	8.5	6.9	0.0	16.7	14.3	45.0	3.7	4.3	0.4	1.6	0.5	0.0	2.5	2.8	Others	
<b>228</b>	<b>259</b>	<b>201</b>	<b>189</b>	<b>35</b>	<b>24</b>	<b>21</b>	<b>40</b>	<b>27</b>	<b>23</b>	<b>250</b>	<b>244</b>	<b>385</b>	<b>474</b>	<b>6,032</b>	<b>6,261</b>	Total	
<b>AGRICULTURE</b>																	
10,108	12,419	4,212	3,865	2,665	2,848	5,443	6,070	1,935	1,864	1,302	1,111	9,104	8,684	62,228	64,313	Individual & Individual % Share	
97.6	98.3	85.8	88.6	98.5	99.0	99.7	99.8	98.0	98.2	81.5	78.2	94.7	94.2	92.4	93.7	Developer & Individual	
5	3	3	11	1	1	0	1	5	3	0	0	11	5	40	114	Company & Individual	
0.0	0.0	0.1	0.3	0.4	0.0	0.0	0.0	0.3	0.2	0.0	0.0	0.1	0.1	0.1	0.2	Company & Company	
185	131	512	420	20	19	8	3	21	12	199	241	502	456	3,706	3,190	Others	
1.8	1.0	10.4	9.6	0.7	0.7	0.1	0.0	1.1	0.6	12.5	17.0	5.2	4.9	5.5	4.6	Company & Company	
22	46	95	33	5	1	2	0	2	6	86	55	52	62	928	692	Company & Company	
0.2	0.4	1.9	0.8	0.2	0.0	0.0	0.0	0.1	0.3	5.4	3.9	0.5	0.7	1.4	1.0	Others	
39	38	88	31	5	9	4	11	12	13	11	14	10	7	427	356	Company & Company	
0.4	0.3	1.8	0.7	0.2	0.3	0.1	0.2	0.6	0.7	0.7	1.0	0.1	0.1	0.6	0.5	Others	
<b>10,359</b>	<b>12,637</b>	<b>4,910</b>	<b>4,360</b>	<b>2,706</b>	<b>2,878</b>	<b>5,457</b>	<b>6,085</b>	<b>1,975</b>	<b>1,898</b>	<b>1,598</b>	<b>1,421</b>	<b>9,679</b>	<b>9,214</b>	<b>67,329</b>	<b>68,665</b>	Total	
<b>DEVELOPMENT LAND</b>																	
2,318	2,330	653	750	2,878	2,961	1,443	1,626	41	67	335	288	1,789	1,572	15,829	16,116	Individual & Individual % Share	
84.5	91.3	78.7	78.2	97.6	98.9	99.4	99.4	91.1	90.5	82.9	75.8	80.1	80.0	83.3	85.9	Developer & Individual	
1	4	5	10	20	0	0	0	0	0	0	0	3	7	46	49	Company & Individual	
0.0	0.2	0.6	1.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.4	0.2	0.3	Company & Company	
239	148	125	153	32	21	7	3	3	5	53	54	359	301	2,155	1,800	Others	
8.7	5.8	15.1	16.0	1.1	0.7	0.5	0.2	6.7	6.8	13.1	14.2	16.1	15.3	11.3	9.6	Company & Company	
161	31	44	40	1	5	1	0	0	1	14	36	75	82	755	632	Others	
5.9	1.2	5.3	4.2	0.0	0.2	0.1	0.0	0.0	1.4	3.5	9.5	3.4	4.2	4.0	3.4	Company & Company	
25	38	3	6	17	6	1	7	1	1	2	2	7	4	207	160	Others	
0.9	1.5	0.4	0.6	0.6	0.2	0.1	0.4	2.2	1.4	0.5	0.5	0.3	0.2	1.1	0.9	Company & Company	
<b>2,744</b>	<b>2,551</b>	<b>830</b>	<b>959</b>	<b>2,948</b>	<b>2,993</b>	<b>1,452</b>	<b>1,636</b>	<b>45</b>	<b>74</b>	<b>404</b>	<b>380</b>	<b>2,233</b>	<b>1,966</b>	<b>18,992</b>	<b>18,757</b>	Total	
<b>OTHERS</b>																	
0	0	0	0	0	0	0	0	0	1	0	0	1	0	6	4	Individual & Individual % Share	
ND	ND	ND	ND	0.0	ND	ND	ND	ND	ND	ND	ND	33.3	ND	16.7	ND	Developer & Individual	
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Company & Individual	
ND	ND	ND	ND	0.0	ND	ND	ND	ND	ND	ND	ND	0.0	ND	0.0	ND	Company & Company	
0	1	0	0	1	0	0	0	0	0	0	0	0	0	1	4	Others	
ND	ND	ND	ND	100.0	ND	ND	ND	ND	ND	ND	ND	0.0	ND	36.1	ND	Company & Company	
0	0	0	0	0	0	0	0	0	0	0	0	0	0	4	0	Others	
ND	ND	ND	ND	0.0	ND	ND	ND	ND	ND	ND	ND	0.0	ND	11.1	ND	Company & Company	
0	1	0	0	0	0	0	0	0	0	0	1	2	0	13	7	Others	
ND	ND	ND	ND	0.0	ND	ND	ND	ND	ND	ND	ND	66.7	ND	36.1	ND	Company & Company	
<b>0</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>1</b>	<b>3</b>	<b>1</b>	<b>36</b>	<b>15</b>	Total	
<b>TOTAL</b>																	
20,297	23,349	10,542	10,921	16,582	18,280	11,980	13,302	2,465	2,472	6,524	6,517	20,491	20,323	230,132	241,991	Individual & Individual % Share	
77.7	77.9	59.9	59.7	90.9	91.0	92.7	92.9	83.6	83.9	78.9	76.8	86.6	86.6	73.4	73.6	Developer & Individual	
3,297	3,739	4,241	4,642	1,181	686	608	633	283	329	72	91	688	573	33,679	39,382	Company & Individual	
12.6	12.5	24.1	25.4	6.5	3.4	4.7	4.4	9.6	11.2	0.9	1.1	2.9	2.4	10.7	12.0	Company & Company	
1,208	1,294	1,482	1,397	251	508	100	152	146	49	1,151	1,147	2,012	2,003	26,982	26,835	Others	
4.6	4.3	8.4	7.6	1.4	2.5	0.8	1.1	5.0	1.7	13.9	13.5	8.5	8.5	8.6	8.2	Company & Company	
820	1,346	943	867	105	104	145	106	29	62	411	590	416	506	18,709	16,242	Others	
3.1	4.5	5.4	4.7	0.6	0.5	1.1	0.7	1.0	2.1	5.0	7.0	1.8	2.2	6.0	4.9	Company & Company	
513	229	406	479	127	509	94	122	25	35	113	136	55	58	4,208	4,197	Others	
2.0	0.8	2.3	2.6	0.7	2.5	0.7	0.9	0.8	1.2	1.4	1.6	0.2	0.2	1.3	1.3	Company & Company	
<b>26,135</b>	<b>29,957</b>	<b>17,614</b>	<b>18,306</b>	<b>18,246</b>	<b>20,087</b>	<b>12,927</b>	<b>14,315</b>	<b>2,948</b>	<b>2,947</b>	<b>8,271</b>	<b>8,481</b>	<b>23,662</b>	<b>23,463</b>	<b>313,710</b>	<b>328,647</b>	Total	

Gambaran Keseluruhan  
 Overview

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Jadual VIII Table VII

Nilai Transaksi Harta Tanah Mengikut Kategori Pemberi Pindah Milik dan Penerima Pindah Milik (RM Juta)  
Value of Property Transactions by Category of Transferor and Transferee (RM Million)

Pemberi & Penerima Pindah Milik	W.P. Kuala Lumpur		W.P. Putrajaya		W.P. Labuan		Selangor		Johor		Pulau Pinang		Perak		Negeri Sembilan		Melaka	
	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019
<b>KEDIAMAN</b>																		
Perseorangan & Perseorangan % Syer	5,988.67	5,763.70	90.75	106.82	61.59	62.89	15,118.56	15,987.40	6,025.63	6,825.10	3,965.39	3,685.61	2,252.20	2,397.72	1,480.39	1,314.78	1,056.29	1,156.85
Pemaju & Perseorangan	64.7	69.1	32.8	43.0	87.3	74.4	65.8	62.9	68.7	67.5	72.6	74.3	52.1	53.1	41.6	44.6	48.2	42.9
Syarikat & Perseorangan	526.31	459.33	94.89	118.89	2.04	10.00	3,700.71	4,784.59	1,536.53	2,306.73	437.67	407.43	1,510.40	1,546.42	1,586.97	1,405.40	947.72	1,319.75
Syarikat & Syarikat	5.7	5.5	34.3	47.9	2.9	11.8	16.1	18.8	17.5	22.8	8.0	8.2	34.9	34.2	44.6	47.7	43.2	49.0
Lain-lain	1,718.26	1,519.66	15.26	9.57	4.09	10.15	2,624.25	2,840.38	833.78	739.12	682.48	720.85	317.87	337.47	369.88	147.70	50.79	54.59
Jumlah	17.5	18.2	5.5	3.9	5.8	12.0	11.4	11.2	9.5	7.3	12.5	14.5	7.3	7.5	10.4	5.0	2.3	2.0
Jumlah	649.66	384.60	10.14	3.06	1.11	1.39	1,146.56	1,626.99	341.57	202.63	116.22	91.83	209.54	200.19	105.35	73.66	101.46	118.01
Jumlah	7.0	4.6	3.7	1.2	1.6	1.6	5.0	6.4	3.9	2.0	2.1	1.9	4.8	4.4	3.0	2.5	4.6	4.4
Jumlah	3,259.39	2,111.47	65.46	9.88	1.72	0.12	392.63	192.71	33.87	43.09	263.45	54.62	35.48	34.88	12.01	3.43	36.06	45.25
Jumlah	4.1	2.5	23.7	4.0	2.4	0.1	1.7	0.8	0.4	0.4	4.8	1.1	0.8	0.8	0.3	0.1	1.6	1.7
Jumlah	9,259.39	8,338.76	276.50	248.21	70.55	84.55	22,982.71	25,432.08	8,771.39	10,116.66	5,465.21	4,960.34	4,325.48	4,516.68	3,554.60	2,944.97	2,192.31	2,694.44
<b>KOMERSIAL</b>																		
Perseorangan & Perseorangan % Syer	1,603.33	1,367.43	5.53	14.07	4.68	13.17	1,567.02	1,860.42	834.43	981.22	337.25	367.33	354.09	371.51	195.89	152.55	161.60	188.53
Pemaju & Perseorangan	13.7	16.0	1.4	7.9	5.7	23.4	22.2	20.6	25.8	31.0	30.3	28.9	34.0	28.9	32.3	27.4	17.6	16.7
Syarikat & Perseorangan	232.67	285.97	0.36	0.00	1.08	4.11	148.37	199.39	182.29	293.77	31.25	33.01	70.69	57.47	75.44	89.13	80.79	105.20
Syarikat & Syarikat	2.0	3.3	0.1	0.0	1.3	7.3	2.1	2.2	5.6	9.3	2.8	2.6	6.8	4.5	12.4	16.0	8.8	9.3
Lain-lain	1,760.07	1,423.62	13.49	6.07	28.11	16.62	1,468.55	1,726.67	554.19	672.35	357.32	357.30	226.19	233.00	129.00	94.82	73.24	104.98
Jumlah	15.1	16.6	3.4	3.4	34.4	29.5	20.8	19.2	17.1	21.2	32.1	28.1	21.7	18.1	21.3	17.0	8.0	9.3
Jumlah	3,302.59	5,188.92	11.77	5.05	17.00	22.42	3,472.10	4,794.59	1,487.31	1,181.62	350.57	484.66	360.14	584.75	190.17	204.31	571.74	444.53
Jumlah	28.2	60.6	2.9	2.8	20.8	39.8	49.2	53.2	46.0	37.3	31.5	38.2	34.6	45.5	31.3	36.7	62.3	39.5
Jumlah	4,793.04	2,964.04	370.70	152.82	30.96	0.00	402.17	433.19	174.56	36.90	35.55	27.63	29.73	16.28	16.38	29.75	283.14	25.1
Jumlah	41.0	3.5	92.2	85.8	37.8	0.0	5.7	4.8	5.4	1.2	3.2	2.2	2.9	3.1	2.7	2.9	3.2	25.1
Jumlah	11,691.69	8,561.98	401.85	178.01	81.82	56.31	7,058.21	9,014.26	3,232.78	3,165.86	1,111.94	1,269.93	1,040.84	1,286.40	606.78	557.20	917.11	1,126.37
<b>PERINDUSTRIAN</b>																		
Perseorangan & Perseorangan % Syer	29.02	35.75	0.00	0.00	2.40	2.71	421.53	384.60	132.83	174.24	45.11	46.90	57.81	60.61	47.92	41.21	25.29	25.55
Pemaju & Perseorangan	8.7	9.5	0.0	0.0	3.0	13.9	5.1	4.6	6.0	8.5	3.9	5.4	9.2	15.6	6.7	7.7	9.2	6.6
Syarikat & Perseorangan	2.06	0.97	0.00	0.00	1.72	0.00	20.49	28.15	20.41	77.92	5.82	5.60	5.26	2.96	14.15	17.97	22.54	23.79
Syarikat & Syarikat	0.6	0.3	0.0	0.0	2.1	0.0	0.2	0.3	0.9	3.6	0.5	0.6	0.8	0.9	2.0	3.4	8.2	6.2
Lain-lain	71.87	98.15	1.50	15.00	2.28	1.48	1,003.44	1,238.13	295.50	437.12	227.15	128.33	112.59	83.25	56.88	66.75	36.48	41.67
Jumlah	21.4	28.0	100.0	100.0	2.8	7.6	12.1	15.0	13.3	21.2	19.5	14.8	18.0	21.5	8.0	12.5	13.2	10.8
Jumlah	232.37	221.69	0.00	0.00	67.27	15.26	6,702.91	6,609.63	1,776.90	1,367.35	811.04	613.16	432.60	220.18	574.72	406.93	184.25	289.45
Jumlah	69.3	58.7	0.0	0.0	82.8	78.5	80.9	79.9	79.7	66.4	69.4	70.9	69.0	56.8	80.7	75.9	66.9	75.2
Jumlah	0.00	21.07	0.00	0.00	7.57	0.00	141.17	15.96	2.66	2.90	78.71	70.92	18.60	20.61	18.27	2.94	6.88	4.34
Jumlah	0.0	5.6	0.0	0.0	9.3	0.0	1.7	0.2	0.1	0.1	6.7	8.2	3.0	5.3	2.6	0.5	2.5	1.1
Jumlah	335.32	377.62	1.50	1.50	81.24	19.45	8,289.53	8,276.47	2,228.30	2,059.53	1,167.82	864.91	626.86	387.62	711.74	535.81	275.44	384.81
<b>PERTANIAN</b>																		
Perseorangan & Perseorangan % Syer	0.00	0.00	0.00	0.00	10.78	12.35	709.60	676.13	1,961.12	1,744.15	324.81	304.17	925.30	959.80	539.91	484.81	331.58	283.24
Pemaju & Perseorangan	ND	ND	ND	ND	87.8	97.9	59.5	55.0	71.8	76.9	56.7	42.0	60.0	50.9	69.4	59.3	57.3	53.8
Syarikat & Perseorangan	0.00	0.00	0.00	0.00	0.00	0.00	0.67	5.95	0.96	0.69	0.00	0.00	0.05	0.77	0.00	19.64	0.00	7.01
Syarikat & Syarikat	ND	ND	ND	ND	0.0	0.0	0.1	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.4	0.0	1.3
Lain-lain	0.00	0.00	0.00	0.00	1.50	0.00	270.16	254.69	408.34	389.83	143.38	86.32	297.65	244.01	124.99	178.62	94.79	36.81
Jumlah	ND	ND	ND	ND	12.2	0.0	22.7	20.7	15.0	17.2	25.0	11.9	19.3	12.9	16.1	21.8	16.4	7.0
Jumlah	0.00	0.00	0.00	0.00	0.00	0.00	200.87	286.83	349.39	117.14	100.08	329.52	306.51	660.20	110.93	133.07	148.67	196.10
Jumlah	ND	ND	ND	ND	0.0	0.0	16.8	23.3	12.8	5.2	17.5	45.5	19.9	35.0	14.3	16.3	25.7	37.3
Jumlah	0.00	0.00	0.00	0.00	0.00	0.26	11.26	5.35	11.48	15.26	5.00	4.99	13.29	20.68	1.59	1.65	3.71	3.14
Jumlah	ND	ND	ND	ND	0.0	2.1	0.9	0.4	0.4	0.7	0.9	0.7	0.9	1.1	0.2	0.2	0.6	0.6
Jumlah	0.00	0.00	0.00	0.00	12.28	12.61	1,192.55	1,228.95	2,731.29	2,267.07	573.27	725.01	1,542.79	1,885.46	777.42	817.79	578.75	526.30
<b>TANAH PEMBANGUNAN</b>																		
Perseorangan & Perseorangan % Syer	264.04	155.38	0.76	0.00	19.44	28.65	945.30	840.77	601.14	663.86	286.59	281.40	81.50	75.39	185.43	147.35	143.74	207.30
Pemaju & Perseorangan	13.1	14.3	3.3	ND	52.1	60.9	43.5	32.7	25.5	43.1	15.4	34.7	26.3	42.1	16.4	5.7	42.7	43.0
Syarikat & Perseorangan	0.00	0.00	0.00	0.00	0.00	0.00	0.37	2.46	0.00	4.50	0.00	0.00	0.57	0.57	0.22	14.77	3.94	4.31
Syarikat & Syarikat	0.0	0.0	0.0	ND	0.0	0.0	0.0	0.1	0.0	0.3	0.0	0.0	0.2	0.3	0.0	0.6	1.2	0.9
Lain-lain	433.55	253.30	0.00	0.00	2.98	11.65	848.49	712.16	550.65	448.02	384.02	184.97	87.03	56.63	149.56	201.45	80.67	109.90
Jumlah	21.5	23.3	0.0	ND	8.0	24.8	39.1	27.7	23.3	29.1	20.6	22.8	28.1	31.6	13.3	7.9	24.0	22.8
Jumlah	408.09	656.16	0.00	0.00	14.88	6.40	354.71	960.60	1,200.35	414.58	1,173.89	309.52	135.11	45.81	774.47	2,180.39	71.59	154.83
Jumlah	20.3	60.3	0.0	ND	39.9	13.6	16.3	37.3	50.9	26.9	62.9	38.2	43.6	25.6	68.7	85.0	21.3	32.1
Jumlah	907.37	23.39	22.23	0.00	0.33	23.19	56.13	7.46	8.25	22.26	34.70	5.63	0.69	17.78	21.66	36.74	5.48	
Jumlah	45.1	2.1	96.7	ND	0.0	0.7	1.1	2.2	0.3	0.5	1.2	4.3	1.8	0.4	1.6	10.9	1.1	
Jumlah	2,013.05	1,088.23	22.98	0.00	37.30	47.03	2,172.07	2,572.12	2,359.59	1,539.22	1,866.76	810.59	309.83	179.08	1,127.45	2,565.62	336.68	481.82
<b>LAIN-LAIN</b>																		
Perseorangan & Perseorangan % Syer	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.50	0.00	0.18	0.00	0.27	0.31	0.00	0.00	0.00	1.25
Pemaju & Perseorangan	ND																	



**Jadual VII / Table VII**  
**Nilai Transaksi Harta Tanah Mengikut Kategori Pemberi Pindah Milik dan Penerima Pindah Milik (RM Juta)**  
*Value of Property Transactions by Category of Transferor and Transferee (RM Million)*

**JABATAN PENILAIAN & PERKHIDMATAN HARTA**

Kedah		Pahang		Terengganu		Kelantan		Perlis		Sabah		Sarawak		MALAYSIA		Transferor and Transferee	
2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019		
1,307.25	1,603.11	1,027.00	1,176.07	1,295.84	1,548.65	644.94	707.15	90.02	102.95	1,493.57	1,578.06	2,211.82	2,368.37	44,109.91	46,385.23	<b>RESIDENTIAL</b>	
55.3	56.6	41.6	44.9	80.8	84.5	85.2	80.8	50.7	54.2	82.0	82.5	83.1	84.3	64.2	64.1	Individual & Individual % Share	
901.78	1,032.82	1,077.98	1,138.40	259.12	137.76	94.97	136.57	62.10	75.12	30.61	25.76	144.02	124.44	12,913.82	15,029.40	Developer & Individual	
38.2	36.5	43.7	43.5	16.2	7.5	12.6	15.6	35.0	39.5	1.7	1.3	5.4	4.4	18.8	20.8	Company & Individual	
97.75	153.03	184.70	169.49	24.42	76.07	6.00	15.76	23.71	6.21	226.94	191.25	268.70	269.61	7,448.89	7,260.90	Company & Individual	
4.1	5.4	7.5	6.5	1.5	4.2	0.8	1.8	13.4	3.3	12.5	10.0	10.1	9.6	10.8	10.0	Company & Company	
21.54	26.84	127.36	94.07	13.03	7.11	0.51	2.55	0.49	2.81	52.48	87.69	35.13	38.08	2,932.13	2,961.50	Company & Company	
0.9	0.9	5.2	3.6	0.8	0.4	0.1	0.3	0.3	1.5	2.9	4.6	1.3	1.4	4.3	4.1	Others	
34.10	17.43	48.87	41.27	11.58	63.35	10.24	12.82	1.15	2.85	16.88	29.09	3.51	7.77	1,343.51	770.02	Others	
1.4	0.6	2.0	1.6	0.7	3.5	1.4	1.5	0.6	1.5	0.9	1.5	0.1	0.3	2.0	1.1		
<b>2,362.42</b>	<b>2,833.23</b>	<b>2,465.91</b>	<b>2,619.30</b>	<b>1,603.98</b>	<b>1,832.92</b>	<b>756.66</b>	<b>874.85</b>	<b>177.48</b>	<b>189.93</b>	<b>1,820.47</b>	<b>1,911.86</b>	<b>2,663.18</b>	<b>2,808.27</b>	<b>68,748.26</b>	<b>72,407.06</b>	<b>Total</b>	
157.18	183.16	191.45	240.74	86.46	91.34	81.20	92.38	19.77	18.42	222.92	216.18	505.09	466.11	6,327.87	6,624.57	<b>COMMERCIAL</b>	
39.2	30.5	33.8	26.6	15.8	41.8	42.1	52.3	29.4	38.2	34.1	25.9	53.7	47.3	21.4	22.9	Individual & Individual % Share	
36.17	34.03	75.41	91.69	26.89	0.61	12.35	14.62	17.89	8.18	1.93	4.96	59.93	47.43	1,053.52	1,269.57	Developer & Individual	
9.0	5.7	13.3	10.1	4.9	0.3	6.4	8.3	26.6	17.0	0.3	0.6	6.4	4.8	3.6	4.4	Company & Individual	
111.31	119.22	95.38	137.98	20.13	53.77	14.01	36.70	17.79	6.11	218.43	267.51	190.37	225.39	5,277.58	5,482.11	Company & Individual	
27.7	19.8	16.8	15.3	3.7	24.6	7.3	20.8	26.4	12.7	33.4	32.1	20.2	22.8	17.9	18.9	Company & Company	
90.74	79.36	160.25	323.33	361.15	31.06	75.13	27.91	10.40	11.55	173.12	309.89	171.73	187.23	10,805.89	13,881.18	Company & Company	
22.6	13.2	28.3	35.8	65.9	14.2	38.9	15.8	15.5	24.0	26.5	37.1	18.2	19.0	36.6	47.9	Others	
5.73	185.47	44.05	110.01	53.63	41.49	10.21	4.89	1.42	3.94	37.03	36.05	13.89	60.26	6,048.69	1,727.87	Others	
1.4	30.8	7.8	12.2	9.8	19.0	5.3	2.8	2.1	8.2	5.7	4.3	1.5	6.1	20.5	6.0		
<b>401.13</b>	<b>601.24</b>	<b>566.53</b>	<b>903.75</b>	<b>548.26</b>	<b>218.28</b>	<b>192.91</b>	<b>176.50</b>	<b>67.27</b>	<b>48.20</b>	<b>653.43</b>	<b>834.59</b>	<b>941.01</b>	<b>986.41</b>	<b>29,513.57</b>	<b>28,985.30</b>	<b>Total</b>	
16.49	15.41	22.42	30.61	1.76	10.93	5.92	3.61	0.50	0.21	46.93	56.49	70.70	92.25	926.62	981.09	<b>INDUSTRIAL</b>	
7.6	4.2	6.0	6.9	4.9	28.3	25.2	1.6	5.8	3.9	16.1	16.0	20.6	18.3	6.2	6.6	Individual & Individual % Share	
0.84	2.72	4.04	5.51	3.86	2.20	0.00	0.00	2.62	0.45	0.00	1.33	5.35	6.61	109.14	176.18	Developer & Individual	
0.4	0.7	1.1	1.2	10.7	5.7	0.0	0.0	30.7	8.3	0.0	0.4	1.6	1.3	0.7	4.2	Company & Individual	
50.92	42.17	58.30	51.60	1.59	1.82	0.88	3.16	2.73	2.51	122.89	92.76	76.07	82.14	2,120.86	2,372.54	Company & Individual	
23.5	11.5	15.5	11.6	4.4	4.7	3.7	1.4	31.9	46.1	42.2	26.3	22.1	16.3	14.1	16.0	Company & Company	
142.22	304.81	193.75	259.85	28.72	19.25	14.29	132.50	2.57	1.50	121.16	197.35	188.49	321.94	11,473.27	10,980.86	Company & Company	
65.7	83.4	51.7	58.6	80.0	49.8	60.8	57.8	30.0	27.5	41.6	56.0	54.8	64.0	76.4	74.0	Others	
6.15	0.43	96.59	95.85	0.00	4.45	2.41	89.99	0.13	0.77	0.30	4.79	3.29	0.00	382.72	335.01	Others	
2.8	0.1	25.8	21.6	0.0	11.5	10.2	39.3	1.6	14.2	0.1	1.4	1.0	0.0	2.5	2.3		
<b>216.62</b>	<b>365.54</b>	<b>375.11</b>	<b>443.41</b>	<b>35.92</b>	<b>38.64</b>	<b>23.50</b>	<b>229.25</b>	<b>8.56</b>	<b>5.44</b>	<b>291.27</b>	<b>352.72</b>	<b>343.89</b>	<b>502.95</b>	<b>15,012.61</b>	<b>14,845.67</b>	<b>Total</b>	
752.95	851.87	634.03	527.72	181.21	211.35	283.52	313.84	153.13	147.60	258.43	223.87	884.42	920.08	7,950.78	7,661.00	<b>AGRICULTURE</b>	
80.6	87.3	53.5	46.4	88.5	97.0	99.6	99.2	93.8	95.1	15.8	22.4	74.9	79.2	61.2	61.7	Individual & Individual % Share	
0.30	5.01	0.28	1.59	8.86	0.08	0.00	0.92	0.03	0.26	0.00	0.00	1.14	0.51	12.29	42.43	Developer & Individual	
0.0	0.5	0.0	0.1	4.3	0.0	0.0	0.3	0.0	0.2	0.0	0.0	0.1	0.0	0.1	0.3	Company & Individual	
138.92	61.07	253.70	225.22	6.76	4.65	0.81	0.66	6.48	2.36	91.38	135.55	164.30	155.95	2,003.16	1,775.75	Company & Individual	
14.9	6.3	21.4	19.8	3.3	2.1	0.3	0.2	4.0	1.5	5.6	13.6	13.9	13.4	15.4	14.3	Company & Company	
33.11	47.42	287.99	148.88	5.82	0.37	0.34	0.00	0.84	3.37	1,287.78	593.23	105.30	83.77	2,937.62	2,599.90	Company & Company	
3.5	4.9	24.3	13.1	2.8	0.2	0.1	0.0	0.5	2.2	78.5	59.4	8.9	7.2	22.6	20.9	Others	
9.04	10.04	8.23	233.32	2.20	1.53	0.08	1.00	2.86	1.56	3.01	45.53	26.10	0.88	97.85	345.20	Others	
1.0	1.0	0.7	20.5	1.1	0.7	0.0	0.3	1.7	1.0	0.2	4.6	2.2	0.1	0.8	2.8		
<b>934.32</b>	<b>975.43</b>	<b>1,184.23</b>	<b>1,136.73</b>	<b>204.85</b>	<b>217.99</b>	<b>284.75</b>	<b>316.43</b>	<b>163.34</b>	<b>155.14</b>	<b>1,640.59</b>	<b>998.18</b>	<b>1,181.26</b>	<b>1,161.19</b>	<b>13,001.69</b>	<b>12,424.27</b>	<b>Total</b>	
341.96	326.86	195.28	222.15	249.90	267.05	130.29	132.00	3.99	10.15	194.82	122.53	763.25	709.86	4,407.43	4,190.71	<b>DEVELOPMENT LAND</b>	
43.2	59.7	40.2	51.2	90.8	94.0	94.4	64.1	91.5	58.7	34.1	19.5	51.4	53.5	31.5	32.9	Individual & Individual % Share	
0.11	5.95	4.55	6.21	0.66	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.80	2.42	13.21	41.18	Developer & Individual	
0.0	1.1	0.9	1.4	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.2	0.1	0.3	Company & Individual	
152.64	114.59	87.02	120.90	15.04	12.04	6.68	0.42	0.30	4.15	91.61	106.43	330.38	254.25	3,220.62	2,590.86	Company & Individual	
19.3	20.9	17.9	27.9	5.5	4.2	4.8	0.2	6.9	24.0	16.0	16.9	22.3	19.2	23.0	20.4	Company & Company	
256.52	80.12	187.13	74.80	6.83	4.78	0.25	0.00	0.00	3.00	231.23	397.14	386.95	355.4	5,202.10	5,643.17	Company & Company	
32.4	14.6	38.6	17.2	2.5	1.7	0.2	0.0	0.0	17.3	40.4	83.2	26.1	26.8	37.2	44.3	Others	
39.91	20.37	11.37	9.85	2.78	0.30	0.75	73.65	0.07	0.00	54.42	2.45	1.45	5.58	1,153.39	262.82	Others	
5.0	3.7	2.3	2.3	1.0	0.1	0.5	35.7	1.6	0.0	9.5	0.4	0.1	0.4	8.2	2.1		
<b>791.24</b>	<b>547.88</b>	<b>485.34</b>	<b>433.90</b>	<b>275.21</b>	<b>284.17</b>	<b>137.97</b>	<b>206.06</b>	<b>4.36</b>	<b>17.30</b>	<b>572.08</b>	<b>628.54</b>	<b>1,484.84</b>	<b>1,327.15</b>	<b>13,996.75</b>	<b>12,728.74</b>	<b>Total</b>	
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.25	0.00	0.00	0.00	0.00	0.95	1.81	<b>OTHERS</b>	
ND	0.0	ND	ND	0.0	ND	ND	ND	ND	100.0	ND	0.0	0.0	0.0	1.8	14.8	Individual & Individual % Share	
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Developer & Individual	
ND	0.0	ND	ND	0.0	ND	ND	ND	ND	0.0	ND	0.0	0.0	0.0	0.0	0.0	0.0	Company & Individual
0.00	1.99	0.00	0.00	0.40	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.83	6.90	4.88	Company & Individual	
ND	82.0	ND	ND	100.0	ND	ND	ND	ND	0.0	ND	0.0	0.0	100.0	12.8	40.1	Company & Company	
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.10	0.00	Others	
ND	0.0	ND	ND	0.0	ND	ND	ND	ND	0.0	ND	0.0	0.0	0.0	2.0</			



**JABATAN PENILAIAN & PERKHIDMATAN HARTA**  
**Jadual VIII / Table VIII**  
**Penawaran Unit Kediaman di Malaysia**  
*Supply of Residential Units in Malaysia*

State	Existing Stock			Completion			Incoming Supply			Start			Planned Supply			New Planned Supply		
	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change
	W.P. Kuala Lumpur	478,258	488,294	2.1	13,871	7,010	-49.5	37,339	46,384	24.2	14,933	14,286	-4.3	68,389	62,665	-8.4	14,028	9,874
W.P. Putrajaya	12,612	14,991	18.9	1,500	2,379	58.6	5,900	5,121	-13.2	363	500	37.7	530	530	0.0	0	0	0.0
W.P. Labuan	12,503	12,691	1.5	687	139	-79.8	612	657	7.4	13	14	7.7	14	0	-100.0	0	0	0.0
Selangor	1,537,300	1,571,259	2.2	17,303	15,087	-12.8	110,284	103,286	-6.3	19,865	16,810	-15.4	79,698	79,836	0.2	16,402	16,480	0.5
Johor	811,350	838,528	3.3	11,792	15,670	32.9	70,178	59,836	-14.7	16,628	15,894	-4.4	89,753	79,771	-11.1	16,412	16,873	2.8
Pulau Pinang	507,827	519,603	2.3	6,530	7,686	17.7	49,543	43,123	-13.0	13,844	7,375	-46.7	23,422	26,922	14.9	7,753	8,915	15.0
Perak	479,051	491,240	2.5	9,188	8,990	-2.2	35,637	35,740	0.3	11,840	10,591	-10.5	45,025	43,616	-3.1	16,177	10,146	-37.3
Negeri Sembilan	268,428	281,836	5.0	3,591	5,457	52.0	22,591	17,684	-21.7	6,460	7,373	14.1	34,732	32,948	-5.1	3,706	4,643	25.3
Melaka	192,491	197,024	2.4	3,628	3,520	-3.0	17,386	17,813	2.5	4,392	3,683	-16.1	15,963	17,888	12.1	3,510	3,372	-3.9
Kedah	328,394	337,251	2.7	3,612	3,656	1.2	18,186	15,374	-15.5	5,856	4,644	-20.7	14,525	12,501	-13.9	4,307	3,054	-29.1
Perhang	273,463	282,968	3.5	5,732	6,462	12.7	21,948	19,173	-12.6	6,980	6,514	-6.7	36,077	36,640	1.6	9,883	6,058	-38.7
Terengganu	100,340	102,235	1.9	2,503	1,308	-47.7	16,424	17,707	7.8	1,942	2,339	20.4	12,661	12,022	-5.0	2,668	2,618	-1.9
Kelantan	80,472	82,904	3.0	1,733	1,959	13.0	12,568	11,917	-5.2	4,772	1,648	-65.5	3,186	4,055	27.3	2,131	2,654	24.5
Perlis	25,876	26,097	0.9	412	111	-73.1	1,169	1,370	17.2	272	273	0.4	1,982	1,693	-14.6	1,245	390	-68.7
Sabah	214,836	219,266	2.1	4,521	3,278	-27.5	25,203	26,400	4.7	6,487	3,753	-42.1	17,642	24,639	39.7	1,353	933	-31.0
Sarawak	254,721	261,627	2.7	6,944	5,019	-27.7	22,123	21,576	-2.5	7,418	5,211	-29.8	6,086	5,583	-8.3	6,770	4,217	-37.7
<b>MALAYSIA</b>	<b>5,577,922</b>	<b>5,727,814</b>	<b>2.7</b>	<b>93,547</b>	<b>87,731</b>	<b>-6.2</b>	<b>467,091</b>	<b>443,161</b>	<b>-5.1</b>	<b>122,065</b>	<b>100,908</b>	<b>-17.3</b>	<b>449,685</b>	<b>441,309</b>	<b>-1.9</b>	<b>106,345</b>	<b>90,227</b>	<b>-15.2</b>

Stok sedia ada, penawaran akan datang dan penawaran yang dirancang sebagaimana diperolehi pada hujung tahun semasa.  
*The existing stock, incoming supply and planned supply are as available at the end of the current year.*

Inventori harta tanah bagi unit siap dibina dan mula dibina adalah jumlah bagi sepanjang tahun semasa.  
*Property inventory for completion and start are accumulated over the current year.*

Sumber: Laporan Stok Pasaran Harta - NAPIC  
 Source: Property Stock Report - NAPIC

Jadual IX / Table IX  
Penawaran Unit Kedai di Malaysia  
Supply of Shop Units in Malaysia

JABATAN PENILAIAN &  
PERKHIDMATAN HARTA

State	Existing Stock		Completion		Incoming Supply		Start		Planned Supply		New Planned Supply							
	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change						
W.P. Kuala Lumpur	31,282	31,595	1.0	156	313	100.6	140	1,570	1021.4	286	24	-91.6	1,717	1,258	-26.7	367	18	-95.1
W.P. Putrajaya	538	538	0.0	0	0	0.0	0	0	0.0	0	0	0.0	64	64	0.0	0	0	0.0
W.P. Labuan	961	983	2.3	72	22	-69.4	60	76	26.7	34	16	-52.9	0	0	0.0	0	0	0.0
Selangor	106,400	107,504	1.0	1,772	993	-44.0	6,948	6,836	-1.6	620	330	-46.8	4,302	3,911	-9.1	530	350	-34.0
Johor	85,704	87,673	2.3	1,470	1,390	-5.4	10,707	10,677	-0.3	2,827	1,863	-34.1	10,966	9,601	-12.4	1,891	1,276	-32.5
Pulau Pinang	37,158	37,832	1.8	350	654	86.9	2,033	1,845	-9.2	612	455	-25.7	1,141	1,613	41.4	603	477	-20.9
Perak	61,259	61,723	0.8	641	370	-42.3	4,293	3,923	-8.6	609	488	-19.9	3,432	3,089	-10.0	1,024	170	-83.4
Negeri Sembilan	25,643	25,843	0.8	404	200	-50.5	2,078	1,447	-30.4	304	63	-79.3	2,883	2,690	-6.7	121	64	-47.1
Melaka	22,237	22,438	0.9	236	146	-38.1	1,606	1,635	1.8	53	166	213.2	1,252	1,172	-6.4	235	42	-82.1
Kedah	30,997	31,398	1.3	332	343	3.3	1,420	1,004	-29.3	360	182	-49.4	1,121	1,117	-0.4	206	254	23.3
Pahang	24,133	25,029	3.7	494	613	24.1	1,933	1,635	-15.4	224	464	107.1	3,380	3,221	-4.7	362	302	-16.6
Terengganu	8,173	8,216	0.5	392	37	-90.6	1,178	1,230	4.4	125	101	-19.2	769	916	19.1	110	155	40.9
Kelantan	12,975	13,543	4.4	366	485	32.5	1,364	1,318	-3.4	203	251	23.6	955	873	-8.6	253	169	-33.2
Perlis	5,208	5,372	3.1	41	148	261.0	606	466	-23.1	239	45	-81.2	955	856	-10.4	17	34	100.0
Sabah	31,112	31,570	1.5	540	378	-30.0	2,191	1,965	-10.3	76	336	342.1	2,126	2,354	10.7	0	110	0.0
Sarawak	33,557	34,822	3.8	1,256	931	-25.9	2,340	1,768	-24.4	473	296	-37.4	2,173	2,448	12.7	638	435	-31.8
<b>MALAYSIA</b>	<b>517,337</b>	<b>526,079</b>	<b>1.7</b>	<b>8,522</b>	<b>7,023</b>	<b>-17.6</b>	<b>38,897</b>	<b>37,395</b>	<b>-3.9</b>	<b>7,045</b>	<b>5,060</b>	<b>-27.9</b>	<b>37,236</b>	<b>35,183</b>	<b>-5.5</b>	<b>6,357</b>	<b>3,856</b>	<b>-39.3</b>

Stok sedia ada, penawaran akan datang dan penawaran yang dirancang sebagaimana diperolehi pada hujung tahun semasa.

The existing stock, incoming supply and planned supply are as available at the end of the current year.

Inventori harta tanah bagi unit siap dibina dan mula dibina adalah jumlah bagi sepanjang tahun semasa.

Property inventory for completion and start are accumulated over the current year.

Sumber: Laporan Stok Pasaran Harta - NAPIC  
Source: Property Stock Report - NAPIC

Jadual X / Table X  
 Penawaran dan Penghantaran Kompleks Perniagaan di Malaysia  
 Supply and Occupancy of Shopping Complex in Malaysia

State	Total Space (s.m.)		Completion (s.m.)		Occupancy (s.m.)		Occupancy Rate (%)		Annual Take-Up Difference (s.m.)		Incoming Supply (s.m.)		Start (s.m.)		Planned Supply (s.m.)		New Planned Supply (s.m.)	
	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019
W.P. Kuala Lumpur	3,114,761	3,093,317	77,109	0	2,580,356	2,579,070	82.8	83.4	66,589	-1,286	150,544	675,202	0	0	647,674	193,459	212,244	0
W.P. Putrajaya	61,090	86,017	0	24,880	50,488	70,958	82.6	82.5	-1,404	20,470	26,456	0	0	0	0	0	0	0
W.P. Labuan	28,434	28,698	0	0	27,256	27,711	95.9	96.6	-1,178	455	0	0	0	0	0	0	0	0
Selangor	3,510,417	3,620,521	36,210	96,405	2,959,937	2,971,139	84.3	82.1	76,411	11,202	537,798	534,091	130,061	0	0	0	0	92,900
Johor	2,167,045	2,392,121	177,446	279,563	1,554,369	1,801,039	71.7	75.3	276,890	246,670	271,433	115,784	0	2,553	20,603	0	0	0
Pulau Pinang	1,741,513	1,816,659	2,601	42,339	1,272,753	1,339,547	73.1	73.7	82,660	66,794	77,130	0	0	0	69,069	69,069	138,138	0
Perak	956,434	952,610	6,758	0	801,986	797,771	83.9	83.7	-30,938	-4,215	100,438	100,438	0	0	29,052	0	0	0
Negeri Sembilan	576,360	595,880	42,691	18,626	407,218	415,691	70.7	69.8	62,015	8,473	15,042	0	32,695	0	21,810	5,534	0	0
Melaka	596,074	596,074	0	0	418,430	418,430	70.2	70.2	-3,758	0	128,465	128,465	55,742	0	0	0	0	0
Kedah	580,678	588,094	0	7,416	459,219	456,030	79.1	77.5	-20,291	-3,189	9,077	1,661	0	0	93,871	93,871	0	0
Pahang	384,215	412,591	0	22,956	257,358	294,563	67.0	71.4	41,819	37,205	49,820	35,005	5,454	8,141	122,291	102,923	89,449	9,894
Terengganu	165,121	164,309	0	1,403	120,157	115,393	72.8	70.2	5,413	-4,764	8,745	195,796	0	187,951	112,951	5,724	0	5,724
Kelantan	341,440	342,055	6,560	0	312,031	312,665	91.4	91.4	21,057	634	108,393	108,393	0	0	0	0	0	0
Perlis	55,872	55,872	0	0	55,872	55,872	100.0	100.0	0	0	13,493	13,493	0	0	0	0	0	0
Sabah	755,587	755,587	0	0	618,520	613,846	81.9	81.2	26,826	-4,674	95,192	35,743	0	0	0	0	0	0
Sarawak	930,584	1,005,136	95,327	65,643	766,044	809,072	82.3	80.5	57,764	43,028	92,792	8,064	0	0	35,870	35,870	0	0
<b>IMALAYSIA</b>	<b>15,965,625</b>	<b>16,505,541</b>	<b>444,702</b>	<b>559,231</b>	<b>12,661,994</b>	<b>13,078,787</b>	<b>79.3</b>	<b>79.2</b>	<b>679,875</b>	<b>416,803</b>	<b>1,684,818</b>	<b>1,952,135</b>	<b>223,952</b>	<b>198,645</b>	<b>1,153,191</b>	<b>506,450</b>	<b>532,731</b>	<b>15,618</b>

Stok sedia ada, penawaran akan datang dan penawaran yang dirancang sebagaimana diperolehi pada hujung tahun semasa.  
 The existing stock, incoming supply and planned supply are as available at the end of the current year.

Inventori harta tanah bagi unit siap dibina dan mula dibina adalah jumlah bagi sepanjang tahun semasa.  
 Property inventory for completion and start are accumulated over the current year.

Sumber: Laporan Stok Pasaran Harta - NAPIC  
 Source: Property Stock Report - NAPIC

**JADUAL XI / Table XI**  
**Penawaran dan Penghunian Pejabat Binaan Khas di Malaysia**  
*Supply and Occupancy of Purpose-Built Office in Malaysia*

State	Total Space (s.m.)		Completion (s.m.)		Occupancy (s.m.)		Occupancy Rate (%)		Annual Take-Up Difference (s.m.)		Incoming Supply (s.m.)		Start (s.m.)		Planned Supply (s.m.)		New Planned Supply (s.m.)	
	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019
W.P. Kuala Lumpur	8,890,157	9,146,277	12,297	269,455	7,088,850	7,161,566	79.7	78.3	341,604	72,716	1,149,235	1,478,415	272,402	211,869	645,914	304,781	340,861	0
W.P. Putrajaya	2,233,381	2,274,574	53,774	39,949	2,027,859	2,024,023	90.8	89.0	60,398	-3,836	364,565	324,616	0	0	31,545	31,545	0	0
W.P. Labuan	66,725	67,051	0	0	56,429	58,718	84.6	87.6	1,413	2,289	19,222	0	0	0	0	0	0	0
Selangor	3,749,814	4,020,955	39,218	124,407	2,778,604	2,879,104	74.1	71.6	216,807	100,500	337,284	181,804	46,078	0	10,276	10,276	0	0
Johor	1,195,057	1,293,521	60,529	103,724	906,728	921,513	75.9	71.2	31,786	14,785	142,084	109,929	17,868	0	48,039	45,301	0	0
Pulau Pinang	1,123,156	1,123,274	0	0	943,159	923,754	84.0	82.2	27,230	-19,405	11,612	4,590	0	0	9,468	0	0	0
Perak	626,861	628,252	6,730	1,342	588,626	592,600	93.9	94.3	2,100	3,974	15,617	43,697	14,203	14,407	0	0	0	0
Negeri Sembilan	311,156	333,083	4,854	1,965	280,935	302,509	90.3	90.8	4,077	21,574	9,487	9,487	4,854	0	10,839	2,130	0	0
Malaka	402,247	402,247	0	0	328,015	330,275	81.5	82.1	-1,244	2,260	0	0	0	0	0	0	0	0
Kedah	420,704	428,672	31,590	0	355,357	373,780	84.5	87.2	29,865	18,423	0	0	0	0	0	0	0	0
Pahang	420,221	420,374	19,175	0	388,192	378,853	92.4	90.1	32,856	-9,339	36,375	36,375	36,375	0	13,204	4,911	0	0
Terengganu	343,711	361,587	0	16,835	334,535	348,346	97.3	96.3	7,853	13,811	81,309	63,767	79,267	0	4,801	0	0	0
Kelantan	386,070	391,525	0	8,452	375,671	370,997	97.3	94.8	4,098	-4,674	8,452	0	0	0	0	0	0	0
Perlis	131,038	131,038	0	0	131,038	131,038	100.0	100.0	0	0	11,933	11,933	0	0	0	0	0	0
Sabah	811,944	829,798	7,093	10,050	736,496	722,942	90.7	87.1	93,057	-13,554	57,674	47,624	0	0	0	0	0	0
Sarawak	731,160	738,245	15,678	0	669,849	677,361	91.6	91.8	9,094	7,512	65,894	65,894	0	0	0	0	0	0
<b>IMALAYSIA</b>	<b>21,843,402</b>	<b>22,590,473</b>	<b>250,938</b>	<b>576,179</b>	<b>17,990,343</b>	<b>18,197,379</b>	<b>82.4</b>	<b>80.6</b>	<b>860,994</b>	<b>207,036</b>	<b>2,310,743</b>	<b>2,378,131</b>	<b>471,047</b>	<b>226,276</b>	<b>774,086</b>	<b>398,944</b>	<b>340,861</b>	<b>0</b>

Stok sedia ada, penawaran akan datang dan penawaran yang dirancang sebagaimana diperolehi pada hujung tahun semasa.

*The existing stock, incoming supply and planned supply are as available at the end of the current year.*

Inventori harta tamah bagi unit siap dibina dan mula dibina adalah jumlah bagi sepanjang tahun semasa.

*Property inventory for completion and start are accumulated over the current year.*

Sumber: Laporan Stok Pasaran Harta - NAPIC  
 Source: Property Stock Report - NAPIC

**JABATAN PENILAIAN & PERKHIDMATAN HARTA**  
**Jacual XII / Table XII**  
**Penawaran Unit SOHO di Malaysia**  
*Supply of SOHO Units in Malaysia*

State	Existing Stock		Completion		Incoming Supply		Start		Planned Supply		New Planned Supply							
	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019						
W.P. Kuala Lumpur	3,134	3,688	17.7	1,163	277	-76.2	742	3,381	355.7	0	350.0	ND	6,160	8,039	30.5	1,882	0	-100.0
W.P. Putrajaya	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND
W.P. Labuan	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND
Selangor	24,829	30,479	22.8	2,623	5,170	97.1	19,378	18,885	-2.5	3,333.0	1,274.0	-61.8	4,553	658	-85.5	3,113	342	-89.0
Johor	646	646	0.0	646	0	-100.0	3,423	1,916	-44.0	120.0	0	-100.0	2,676	3,316	23.9	0	640	ND
Pulau Pinang	2,387	2,387	0.0	405	0	-100.0	1,727	2,842	64.6	0	1,115.0	ND	2,446	2,495	2.0	1,414	0	-100.0
Perak	575	575	0.0	0	0	ND	0	654	ND	0	12.0	ND	4,612	3,397	-26.3	2,506	0	-100.0
Negeri Sembilan	104	104	0.0	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND
Melaka	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND
Kedah	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND
Pahang	0	0	ND	0	0	ND	48	48	0.0	120	0	-100.0	0	0	ND	0	0	ND
Terengganu	0	0	ND	0	0	ND	0	0	ND	0	0	ND	53	53	0.0	0	0	ND
Kelantan	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND
Perlis	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND
Sabah	152	152	0.0	0	0	ND	18	145	705.6	0	127.0	ND	0	0	ND	0	0	ND
Sarawak	55	103	87.3	0	48	ND	250	202	-19.2	148.0	0	-100.0	0	0	ND	0	0	ND
<b>MALAYSIA</b>	<b>31,882</b>	<b>38,134</b>	<b>19.6</b>	<b>4,837</b>	<b>5,495</b>	<b>13.6</b>	<b>25,586</b>	<b>28,073</b>	<b>9.7</b>	<b>3,613.0</b>	<b>2,878.0</b>	<b>-20.3</b>	<b>20,500</b>	<b>17,958</b>	<b>-12.4</b>	<b>8,915</b>	<b>982</b>	<b>-89.0</b>

Stok sedia ada, penawaran akan datang dan penawaran yang dirancang sebagaimana diperolehi pada hujung tahun semasa.  
*The existing stock, incoming supply and planned supply are as available at the end of the current year.*

Inventori harta tanah bagi unit siap dibina dan mula dibina adalah jumlah bagi sepanjang tahun semasa.  
*Property inventory for completion and start are accumulated over the current year.*

Sumber: Laporan Stok Pasaran Harta - NAPIC  
 Source: Property Stock Report - NAPIC

State	Existing Stock			Completion			Incoming Supply			Start			Planned Supply			New Planned Supply		
	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change
	W.P. Kuala Lumpur	59,603	67,563	13.4	12,435	7,122	-42.7	3,204	42,215	1217.6	10,193.0	19,646.0	92.7	83,354	80,853	-3.0	23,924	18,853
W.P. Putrajaya	0	0	ND	0	0	ND	746	746	0.0	0	0	ND	186	186	0.0	0	0	ND
W.P. Labuan	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND
Selangor	59,130	73,528	24.3	8,340	12,723	52.6	36,999	38,033	2.8	4,462.0	5,695.0	27.6	29,462	21,133	-28.3	9,674	2,106	-78.2
Johor	52,838	81,343	53.9	7,930	18,015	127.2	34,366	22,779	-33.7	7,775.0	3,724.0	-52.1	58,598	58,599	0.0	12,023	12,077	0.4
Pulau Pinang	2,922	3,546	21.4	163	312	91.4	3,302	4,365	32.2	312.0	1,153.0	269.6	4,707	6,513	38.4	3,194	2,233	-30.1
Perak	682	682	0.0	0	0	ND	793	404	-48.4	0	253.0	ND	701	862	23.0	538	414	-23.0
Negeri Sembilan	11,322	13,077	15.5	0	1,001	ND	1,001	1,524	52.2	0	1,524.0	ND	3,213	2,795	-13.0	0	0	ND
Melaka	4,777	4,777	0.0	1,934	0	-100.0	4,879	6,293	29.0	2,377.0	1,444.0	-39.3	4,365	3,231	-26.0	3,790	0	-100.0
Kedah	637	637	0.0	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND
Pahang	3,462	5,554	60.4	360	2,092	481.1	1,373	613	55.4	261.0	0	-100.0	3,629	3,908	7.7	1,363	1,688	22.4
Terengganu	0	0	ND	0	0	ND	152	152	0.0	0	0	ND	132	132	0.0	0	0	ND
Kelantan	520	520	0.0	0	0	ND	0	338	ND	0	0	ND	418	418	0.0	0	0	ND
Perlis	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND
Sabah	1,215	1,215	0.0	0	0	ND	350	1,391	297.4	350.0	414.0	18.3	627	2,121	238.3	0	1,011	ND
Sarawak	240	614	155.8	0	187	ND	615	428	-30.4	0	0	ND	0	0	ND	0	0	ND
<b>MALAYSIA</b>	<b>197,348</b>	<b>253,056</b>	<b>28.2</b>	<b>31,162</b>	<b>41,452</b>	<b>33.0</b>	<b>87,770</b>	<b>119,281</b>	<b>35.9</b>	<b>25,730.0</b>	<b>33,853.0</b>	<b>31.6</b>	<b>189,392</b>	<b>180,751</b>	<b>-4.6</b>	<b>54,506</b>	<b>38,362</b>	<b>-29.6</b>

Stok sedia ada, penawaran akan datang dan penawaran yang dirancang sebagaimana diperolehi pada hujung tahun semasa.  
The existing stock, incoming supply and planned supply are as available at the end of the current year.

Inventori harta tanah bagi unit siap dibina dan mula dibina adalah jumlah bagi sepanjang tahun semasa.  
Property inventory for completion and start are accumulated over the current year.

Sumber: Laporan Stok Pasaran Harta - NAPIC  
Source: Property Stock Report - NAPIC

Jadual XIV / Table XIV  
Penawaran Unit Industri di Malaysia  
Supply of Industrial Units in Malaysia

State	Existing Stock		Completion		Incoming Supply		Start		Planned Supply		New Planned Supply				
	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change			
W.P. Kuala Lumpur	5,138	5,138	0.0	0	0	ND	0	0	0	37	37	0.0	0	0	ND
W.P. Putrajaya	48	48	0.0	0	0	ND	0	0	0	0	0	ND	0	0	ND
W.P. Labuan	635	635	0.0	0	0	ND	8	8	0	0	0	ND	0	0	ND
Selangor	40,380	40,701	0.8	335	245	-26.9	1,053	1,013	-3.8	242	1,674	4.8	253	253	0.0
Johor	16,840	17,681	5.0	453	232	-48.8	1,676	1,305	-22.1	438	940	-36.1	44	316	618.2
Pulau Pinang	9,169	9,231	0.7	12	23	91.7	176	293	66.5	1	127	12,600.0	154	84	-45.5
Perak	8,433	8,463	0.4	147	24	-83.7	186	153	-17.7	42	283	-100.0	0	0	ND
Negeri Sembilan	5,503	5,516	0.2	0	0	ND	22	58	163.6	0	600	7.0	0	43	ND
Melaka	6,987	7,104	1.7	167	117	-29.9	934	817	-12.5	0	1,793	0.0	0	0	ND
Kedah	3,858	3,858	0.0	33	0	-100.0	22	33	50.0	0	304	2.3	0	18	ND
Pahang	3,541	3,559	0.5	41	11	-73.2	106	92	-13.2	48	227	-100.0	2	3	50.0
Terengganu	866	866	0.0	1	0	-100.0	47	47	0.0	0	66	45.5	0	30	ND
Kelantan	604	606	0.3	0	2	ND	18	28	55.6	1	33	0.0	1	12	1100.0
Perlis	234	295	26.1	12	61	408.3	90	29	-67.8	81	140	1.4	0	1	ND
Sabah	6,145	6,163	0.3	78	18	-76.9	314	305	-2.9	0	185	25.9	18	0	-100.0
Sarawak	7,016	7,117	1.4	142	90	-36.6	265	162	-38.9	48	427	29.8	134	90	-32.8
<b>MALAYSIA</b>	<b>115,397</b>	<b>116,981</b>	<b>1.4</b>	<b>1,421</b>	<b>823</b>	<b>-42.1</b>	<b>4,917</b>	<b>4,343</b>	<b>-11.7</b>	<b>901</b>	<b>7,057</b>	<b>-19.6</b>	<b>606</b>	<b>850</b>	<b>40.3</b>

Stok sedia ada, penawaran akan datang dan penawaran yang diramang sebagaimana diperolehi pada hujung tahun semasa.  
The existing stock, incoming supply and planned supply are as available at the end of the current year.

Inventori harta tanah bagi unit siap dibina dan mula dibina adalah jumlah bagi sepanjang tahun semasa.  
Property inventory for completion and start are accumulated over the current year.

Sumber: Laporan Stok Pasaran Harta - NAPIC  
Source: Property Stock Report - NAPIC

State	Existing Stock			Completion			Incoming Supply			Start			Planned Supply			New Planned Supply		
	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change
W.P. Kuala Lumpur	40,676	44,784	10.1	1,129	1,290	14.3	5,388	5,688	5.2	437	0	-100.0	2,145	4,370	103.7	964	259	-73.1
W.P. Putrajaya	1,302	1,026	-21.2	243	0	-100.0	0	290	ND	0	0	ND	0	0	ND	0	0	ND
W.P. Labuan	1,722	1,749	1.6	95	0	-100.0	264	264	0.0	0	0	ND	0	0	ND	0	0	ND
Selangor	22,372	23,762	6.2	588	0	-100.0	1,743	1,843	5.7	814	0	-100.0	200	311	55.5	0	0	ND
Johor	29,492	31,736	7.6	1,949	438	-77.5	2,345	3,293	40.4	398	1,488	273.9	1,717	2,098	22.2	525	335	-36.2
Pulau Pinang	19,581	21,815	11.4	208	397	90.9	3,429	5,089	48.4	286	1,968	588.1	1,478	1,339	-9.4	584	1,150	96.9
Perak	16,212	16,110	-0.6	153	201	31.4	944	829	-12.2	55	115	109.1	974	909	-6.7	219	134	-38.8
Negeri Sembilan	9,994	10,029	0.4	159	0	-100.0	1,348	1,546	14.7	0	48	ND	358	408	14.0	182	50	-72.5
Melaka	16,751	17,031	1.7	0	301	ND	1,541	1,456	-5.5	0	336	ND	1,894	1,558	-17.7	776	0	-100.0
Kedah	17,036	13,851	-18.7	0	96	ND	804	756	-6.0	341	253	-25.8	474	134	-71.7	0	0	ND
Pahang	24,457	25,376	3.8	20	893	4,365.0	40	70	75.0	0	0	ND	633	595	-6.0	80	0	-100.0
Terengganu	8,758	9,655	10.2	0	0	ND	302	568	88.1	236	266	12.7	483	1,035	109.9	0	492	ND
Kelantan	4,431	4,360	-1.6	17	0	-100.0	144	144	0.0	0	0	ND	0	0	ND	0	0	ND
Perlis	1,230	1,276	3.7	112	0	-100.0	120	120	0.0	0	0	ND	240	240	0.0	0	0	ND
Sabah	22,671	23,860	5.2	765	0	-100.0	628	1,907	203.7	0	903	ND	566	1,813	220.3	0	0	ND
Sarawak	19,997	20,552	2.8	556	0	-100.0	318	318	0.0	0	0	ND	0	0	ND	0	0	ND
<b>MALAYSIA</b>	<b>256,682</b>	<b>266,972</b>	<b>4.0</b>	<b>5,994</b>	<b>3,616</b>	<b>-39.7</b>	<b>19,358</b>	<b>24,161</b>	<b>24.8</b>	<b>2,567</b>	<b>5,377</b>	<b>108.5</b>	<b>11,172</b>	<b>14,810</b>	<b>32.6</b>	<b>3,330</b>	<b>2,420</b>	<b>-27.3</b>

Stok sedia ada, perawakan akan datang dan perawakan yang dirancang sebagaimana diperolehi pada hujung tahun semasa.  
The existing stock, incoming supply and planned supply are as available at the end of the current year.

Inventori harta tanah bagi unit siap dibina dan mula dibina adalah jumlah bagi sepanjang tahun semasa.  
Property inventory for completion and start are accumulated over the current year.

Sumber: Laporan Stok Pasaran Harta - NAPIC  
Source: Property Stock Report - NAPIC



State	Newly Launched		Completed		Under Construction		Not Constructed	
	2018	2019	2018	2019	2018	2019	2018	2019
<b>Malaysia</b>								
Units Launched	66,040	59,968	32,313	30,664	80,984	72,692	19,865	16,774
Units Sold	22,836	24,238	19,861.91	18,819.43	NA	NA	NA	NA
Sales Performance	34.6	40.4						
<b>W.P. Kuala Lumpur</b>								
Units Launched	9,714	8,865	2,769	2,605	5,912	4,317	10,010	8,645
Units Sold	2,897	3,293	2,680.70	2,600.25	NA	NA	NA	NA
Sales Performance	29.8	37.1						
<b>W.P. Putrajaya</b>								
Units Launched	29	0	0	0	559	769	266	13
Units Sold	1	0	0.00	0.00	NA	NA	NA	NA
Sales Performance	3.4	0.0						
<b>W.P. Labuan</b>								
Units Launched	205	14	0	70	128	0	0	0
Units Sold	54	4	0.00	22.89	NA	NA	NA	NA
Sales Performance	26.3	28.6						
<b>Selangor</b>								
Units Launched	12,177	9,970	4,693	4,687	15,783	10,472	1,340	1,156
Units Sold	5,425	3,053	4,199.79	3,750.71	NA	NA	NA	NA
Sales Performance	44.6	30.6						
<b>Johor</b>								
Units Launched	9,294	9,711	6,066	5,627	9,190	10,392	1,291	104
Units Sold	4,227	4,613	4,608.40	4,703.22	NA	NA	NA	NA
Sales Performance	45.5	47.5						
<b>Pulau Pinang</b>								
Units Launched	4,736	4,152	3,502	3,353	10,613	8,601	773	1,437
Units Sold	333	1,557	3,088.42	2,593.39	NA	NA	NA	NA
Sales Performance	7.0	37.5						
<b>Perak</b>								
Units Launched	5,890	9,504	5,367	5,024	8,860	8,891	788	931
Units Sold	2,208	4,182	1,632.36	1,516.86	NA	NA	NA	NA
Sales Performance	37.5	44.0						
<b>Negeri Sembilan</b>								
Units Launched	3,878	2,706	1,046	1,048	2,646	3,620	150	127
Units Sold	1,734	1,153	610.29	581.09	NA	NA	NA	NA
Sales Performance	44.7	42.6						
<b>Melaka</b>								
Units Launched	4,519	3,492	759	678	4,794	3,192	595	1,406
Units Sold	1,696	1,911	268.69	266.88	NA	NA	NA	NA
Sales Performance	37.5	54.7						
<b>Kedah</b>								
Units Launched	2,066	929	3,311	1,974	2,813	1,681	501	235
Units Sold	456	265	889.54	560.73	NA	NA	NA	NA
Sales Performance	22.1	28.5						
<b>Pahang</b>								
Units Launched	5,784	6,449	1,405	1,466	5,516	5,086	914	893
Units Sold	2,305	2,658	500.18	570.59	NA	NA	NA	NA
Sales Performance	39.9	41.2						
<b>Terengganu</b>								
Units Launched	470	517	402	498	1,235	995	1,221	214
Units Sold	224	267	139.68	184.82	NA	NA	NA	NA
Sales Performance	47.7	51.6						
<b>Kelantan</b>								
Units Launched	1,738	288	139	210	2,735	4,112	944	478
Units Sold	530	94	31.81	85.39	NA	NA	NA	NA
Sales Performance	30.5	32.6						
<b>Perlis</b>								
Units Launched	634	64	65	33	105	65	0	536
Units Sold	36	27	20.08	10.27	NA	NA	NA	NA
Sales Performance	5.7	42.2						
<b>Sabah</b>								
Units Launched	2,477	958	1,377	1,544	4,087	6,683	738	510
Units Sold	99	371	579.71	624.48	NA	NA	NA	NA
Sales Performance	4.0	38.7						
<b>Sarawak</b>								
Units Launched	2,429	2,349	1,412	1,847	6,008	3,816	334	89
Units Sold	611	790	612.26	747.87	NA	NA	NA	NA
Sales Performance	25.2	33.6						

State	Completed		Under Construction		Not Constructed	
	2018	2019	2018	2019	2018	2019
<b>Malaysia</b>						
Unsold Units	5,055	6,024	7,233	6,232	385	336
Value (RM Million)	4,082.53	4,871.97	NA	NA	NA	NA
<b>W. P. Kuala Lumpur</b>						
Unsold Units	41	18	296	309	0	0
Value (RM Million)	35.47	10.15	NA	NA	NA	NA
<b>W. P. Putrajaya</b>						
Unsold Units	28	25	0	0	0	0
Value (RM Million)	99.11	88.37	NA	NA	NA	NA
<b>W. P. Labuan</b>						
Unsold Units	0	0	0	6	0	0
Value (RM Million)	0.00	0.00	NA	NA	NA	NA
<b>Selangor</b>						
Unsold Units	612	684	2,054	721	0	0
Value (RM Million)	765.47	794.06	NA	NA	NA	NA
<b>Johor</b>						
Unsold Units	1,182	1,288	1,757	2,193	58	58
Value (RM Million)	1,257.99	1,370.70	NA	NA	NA	NA
<b>Pulau Pinang</b>						
Unsold Units	23	57	140	172	42	0
Value (RM Million)	29.59	52.61	NA	NA	NA	NA
<b>Perak</b>						
Unsold Units	403	409	536	655	9	22
Value (RM Million)	218.26	216.37896	NA	NA	NA	NA
<b>Negeri Sembilan</b>						
Unsold Units	367	395	237	117	0	43
Value (RM Million)	178.57	214.08	NA	NA	NA	NA
<b>Melaka</b>						
Unsold Units	727	748	138	241	33	101
Value (RM Million)	359.37	379.77	NA	NA	NA	NA
<b>Kedah</b>						
Unsold Units	425	359	304	170	0	21
Value (RM Million)	198.86	180.85	NA	NA	NA	NA
<b>Pahang</b>						
Unsold Units	377	765	519	404	50	49
Value (RM Million)	230.30	514.54	NA	NA	NA	NA
<b>Terengganu</b>						
Unsold Units	143	130	237	225	76	14
Value (RM Million)	98.50	94.599	NA	NA	NA	NA
<b>Kelantan</b>						
Unsold Units	123	196	278	246	111	28
Value (RM Million)	78.65	109	NA	NA	NA	NA
<b>Perlis</b>						
Unsold Units	32	50	129	93	0	0
Value (RM Million)	17.09	25.23	NA	NA	NA	NA
<b>Sabah</b>						
Unsold Units	498	684	284	370	0	0
Value (RM Million)	418.18	545.48	NA	NA	NA	NA
<b>Sarawak</b>						
Unsold Units	74	216	324	310	6	0
Value (RM Million)	97.14	275.99	NA	NA	NA	NA

Sumber: Laporan Status Pasaran Harta Tanah - NAPIC  
Source: Property Market Status Report - NAPIC  
Total may not add up to the shown figures due to rounding off

State	Completed		Under Construction		Not Constructed	
	2018	2019	2018	2019	2018	2019
<b>Malaysia</b>						
Unsold Units	1,183	1,280	812	642	176	69
Value (RM Million)	1,983.30	1,874.60	NA	NA	NA	NA
<b>W. P. Kuala Lumpur</b>						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0.00	0.00	NA	NA	NA	NA
<b>W. P. Putrajaya</b>						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0.00	0.00	NA	NA	NA	NA
<b>W. P. Labuan</b>						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0.00	0.00	NA	NA	NA	NA
<b>Selangor</b>						
Unsold Units	62	53	115	75	0	0
Value (RM Million)	192.813	160.743	NA	NA	NA	NA
<b>Johor</b>						
Unsold Units	579	554	288	276	0	0
Value (RM Million)	1,384.41	1,154.44	NA	NA	NA	NA
<b>Pulau Pinang</b>						
Unsold Units	95	85	0	8	8	0
Value (RM Million)	155.49	138.38	NA	NA	NA	NA
<b>Perak</b>						
Unsold Units	23	64	78	51	0	0
Value (RM Million)	17.59	47.47	NA	NA	NA	NA
<b>Negeri Sembilan</b>						
Unsold Units	75.00	79	25	17	0	0
Value (RM Million)	47.63	60.75	NA	NA	NA	NA
<b>Melaka</b>						
Unsold Units	41	28	36	0	168	0
Value (RM Million)	34.04	23.53	NA	NA	NA	NA
<b>Kedah</b>						
Unsold Units	10	0	0	0	0	0
Value (RM Million)	5.09	0.00	NA	NA	NA	NA
<b>Pahang</b>						
Unsold Units	62	38	32	54	0	0
Value (RM Million)	35.89	23.14	NA	NA	NA	NA
<b>Terengganu</b>						
Unsold Units	15	15	0	0	0	0
Value (RM Million)	7.69	7.69	NA	NA	NA	NA
<b>Kelantan</b>						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0.00	0.00	NA	NA	NA	NA
<b>Perlis</b>						
Unsold Units	0	0	60	40	0	0
Value (RM Million)	0.00	0.00	NA	NA	NA	NA
<b>Sabah</b>						
Unsold Units	27	42	12	83	0	22
Value (RM Million)	23.94	43.58	NA	NA	NA	NA
<b>Sarawak</b>						
Unsold Units	194	322	166	38	0	47
Value (RM Million)	78.72	215	NA	NA	NA	NA

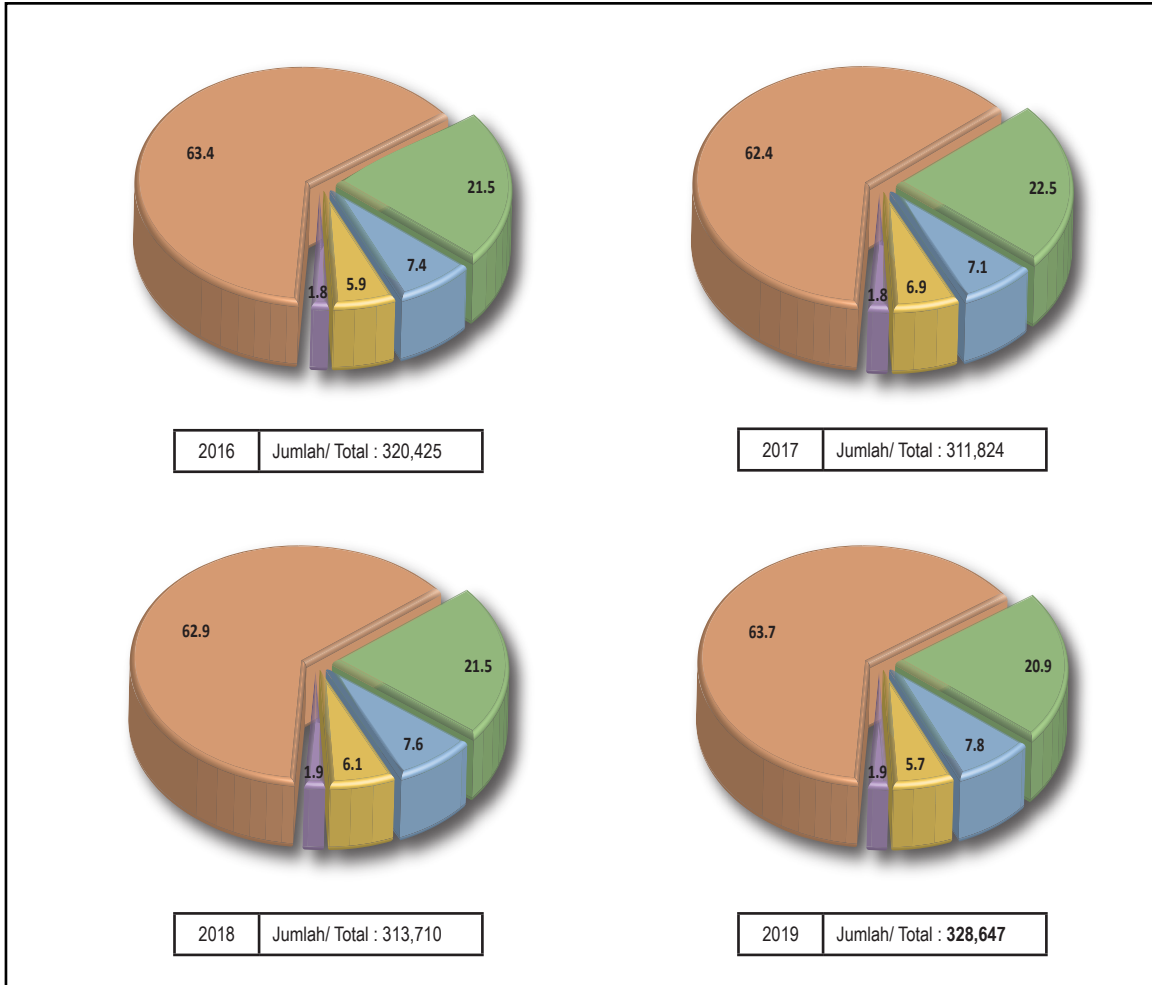
State	Completed		Under Construction		Not Constructed	
	2018	2019	2018	2019	2018	2019
<b>Malaysia</b>						
Unsold Units	1,343	1,878	4,965	4,469	884	0
Value (RM Million)	669.20	898.83	NA	NA	NA	NA
<b>W. P. Kuala Lumpur</b>						
Unsold Units	171	242	1,496	1,737	733	0
Value (RM Million)	135.67	209.63	NA	NA	NA	NA
<b>W. P. Putrajaya</b>						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0	0	NA	NA	NA	NA
<b>W. P. Labuan</b>						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0	0	NA	NA	NA	NA
<b>Selangor</b>						
Unsold Units	446	1,133	3,377	2,153	0	0
Value (RM Million)	205.28	443.29	NA	NA	NA	NA
<b>Johor</b>						
Unsold Units	726	503	79	89	0	0
Value (RM Million)	328.26	245.91	NA	NA	NA	NA
<b>Pulau Pinang</b>						
Unsold Units	0	0	13	490	151	0
Value (RM Million)	0	0	NA	NA	NA	NA
<b>Perak</b>						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0	0	NA	NA	NA	NA
<b>Negeri Sembilan</b>						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0	0	NA	NA	NA	NA
<b>Melaka</b>						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0	0	NA	NA	NA	NA
<b>Kedah</b>						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0	0	NA	NA	NA	NA
<b>Pahang</b>						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0	0	NA	NA	NA	NA
<b>Terengganu</b>						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0	0	NA	NA	NA	NA
<b>Kelantan</b>						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0	0	NA	NA	NA	NA
<b>Perlis</b>						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0	0	NA	NA	NA	NA
<b>Sabah</b>						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0	0	NA	NA	NA	NA
<b>Sarawak</b>						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0	0	NA	NA	NA	NA

Sumber: Laporan Status Pasaran Harta Tanah - NAPIC  
Source: Property Market Status Report - NAPIC

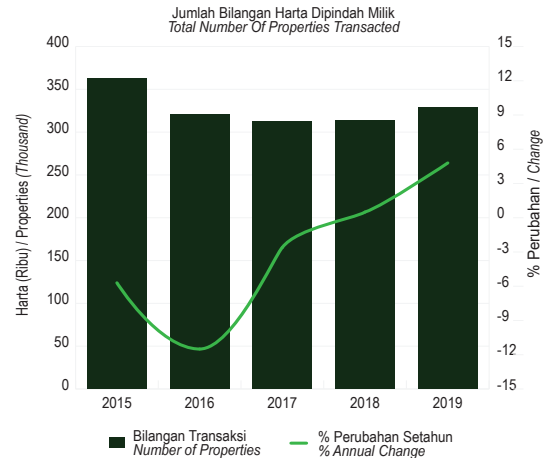
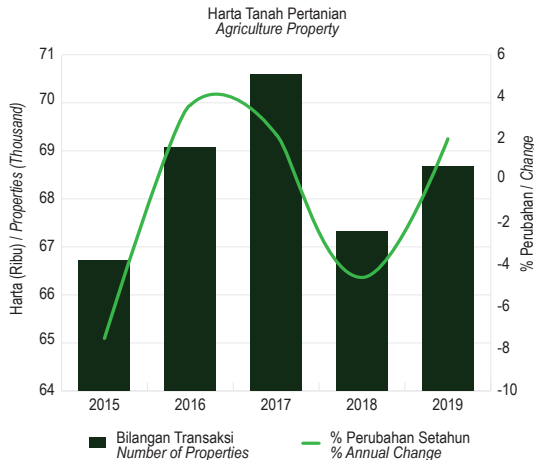
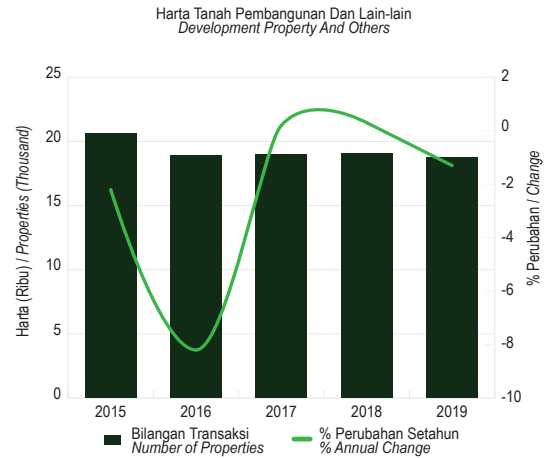
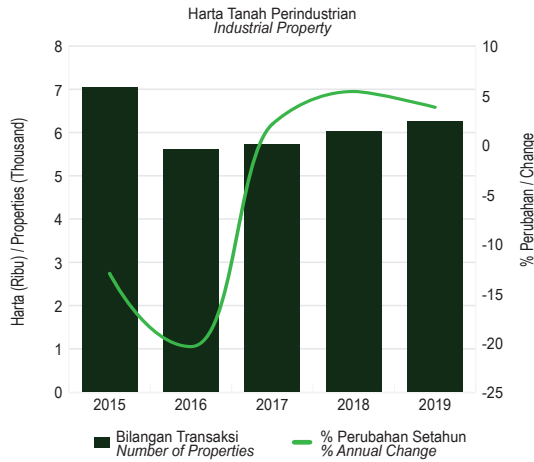
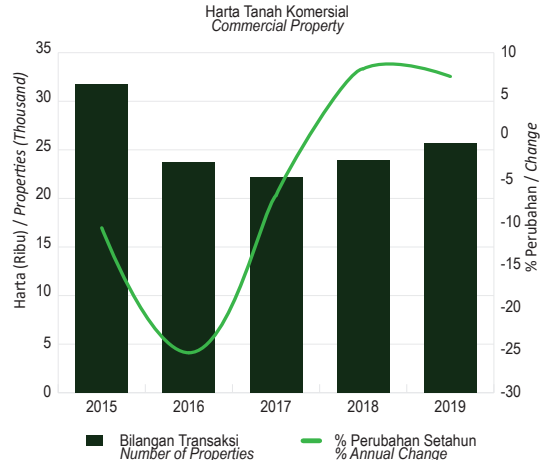
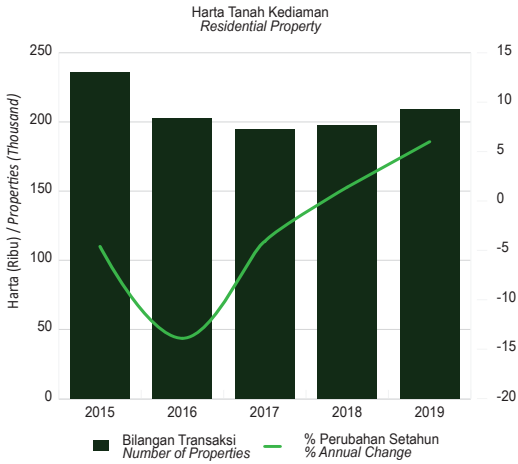
Total may not add up to the shown figures because of rounding up

State	Completed		Under Construction		Not Constructed	
	2018	2019	2018	2019	2018	2019
<b>Malaysia</b>						
Unsold Units	11,371	17,142	37,285	33,827	12,864	7,659
Value (RM Million)	9,161.60	15,039.15	NA	NA	NA	NA
<b>W. P. Kuala Lumpur</b>						
Unsold Units	1,895	2,336	8,347	10,298	10,297	7,457
Value (RM Million)	1,821.84	2,022.13	NA	NA	NA	NA
<b>W. P. Putrajaya</b>						
Unsold Units	0	34	15	201	218	0
Value (RM Million)	0.00	19.22	NA	NA	NA	NA
<b>W. P. Labuan</b>						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0	0	NA	NA	NA	NA
<b>Selangor</b>						
Unsold Units	1,297	1,985	7,304	5,714	2,310	202
Value (RM Million)	757.72	1,185.28	NA	NA	NA	NA
<b>Johor</b>						
Unsold Units	7,478	12,207	18,278	11,490	0	0
Value (RM Million)	6,206.26	11,560.77	NA	NA	NA	NA
<b>Pulau Pinang</b>						
Unsold Units	141	69	1,046	1,085	39	0
Value (RM Million)	119.61	91.31	NA	NA	NA	NA
<b>Perak</b>						
Unsold Units	0	0	248	231	0	0
Value (RM Million)	0	0	NA	NA	NA	NA
<b>Negeri Sembilan</b>						
Unsold Units	0	0	774	2,329	0	0
Value (RM Million)	0	0	NA	NA	NA	NA
<b>Melaka</b>						
Unsold Units	362	32	507	1,035	0	0
Value (RM Million)	157.00	15.54	NA	NA	NA	NA
<b>Kedah</b>						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0	0	NA	NA	NA	NA
<b>Pahang</b>						
Unsold Units	119	141	227	1,176	0	0
Value (RM Million)	47.60	53.48	NA	NA	NA	NA
<b>Terengganu</b>						
Unsold Units	0	0	232	230	0	0
Value (RM Million)	0	0	NA	NA	NA	NA
<b>Kelantan</b>						
Unsold Units	0	278	307	38	0	0
Value (RM Million)	0.00	52.26	NA	NA	NA	NA
<b>Perlis</b>						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0	0	NA	NA	NA	NA
<b>Sabah</b>						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0	0	NA	NA	NA	NA
<b>Sarawak</b>						
Unsold Units	79	60	0	0	0	0
Value (RM Million)	51.56	39.16	NA	NA	NA	NA

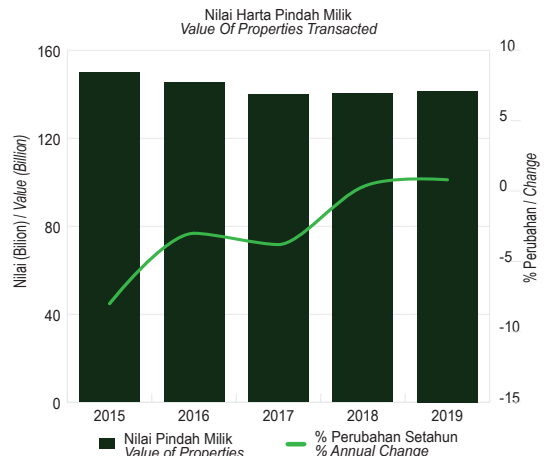
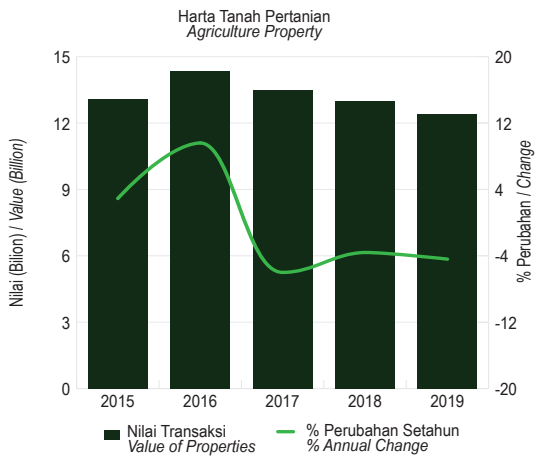
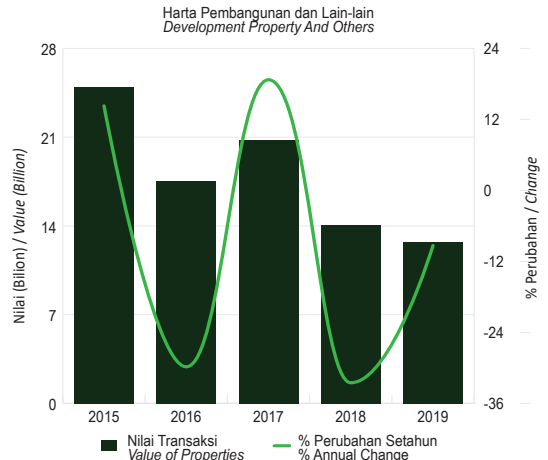
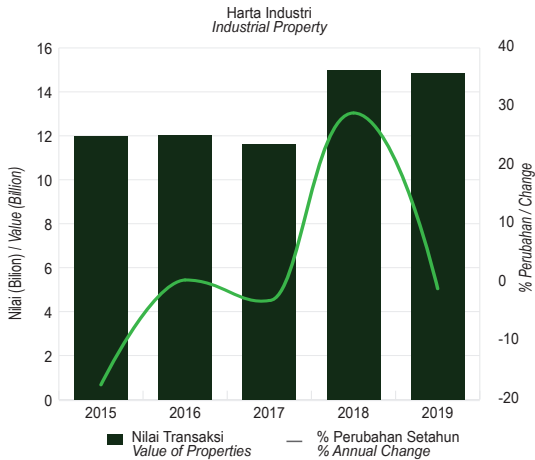
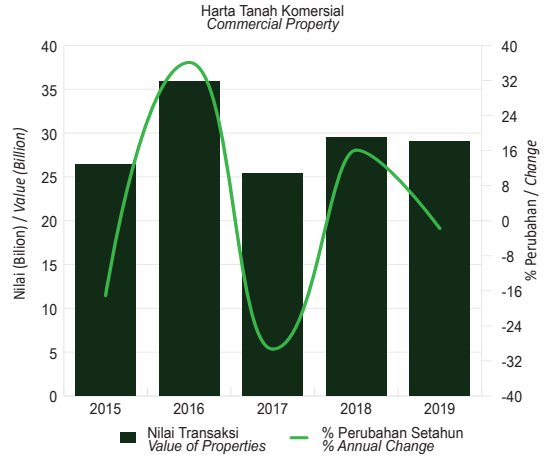
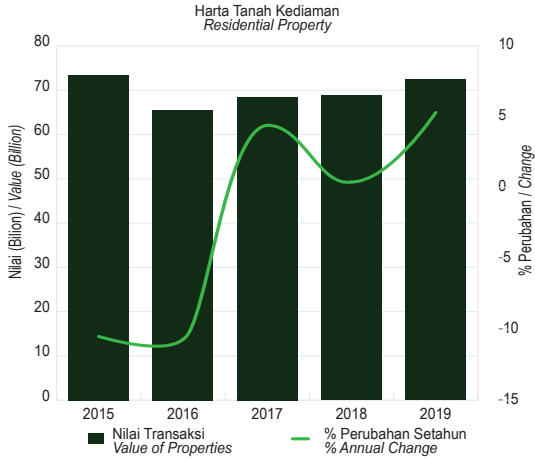
Chart I / Chart I  
 Jumlah dan Peratus Pecahan Transaksi Harta Tanah Mengikut Subsektor  
 Total and Percentage Share of Properties Transacted by Sub-Sector



Subsektor/ Sub-sector	Bilangan Harta/ Number of Properties				% Pecahan/ Share			
	2016	2017	2018	2019	2016	2017	2018	2019
Kediaman/ Residential	203,064	194,684	197,385	209,295	63.4	62.4	62.9	63.7
Pertanian/ Agriculture	66,078	70,290	67,329	68,665	21.6	22.5	21.5	20.9
Komersial/ Commercial	23,745	22,162	23,936	25,654	7.4	7.1	7.6	7.8
Tanah Pembangunan Dan Lain-lain/ Development Land and Others	18,929	18,963	19,028	18,772	5.9	6.1	6.1	5.7
Industri/ Industrial	5,609	5,725	6,032	6,261	1.8	1.8	1.9	1.9
<b>Jumlah/ Total</b>	<b>320,425</b>	<b>311,824</b>	<b>313,710</b>	<b>328,647</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>



Carta III / Chart III  
 Nilai Harta Dipindah Milik dan Peratus Perubahan  
 Value of Properties Transacted and Percentage Change



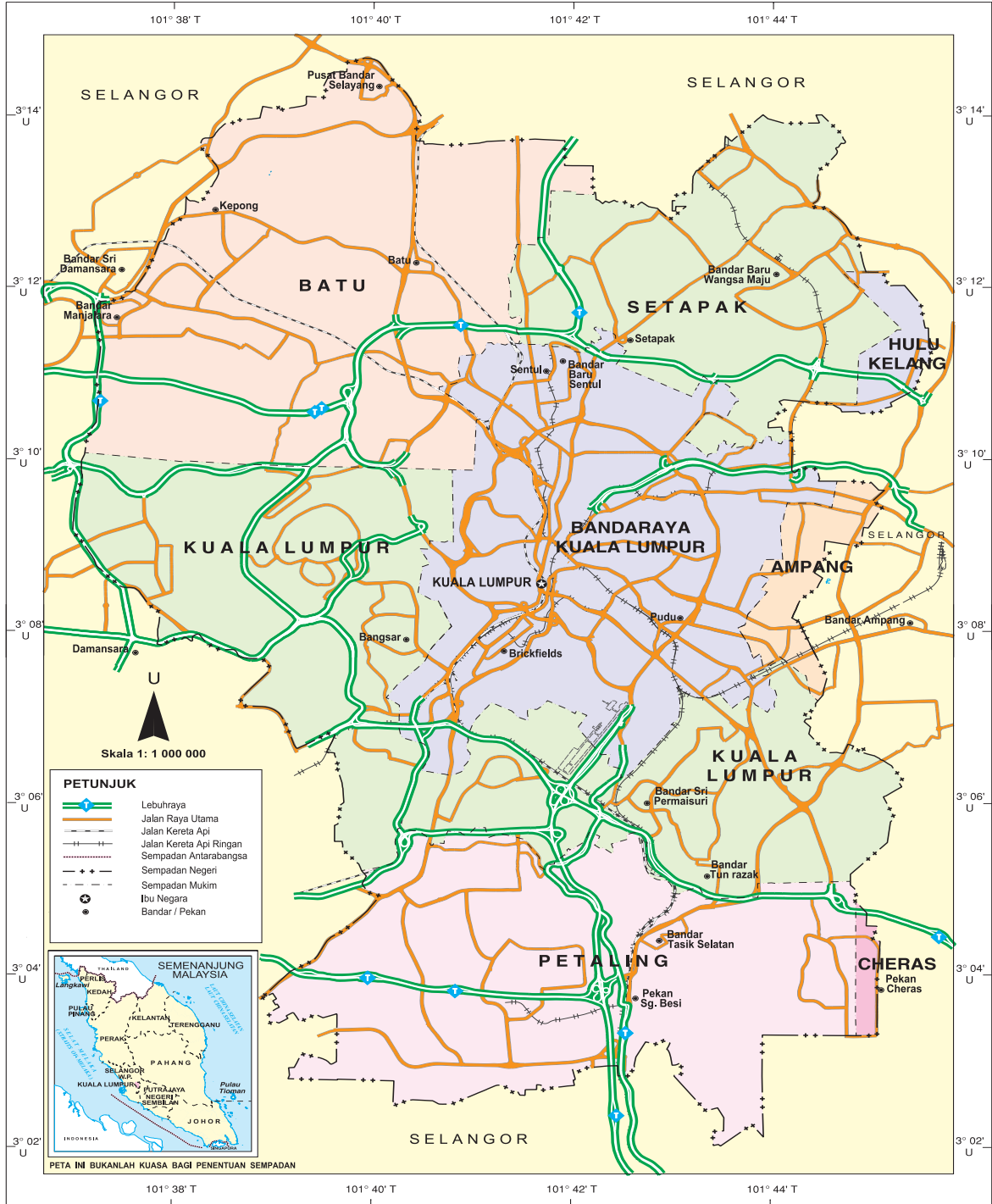




**TEKS NEGERI**  
***STATE TEXT***



# WILAYAH PERSEKUTUAN KUALA LUMPUR



# WILAYAH PERSEKUTUAN KUALA LUMPUR

## GAMBARAN KESELURUHAN

Prestasi pasaran harta tanah di Kuala Lumpur perlahan pada tahun 2019 yang ditunjukkan oleh penguncupan dalam aktiviti pasaran. Tempoh kajian mencatat 15,427 transaksi dengan jumlah nilai RM18.37 bilion, masing-masing menurun 0.4% dan 21.2% dalam bilangan dan nilai berbanding 2018 (15,488 transaksi bernilai RM23.30 bilion). Subsektor kediaman terus memacu pasaran keseluruhan, mencakupi 72.0% daripada bilangan pasaran harta tanah negeri. Bilangan transaksi ini diikuti oleh subsektor komersial (25.8%), tanah pembangunan (1.3%) dan industri (1.0%).

Pergerakan pasaran merentas semua subsektor berada pada trend menurun kecuali subsektor kediaman yang meningkat sekadar 1.1%. Subsektor lain menyaksikan penyusutan didahului oleh subsektor tanah pembangunan (-19.4%), industri (-14.4%), dan komersial (-2.6%). Dari segi nilai, hanya subsektor industri menunjukkan trend menaik manakala tanah pembangunan, komersial dan subsektor kediaman mencatatkan sebaliknya.

## OVERVIEW

The property market performance in Kuala Lumpur softened in 2019 indicated by the contraction in market activity. The review period registered 15,427 transactions with a total value of RM18.37 billion, declined by 0.4% and 21.2% in volume and value respectively over 2018 (15,488 transactions worth RM23.30 billion). Residential sub-sector continued to propel the overall market, accounting for 72.0% of the state's property market volume. This was followed by the commercial (25.8%), development land (1.3%) and industrial (1.0%) sub-sectors.

Market movements across all sub-sectors were on the downtrend except for residential sub-sector which increased by a mere 1.1%. Other sub-sectors witnessed contraction, led by development land (-19.4%), industrial (-14.4%) and commercial (-2.6%). In term of value, only industrial sub-sector showed upward pattern whereas development land, commercial and residential sub-sectors recorded otherwise.

2

Chart 1.1

Volume of Property Transactions 2015 – 2019

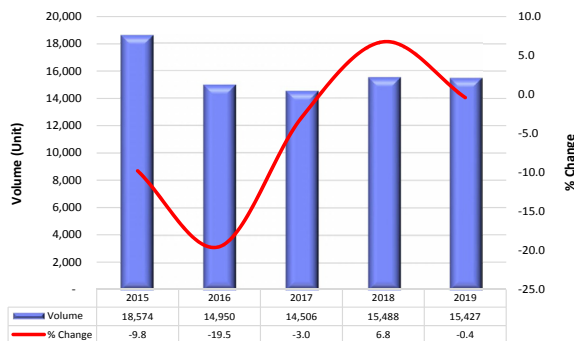


Chart 1.2

Value of Property Transactions 2015 – 2019

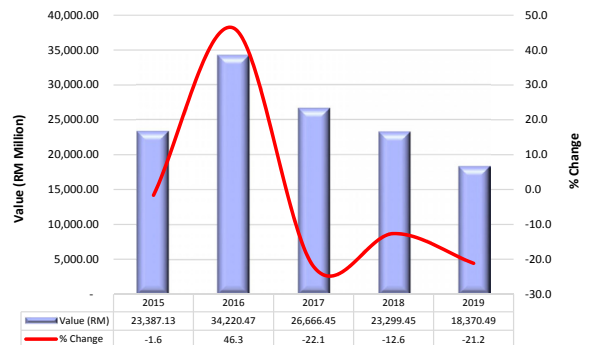


Chart 1.3

Contribution to Transaction Volume by Sub-sector 2019

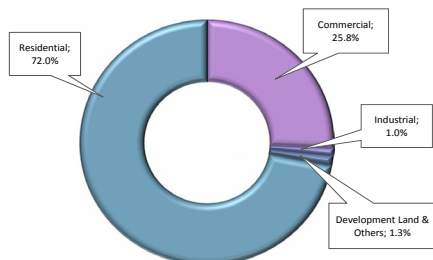
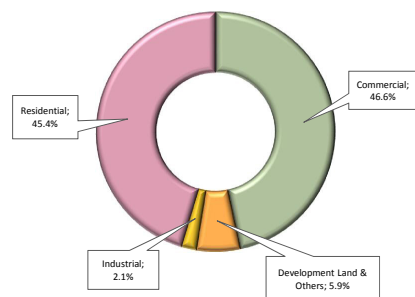


Chart 1.4

Contribution to Transaction Value by Sub-sector 2019



## PROMINENT SALES

Table 1.1

Summary of Prominent Sales Recorded in 2019

No.	Property	Location	Transaction Year
1.	Vacant Residential Land	Jalan Bendahara, Taman Salak Selatan	2019
2.	Menara AIMS	Jalan Changkat Raja Chulan	2019
3.	Wisma MPL	Jalan Raja Chulan	2019
4.	Pavilion Bukit Jalil	Persiaran Jalil Utama	2019
5.	Restoran Halab Gate Shawarma	Jalan Sultan Ismail	2019
6.	Balai Berita	Jalan Riong	2018
7.	Bangunan Ikhlas Point	Bangsar South, Jalan Kerinchi	2018
8.	Bangunan Moccis	Jalan Tun Perak	2018
9.	Wisma Gurcharan	Jalan Tuanku Abdul Rahman	2018

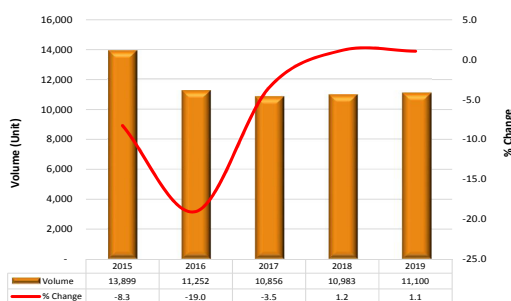
## HARTA TANAH KEDIAMAN

### Transaksi

Prestasi pasaran bagi subsektor kediaman meningkat dalam tempoh kajian dengan 11,100 transaksi bernilai RM8.34 bilion, menunjukkan pertumbuhan marginal 1.1% dalam bilangan manakala nilai transaksi menurun 9.9% berbanding 2018 (10,983 transaksi bernilai RM9.26 bilion). Pasaran menyaksikan lebih banyak transaksi dalam lingkungan harga RM500,000 hingga RM1 juta. Unit kondominium dan pangsapuri terus memacu pasaran kediaman, menyumbang 47.0% daripada jumlah transaksi.

Chart 1.5

Volume of Residential Property Transactions 2015 – 2019



### Pelancaran Baharu

Pasaran utama pada 2019 menurun 8.7%, berbanding tahun 2018. Walau bagaimanapun, prestasi jualan keseluruhan adalah lebih baik pada 2019. Pangsapuri dan kondominium membentuk sebahagian besar daripada pelancaran baharu menyumbang 99.3% (8,799 unit).

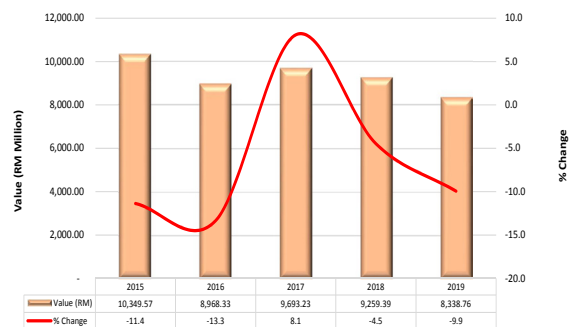
## RESIDENTIAL PROPERTY

### Transaction

The residential sub-sector's market performance improved in the review period with 11,100 transactions worth RM8.34 billion, indicating a marginal increase of 1.1% in volume and 9.9% decline in transactions value against 2018 (10,983 transactions worth RM9.26 billion). The market saw higher number of transactions in the RM500,000 to RM1 million price bracket. Condominium and apartment units continued to propel the residential market, contributed with 47.0% of the total transactions.

Chart 1.6

Value of Residential Property Transactions 2015 – 2019

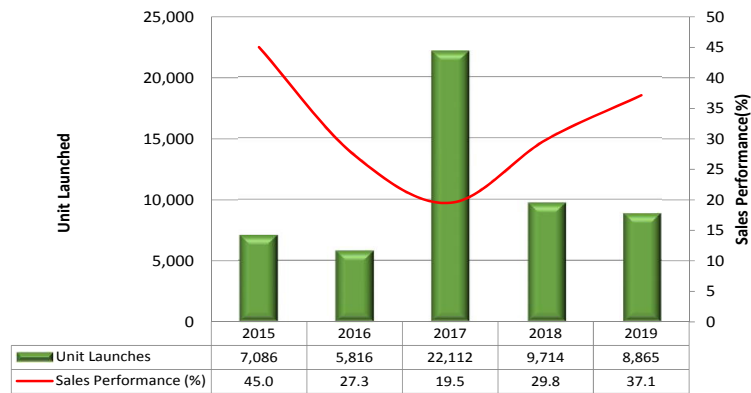


### New Launches

The primary market in 2019 dropped by 8.7% as compared to 2018. However, the overall sales performance was better in 2019. Apartments and condominiums formed the bulk of the new launches accounting for 99.3% (8,799 units).

Chart 1.7

New Launches Trend 2015 – 2019



**Status Pasaran**

Unit kediaman siap dibina tidak terjual, dalam pembinaan dan belum dibina belum terjual menunjukkan prestasi yang lebih baik berdasarkan bilangan yang berkurang dalam tempoh kajian.

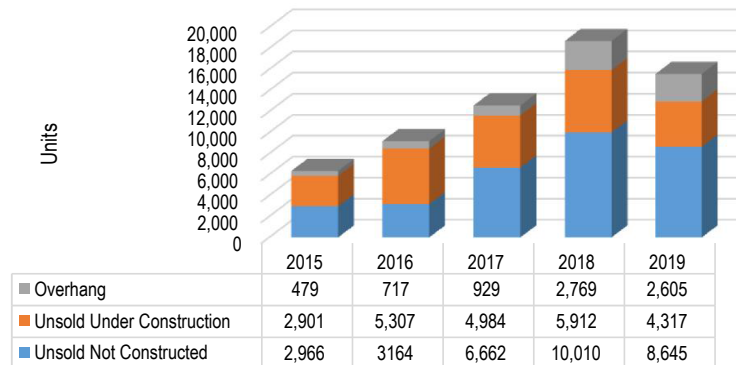
**Market Status**

*The residential overhang and unsold units showed better performance as the number reduced in the review period.*

4

Chart 1.8

Residential Market Status Trend 2015 – 2019

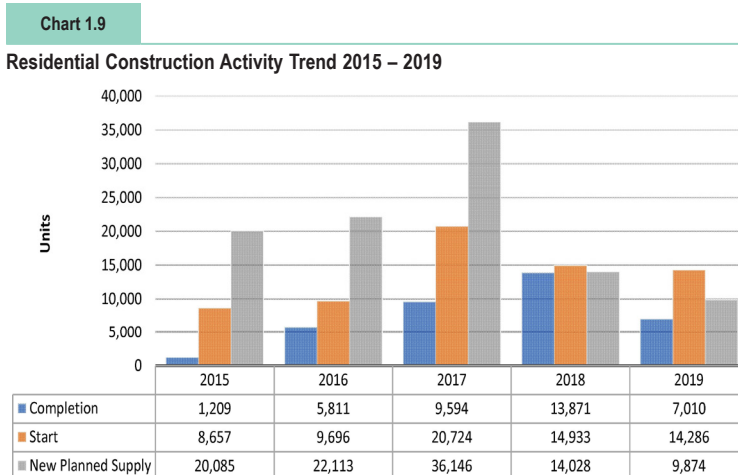


**Aktiviti Pembinaan**

Aktiviti pembinaan subsektor kediaman berada pada mod perlahan. Sehingga akhir 2019, terdapat 488,294 unit kediaman sedia ada dengan 46,384 unit lagi dalam penawaran akan datang dan 62,665 unit dalam penawaran yang dirancang.

**Construction Activity**

*The residential sub-sector's construction activity was on a low mode. As at end-2019, there were 488,294 existing residential units with another 46,384 units in the incoming supply and 62,665 units in the planned supply.*



### Harga dan Sewa

Harga bagi harta kediaman secara keseluruhan menunjukkan pergerakan bercampur-campur. Rumah teres satu tingkat di Taman Desa Cheras, Lucky Garden dan Happy Garden menikmati kenaikan modal 4.3% hingga 14.9% manakala teres dua tingkat yang terletak di Bangsar Park, Bangsar Baru dan Desa Parkcity (Amelia Garden Homes) merekodkan pertumbuhan modal 3.0% hingga 9.5%.

Segmen kediaman bertingkat tinggi menyaksikan prestasi bercampur-campur secara keseluruhan. Beberapa skim menunjukkan pertumbuhan dua angka melebihi 12.0% iaitu Kenari Apartment di Taman Melati, The Palladium di Jalan Gurney 2, Hijauan Kiara dan Laman Suria di Mon't Kiara. Sehingga Q4 2019, Indeks Harga Semua Rumah bagi negeri ini berada pada 195.8 mata, menurun 1.4% daripada 198.6 mata pada Q4 2018. Purata Harga Semua Rumah pada Q4 2019 berada pada RM777,332, menurun daripada RM788,780 yang direkodkan pada Q4 2018.

Pasaran sewa kediaman pada 2019 menggambarkan perubahan yang stabil berbanding tahun lepas. Kediaman terutamanya unit bertingkat tinggi yang terletak berhampiran dengan laluan Transit Aliran Ringan (LRT) dan Transit Aliran Massa (MRT) mengalami peningkatan sewa. Purata pulangan sewa untuk unit bertingkat tinggi di Mukim Batu memperoleh antara 2.2% dan 7.7%

### HARTA TANAH KOMERSIAL

Subsektor komersial mencatatkan 3,974 transaksi dengan jumlah nilai RM8.56 bilion pada 2019 berbanding 2018 (4,079 transaksi bernilai RM11.69 bilion). Aktiviti pasaran ini menunjukkan penurunan 2.6% dalam bilangan dan 26.8% dalam nilai berbanding dengan 2018 apabila bilangan jualan utama lebih sedikit direkodkan pada tahun ini.

### Price and Rental

*Residential property price showed mix movements across the board. Single storey terrace houses located in Taman Desa Cheras, Lucky Garden and Happy Garden enjoy capital appreciation of 4.3% to 14.9%, while double storey terrace located in Bangsar Park, Bangsar Baru and Desa Parkcity (Amelia Garden Homes) recorded capital growth of 3.0% to 9.5%.*

*The high-rise segment witnessed mixed performance across the board. Several schemes portrayed double-digit growth by more than 12.0% namely Kenari Apartment at Taman Melati, The Palladium at Jalan Gurney 2, Hijauan Kiara and Laman Suria at Mon't Kiara. As at Q4 2019, the All House Price Index for the state stood at 195.8 points, down by 1.4% from 198.6 points in Q4 2018. The average All House Price as at Q4 2019 stood at RM777,332, decreased from RM788,780 recorded in Q4 2018.*

*The residential rental market in 2019 portrayed stable changes as compared to last year. Houses especially high-rise units located along Light Rail Transit (LRT) and Mass Rapid Transit (MRT) routes experienced rental gains. Average rental yield for high-rise units in Mukim Batu obtained between 2.2% and 7.7%.*

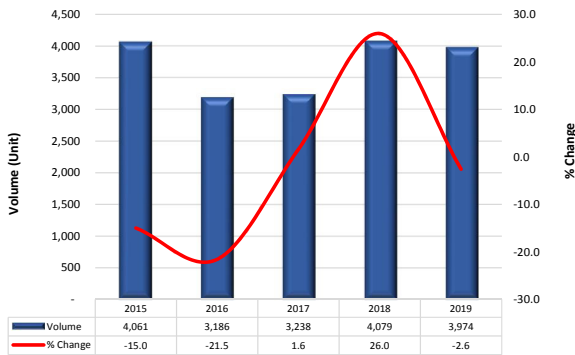
### COMMERCIAL PROPERTY

*The commercial sub-sector recorded 3,974 transactions with a total value of RM8.56 billion in 2019 against 2018 (4,079 transactions worth RM11.69 billion). This indicated decline of 2.6% in volume and 26.8% in value against 2018 as fewer numbers of major sales recorded in the year.*



Chart 1.10

Volume of Commercial Property Transactions 2015 – 2019



**Kedai**

**Transaksi**

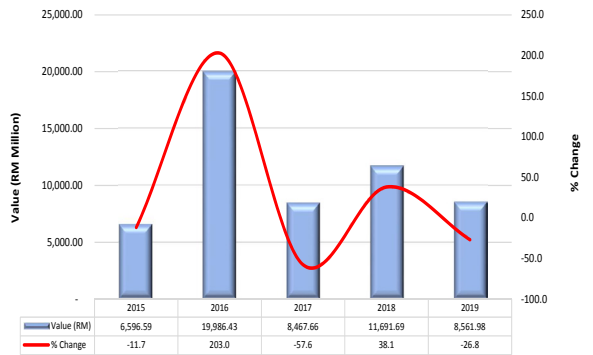
Subsektor kedai mencatat 529 transaksi dengan nilai RM1.34 bilion pada 2019, mencakupi 13.3% daripada transaksi harta komersial dan 15.7% daripada jumlah nilai transaksi. Aktiviti pasaran menunjukkan penurunan apabila bilangan dan nilai transaksi masing-masing menguncup 13.3% dan 11.3% (2018: 610 transaksi bernilai RM1.51 bilion).

**Status Pasaran**

Kedai siap dibina tidak terjual memperlihatkan trend bercampur-campur. Siap dibina berkurangan bilangan, manakala dalam pembinaan belum terjual bertambah dalam tempoh kajian. Negeri ini tidak dibebankan dengan unit kedai belum dibina belum terjual pada 2019.

Chart 1.11

Value of Commercial Property Transactions 2015 – 2019



**Shop**

**Transaction**

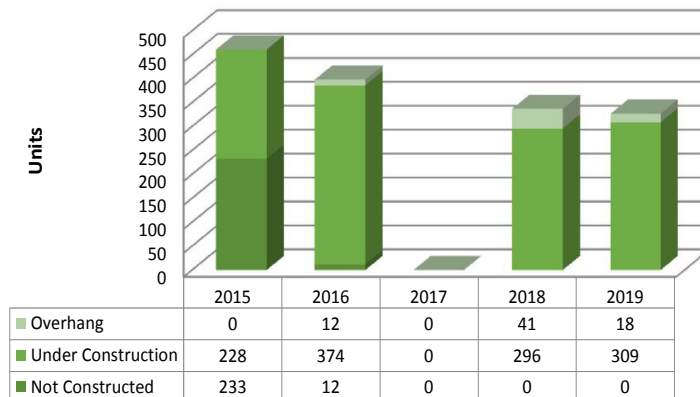
Shop sub-sector recorded 529 transactions worth RM1.34 bilion in 2019, accounting for 13.3% of the commercial property transactions and 15.7% of the total value transactions. Market activity showed a downturn as the volume and value of transactions contracted by 13.3% and 11.3% respectively (2018: 610 transactions worth RM1.51 bilion).

**Market Status**

Mixed trend was seen in shop overhang and unsold. Overhang witnessed decreasing numbers, meanwhile unsold under construction increased in the review period. The state was unencumbered with unsold not constructed shop units in 2019.

Chart 1.12

Shop Market Status Trend 2015 – 2019



## Aktiviti Pembinaan

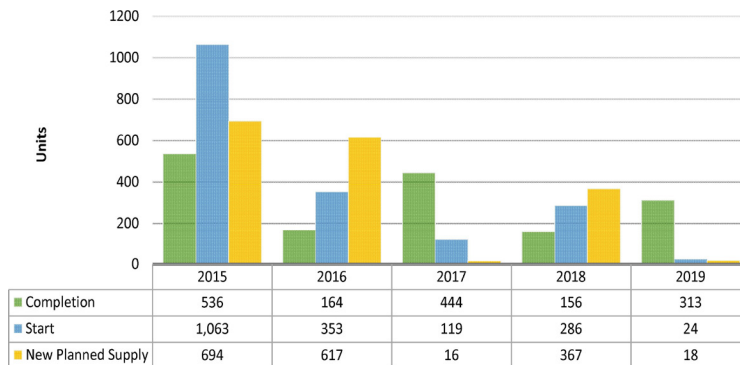
Subsektor kedai menyaksikan pergerakan bercampur-campur dalam aktiviti pembinaan. Sehingga akhir 2019, subsektor kedai mencatat 31,595 unit kedai sedia ada dengan 1,570 unit lagi dalam penawaran yang akan datang dan 1,258 unit dalam penawaran yang dirancang.

## Construction Activity

Shop sub-sector saw mixed movements in construction activity. As at end 2019, shop sub-sector recorded 31,595 units existing shop with another 1,570 units in the incoming supply and 1,258 units in the planned supply.

Chart 1.13

Shop Construction Activity Trend 2015 – 2019



## Pangsapuri Khidmat / SOHO

### Transaksi

Subsektor ini mencatat 2,029 transaksi dengan nilai RM1.82 bilion pada 2019, mencakupi 51.1% daripada transaksi harta komersial dan 21.3% daripada jumlah nilai transaksi. Aktiviti pasaran menunjukkan penurunan apabila bilangan dan nilai transaksi masing-masing menurun 4.2% dan 11.4% (2018: 2,119 transaksi bernilai RM2.05 bilion).

## Serviced Apartment/SOHO

### Transaction

The sub-sector recorded 2,029 transactions worth RM1.82 billion in 2019, accounting for 51.1% of the commercial property transactions and 21.3% of the total value transactions. Market activity showed a downturn as the volume and value of transactions decreased by 4.2% and 11.4% respectively (2018: 2,119 transactions worth RM2.05 billion).

### Status Pasaran

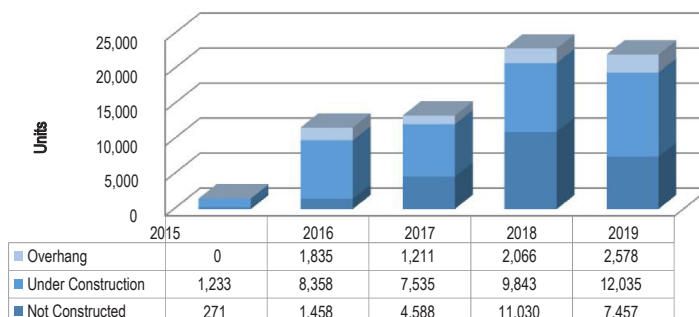
Pangsapuri khidmat / SOHO memperlihatkan trend bercampur-campur. Siap dibina tidak terjual dan dalam pembinaan belum terjual bertambah manakala belum dibina belum terjual berkurangan dalam tempoh kajian. dibina belum terjual berkurangan dalam tempoh kajian.

### Market Status

Mixed trend was seen in serviced apartment/SOHO overhang and unsold. Overhang and unsold under construction increased meanwhile unsold not constructed witnessed decreasing numbers in the review period.

Chart 1.14

Serviced Apartment/SOHO Market Status Trend 2015 – 2019



## Aktiviti Pembinaan

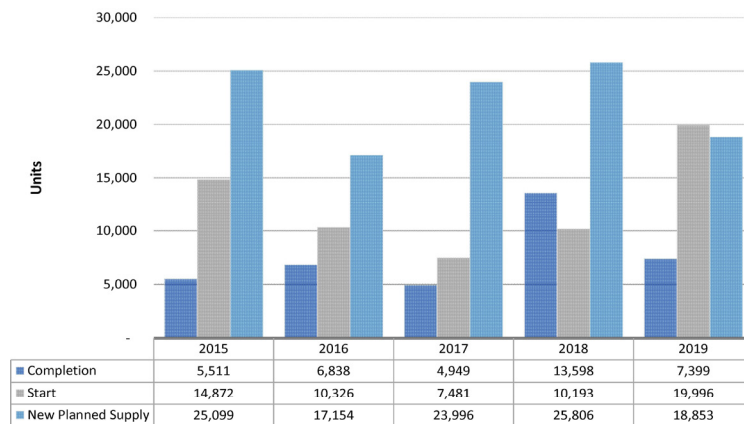
Aktiviti pembinaan subsektor ini berada pada mod perlahan. Sehingga akhir 2019, terdapat 71,251 pangsapuri khidmat / SOHO sedia ada dengan 45,596 unit lagi dalam penawaran akan datang dan 88,892 unit dalam penawaran yang dirancang.

## Construction Activity

The sub-sector's construction activity was on a low mode. As at end-2019, there were 71,251 existing serviced apartment / SOHO units with another 45,596 units in the incoming supply and 88,892 units in the planned supply.

Chart 1.15

Serviced Apartment/SOHO Construction Activity Trend 2015 – 2019



8

## Harga dan Sewa

Secara umum, harga pangsapuri khidmat dan SOHO berada pada mod stabil dengan beberapa pergerakan bercampur di skim-skim terpilih. Hampshire Residences, Laman Ceylon dan Pavilion Residences menunjukkan aliran menurun disebabkan penawaran pasaran yang tinggi. Banyan Tree Signature (162 m.p.) mencapai julat transaksi tertinggi daripada RM3.0 juta hingga setinggi RM4.2 juta.

Secara keseluruhannya, pasaran sewa adalah stabil untuk sebahagian besar skim. Banyan Tree Signature dan Residensi Sentral memperoleh sewa tertinggi pada RM7,500 hingga RM9,000 sebulan disebabkan lokasi yang baik. Umumnya, purata pulangan sewa bagi pangsapuri khidmat dan SOHO adalah di antara 1.4% dan 10.4%.

## Price and Rental

Generally, prices of serviced apartment and SOHO on a stable mode with some mixed movements noted in selected schemes. Hampshire Residences, Laman Ceylon and Pavilion Residences showed downward movements due to the high market supply. Banyan Tree Signature (162 s.m.) fetching the highest transaction range from RM3.0 million to as high as RM4.2 million.

The rental market was generally stable for most of the schemes. Banyan Tree Signature and Residensi Sentral fetched the highest rental at RM7,500 to RM9,000 per month due to its good location. In general, serviced apartment and SOHO average rental yield are between 1.4% and 10.4%.

## Kompleks Perniagaan

### Penghunian dan Ketersediaan Ruang

Prestasi subsektor ruang niaga meningkat sedikit apabila kadar purata penghunian bertambah kepada 83.4% berbanding dengan 82.8% yang dicatat pada 2018. Ambilan tahunan negatif pada 1,286 m.p. (2018: 86,589 m.p.). Antara pergerakan penting dalam kompleks perniagaan ditunjukkan di Jadual 1.2.

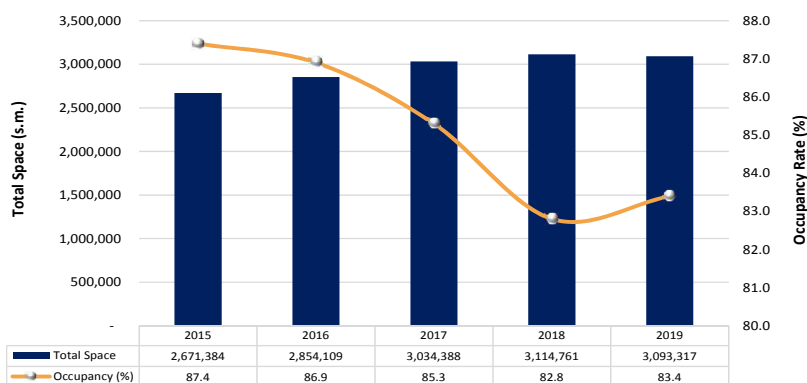
## Shopping Complex

### Occupancy and Space Availability

The performance of retail sub-sector strengthened slightly as the average occupancy rate increased to 83.4% as compared with 82.8% recorded in 2018. The annual take-up was negative at 1,286 s.m (2018: 86,589 s.m). Among the pertinent movements in shopping complexes as shown in Table 1.2.

Chart 1.16

Supply and Occupancy of Shopping Complex



**Aktiviti Pembinaan**

Table 1.2

Pertinent Movements in Shopping Complex

No.	Shopping Complex	Estimated Space (s.m)	Tenant Movement
1.	1 Shamelin Mall	4,923	Move In
2.	Pearl Point	2,418	Move In

Tiada aktiviti pembinaan baharu dalam 2019. Sehingga akhir 2019, terdapat 111 kompleks perniagaan sedia ada (3,093,317 m.p.) dengan lapan lagi kompleks dalam penawaran akan datang (675,202 m.p.) dan empat lagi dalam penawaran yang dirancang (193,459 m.p.).

**Sewa**

Secara amnya, sewa ruang niaga adalah stabil. Pergerakan sewa menaik direkodkan di Kuala Lumpur City Centre (Suria KLCC) dan Kompleks Wilayah disebabkan oleh pembaharuan sewa. Suria KLCC mengekalkan keunggulannya, mencapai julat sewa tertinggi daripada RM111 s.m.p. hingga setinggi RM2,067 s.m.p.

**Pejabat Binaan Khas**

**Transaksi**

Segmen pejabat binaan khas menunjukkan dua transaksi utama pada tahun 2019. Transaksi ini termasuk Menara AIMS di Jalan Changkat Raja Chulan dan Wisma MPL di Jalan Raja Chulan.

**Penghunian dan Ketersediaan Ruang**

**Construction Activity**

*There were no new construction activities in 2019. As at end-2019, there were 111 existing shopping complexes (3,093,317 s.m.) with another eight complexes (675,202 s.m.) in the incoming supply and four in the planned supply (193,459 s.m.).*

**Rental**

*Generally, rental of retail space was stable. Upward rental movements were recorded at Kuala Lumpur City Centre (Suria KLCC) and Kompleks Wilayah due to rental renewals. Suria KLCC sustained its prominence, fetching the highest rental range from RM111 p.s.m. to as high as RM2,067 p.s.m.*

**Purpose-Built Office**

**Transaction**

*The purpose-built office segment saw two prominent transactions in 2019. These included The Menara AIMS in Jalan Changkat Raja Chulan and Wisma MPL in Jalan Raja Chulan.*

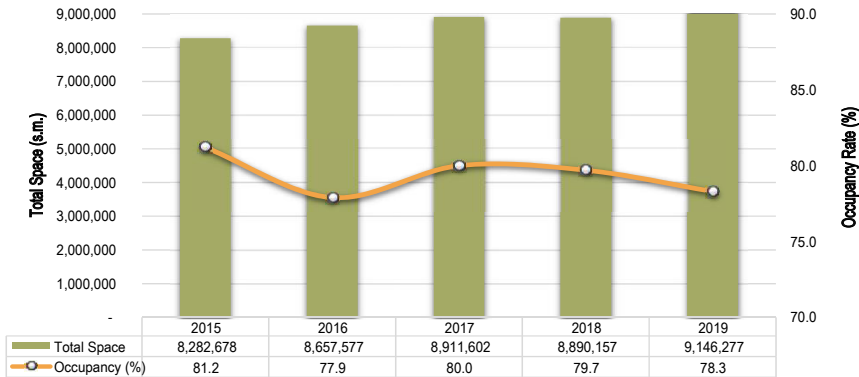
## Occupancy and Space Availability

Purata kadar penghunian bagi pejabat binaan khas menurun kepada 78.3% pada tahun 2019 berbanding 79.7% pada tahun 2018. Ambilan tahunan pada 72,716 m.p. (2018: 341,604 m.p.). Ini disebabkan oleh ambilan rendah di beberapa pejabat binaan khas. Pergerakan penyewa utama seperti ditunjukkan di Jadual 1.3.

The average occupancy rate for purpose-built office reduced to 78.3% in 2019 as compared to 79.7% in 2018. The annual take-up was at 72,716 s.m (2018: 341,604 s.m). This was due to low take-up in several purpose-built offices. Pertinent movements of tenants as shown in Table 1.3.

Chart 1.17

Supply and Occupancy of Purpose-Built Office



10

## Aktiviti Pembinaan

Table 1.3

Pertinent Movements in Purpose-Built Office

No.	Purpose-built Office Name	Tenant	Estimated Space (s.m)	Tenant Movement
1.	G Tower	Nytee Resoures Limited.	1,372	Move In
2.	Menara Citi Bank	Citibank Berhad	6,962	Move In
3.	Menara AIA Sentral (Formerly known as Menara Standard Chartered)	Standard Chartered Bank Malaysia Bhd Scope International (M) Sdn Bhd	13,678 1,055	Move Out Move Out
4.	Menara IGB & Annexe Block	Ipsos Sdn Bhd	2,412	Move Out
5.	Menara Prestige	Best Solutions Management Sdn Bhd	1,022	Move In
6.	Menara Tan & Tan	Baker Hughes Services (M) Sdn Bhd Petronas Dagangan Bhd United Business media (M) Sdn Bhd	2,751 2,266 1,098	Move In Move Out Move Out

Terdapat tiga bangunan pejabat binaan khas swasta baharu siap dibina pada tahun 2019 dengan jumlah ruang 269,455 m.p. Sehingga akhir 2019, terdapat 445 pejabat binaan khas sedia ada (9,146,277 m.p.) dengan 21 lagi bangunan (1,478,415 m.p.) dalam penawaran akan datang dan lapan bangunan (304,781 m.p.) dalam penawaran yang dirancang.

## Construction Activity

There were three new completions of private purpose-built office buildings recorded in 2019 with a total space of 269,455 s.m. As at end-2019, there were 445 existing purpose-built offices (9,146,277 s.m.) with another 21 buildings (1,478,415 s.m.) in the incoming supply and eight buildings (304,781 s.m.) in the planned supply.

**Table 1.4**

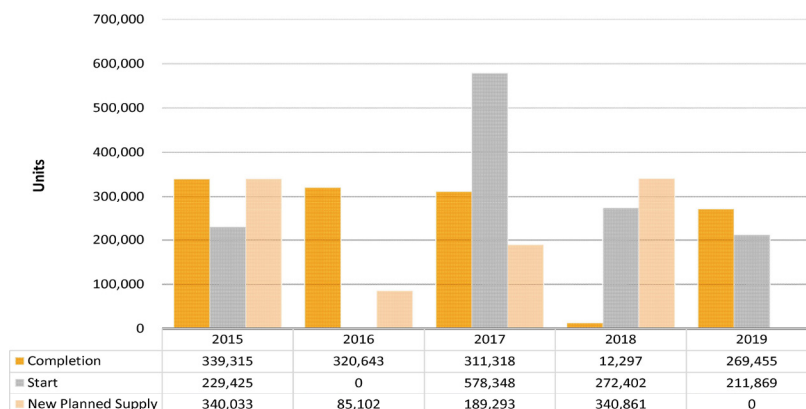
**List of Completion for Purpose-Built Office**

No.	Property	Location	No. of Room
1.	Menara Prudential @ TRX	Jalan Tun Razak	38,282
2.	The Exchange 106 (Signature Tower) @ TRX	Jalan Tun Razak	213,680
3.	Eko Cheras Office Suite	Jalan Cheras	17,493

**Harga dan Sewa**

**Chart 1.18**

**Purpose-Built Office Construction Activity Trend 2015 – 2019**



Harga ruang pejabat di bangunan pejabat binaan khas menyaksikan prestasi bercampur-campur secara keseluruhan. Di kawasan utama pusat bandar, penurunan kecil antara 2.5% dan 3.1% dicatatkan di Vogue Suites One (tingkat 33) dan Menara UOA Bangsar (tingkat 13-22). Dalam perkembangan yang positif, 3 Towers (tingkat 14-22) dan Phileo Promenade (tingkat 11) masing-masing mencatat peningkatan sedikit 5.9% dan 6.7%. Di kawasan sekunder pusat bandar, penurunan kecil lebih 3.0% ditunjukkan di Plaza Sentral (tingkat 23) dan Q Sentral (tingkat 18-22). Lingkungan harga tertinggi direkodkan di Gleaneagles Medical Centre (tingkat 5-6) pada RM16,162 s.m.p. hingga RM20,990 s.m.p.

Pasaran sewa pejabat kekal stabil pada 2019. Sewa di beberapa bangunan pejabat menyaksikan pertumbuhan dua digit iaitu Plaza See Hoy Chan, Jalan Raja Chulan, The Horizon, Bangsar South (Tower 2A, Avenue 5) dan The Horizon, Bangsar South (Tower 6, Avenue 5). Menara Berkembar Petronas mengekalkan rekod sewa tertinggi subsektor pejabat dengan RM96.87 s.m.p. dan RM129.17 s.m.p.

Sehingga Q4 2019, Indeks Sewa Pejabat Binaan Khas bagi negeri berada pada 140.4 mata, naik 3.2% daripada 136.1 mata pada Q4 2018. Sewa Purata Pejabat Binaan Khas pada Q4 2019 berada pada RM54.19 s.m.p., meningkat dari RM52.54 s.m.p. yang direkodkan pada Q4 2018.

**Riadah**

**Price and Rental**

*Prices of office space in purpose-built office buildings saw mixed performance across the board. In the central town prime area, a marginal decline between 2.5% and 3.1% was recorded in Vogue Suites One (level 33) and Menara UOA Bangsar (level 13-22). On a positive note, 3 Towers (level 14-22) and Phileo Promenade (level 11) recorded a slight increase of 5.9% and 6.7% respectively. In the central town secondary area, a marginal decrease of more than 3.0% showed at Plaza Sentra (level 23) and Q Sentral (level 18-22). The highest price range was recorded at Gleaneagles Medical Centre (level 5-6) at RM16,162 p.s.m. to RM20,990 p.s.m.*

*The office rental market remained stable in 2019. Several office buildings witnessed double digit growth namely Plaza See Hoy Chan, Jalan Raja Chulan, The Horizon, Bangsar South (Tower 2A, Avenue 5) and The Horizon, Bangsar South (Tower 6, Avenue 5). Petronas Twin Towers remained highest rental in the sub-sector with ranging between RM96.87 p.s.m. and RM129.17 p.s.m.*

*As at Q4 2019, the Purpose-Built Office Rental Index for the state stood at 140.4 points, up by 3.2% from 136.1 points in Q4 2018. The Purpose-Built Office Average Rental as at Q4 2019 stood at RM54.19 p.s.m., increased from RM52.54 p.s.m., recorded in Q4 2018.*



Subsektor riadah mencatatkan tujuh hotel baharu siap dibina yang menawarkan 1,608 bilik ke dalam pasaran. Sehingga akhir 2019, terdapat 240 hotel (44,784 bilik) sedia ada dengan 21 hotel (5,350 bilik) dalam penawaran akan datang dan 17 hotel (4,370 bilik) dalam penawaran yang dirancang. Senarai hotel siap dibina pada 2019 ditunjukkan dalam Jadual 1.5.

## Leisure

*The leisure sub-sector recorded the completions of seven new hotels offering 1,608 rooms into the market. As at 2019, there were 240 hotels (44,784 rooms) in the existing supply with another 21 hotels (5,350 rooms) in the incoming supply and 17 hotels (4,370 rooms) in planned supply. The list of hotel completions in 2019 shown in Table 1.5.*

Table 1.5

The List of Hotel Completions

No.	Property	Location	Room
1.	CitizenM Bukit Bintang	Jalan Pudu	198
2.	Dorsett Hartamas	Jalan Sri Hartamas 1	290
3.	EQ Hotel	Jalan Sultan Ismail	440
4.	J-Hotel	Jalan Imbi	150
5.	Momo's	Jalan Tuanku Abdul Rahman	99
6.	Ormond Hotels	Jalan Sultan Ismail	113
7.	Four Point By Sheraton	Jalan Balai Polis	318

## PROSPEK 2020

12 Pasaran harta tanah negeri dijangka kekal positif disokong oleh pelbagai projek pembangunan semasa dan akan datang. Pembangunan infrastruktur pengangkutan tetap menjadi tumpuan selaras dengan Greater Kuala Lumpur / Klang. Antaranya projek tersebut ialah:

- i. MRT2 Sungai Buloh - Serdang - Putrajaya (SSP Line) - dijangka siap sepenuhnya pada 2022.
- ii. Lebuhraya Setiawangsa - Pantai (SPE) sebelum ini dikenali sebagai Lebuhraya Duta - Ulu Kelang Fasa 3 "DUKE Phase 3" - dijangka siap sepenuhnya pada November 2020.
- iii. Lebuhraya Sungai Besi - Ulu Kelang (SUKU) - dijangka siap sepenuhnya pada tahun 2020.
- iv. Projek Kereta Api Berkelajuan Tinggi (HSR) Kuala Lumpur - Singapura.

Cadangan penerusan Projek Bandar Malaysia di tanah seluas 195.5 hektar di Sungai Besi, Kuala Lumpur dengan nilai pembangunan kasar RM140 bilion dijangka menjadi penggalak perubahan kepada ekonomi Malaysia. Bandar Malaysia ialah projek pembangunan bercampur komersial, kediaman dan berorientasikan transit yang akan memberi nilai ekonomi substantif kepada negara dan mewujudkan peluang pekerjaan terutamanya dalam bidang pembinaan, pengetahuan, keusahawanan dan teknologi. Bandar Malaysia juga akan menempatkan sebuah stesen Kereta Api Berkelajuan Tinggi (HSR) Kuala Lumpur-Singapura. Di bawah syarat perjanjian baharu, sebanyak 10,000 unit rumah mampu milik beserta taman dan kawasan rekreasi seluas 34.4 hektar akan dibina di Bandar Malaysia. Pasaran subsektor kediaman, kekal teguh dipengaruhi

## 2020 OUTLOOK

*The state's property market would remain on a positive path backed by various on-going and proposed development projects. Transport infrastructure development remains the state's focus in line with Greater Kuala Lumpur / Klang. Among the projects are:*

- i. MRT2 Sungai Buloh - Serdang - Putrajaya (SSP Line) - expected to be completed fully by 2022.
- ii. Setiawangsa - Pantai Expressway (SPE) previously known as Duta - Ulu Kelang Expressway Phase 3 "DUKE Phase 3" - expected to be completed by November 2020.
- iii. Sungai Besi - Ulu Kelang Expressway (SUKU) - expected to be completed fully by 2020.
- iv. Kuala Lumpur - Singapore High Speed Rail (KL-SG HSR) project.

*The revival of Bandar Malaysia on the 195.5-hectare land in Sungai Besi, Kuala Lumpur with gross development value (GDV) of RM140 billion expected to be the game changer for the Malaysian economy. Bandar Malaysia comprises mixed development of commercial, residential and transit-oriented development which will bring substantive economic value to the nation and create thousands of jobs, particularly in the construction, knowledge, entrepreneurial and technology sectors. Among major infrastructure to be included in Bandar Malaysia is a Kuala Lumpur-Singapore High Speed Rail (KL-SG HSR) station. Additionally, 10,000 affordable homes and 34.4 hectares of park and recreational areas will be built in Bandar Malaysia which are among the improved terms stipulated in the project's new agreement.*

oleh pembinaan kondominium mewah dan rumah mampu milik. Perkembangan yang positif bagi pembangunan TRX, Bandar Malaysia dan pengumuman penerusan semula projek Laluan Kelajuan Tinggi KL-Singapura (KL-SG HSR), telah mengembalikannya semula tumpuan pasaran ke pusat bandar.

Residensi Wilayah (dahulunya dikenali sebagai RUMAWIP) merupakan satu program perumahan mampu milik yang menyediakan kediaman mampu dimiliki kepada warga Wilayah Persekutuan manakala Perumahan Penjawat Awam Malaysia (PPAM) adalah skim rumah mampu milik untuk penjawat awam. Ringkasan projek rumah berpatutan untuk memberi tumpuan adalah:

Sementara itu dalam segmen komersial, projek komersial

*Market for residential sub-sector, remains sustainable given by the on-going construction of high-end condominium units as well as affordable homes. The positive news flow of TRX, Bandar Malaysia, coupled with the review announcement of the KL-Singapore High Speed Rail (KL-SG HSR) project, has drawn market attention back to the city centre.*

*Residensi Wilayah (previously known as RUMAWIP), is an affordable housing scheme providing affordable home to all Federal Territory citizen while Perumahan Penjawat Awam Malaysia (PPAM) is a scheme of affordable houses for government servants. Summary of affordable house project to focus on are:*

**Table 1.6**

**The Summary of Affordable Housing Projects**

No.	Scheme	Stage	Units
1.	Sky Awani 3 Residences (RUMAWIP)	Under construction	1,905
2.	Residensi Wilayah Aman Jalil (RUMAWIP)	Under construction	1,260
3.	Residensi Inspiria (RUMAWIP)	Approved Building Plan	900
4.	Residensi Wilayah (RUMAWIP)	Approved Building Plan	494
5.	Lot 20004 (Rumah Mampu Milik)	Approved Building Plan	100
6.	Lot 45648 (Rumah Mampu Milik)	Approved Building Plan	77
7.	Residensi SkyAwani IV	Approved Building Plan	1,782
8.	PPAM Setapak	Approved Building Plan	1,587

mega lain yang dalam perancangan ialah:

**i. Bukit Jalil City**

Bukit Jalil City merupakan pembangunan gaya hidup bersepadu, pusat membeli-belah serantau dan akan dihubungkan dengan Taman Rekreasi Bukit Jalil seluas 80 ekar di seberang jalan melalui jambatan pejalan kaki. Skim ini merupakan pembangunan bercampur bersepadu diterajui oleh Pavilion Bukit Jalil, salah satu pusat membeli-belah terbesar di Malaysia. Pavilion Bukit Jalil dijangka buka pada tahun 2021.

**ii. Tun Razak Exchange (TRX)**

Tun Razak Exchange (TRX), Kuala Lumpur ialah pembangunan dengan keluasan tanah 70 ekar di pusat bandar Kuala Lumpur; bakal menjadi sebuah hub kewangan antarabangsa dan perniagaan yang terkemuka. Fasa 1 telah siap dan dibuka pada 2019 yang merangkumi The Exchange 106 dan Menara Prudential. Fasa 2 pula dijangka siap pada tahun 2020 yang akan menyaksikan pembukaan Exchange Mall dan Ibu Pejabat Bank HSBC Malaysia dan Bank Affin.

**iii. KL Metropolis**

*Meanwhile on the commercial segment, other proposed commercial mega projects in the pipeline are:*

**i. Bukit Jalil City**

*Bukit Jalil City is an intergrated lifestyle development, regional shopping hub and will be connected to the 80-acre Bukit Jalil Recreational Park across the road by a pedestrian walkway bridge. It is an integrated mixed-use development anchored by Pavilion Bukit Jalil, one of Malaysia's largest shopping centre. The Pavillion Bukit Jalil is expected to open in 2021.*

**ii. Tun Razak Exchange (TRX)**

*Tun Razak Exchange (TRX), Kuala Lumpur is a 70-acre development in the heart of Kuala Lumpur, a leading centre for international finance and business. Phase 1 completed in 2019 comprises The Exchange 106 and Menara Prudential. Phase 2 is expected to complete in 2020 comprises the Exchange Mall and new headquarters for HSBC Malaysia and Affin Bank.*



KL Metropolis ialah pembangunan bercampur komersial atas tanah seluas 75.5 ekar yang terletak dalam kawasan Dutamas, Kuala Lumpur. Ia terbahagi kepada sembilan fasa yang dikenali sebagai Met 1, Met 2, Met 3, Met 5, Met 6, Met 7, Met 8, Met 9 dan sebuah pusat pameran. Komponen KL Metropolis adalah seperti berikut:-

- Malaysia International Trade and Exhibition Centre (MITEC)
- MET 1: Dua menara pejabat, serviced residences dan sebuah pusat beli-belah
- MET 2: Blok pejabat dengan hotel
- MET 3: Pusat beli-belah, kondominium, hotel dan menara pejabat
- MET 5: Podium retail, menara pejabat, kediaman, hotel dan menara serviced residential
- MET 6: Menara pejabat
- MET 7: Suite Wellness
- MET 8: Menara pejabat
- MET 9: Hotel

**iv. Rencana Royale**

Rencana Royale ialah pembangunan komersial yang terletak menghadap Jalan Datuk Sulaiman di Taman Tun Dr Ismail merangkumi korporat suite di langit, garden suite 2 tingkat, Deluxe Duplex Suite, Deluxe Suite, Executive Duplex Suite dan Executive Suite dengan jumlah 622 unit bersama 13 lot perniagaan dan medan selera. Projek ini dibina atas tanah Rezab Melayu Sungai Penchala. Pembangunan ini juga termasuk fasiliti kediaman seperti kolam, gymnasium, taman permainan dan bilik-bilik permainan.

**v. 8th & Stellar**

8th & Stellar ialah pembangunan bercampur berpegangan pajakan yang dibina atas tanah 2.2 ekar di Bandar Baru Sri Petaling. Projek dalam pembinaan ini merangkumi dua menara yang mengandungi 138 unit duplex, 522 unit pangsapuri khidmat, enam kedai dan 120,000 kaki persegi ruang pejabat.

**iii. KL Metropolis**

*KL Metropolis is a mixed commercial development that will be developed on 75.5 acres of land located within Dutamas, Kuala Lumpur vicinity. It was divided into nine phases known as Met 1, Met 2, Met 3, Met 5, Met 6, Met 7, Met 8, Met 9 and an exhibition centre. Components of KL Metropolis are as below:*

- *Malaysia International Trade and Exhibition Centre (MITEC)*
- *MET 1: Two office towers, serviced residences and a retail mall*
- *MET 2: Office block with hotel*
- *MET 3: Mall, condominium, hotel and office towers*
- *MET 5: Podium retail, office tower, residential tower, hotel and serviced residential tower*
- *MET 6: Office towers*
- *MET 7: Wellness suites*
- *MET 8: Office towers*
- *MET 9: Hotel*

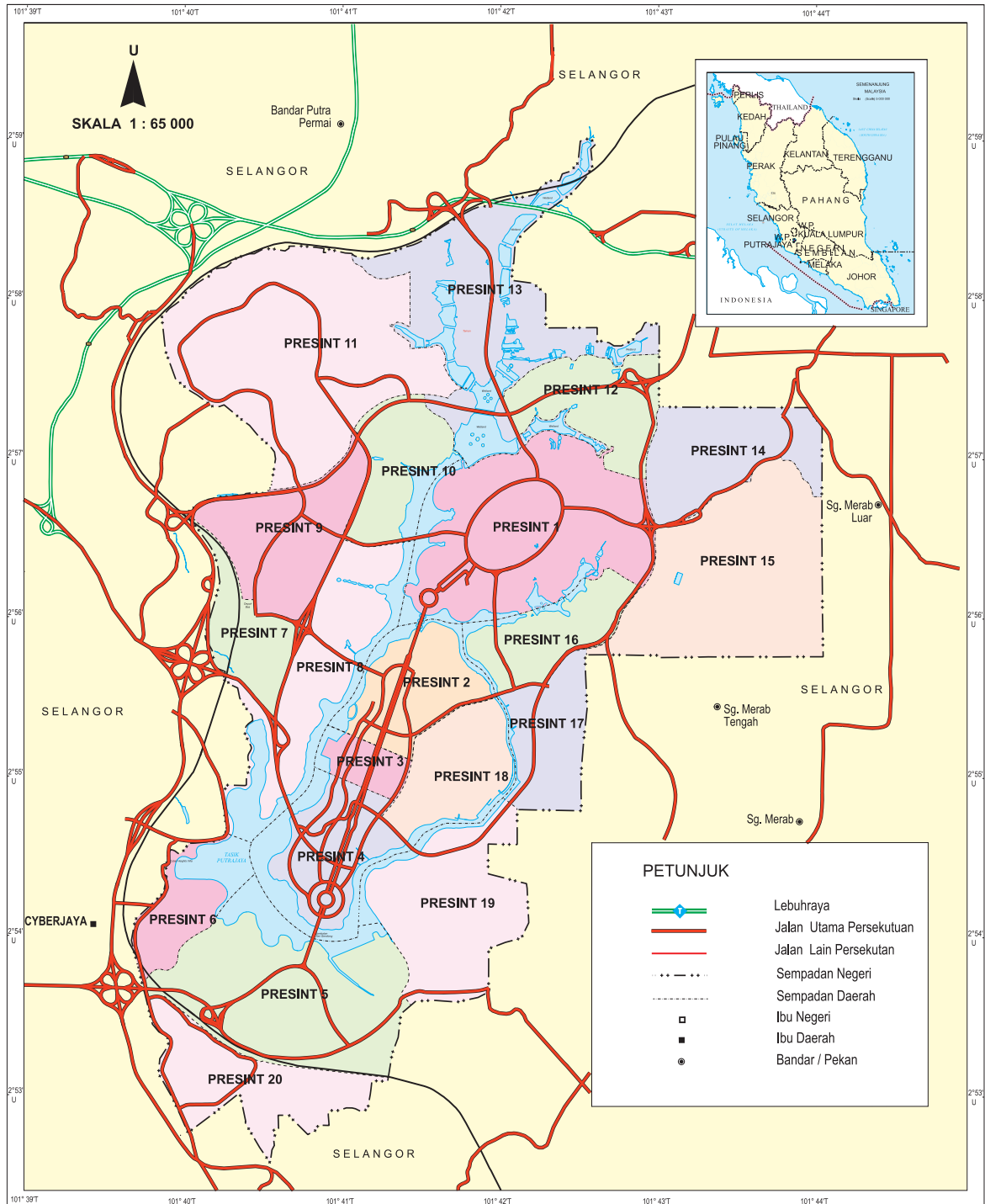
**iv. Rencana Royale**

*Rencana Royale fronting Jalan Datuk Sulaiman in Taman Tun Dr Ismail comprising 13-storey commercial development featuring Corporate Suites in the sky, 2-storey Garden Suites, Deluxe Duplex Suites, Deluxe Suites, Executive Duplex Suites and Executive Suites. It comprise of 622 suites together with 13 lots retail and food court. The project is built on Sungai Penchala Malay Reserved Land. The development also come with residential facilities like sky pool, gymnasium, playground and games room.*

**v. 8th & Stellar**

*8th & Stellar is leasehold mixed development project build on 2.2 acre land located in Bandar Baru Sri Petaling township. This project consists of two towers housing 138 Duplex Loft units, 522 serviced apartments units, six shoplots and 120,000 square foot office spaces which is currently under construction.*

# WILAYAH PERSEKUTUAN PUTRAJAYA



# WILAYAH PERSEKUTUAN PUTRAJAYA

## GAMBARAN KESELURUHAN

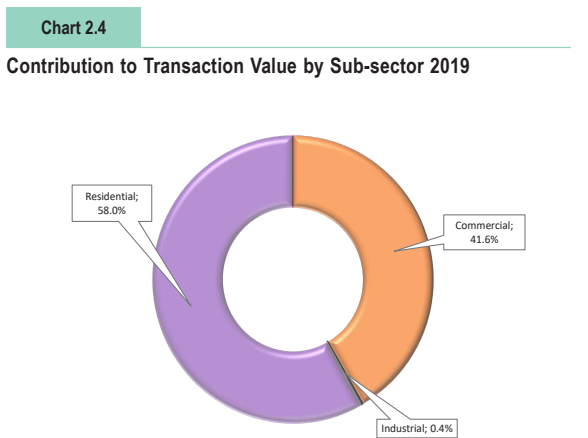
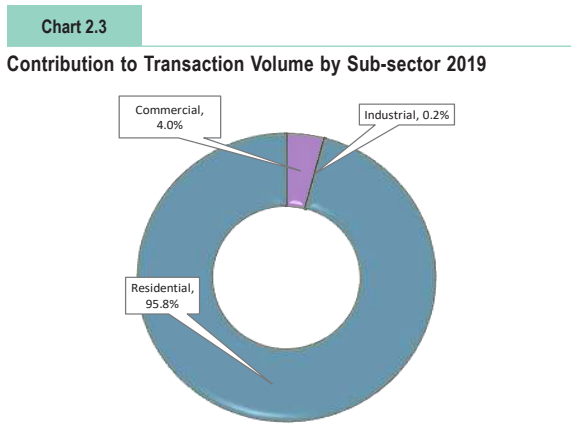
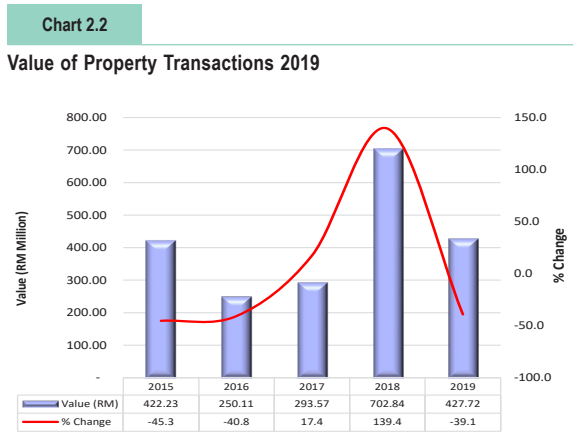
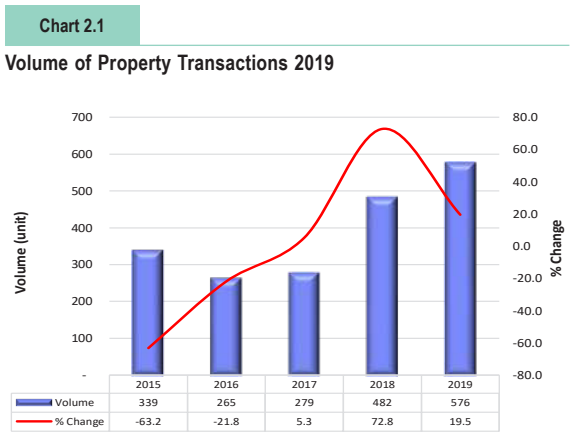
Prestasi pasaran harta tanah negeri sederhana dalam tempoh kajian. Sebanyak 576 transaksi bernilai RM427.72 juta direkodkan, meningkat 19.5% manakala nilai berkurang dengan ketara 39.1% berbanding 2018 (482 transaksi bernilai RM702.84 juta). Subsektor kediaman mempelopori pasaran harta tanah, menyumbang 95.8% daripada keseluruhan aktiviti pasaran, diikuti oleh subsektor komersial (4.0%) dan industri (0.2%).

Pergerakan aktiviti pasaran adalah menggalakkan; subsektor kediaman meningkat 20.5% manakala subsektor komersial 43.8%. Sebaliknya, dari segi nilai transaksi, semua subsektor merekodkan penguncupan dengan pengecualian subsektor industri yang tiada perubahan.

## OVERVIEW

The state's property market performance moderated in the review period. A total of 576 transactions worth RM427.72 million were recorded, up by 19.5% in volume whereas value reduced substantially by 39.1% over 2018 (482 transaction worth RM702.84 million). The residential sub-sector spearheaded the property market, contributed 95.8% of the total market activity, followed by commercial (4.0%) and industrial (0.2%) sub-sectors.

Market activity movements was encouraging; residential sub-sector grew by 20.5% whilst commercial sub-sector by 43.8%. On the contrary, in terms of transactions value, all sub-sectors recorded contraction with the exception of industrial sub-sector which unchanged.



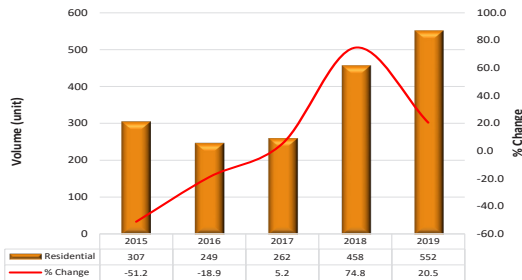
## HARTA TANAH KEDIAMAN

### Transaksi

Terdapat 552 transaksi bernilai RM248.21 juta direkodkan dalam tempoh kajian, meningkat 20.5% dalam bilangan manakala nilai menurun 10.2%. Kondominium dan pangsapuri menguasai pasaran tertinggi, menyumbang 72.3% (399 unit) daripada transaksi harta kediaman.

Chart 2.5

Volume of Residential Property Transactions 2019

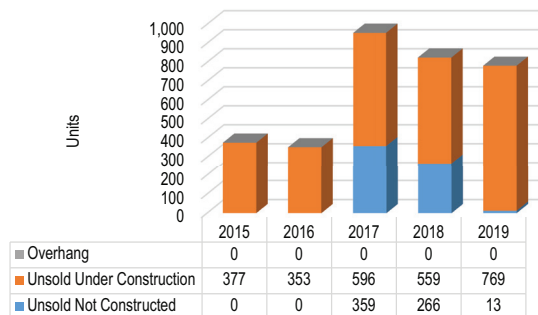


### Status Pasaran

Negeri tidak dibebankan dengan unit kediaman siap dibina tidak terjual dan belum dibina belum terjual menunjukkan penurunan yang ketara. Manakala, dalam pembinaan belum terjual merekodkan sebaliknya.

Chart 2.7

Residential Market Status Trend 2015 – 2019



### Aktiviti Pembinaan

Aktiviti pembinaan menyaksikan prestasi lebih baik dalam tempoh kajian. Siap dibina dan mula dibina mencatatkan lebih banyak unit berbanding tahun sebelumnya. Pada akhir 2019, terdapat 14,991 unit kediaman sedia ada dengan 5,121 unit lagi dalam penawaran akan datang dan 530 unit dalam penawaran yang dirancang.

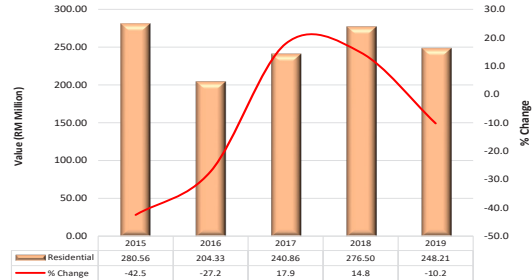
## RESIDENTIAL PROPERTY

### Transaction

There were 552 transactions worth RM248.21 million recorded in the review period, increased by 20.5% in volume whereas value dropped 10.2%. Condominiums and apartments dominated the highest market share, contributed 72.3% (399 units) of the residential property transactions.

Chart 2.6

Value of Residential Property Transactions 2019



### Market Status

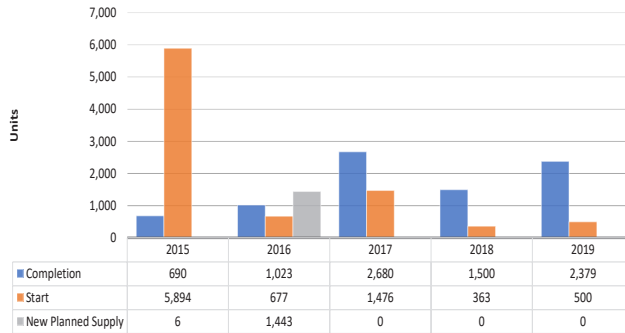
The state was unencumbered with residential overhang unit and the unsold not constructed showed a mark decline. Whereas, unsold under construction recorded otherwise.

### Construction Activity

The construction activity witnessed a better performance in the review period. Completion and start recorded more units as compared to previous year. As at end-2019, there were 14,991 existing residential units with another 5,121 units in the incoming supply and 530 units in the planned supply.

Chart 2.8

Residential Construction Activity Trend 2015 – 2019



### Harga dan Sewa

Harta tanah kediaman mencatatkan pergerakan harga bercampur-campur di seluruh wilayah. Harga kukuh di dalam skim-skim strategik yang terletak berhampiran pusat komersial dan kompleks membeli-belah. Walau bagaimanapun, rumah pangsa kos rendah di Apartment Putra Harmoni dan kondominium di Saujana Aster menyaksikan penurunan harga.

### Price and Rental

Residential properties recorded mixed price movements across the board. Prices also firmed up in strategically-located schemes nearby commercial centres and shopping complexes. However, low-cost flat in Apartment Putra Harmoni and condominium in Saujana Aster saw prices softening.

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Pasaran sewa kediaman umumnya stabil. Penyewaan baru dan lokasi strategik adalah antara faktor yang menyumbang kepada kadar sewa lebih tinggi. Purata pulangan sewa bagi kediaman bertanah adalah 1.1% hingga 4.6%, manakala bagi unit bertingkat tinggi di antara 4.3% dan 5.5%.

The residential rental market was generally stable. New tenancy and strategic locations were among the factors contributed to the higher rental rate. The average rental yield for landed property was at 1.1% to 4.6%, while for high-rise units between 4.3% and 5.5%.

## HARTA TANAH KOMERSIAL

## COMMERCIAL PROPERTY

### Transaksi

Subsektor komersial mencatatkan 23 transaksi bernilai RM178.01 juta (2018: 16 transaksi bernilai RM401.85 juta). Walaupun bilangan bertambah, nilai menunjukkan penurunan berbanding tahun lepas.

### Transaction

The commercial sub-sector recorded 23 transactions worth RM178.01 million (2018: 16 transactions worth RM401.85 million). Although the volume rose, value showed a mark decrease as compared to last year.

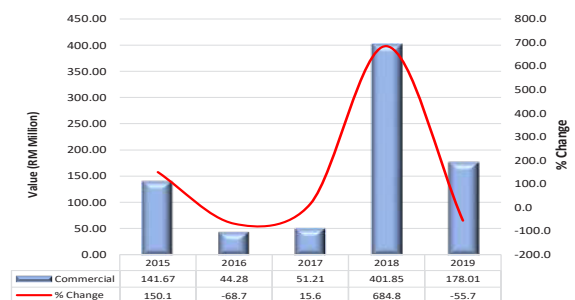
Chart 2.9

Volume of Commercial Property Transactions 2019



Chart 2.10

Value of Commercial Property Transactions 2019

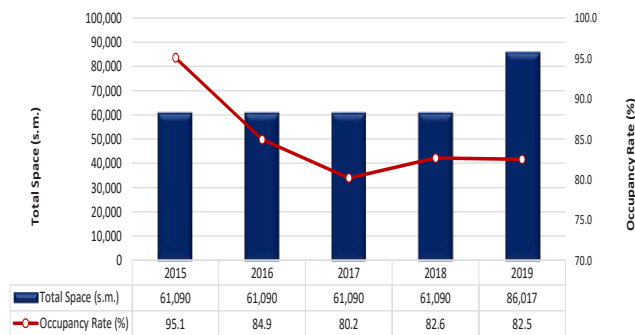


## Kompleks Perniagaan

### Penghunian dan Ketersediaan Ruang

Subsektor niaga menyaksikan prestasi lebih rendah berdasarkan purata kadar penghunian berkurangan kepada 82.5% berbanding 82.6% pada 2018. Ambilan tahunan adalah positif pada 20,470 m.p., disebabkan peningkatan penghunian daripada kompleks beli-belah baru iaitu Shaftsbury Avenue.

**Chart 2.11**  
Supply and Occupancy of Shopping Complex



### Aktiviti Pembinaan

Subsektor niaga menyaksikan Shaftsbury Avenue di Presint 1 siap dibina yang menyuntik 24,880 m.p. ke dalam pasaran. Pada akhir 2019, terdapat empat kompleks membeli-belah sedia ada (86,017 m.p.), manakala penawaran akan datang dan penawaran yang dirancang tiada.

### Sewa

Sewa ruang niaga sebahagian besarnya stabil di seluruh wilayah.

### Pejabat Binaan Khas

### Penghunian dan Ketersediaan Ruang

Prestasi subsektor pejabat kurang memberangsangkan dengan kadar penghunian keseluruhan menurun kepada 89.0% berbanding 90.8% yang dicatatkan pada 2018. Ambilan tahunan adalah negatif pada 3,836 m.p. berbanding dengan ambilan positif pada tahun lepas (60,398 m.p.).

## Shopping Complex

### Occupancy and Space Availability

The retail sub-sector saw a slightly lesser performance as its average occupancy rate reduced to 82.5% as compared to 82.6% in 2018. The annual take-up was positive at 20,470 s.m., attributed to the additional occupancy from new completion shopping complex namely Shaftsbury Avenue.

### Construction Activity

The retail sub-sector witnessed a completion of Shaftsbury Avenue in Presint 1 which injected 24,880 s.m. into the market. As at end-2019, there were four existing shopping complexes (86,017 s.m.), whereas incoming supply and planned supply was nil.

### Rental

Rentals of retail space were largely stable across the board.

### Purpose-Built Office

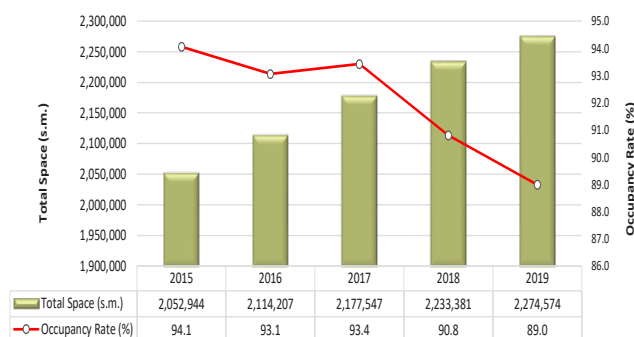
### Occupancy and Space Availability

Performance of office sub-sector was less encouraging with overall occupancy rate declined to 89.0% as compared to 90.8% recorded in 2018. The annual take-up was negative at 3,836 s.m., as compared to positive take-up last year (60,398 s.m.).



Chart 2.12

Supply and Occupancy of Purpose-Built Office



**Aktiviti Pembinaan**

Tempoh kajian mencatatkan Menara MRCB di Presint 2 siap dibina yang menyuntik 39,949 m.p. ruang pejabat ke dalam pasaran. Pada akhir 2019, terdapat 44 kompleks membeli-belah sedia ada (2,274,574 m.p.) dengan tiga kompleks (324,616 m.p.) dalam penawaran akan datang dan satu lagi (31,545 m.p.) dalam penawaran yang dirancang.

**Construction Activity**

The review period registered the completion of Menara MRCB at Presint 2 which injected 39,949 s.m. office space into the market. As at end-2019, there were 44 existing shopping complexes (2,274,574 s.m.) with three complexes (324,616 s.m.) in the incoming supply and another two (31,545 s.m.) in the planned supply.

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**Sewa**

Pasaran sewa pejabat adalah stabil.

**Rental**

The office rental market was stable.

**Riadah**

Pada akhir 2019, terdapat lima hotel (1,026 bilik) dalam penawaran sedia ada dengan satu lagi hotel (290 bilik) dalam penawaran akan datang.

**Leisure**

As at end-2019, there were five hotels (1,026 rooms) in the existing supply with another one hotel (290 rooms) in the incoming supply.

**PROSPEK 2020**

Trend pasaran harta tanah Putrajaya dijangka kekal positif pada 2019, dengan sektor kediaman menjadi penyumbang utama kepada jumlah transaksi harta tanah. Antara pembangunan yang dijangka memberi kesan positif ke atas pasaran harta tanah adalah:

**2020 OUTLOOK**

Putrajaya property market is expected to maintain a positive trend as 2019, with residential sector is the main contributor to the total property transactions. Among the developments that are expected to create positive impact on the state's property market are:

- **Projek Perumahan Penjawat Awam Malaysia (PPAM):**
  - i) PPAM Dalur di Presint 18 merupakan pangsapuri 33 tingkat terdiri daripada 500 unit kediaman dan tiga unit kedai yang dibina oleh TRC Synergy Berhad. Projek ini sedang dalam pembinaan dan dijangka siap pada tahun 2021.
  - ii) PPAM Saderi terletak di Presint 16, dibina oleh Protasco Berhad. Projek ini terdiri daripada 1,100 unit kediaman dan dijangka siap pada Ogos 2020.

- **Perumahan Penjawat Awam Malaysia (PPAM) projects:**
  - i) The PPAM Dalur at Precinct 18 is a 33-storey apartment comprises 500 residential units and three shop units constructed by TRC Synergy Berhad. The project is currently under construction and expected to be completed in 2021.
  - ii) The PPAM Saderi is located in Precinct 16, constructed by Protasco Berhad. The project consists of 1,100 residential units and are expected to be completed in August 2020.

iii) PPAM Kasturi di Presint 17 dibina oleh Mitrajaya Holdings Berhad. Projek yang sedang dalam pembinaan ini terdiri daripada 404 unit kediaman.

- **Flora Rasa @ Presint 11.** Projek ini dimajukan oleh Putrajaya Holdings, merupakan lapan blok pangsapuri 17 tingkat yang terdiri daripada 676 unit. Projek ini sedang dalam pembinaan dan dijangka siap pada Ogos 2021.

Di segmen komersial, bangunan kerajaan baharu siap dibina iaitu Parcel F di Presint 1 yang akan menawarkan lebih banyak ruang pejabat ke dalam pasaran. Bangunan ini merupakan projek kerajaan yang pertama menggunakan konsep Building Information Modelling (BIM). Ia merupakan kompleks pejabat 10 tingkat dibina di atas tanah seluas 33.47 ekar, terdiri daripada sembilan menara pejabat serta blok kemudahan fasiliti.

iii) *The PPAM Kasturi at Precinct 17 is constructed by Mitrajaya Holdings Berhad. This under construction project comprises 404 residential units.*

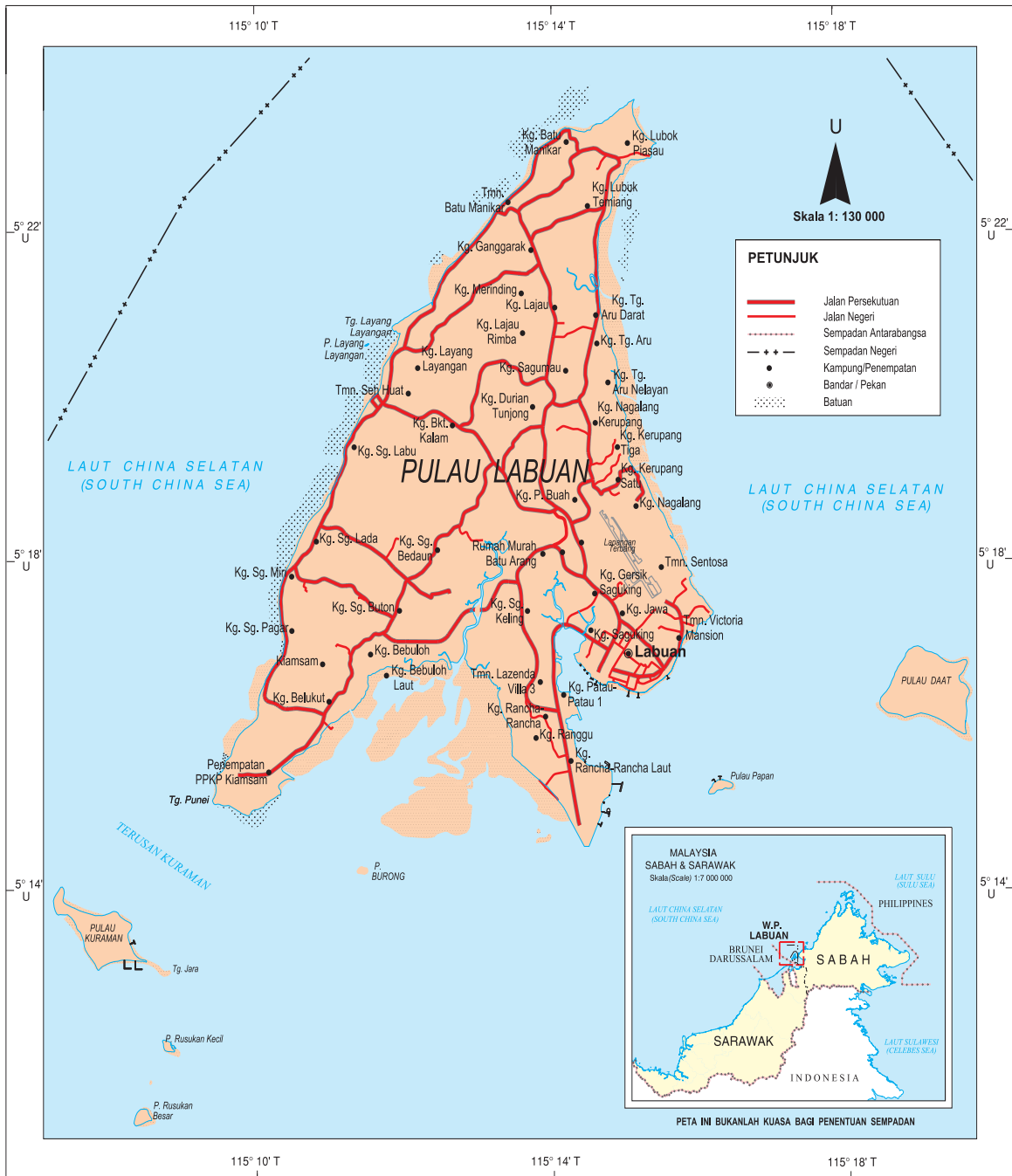
- **Flora Rasa @ Precinct 11.** *The project developed by Putrajaya Holdings, are eight blocks of 17-storey apartments comprising a total of 676 units. The project currently under construction and estimated to be completed in August 2021.*

*On the commercial segment, the new completion government building namely Parcel F at Precinct 1 will offer more office space into the market. The building is the first government project to apply Building Information Modelling (BIM) concept. It is a 10-storey office complex on a 33.47-acre piece of land, consists of nine office towers as well as blocks of shared facilities.*





# WILAYAH PERSEKUTUAN LABUAN



# WILAYAH PERSEKUTUAN LABUAN

## GAMBARAN KESELURUHAN

Pasaran harta tanah negeri ini menyaksikan sedikit pemulihan dalam tempoh kajian ditunjukkan oleh pertumbuhan aktiviti pasaran. Terdapat 493 transaksi yang direkodkan, menunjukkan peningkatan 10.3%. Nilai transaksi menurun 22.3% kepada RM219.95 juta berbanding 2018 (447 transaksi bernilai RM283.19 juta). Subsektor kediaman terus menguasai syer pasaran keseluruhan dengan 45.6% syer, diikuti dengan subsektor tanah pembangunan (31.6%), pertanian (13.6%), komersial (7.3%) dan industri (1.8%).

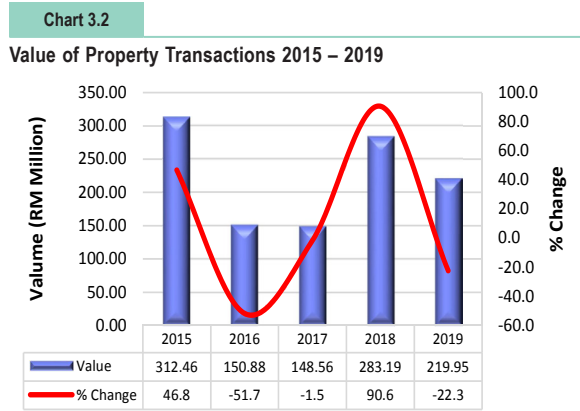
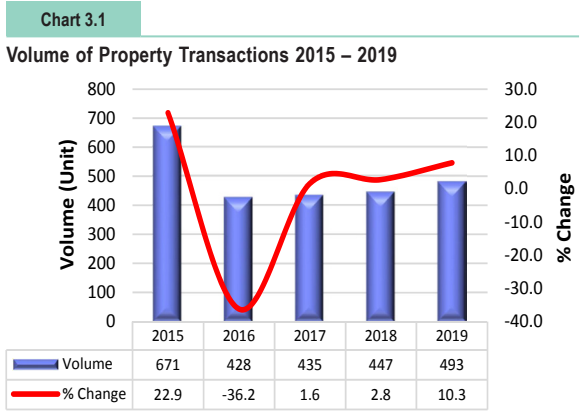
Prestasi semua subsektor bertambah baik kecuali industri (-50.0%). Subsektor komersial mencatatkan peningkatan tertinggi iaitu 71.4%, diikuti oleh subsektor tanah pembangunan (18.2%), kediaman (7.1%) dan pertanian (1.5%). Nilai transaksi menunjukkan pergerakan bercampur-campur: kediaman, pertanian dan subsektor tanah pembangunan masing-masing merekodkan kenaikan 19.8%, 2.7% dan 26.1% sementara subsektor komersial dan industri menunjukkan sebaliknya.

## OVERVIEW

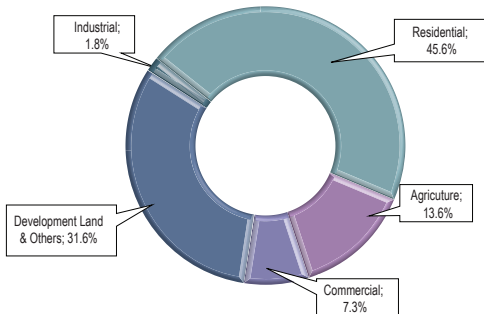
The state's property market saw a slight rebound in the review period indicated by the growth in market activity. There were 493 transactions recorded, indicating an increase of 10.3%. Transactions value decreased by 22.3% to RM219.95 million against 2018 (447 transactions worth RM283.19 million). Residential sub-sector continued to dominate the overall market share with 45.6% share, followed by development land (31.6%), agriculture (13.6%), commercial (7.3%) and industrial (1.8%) sub-sectors.

The performance of all sub-sectors improved except for Industrial (-50.0%). Commercial sub-sector recorded the highest increase of 71.4%, followed by development land (18.2%), residential (7.1%) and agriculture (1.5%) sub-sectors. Value of transactions showed mixed movements: residential, agriculture and development land sub-sectors recorded increase of 19.8%, 2.7% and 26.1% respectively, whilst commercial and industrial sub-sectors showed otherwise.

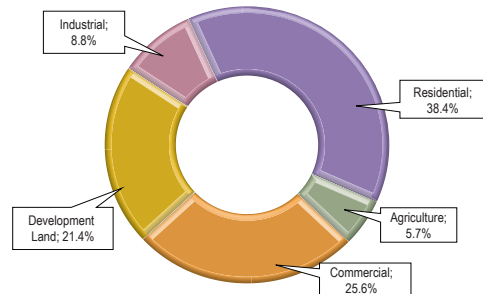
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**Chart 3.3**  
Contribution to Transaction Volume by Sub-sector 2019



**Chart 3.4**  
Contribution to Transaction Value by Sub-sector 2019



## JUALAN UTAMA

Negeri ini menyaksikan transaksi Pulau Rusukan Kecil dengan balasan RM4.0 juta dalam tempoh kajian.

## HARTA TANAH KEDIAMAN

### Transaksi

Subsektor itu mencatatkan 225 transaksi bernilai RM84.55 juta, menunjukkan pertambahan marginal 7.1% dalam bilangan dan 19.8% dalam nilai berbanding 2018 (210 transaksi bernilai RM70.55 juta). Transaksi rumah teres menyumbang 32.0% kepada transaksi harta tanah kediaman.

## PROMINENT SALES

The state witnessed the transfer of Pulau Rusukan Kecil at a consideration of RM4.0 million in the review period.

## RESIDENTIAL PROPERTY

### Transaction

The sub-sector recorded 225 transactions worth RM84.55 million, indicating a marginal increase of 7.1% in volume and 19.8% in value against 2018 (210 transactions worth RM70.55 million). Terraced houses transactions contributed 32.0% to the residential property transactions.

Chart 3.5

Volume of Residential Property Transactions 2015 – 2019

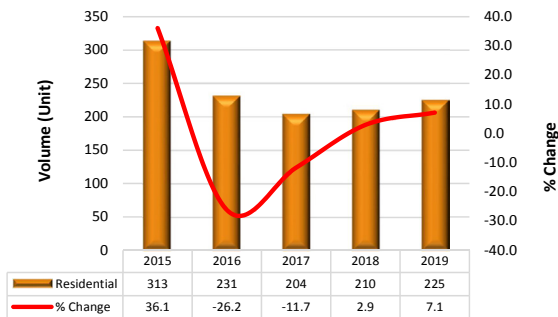
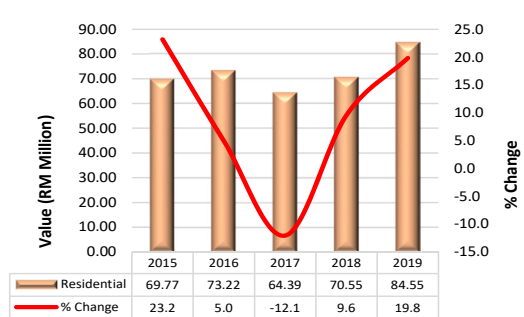


Chart 3.6

Value of Residential Property Transactions 2015 – 2019



### Pelancaran Baharu

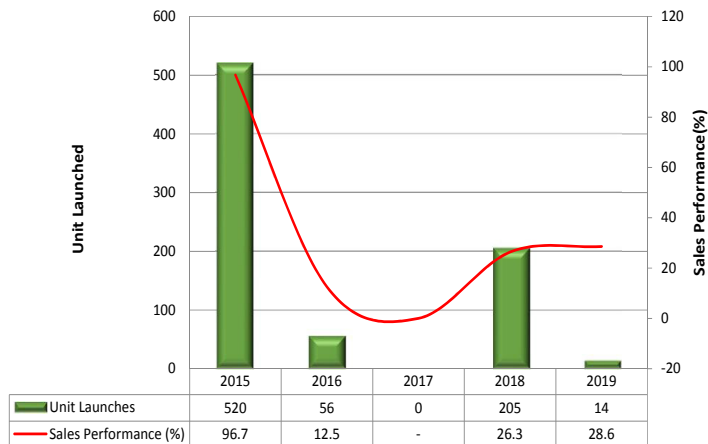
Pasaran utama pada tahun 2019 menurun 93.2%, berbanding 2018. Walau bagaimanapun, prestasi jualan keseluruhan adalah lebih baik. Teres dua dan tiga tingkat membentuk kesemua pelancaran baharu.

### New Launches

The primary market in 2019 dropped by 93.2% compared to 2018. However, the overall sales performance was better. Two to three storey terraces formed all of the new launches.

Chart 3.7

New Launches Trend 2015 – 2019



## Status Pasaran

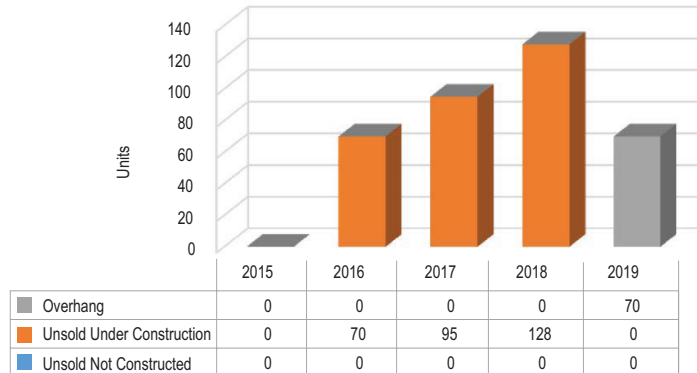
Negeri ini mencatatkan 70 unit kediaman siap dibina tidak terjual dan tiada unit belum terjual dalam pembinaan dan unit belum terjual belum dibina dalam tempoh kajian.

## Market Status

State recorded 70 units of residential overhang and no unsold under construction and unsold not constructed unit in the review period.

Chart 3.8

Residential Market Status Trend 2015 – 2019



## Aktiviti Pembinaan

24

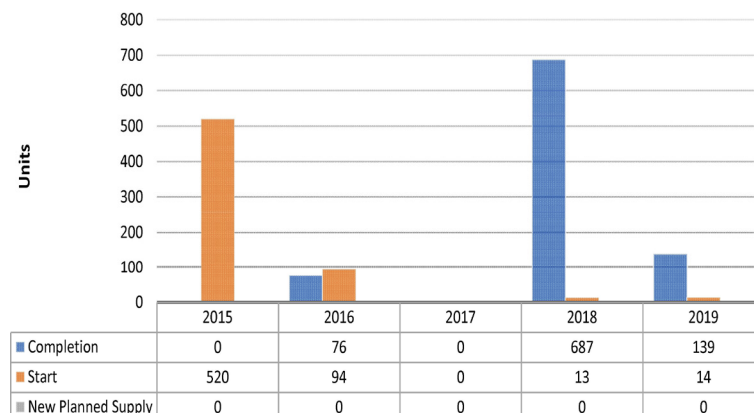
Aktiviti pembinaan harta kediaman menunjukkan pergerakan bercampur-campur. Sehingga akhir 2019, terdapat 12,691 unit kediaman sedia ada dan 657 unit lagi dalam penawaran akan datang dan tiada penawaran yang dirancang.

## Construction Activity

The residential construction activities saw mixed movements. As at end-2019, there were 12,691 existing residential units and another 657 units in the incoming supply and no planned supply recorded.

Chart 3.9

Residential Construction Activity Trend 2015 – 2019



## Harga dan Sewa

Harga harta kediaman berada dalam keadaan stabil dengan beberapa pergerakan dicatatkan di lokasi terpilih terutamanya unit strata. Pangsapuri IOFC Kerupang dan Pangsapuri Tanjung Aru merekodkan kenaikan nilai modal dari 4.9% hingga 7.7% disebabkan kekosongan terhad.

## Price and Rental

Residential property prices were on a stable mode with some movements noted in choice locations particularly stratified unit. IOFC Kerupang Apartments and Tanjung Aru Apartments recorded capital gains from 4.9% to 7.7% due to limited availability.

**HARTA TANAH KOMERSIAL****Transaksi**

Subsektor komersial merekodkan 36 transaksi bernilai RM56.31 juta, meningkat 71.4% dalam bilangan manakala menurun 31.2% dalam nilai.

**Kedai****Transaksi**

Terdapat 32 transaksi kedai bernilai RM45.26 juta direkodkan, menunjukkan peningkatan masing-masing sebanyak 88.2% dan 15.1% dalam bilangan dan nilai berbanding 2018.

**Harga dan Sewa**

Kedai dua tingkat di pusat bandar mencatatkan kenaikan 4.3% dengan harga pindahmilik dari RM2.35 juta hingga RM2.5 juta seunit. Dalam segmen sewa, trend stabil dilihat.

**PROSPEK 2020**

Pasaran harta tanah negeri akan berada pada landasan positif pada tahun yang akan datang disokong oleh projek-projek infrastruktur yang dijangka siap pada tahun 2020 termasuk:

- Menaik taraf jalan dari Pohon Batu (Simpang Tamu) ke Pancur Hitam (Fasa 2); dan
- Pembinaan jalan pantai dari Membedai ke Tanjung Aru.

Antara pembangunan kediaman sedang berjalan yang dijangka akan mencetuskan kesan positif ke atas pasaran harta tanah adalah:

- **Perumahan Rakyat MPL Batu Arang**  
Projek melibatkan 500 unit rumah pangsa terletak di Jalan Batu Arang, Kampung Lajau mula dibina pada 29 Januari 2018 dan dijangka siap pada Disember 2020.
- **Lazenda Nagalang Beach Residence**  
Projek pembangunan bercampur dalam pembinaan ini terdiri daripada 44 unit rumah teres dua tingkat dan empat unit kedai pejabat dua tingkat yang terletak di Jalan Batu Arang, Kampung Nagalang.

**COMMERCIAL PROPERTY****Transaction**

The commercial sub-sector recorded 36 transactions worth RM56.31 million, increased by 71.4% in volume whereas value decreased by 31.2%.

**Shop****Transaction**

There were 32 shop transactions worth RM45.26 million recorded, indicating an increase of 88.2% and 15.1% in volume and value respectively against 2018.

**Price and Rental**

Double storeys shops in town centre recorded 4.3% growth at a price range of RM2.35 million to RM2.5 million per unit. In the rental segment, stable trend was seen.

**2020 OUTLOOK**

The state's property market would be on a positive path in the coming year backed by infrastructure projects that are expected to be completed by 2020 including:

- Road upgrading from Pohon Batu (Simpang Tamu) to Pancur Hitam (Phase 2); and
- Coastal road construction from Membedai to Tanjung Aru.

Among the on-going residential development that are expected to create positive impact on the state's property market are:

- **MPL Batu Arang People's Housing Project**  
Project consisting of 500 flat units located at Jalan Batu Arang, Kampung Lajau commenced its construction in 29 January 2018 and expected to be completed by December 2020.
- **Lazenda Nagalang Beach Residence**  
This on-going mixed development project consists of 44 units of double storey terraced houses and four units double storey shop offices located at Jalan Batu Arang, Kampung Nagalang.

- **SouthSea Pearl Residence**  
Projek pembangunan bercampur ini terdiri daripada 278 unit kondominium dengan 5 blok berbeza, empat unit pejabat dua tingkat dan empat unit pejabat tiga tingkat. Projek ini terletak di Jalan OKK Daud, Kampung Ganggarak. Fasa perdagangan Blok A dan fasa kediaman Blok B hampir siap dibina manakala blok lain masih belum dibina.
- **Villa Lotus**  
Projek kediaman dalam pembinaan ini terdiri daripada 76 unit rumah bandar tiga tingkat yang terletak di Kampung Sungai Bangat.

Segmen komersial yang dijangka memberi impak positif kepada pasaran harta tanah di sekitar ini termasuk:

- **BVO Premium Outlet**  
BVO Premium Outlet bakal menjadi outlet premium bebas cukai pertama di Malaysia Timur. Ia terletak di Jalan Sungai Pagar, Kiasam iaitu berhampiran Universiti Malaysia Sabah (UMS), Kolej Antarabangsa Labuan dan Kelab Golf Antarabangsa Labuan. Projek bebas cukai yang telah mula dibina ini merangkumi bangunan premium outlet dua tingkat, hotel dan pangapuri khidmat.
- **Grand Arcade**  
Projek komersial dalam pembinaan ini terdiri daripada sebuah kompleks membeli-belah lima tingkat dan sebuah hotel tujuh tingkat. Projek ini terletak di Jalan OKK Abdullah, Bandar Labuan.

- **SouthSea Pearl Residence**  
*The mixed development project comprising 278 units of condominium with five different blocks, four units of double storey office and four units of three storey shop offices. The project located at Jalan OKK Daud, Kampung Ganggarak. Block A, a commercial development and Block B, a residential block almost completed while the rest block has not commenced.*
- **Villa Lotus**  
*This on-going residential project consists of 76 units of three storey town house located at Kampung Sungai Bangat.*

*Commercial segment that are expected to give a positive impact on the property market around the vicinity including:*

- **BVO Premium Outlet**  
*BVO Premium Outlet will be the first duty-free premium outlet in East Malaysia. It is located at Jalan Sungai Pagar, Kiasam nearby Universiti Malaysia Sabah (UMS), Labuan International College and Labuan International Golf Club. This commenced duty-free project consists of a double storey premium outlet, hotel and serviced apartment.*
- **Grand Arcade**  
*This on-going commercial development project comprises of a five storey shopping complex and a seven storey hotel located at Jalan OKK Abdullah, Bandar Labuan.*

# SELANGOR





# SELANGOR

## GAMBARAN KESELURUHAN

Pasaran harta tanah di Selangor memberansangkan pada 2019 seperti yang ditunjukkan oleh pergerakan positif dalam aktiviti pasaran. Terdapat 66,548 transaksi dicatatkan bernilai RM46.52 bilion, meningkat 8.6% dalam bilangan dan 11.6% dalam nilai (2018: 61,266 transaksi bernilai RM41.70 bilion). Subsektor kediaman mendahului pasaran, menyumbang 78.1% daripada aktiviti pasaran. Subsektor komersial menjadi penyumbang utama seterusnya dengan 9.6% syer pasaran, diikuti subsektor pertanian (5.4%), tanah pembangunan (3.6%) dan industri (3.3%).

Prestasi semua subsektor bertambah baik kecuali pertanian (-0.7%) dan tanah pembangunan (-4.3%). Subsektor komersial meningkat 17.7%, diikuti oleh industri (9.0%) dan kediaman (8.9%). Dari segi nilai, semua subsektor mencatatkan pergerakan meningkat kecuali bagi subsektor industri, sedikit berkurang iaitu 0.2%.

## OVERVIEW

Property market in Selangor firmed up in 2019 as indicated by the positive movements in market activity. There were 66,548 transactions recorded worth RM46.52 billion, up by 8.6% in volume and 11.6% in value (2018: 61,266 transaction worth RM41.70 billion). The residential sub-sector spearheaded the property market, contributed 78.1% of the total market activity. Commercial sub-sector was the next leading contributor with 9.6% market share, followed by agriculture (5.4%), development land (3.6%) and industrial (3.3%) sub-sectors.

The performance of all sub-sectors improved except for agriculture (-0.7%) and development land (-4.3%). Commercial subsector increased by 17.7%, followed by industrial (9.0%) and residential (8.9%). In terms of value, all sub-sectors recorded uptrend movement except for industrial sub-sector, decrease merely by 0.2%.

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Chart 4.1

Volume of Property Transactions 2015 – 2019

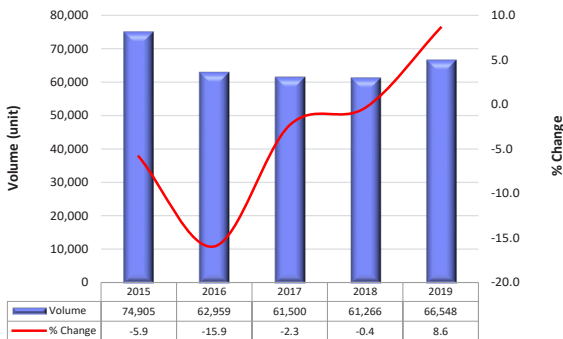


Chart 4.2

Value of Property Transactions 2015 – 2019

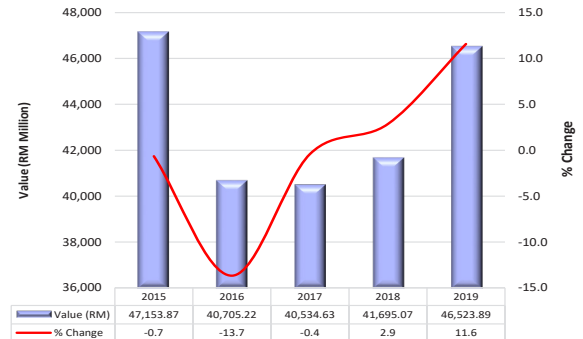


Chart 4.3

Contribution to Transaction Volume by Sub-sector 2019

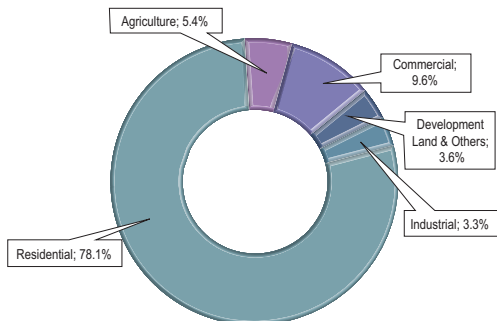
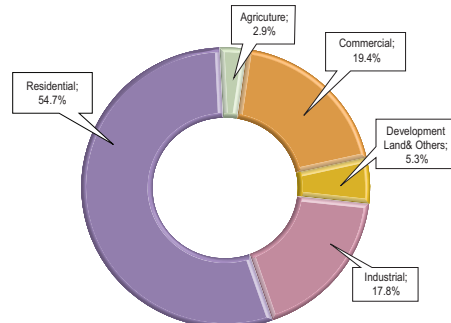


Chart 4.4

Contribution to Transaction Value by Sub-sector 2019



## PROMINENT SALES

Table 4.1

### Summary of Prominent Sales in 2019:

No.	Property	Location	Transaction Year
1.	Casa Klang	Jalan Meru, Klang	2019
2.	Jaya Square	Subang Jaya	2019
3.	Marriot International Hotel	Bandar Damansara Perdana	2019
4.	Mtree Hotel	Bandar Puchong Jaya	2019
5.	Estate Tanjung Duabelas	Jalan Sri Cheeding	2019
6.	Menara Kurnia, Leisure Commerce Square	Bandar Sunway	2018
7.	The Golden Palm Tree Water Villas	Sepang Goldcoast	2018
8.	Estate New Lunderstone	Jalan Sungai Buaya	2018
9.	41.02-hectare estate land	Persiaran Saujana Putra	2018

Tempoh kajian juga menyaksikan beberapa pembelian pukal. Antaranya ialah 109 plot kediaman sesebuah di Bukit Bandaraya Shah Alam, 311 plot kediaman teres di Taman Bukit Teratai, 10 plot industri di Bukit Raja Industrial Park, Klang dan 96 plot industri di Kawasan Perindustrian Telok Gong.

The review period also saw several bulk purchases. Among these were 109 residential detached plots in Bukit Bandaraya Shah Alam, 311 residential terraced plots in Taman Bukit Teratai, 10 industrial plots in Bukit Raja Prime Industrial Park, Klang and 96 industrial plots in Telok Gong Industrial Area.

## HARTA TANAH KEDIAMAN

### Transaksi

Terdapat 51,981 transaksi bernilai RM25.43 bilion dicatatkan dalam tempoh kajian, meningkat 8.9% dalam bilangan dan 10.7% dalam nilai. Transaksi rumah teres mendominasi syer pasaran tertinggi, menyumbang 44.0% (22,872 unit) daripada transaksi harta kediaman daripada teres satu tingkat (6,215 unit) dan teres dua tingkat (16,657 unit).

## RESIDENTIAL PROPERTY

### Transaction

There were 51,981 transactions worth RM25.43 billion recorded in the review period, increased by 8.9% in volume and 10.7% in value. Terrace houses transactions dominated the highest market share, contributed 44.0% (22,872 units) of the residential property transactions attributed to single storey terraces (6,215 units) and double storey terraces (16,657 units).

Chart 4.5

### Volume of Residential Property Transactions 2015 – 2019

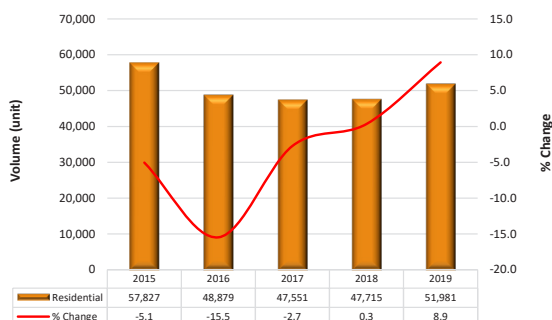
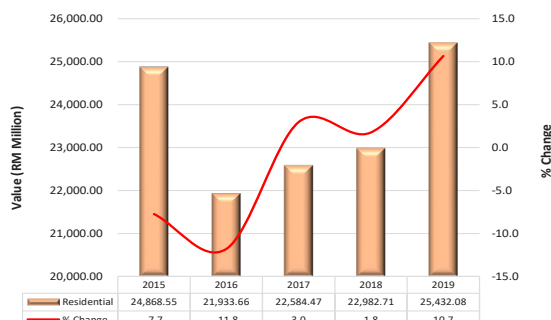


Chart 4.6

### Value of Residential Property Transactions 2015 – 2019



## Pelancaran Baharu

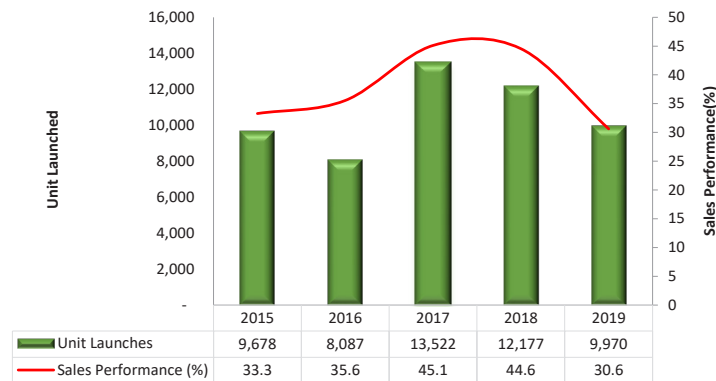
Pasaran utama sederhana dalam tempoh kajian. Terdapat 9,970 unit dilancar, berkurangan 18.1% berbanding 2018 (12,177 unit). Prestasi jualan adalah perlahan pada 30.6%, lebih rendah daripada 44.6% yang direkod pada tempoh sama tahun lepas. Rumah teres dua hingga tiga tingkat membentuk sebahagian besar pelancaran baharu, menyumbang 47.5% (4,740 unit) daripada jumlah keseluruhan.

## New Launches

The primary market softened in the review period. There were 9,970 units launched, reduced by 18.1% against 2018 (12,177 units). The sales performance was low at 30.6%, lower than 44.6% registered in corresponding period of last year. Two to three storey terrace houses formed the bulk of the new launches, accounting 47.5% (4,740 units) of total.

Chart 4.7

New Launches Trend 2015 – 2019



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## Status Pasaran

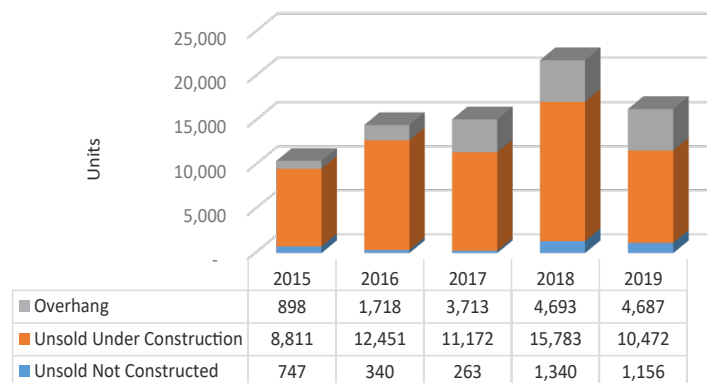
Situasi kediaman siap dibina tidak dan belum terjual menunjukkan prestasi lebih baik berdasarkan bilangan yang semakin berkurangan dalam tempoh kajian.

## Market Status

The residential overhang and unsold situation showed a better performance as the numbers reduced in the review period.

Chart 4.8

Residential Market Status Trend 2015 – 2019



## Aktiviti Pembinaan

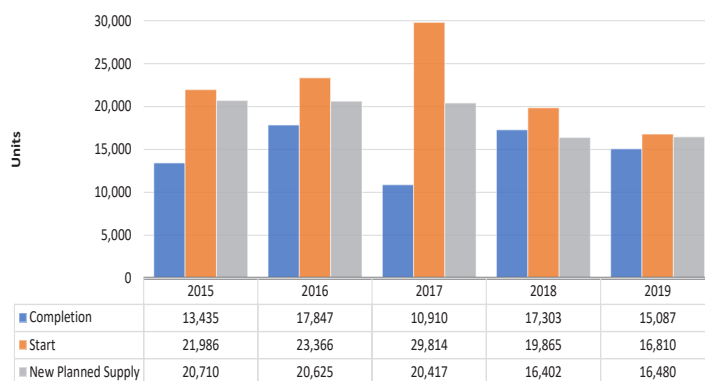
Aktiviti pembinaan subsektor kurang aktif. Pada akhir 2019, terdapat 1,571,259 unit kediaman sedia ada dengan 103,286 unit lagi dalam penawaran akan datang dan 79,836 unit dalam penawaran yang dirancang.

## Construction Activity

The sub-sector's construction activity was less active. As at end-2019, there were 1,571,259 existing residential units with another 103,286 units in the incoming supply and 79,836 units in the planned supply.

Chart 4.9

## Residential Construction Activity Trend 2015 – 2019



## Harga dan Sewa

Harga harta kediaman bagi kedua-dua harta bertanah dan bertingkat tinggi adalah pelbagai pada tempoh kajian. Teras dua tingkat di Bukit Bandaraya, Taman Bukit Mayang Mas dan Damansara Indah Resort Homes di Mukim Petaling mencatat peningkatan modal 15.9% hingga 17.0% disebabkan keutamaan pasaran yang tinggi. Walau bagaimanapun, jenis harta tanah sama di Mutiara Subang dan Denai Alam menyaksikan penurunan harga, jatuh 10.2% hingga 11.6%. Begitu juga, beberapa skim bertingkat tinggi menunjukkan penurunan iaitu Pangsapuri Arcadia, Seri Impian dan Lafite di Mukim Petaling. Pada Q4 2019, Indeks Harga Semua Rumah untuk negeri ini berada pada 201.4 mata, naik 1.3% daripada 198.9 mata pada Q4 2018. Purata Harga Semua Rumah bagi negeri pada Q4 2019 berada pada RM488,520, meningkat dari RM482,385 pada Q4 2018.

Pasaran sewa harta kediaman umumnya stabil dengan pergerakan positif direkodkan di beberapa kawasan. Penyewaan baru dan lokasi strategik berdekatan pusat komersial yang dilengkapi jaringan perhubungan yang cekap adalah antara faktor menyumbang kepada keuntungan sewa. Teres dua tingkat di Bukit Rahman Putra, Saujana Rawang dan Taman Rawang Tin menunjukkan pergerakan menaik antara 10.5% dan 15.0% disebabkan lokasi yang baik dan berdekatan kawasan perindustrian. Sementara itu, penyewaan unit bertingkat tinggi kekal stabil.

## HARTA TANAH KOMERSIAL

### Transaksi

Subsektor komersial merekodkan 6,394 transaksi dengan jumlah nilai RM9.01 bilion pada 2019. Ini menunjukkan peningkatan 17.7% dalam bilangan dan 27.7% dalam nilai berbanding 2018 (5,431 transaksi bernilai RM7.06 bilion).

## Price and Rental

*Prices of residential property both landed and high-rise varied during the review period. Double storey terraces in Bukit Bandaraya, Taman Bukit Mayang Mas and Damansara Indah Resort Homes in Mukim Petaling charted capital appreciations of 15.9% to 17.0% due to high market preference. However, same type of property in Mutiara Subang and Denai Alam saw prices softening, dropped by 10.2% to 11.6%. Similarly, several high-rise schemes showed declines namely Arcadia, Seri Impian and Lafite Apartments in Mukim Petaling. As at Q4 2019, the All House Price Index for the state stood at 201.4 points, up by 1.3% from 198.9 points in Q4 2018. The average All House Price for the state as at Q4 2019 stood at RM488,520, increased from RM482,385 in Q4 2018.*

*The residential rental market was generally stable with positive movements recorded in several areas. New tenancy and strategic locations nearby commercial centres served with efficient connectivity were among the factors contributed to the rental gains. Double storey terraces in Bukit Rahman Putra, Saujana Rawang and Taman Rawang Tin portrayed upward movements ranged between 10.5% and 15.0% due to good location and proximity to industrial area. Meanwhile, rentals of high-rise units remained stable.*

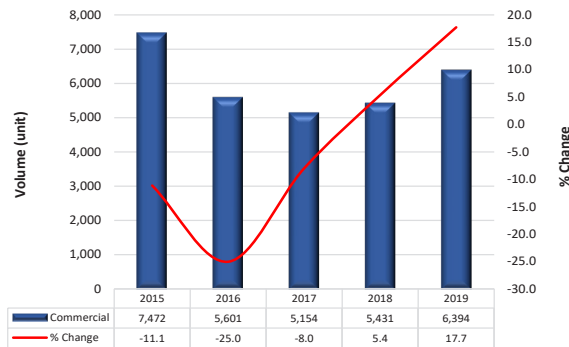
## COMMERCIAL PROPERTY

### Transaction

*The commercial sub-sector recorded 6,394 transactions with a total value of RM9.01 billion in 2019. This indicated an increase of 17.7% in volume and 27.7% in value as compared to 2018 (5,431 transactions worth RM7.06 billion).*

Chart 4.10

Volume of Commercial Property Transactions 2015 – 2019



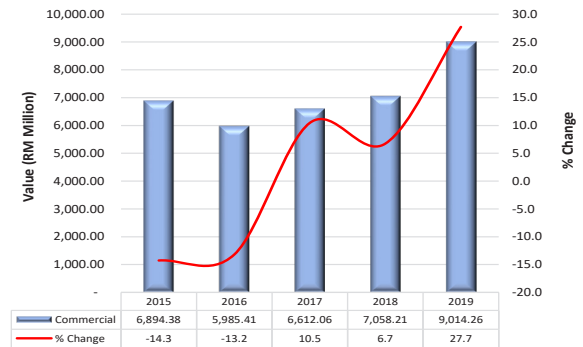
**Kedai**

**Transaksi**

Subsektor kedai merekodkan 2,514 transaksi bernilai RM3.30 bilion dalam tempoh kajian (2018: 2,295 transaksi bernilai RM3.08 bilion). Berbanding 2018, aktiviti pasaran berada pada trend menaik, meningkat 9.5% dalam bilangan dan 7.3% dalam nilai.

Chart 4.11

Value of Commercial Property Transactions 2015 – 2019



**Shop**

**Transaction**

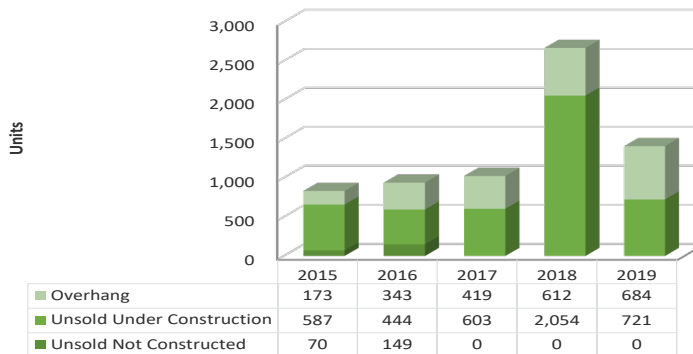
Shop sub-sector recorded 2,514 transactions worth RM3.30 bilion in the review period (2018: 2,295 transactions worth RM3.08 bilion). In comparison to 2018, the market activity was on upward trend, rose by 9.5% in volume and 7.3% in value.

**Market Status**

Mixed trend was seen in shop overhang and unsold. Overhang witnessed increasing numbers, meanwhile unsold under construction and not constructed saw a better performance as the numbers declined in the review period. The trend is shown in Chart 4.12.

Chart 4.12

Shop Market Status Trend 2015 – 2019

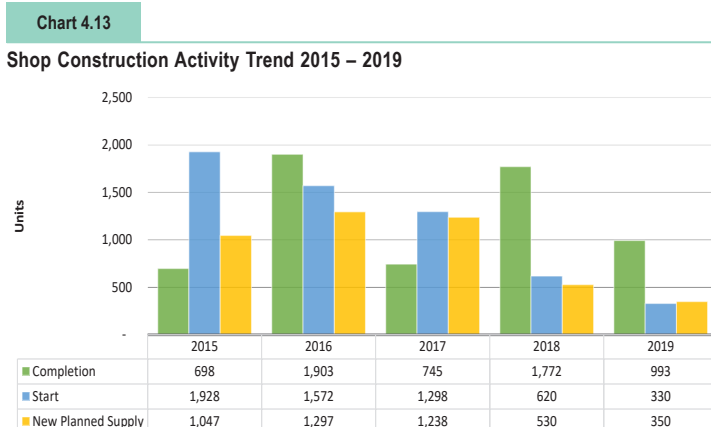


**Aktiviti Pembinaan**

Aktiviti pembinaan terus perlahan ditunjukkan oleh penguncupan dalam siap dibina, mula dan penawaran baru dirancang. Pada akhir tahun 2019, terdapat 107,504 unit kedai sedia ada dengan 6,836 unit lagi dalam penawaran yang akan datang dan 3,911 unit dalam penawaran yang dirancang.

**Construction Activity**

Construction activity continued to be slow indicated by the contraction in completion, start and new planned supply. As at end-2019, there were 107,504 existing shop units with another 6,836 units in the incoming supply and 3,911 units in the planned supply.



## Pangsapuri Khidmat / SOHO

### Transaksi

Subsektor mencatatkan 1,285 transaksi bernilai RM640.26 juta pada 2019 (2018: 987 unit bernilai RM514.36 juta) mencakupi 20.1% daripada transaksi harta komersial dan 7.1% daripada jumlah nilai.

### Status Pasaran

Terdapat 3,118 unit siap dibina tidak terjual dicatatkan bernilai RM1.63 bilion, meningkat dengan ketara 78.9% dalam bilangan dan 69.1% dalam nilai berbanding tahun sebelumnya (2018: 1,743 unit bernilai RM963 million). Pada situasi yang lebih baik, dalam pembinaan belum terjual dan belum dibina belum terjual menurun sebanyak 26.3% kepada 7,867 unit (2018: 10,681 unit) dan 91.3% kepada 202 unit (2018: 2,310 unit).

### Aktiviti Pembinaan

Aktiviti pembinaan menunjukkan pergerakan bercampur-campur dalam tempoh kajian. Siap dibina meningkat dengan ketara sebanyak 63.2% kepada 17,893 unit (2018: 10,963 unit). Sebaliknya, mula dibina dan penawaran baru dirancang masing-masing menyusut sebanyak 10.6% kepada 6,969 unit (2018: 7,795 unit) dan 80.9% kepada 2,448 unit (2018: 12,787 unit). Sehingga akhir 2019, terdapat 104,007 units pangsapuri khidmat/ SOHO sedia ada dengan 56,918 unit lagi dalam penawaran akan datang dan 21,791 unit dalam penawaran yang dirancang.

### Harga dan Sewa

Secara umum, harga pangsapuri khidmat dan SOHO berada pada mod stabil dengan beberapa pergerakan bercampur di skim-skim terpilih. Savanna Executive Suite dan Shaftsbury Residences di Cyberjaya mencatat

## Serviced Apartment / SOHO

### Transaction

*The sub-sector recorded 1,285 transactions worth RM640.26 million in 2019 (2018: 987 units worth RM514.36 million) accounting for 20.1% of the commercial property transactions and 7.1% of the total value.*

### Market Status

*There were 3,118 overhang units recorded worth RM1.63 billion, increased substantially by 78.9% in volume and 69.1% in value as compared to previous year (2018: 1,743 units worth RM963 million). On a better situation, the unsold under construction and not constructed declined by 26.3% to 7,867 units (2018: 10,681 units) and 91.3% to 202 units (2018: 2,310 units) respectively.*

### Construction Activity

*Construction activities showed mixed movements in the review period. Completion increased substantially by 63.2% to 17,893 units (2018: 10,963 units). On the contrary, start and new planned supply shrank by 10.6% to 6,969 units (2018: 7,795 units) and 80.9% to 2,448 units (2018: 12,787 units) respectively. As at end 2019, there were 104,007 existing serviced apartments/ SOHO units with another 56,918 units in the incoming supply and 21,791 units in the planned supply.*

### Price and Rental

*Generally, prices of serviced apartment and SOHO on a stable mode with some mixed movements noted in selected schemes. Savanna Executive Suite and Shaftsbury Residences in Cyberjaya recorded capital*



keuntungan modal pada 7.1% dan 15.8% disebabkan keutamaan pasaran yang tinggi. Pangsapuri khidmat yang mantap seperti Arte@Subang West di Shah Alam dan Glomac Centro di Petaling Jaya mencatat keuntungan modal 9.8% hingga 10.7% disebabkan lokasi yang strategik.

Selaras dengan peningkatan nilai, pasaran sewa menunjukkan trend menaik. One Avenue USJ dan Subang Park Homes di Mukim Petaling memperoleh sewa tertinggi pada RM2,150 hingga RM3,500 sebulan disebabkan lokasi yang baik dan tarikan kejiranan. Umumnya, purata pulangan sewa bagi pangsapuri khidmat dan SOHO adalah di antara 3.1% dan 6.1%.

## Kompleks Perniagaan

### Penghunian dan Ketersediaan Ruang

Subsektor niaga menyaksikan prestasi sedikit rendah berdasarkan purata kadar penghunian yang berkurang kepada 82.2% berbanding 84.3% pada 2018. Ambilan tahunan kekal positif pada 11,202 m.p., lebih rendah daripada 76,411 m.p. yang direkodkan tahun sebelumnya.

*gains at 7.1% and 15.8% due to high market preferences. Established serviced apartment such as Arte@Subang West in Shah Alam and Glomac Centro in Petaling Jaya recorded capital gains 9.8% to 10.7% due to its strategic location.*

*In tandem with value appreciation, rental market showed an upward trend. One Avenue USJ and Subang Park Homes in Mukim Petaling fetched the highest rental at RM2,150 to RM3,500 per month due to its good location and neighbourhood attractions. In general, serviced apartment and SOHO average rental yield are between 3.1% and 6.1%.*

## Shopping Complex

### Occupancy and Space Availability

*The retail sub-sector saw a slightly lesser performance as its average occupancy rate reduced to 82.2% as compared to 84.3% in 2018. The annual take-up remained positive at 11,202 s.m., lower than 76,411 s.m. recorded previous year.*

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Chart 4.14

Supply and Occupancy of Shopping Complex

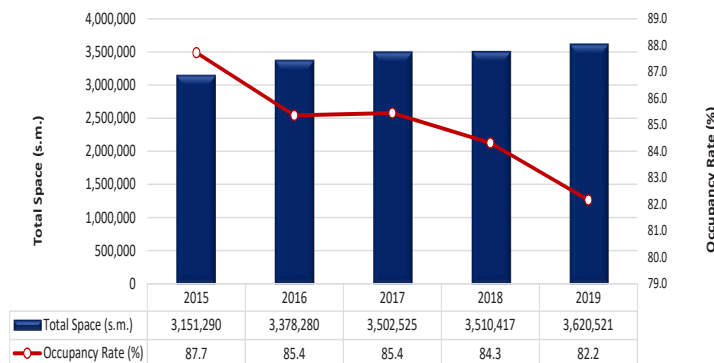


Table 4.2

Pertinent Movements in Shopping Complexes

No.	Shopping Complex	Estimated Space (s.m.)	Tenant Movement
1.	Plaza Alam Sentral	1,147	Move In
2.	M Square Puchong (Parkson)	26,663	Move Out
3.	SACC Mall Shah Alam	958	Move Out

## Aktiviti Pembinaan

Subsektor niaga menyaksikan dua siap dibina baru yang menyuntik 96,405 m.p. ke dalam pasaran. Pada akhir 2019, terdapat 151 kompleks membeli-belah sedia ada (3,620,521 m.p.) dengan enam kompleks (534,091 m.p.) dalam penawaran akan datang.

## Construction Activity

*The retail sub-sector witnessed two new completions which injected 96,405 s.m. into the market. As at end-2019, there were 151 existing shopping complexes (3,620,521 s.m.) with six complexes (534,091 s.m.) in the incoming supply.*

Table 4.3

## List of Completion for Shopping Complex

No.	Property	Location	Floor Area (s.m.)
1.	Central I-City Shopping Centre	Shah Alam	87,320
2.	Eco Sanctuary Mall	Banting	9,085

**Sewa**

Amnya, sewa ruang niaga stabil bagi kebanyakan kompleks membeli-belah dengan beberapa pengecualian. Pergerakan sewa menurun direkodkan di Mines Shopping Fair, Tropicana City Mall dan Citta Mall disebabkan lokasi pusat membeli-belah berkenaan di pinggir bandar dan kurang pengunjung. Sementara itu, tingkat bawah IOI City Mall di Sepang mencatatkan sewa yang stabil dari RM292.67 s.m.p. hingga RM486.35 s.m.p. sebulan disebabkan pembaharuan penyewaan dan semakan sewa.

**Pejabat Binaan Khas****Transaksi**

Segmen pejabat binaan khas menyaksikan beberapa transaksi utama pada 2019. Ini termasuk Menara Kurnia di Leisure Commerce Square, Jaya Square di Subang Jaya dan Casa Klang di Klang Town.

**Penghunian dan Ketersediaan Ruang**

Pejabat binaan khas merekodkan kadar penghunian purata sedikit lebih rendah iaitu 71.7% pada 2019 berbanding 74.1% pada 2018. Ambilan tahunan kekal positif pada 102,698 m.p. lebih rendah daripada 216,807 m.p. direkodkan pada 2018. Pergerakan penyewa utama seperti ditunjukkan di Jadual 4.4.

**Rental**

Generally, rentals of retail space were stable for most shopping complexes with few exceptions. Downtrend rental movements were recorded in Mines Shopping Fair, Tropicana City Mall and Citta Mall due to location of malls in the suburbs area and low footfall. Meanwhile, lower ground floor of IOI City Mall in Sepang recorded stable higher rental ranging from RM292.67 p.s.m. to RM486.35 p.s.m. per month due to tenancy renewal and rental revision.

**Purpose-Built Office****Transaction**

The purpose-built office segment saw several prominent transactions in 2019. These included Menara Kurnia at Leisure Commerce Square, Jaya Square in Subang Jaya and Casa Klang in Klang Town.

**Occupancy and Space Availability**

The purpose-built office recorded a slightly lower average occupancy rate of 71.7% in 2019 as compared with 74.1% in 2018. The annual take-up remained positive at 102,698 s.m. lower than 216,807 s.m. recorded in 2018. Pertinent movements of tenants as shown in Table 4.4.

Chart 4.15

## Supply and Occupancy of Purpose-Built Office

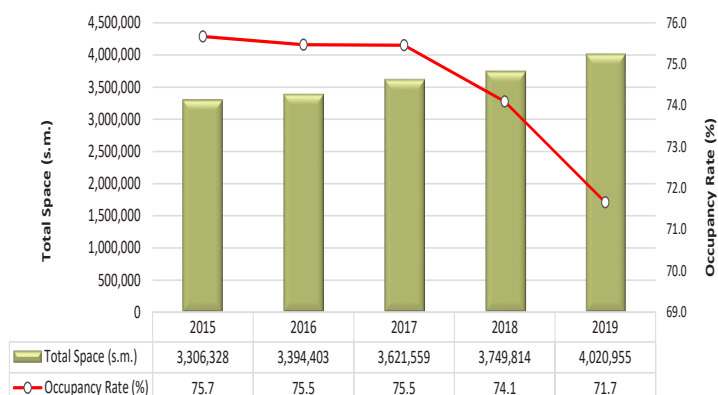




Table 4.4

## Pertinent Movements in Purpose-Built Office

No.	Shopping Complex	Estimated Space (s.m.)	Tenant Movement
1.	Wisma Mustapha Kamal	9,576	Move In
2.	Blok 3517, MIGHT Building, Cyberview	3,482	Move Out
3.	IOI Tower (Tower 2)	3,040	Move In
4.	Kompleks PKNS	3,394	Move Out
5.	Nucleus Tower	5,979	Move In
6.	Menara Axis	1,069	Move In
7.	Crystal Plaza	1,143	Move In
8.	Wisma Kemajuan	1,018	Move Out

## Aktiviti Pembinaan

Tempoh kajian mencatatkan lima bangunan baru siap dibina yang menyuntik sejumlah 124,407 m.p. ruang pejabat ke dalam pasaran. Sehingga akhir 2019, terdapat 242 kompleks membeli-belah sedia ada (4,020,955 m.p.) dengan lima kompleks (181,804 m.p.) dalam penawaran akan datang dan satu lagi (10,276 m.p.) dalam penawaran yang dirancang. Senarai pejabat binaan khas siap dibina adalah seperti di Jadual 4.5.

## Construction Activity

The review period registered the completion of five buildings which injected a total of 124,407 s.m. office space into the market. As at end-2019, there were 242 existing shopping complexes (4,020,955 s.m.) with five complexes (181,804 s.m.) in the incoming supply and another one (10,276 s.m.) in the planned supply. The list of completed purpose-built office is shown in Table 4.5.

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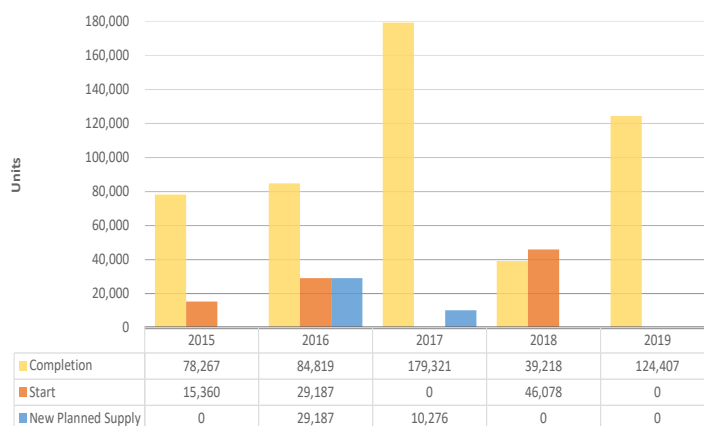
Table 4.5

## List of Completion for Purpose-Built Office

No.	Property	Location	Floor Area (s.m.)
1.	KYM Tower	Mutiara Damansara	14,081
2.	Menara Symphony	Petaling Jaya	23,506
3.	Menara BSN	Shah Alam	14,068
4.	Wisma Conlay	USJ	35,312
5.	1 Power House	Bandar Utama	37,440

Chart 4.16

## Construction Activity of Purpose-Built Office



## Sewa

Subsektor pejabat binaan khas terus merekodkan aliran stabil dengan pengecualian bagi Jaya 33, sewa menurun 8.5% hingga 14.3% dan Puchong Financial Corporate Centre (Tower 2) juga menurun 6.5% hingga 21.5% disebabkan penambahan ruang boleh disewa di dalam bangunan. Sewa dikurangkan untuk menarik penyewaan baru. Pada situasi lebih baik, sewa Century Square di Cyberjaya menunjukkan peningkatan 7.8% hingga 12.5% disebabkan pembaharuan penyewaan dan semakan sewa.

Pada Q4 2019, Indeks Sewa Pejabat Binaan Khas Selangor berada pada 125.3, naik 1.6% daripada 123.3 mata dalam Q4 2018. Purata Sewa Pejabat Binaan Khas pada Q4 2019 berada pada RM46.15 s.m.p., meningkat daripada RM45.42 s.m.p., direkodkan pada Q4 2018.

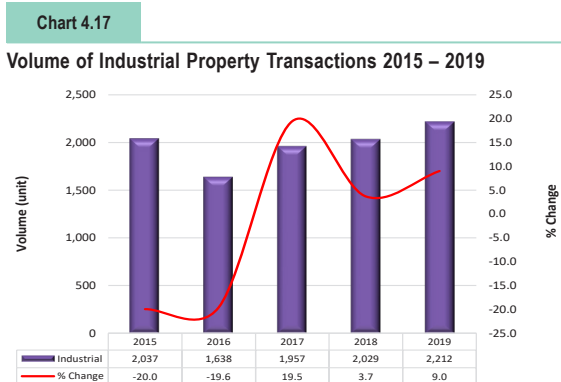
## Riadah

Pada akhir tahun 2019, terdapat 201 hotel (23,762 bilik) penawaran sedia ada dengan lima lagi hotel (1,843 bilik) dalam penawaran akan datang dan dua hotel (311 bilik) dalam penawaran yang dirancang.

## HARTA TANAH INDUSTRI

### Transaksi

Subsektor perindustrian merekodkan 2,212 transaksi bernilai RM8.28 bilion, naik 9.0% dalam bilangan manakala nilai sedikit berkurang 0.2% (2018: 2,029 transaksi bernilai RM8.29 bilion).



### Status Pasaran

Situasi industri tidak terjual menunjukkan prestasi yang lebih baik apabila jumlahnya berkurang dalam tempoh kajian. Trend ditunjukkan dalam Carta 4.19.

## Rental

The purpose-built office sub-sector continued to record stable trend with the exception of Jaya 33, rental dropped 8.5% to 14.3% and Puchong Financial Corporate Centre (Tower 2) which also dropped 6.5% to 21.5% due to additional rentable space in the building. Rental reduced to attract new tenancy. On a better situation, rental of Century Square in Cyberjaya showed an increase of 7.8% to 12.5% due to tenancy renewals and rental revisions.

As at Q4 2019, the Purpose-Built Office Rental Index for Selangor stood at 125.3, up by 1.6% from 123.3 points in Q4 2018. The Purpose-Built Office Average Rental as at Q4 2019 stood at RM46.15 p.s.m., increased from RM45.42 p.s.m., recorded in Q4 2018.

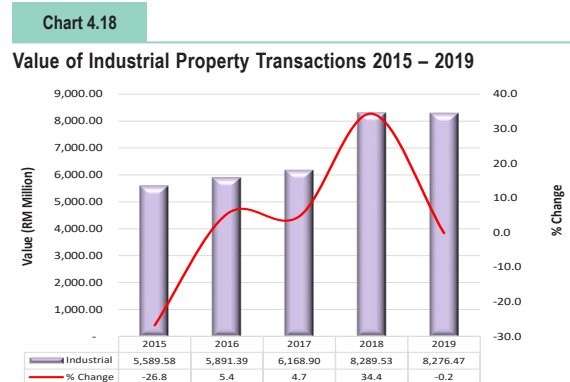
## Leisure

As at end-2019, there were 201 hotels (23,762 rooms) in the existing supply with another five hotels (1,843 rooms) in the incoming supply and two hotels (311 rooms) in the planned supply.

## INDUSTRIAL PROPERTY

### Transaction

The industrial sub-sector recorded 2,212 transactions worth RM8.28 bilion, up by 9.0% in volume whilst value reduced marginally by 0.2% (2018: 2,029 transactions worth RM8.29 bilion).

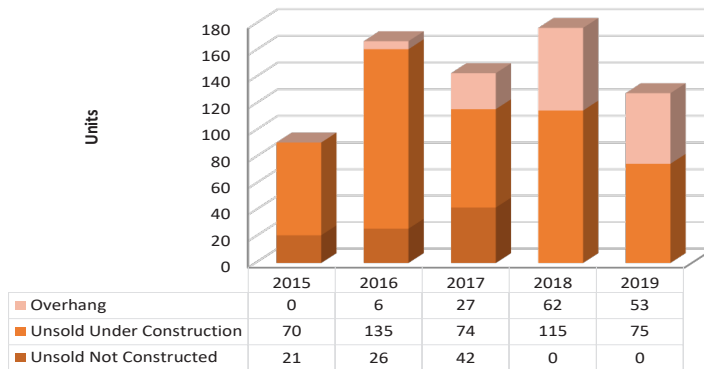


### Market Status

The Industrial overhang and unsold situation showed a better performance as the numbers reduced in the review period. The trend is shown in Chart 4.19.

Chart 4.19

Industrial Market Status Trend 2015 – 2019



### Aktiviti Pembinaan

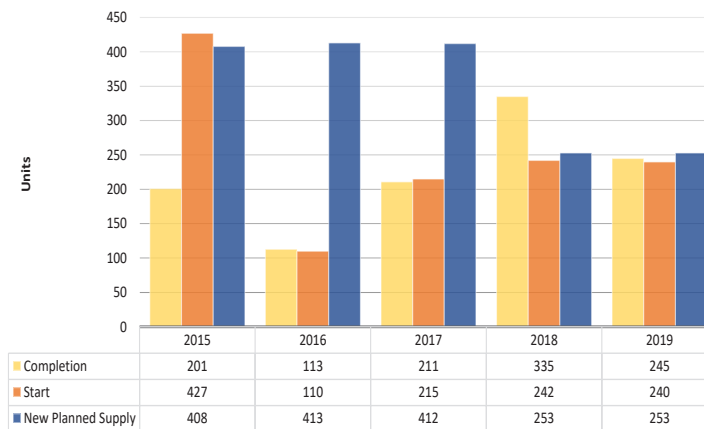
Aktiviti pembinaan kurang menggalakkan dalam tempoh kajian. Pada akhir tahun 2019, terdapat 40,701 unit industri sedia ada dengan 1,013 unit lagi dalam penawaran akan datang dan 1,674 unit dalam penawaran yang dirancang.

### Construction Activity

Construction activities were less encouraging in the review period. As at end-2019, there were 40,701 existing industrial units with another 1,013 units in the incoming supply and 1,674 units in the planned supply.

Chart 4.20

Industrial Construction Activity Trend 2015 – 2019



### Harga

Harga harta tanah industri menunjukkan prestasi bercampur-campur. Kilang berkembar satu setengah tingkat di Daerah Hulu Langat mencecah antara RM2,600,000 dan RM2,800,000, turun 10.0% di Bandar Teknologi. Pada situasi yang lebih baik, Kilang sesebuah satu setengah tingkat di Bukit Raja Prime Industrial Park menyaksikan peningkatan harga 12.8% kepada RM5,800,000.

### Price

Prices of industrial property showed a mixed performance. One and a-half storey semi-detached factory in Hulu Langat District fetched between RM2,600,000 and RM2,800,000, down by 10.0% in Bandar Teknologi. On a better note, one and a-half storey detached factory in Bukit Raja Prime Industrial Park saw a price increase of 12.8% to RM5,800,000.

## PROSPEK 2020

Prestasi pasaran harta tanah Selangor dijangka bertambah baik dan kekal positif pada 2020. Keadaan ini disokong oleh pelbagai projek pembangunan yang sedang berjalan dan dirancang. Pembangunan infrastruktur pengangkutan kekal menjadi fokus negeri di mana dalam Bajet Selangor 2020, RM353.5 juta diperuntukkan bagi pembangunan infrastruktur. Sistem pengangkutan dan perhubungan yang lebih baik akan menjadi pemangkin kepada pembangunan pasaran harta tanah Selangor dan ekonomi masa hadapan.

Projek-projek infrastruktur yang akan memberi kesan positif kepada pasaran harta tanah Selangor adalah:

- Projek Transit Aliran Ringan 3 (LRT3), dijadualkan siap pada tahun 2024.
- Pembinaan Lebuhraya Bertingkat Sungai Besi-Ulu Klang (SUKU) dan Lebuhraya Bertingkat Damansara-Shah Alam (DASH) dijadualkan siap pada 2020.
- Laluan MRT Sungai Buloh-Serdang-Putrajaya (Laluan SSP), yang sedang dalam pembinaan berpotensi untuk pembangunan berorientasikan transit (TOD).
- Lebuhraya Setiawangsa-Pantai (SPE) dijangka siap menjelang suku pertama 2020.
- Laluan Rel Pantai Timur (ECRL), sepanjang 648 kilometer dari Kota Bharu-Mentakab, Jelevu, Kuala Klawang, Bangi/Kajang, Putrajaya-Pelabuhan Klang. Projek ini menyediakan 20 stesen, terdiri daripada 14 stesen penumpang, lima stesen penumpang dan kargo serta satu stesen kargo. Projek ini dijangka siap pada Disember 2026.
- Projek Pintasan Kereta Api Serendah-Pelabuhan Klang akan menjadi Koridor Logistik Klang yang baharu, lebuhraya logistik yang menghubungkan Pelabuhan Utara, Pelabuhan Barat dan lebuhraya sedia ada dengan cekap. Kajian kemungkinan projek akan dijalankan oleh Kementerian Pengangkutan pada tahun hadapan.

Mengenai subsektor kediaman, untuk meningkatkan pemilikan rumah, Kerajaan Negeri dalam Bajet Selangor 2020 masih melaksanakan beberapa inisiatif terdahulu. Ini adalah:

- Rumah SelangorKu - Usaha kerajaan negeri melalui Lembaga Perumahan dan Hartanah Selangor (LPHS) untuk menyediakan rumah mampu milik di lokasi strategik. Antara lokasi adalah di Daerah Petaling, Hulu Langat, Gombak, Sepang dan Klang. Pada Ogos 2019, sejumlah 112,852 unit (262

## 2020 OUTLOOK

*The performance of Selangor property market is expected to improve and remain positive for 2020. The situation is underpinned by various on-going and proposed development projects. Transport infrastructure development remains the state's focus where in the Selangor 2020 Budget, RM353.5 million is allocated for infrastructure development. The improved accessibility and connectivity system will serve as a catalyst for the future development of the Selangor property market and economy.*

*The infrastructure projects which will positively impact to the Selangor property market are:*

- *Light Rail Transit 3 (LRT3) project, scheduled to be completed in 2024.*
- *Construction of the Sungai Besi-Ulu Klang Elevated Expressway (SUKU) and Damansara-Shah Alam Elevated Expressway (DASH) expressways is scheduled for completion in 2020.*
- *The Sungai Buloh-Serdang-Putrajaya MRT Line (SSP Line), which is currently under construction has potential for transit-oriented development (TOD).*
- *The Setiawangsa-Pantai Expressway (SPE) is expected to be completed by the first quarter of 2020.*
- *East Coast Rail Link (ECRL), stretching 648 kilometers from Kota Bharu-Mentakab, Jelevu, Kuala Klawang, Bangi/Kajang, Putrajaya-Port Klang. The project provides 20 stations, comprising 14 passenger stations, five passenger and freight stations and one freight station. Expected to be completed by December 2026.*
- *The Serendah-Port Klang Rail Bypass project will be the new Klang Logistics Corridor, a logistics highway that link the Northern Port, Western Port and existing highways efficiently. The feasibility study of the project will be conducted by the Transport Ministry by next year.*

*On the residential sub-sector, to increase home ownership, the State Government in the Selangor 2020 Budget is still pursuing some of the previous initiatives. These are:*

- *Rumah SelangorKu – The state government's effort through the Selangor Housing and Real Estate Board (LPHS) to provide affordable housing in a strategic location. Among of the locations are in the District of Petaling, Hulu Langat, Gombak, Sepang and Klang. As at August 2019, a total of 112,852*

projek) Rumah SelangorKu telah diluluskan oleh Kerajaan Negeri. Daripada jumlah ini, 11,555 unit (25 projek) telah dimajukan oleh agensi-agensi di bawah Negeri Selangor manakala baki 101,297 unit (216 projek) dibangunkan oleh pemaju swasta. Bagi tahun 2020, Kerajaan Negeri akan membina 6,379 unit Rumah SelangorKu melalui 19 projek perumahan. Kerajaan Negeri bermatlamat untuk menyiapkan 22,664 unit Rumah SelangorKu menjelang 2023.

- Skim Smart Sewa - Kerajaan Negeri akan meneruskan Skim Smart Sewa dengan memperuntukkan dana tambahan untuk membeli unit kediaman di lokasi strategik dan menyewakannya kepada rakyat yang berkelayakan. Sebanyak 100 unit akan dibeli untuk mempercepat pelaksanaan Skim Smart Sewa dengan anggaran harga belian sebanyak RM200,000 seunit yang memberi impak kewangan keseluruhan sebanyak RM20 juta.
- Rumah Idaman - Objektif utama Rumah Idaman adalah untuk meningkatkan sosio-ekonomi golongan berpendapatan rendah (B40) dan sederhana (M40) melalui persekitaran hidup yang kondusif yang dapat meningkatkan kualiti hidup mereka. Dianggarkan 30,000 unit Rumah Idaman akan dibina, mewujudkan nilai ekonomi sebanyak RM7.5 bilion dan memberi impak ekonomi positif kepada industri pembinaan dan kewangan. Sebanyak 4,800 unit meliputi kawasan Kajang, Bangi dan Paya Jaras telah diluluskan untuk pembinaan dan dijangka siap dalam tempoh tiga tahun.
- Skim Rent-To-Own (RTO) - Pembiayaan sebanyak RM10 bilion disediakan oleh institusi kewangan dengan sokongan kerajaan persekutuan menerusi peruntukan jaminan 30%. Di bawah skim ini, pembeli Rumah Idaman akan menyewa sehingga lima tahun dan selepas satu tahun diberi pilihan untuk membeli rumah dengan harga RM250,000 seperti yang telah dipersetujui semasa menandatangani perjanjian penyewaan.

Beberapa projek perbandaran baharu yang dijangka merangsang pasaran harta tanah di Selangor, adalah:

- Eco Forest, Semenyih – merupakan projek pembangunan bercampur di atas tanah pegangan bebas seluas 208 hektar, yang terletak bersebelahan Broga Hills. Fasa pertama yang diperkenalkan di Eco Forest adalah Ebonylane. Ia terdiri daripada 685 unit rumah teres dua tingkat iaitu Artisan Homes, berharga RM598,000 dan Garden Homes, berharga RM792,000.
- Gamuda Cove, Lembah Klang Selatan - Perbandaran baharu yang terletak di sepanjang Lebuhraya ELITE. Dibangunkan oleh Gamuda Land dan menjadi nukleus Lembah Klang Selatan. Pemaju pertama kali

*units (262 projects) Rumah SelangorKu have been approved by the State Government. Of these, 11,555 units (25 projects) were developed by the Selangor State Agencies while the remaining 101,297 units (216 projects) were developed by private developers. For 2020, the State Government will build 6,379 units of Rumah SelangorKu through 19 housing projects. The State Government aims to complete 22,664 units of Rumah SelangorKu by 2023.*

- *Smart Rent Scheme – The State Government will continue the Smart-Rent Scheme by allocating additional funds for purchase residential units at strategic locations and rent it out to the qualified peoples. A total of 100 units will be purchased to accelerate the implementation of the Smart Rent Scheme with an estimated purchase price of RM200,000 per unit which has an overall financial impact of RM20 million.*
- *Rumah Idaman - The main objective of the Idaman House is to improve the socio-economy of low-income (B40) and middle-income (M40) groups through conducive living environment to improve their quality of living. An estimated 30,000 units of Rumah Idaman will be built, creating economic value of RM7.5 billion and giving a positive economic impact to the construction and financial industry. A total of 4,800 units covering the Kajang, Bangi and Paya Jaras areas have been approved for construction and are expected to be completed within three years.*
- *Skim Rent-To-Own (RTO) - Funding of RM10 billion was provided by financial institutions with the federal government support through the provision of 30% guarantee. Under this scheme, buyers of Rumah Idaman will rent for up to five years and after one year are given the option to buy the house at an agreed price of RM250,000 stated in the lease agreement.*

*Several new township projects that are expected to stimulate the property market in Selangor are:*

- *Eco Forest, Semenyih - A mixed development project on 208 hectares of freehold land, located next to Broga Hills. The first phase introduced in Eco Forest is Ebonylane. It consists of 685 units two-storey terraced houses namely Artisan Homes, priced from RM598,000 and Garden Homes, priced at RM792,000.*
- *Gamuda Cove, Southern Klang Valley - The new township located along the ELITE Expressway, developed by Gamuda Land and become the nucleus of the South Klang Valley. The developer*



memperkenalkan Gamuda Cove pada September 2018 dan pembangunan pertamanya adalah Palma Sands dan Maya Bay Residences. Ianya terdiri daripada 490 unit rumah teres dua tingkat dan 972 unit pangsapuri perkhidmatan. Palma Sands dijangka siap menjelang 2021 manakala Maya Bay dijangka siap menjelang 2022. Keseluruhan projek pembangunan dijangka siap menjelang 2038.

- Setia Ecohill 2, Semenyih Setia Ecohill 2 - Perbandaran 408 hektar yang dibangunkan oleh Setia Hill Sdn Bhd dan terletak di Beranang, Daerah Hulu Langat. Ia menawarkan pembangunan bercampur yang terdiri daripada rumah teres dua tingkat, berkembar dan sesebuah, plot sesebuah dan komersial. Pembangunan dijangka siap pada tahun 2021.
- Bandar Raudah, Cyber Valley Selangor, Cyberjaya - Raudah City akan menjadi bandar Islam moden pertama di Malaysia, dilengkapi dengan dewan pendidikan, perpustakaan dan pusat komputer. Ia akan menjadi pusat pengetahuan Islam untuk pembelajaran sepanjang hayat. Ia merupakan projek mega yang dibangunkan oleh PKNS dan Raudah City Sdn Bhd. PKNS Raudah Ville adalah sebahagian daripada Raudah City, dijangka siap menjelang 2020.

Pembangunan bercampur lain yang sedang dimajukan adalah seperti berikut:

- Meta City, Sri Kembangan
- Emerald 9 Cheras
- Twentyfive.7, Kota Kemuning
- Kita @ Cybersouth
- Horizon di Sepang
- Serenia City, Sepang

Dalam subsektor komersial, Kerajaan Negeri akan memajukan projek pembangunan bersepadu yang dikenali sebagai Selangor Business Capital (SBC). Ini adalah selaras dengan cita-cita kerajaan negeri untuk menjadikan Selangor sebagai negeri pintar terkemuka di Asia Tenggara. Salah satu kelebihan SBC adalah lokasinya yang strategik. Ia terletak di antara Cyberjaya, Putrajaya serta KLIA 1 dan KLIA 2. Anggaran nilai pembangunan kasar adalah RM12 bilion. Pembangunan ini juga menyediakan pusat konvensyen dan persidangan bertaraf dunia, hotel bertaraf 5 bintang, pusat membeli-belah, bangunan pejabat, kediaman dan pelbagai kemudahan sokongan lain.

Sementara itu, subsector industri memainkan peranan penting dalam pertumbuhan dan kestabilan ekonomi Selangor. Dalam usaha mencapai kecemerlangan dalam subsector industri, Kerajaan Negeri mensasarkan untuk melabur RM10 bilion dalam pembuatan. Dari Januari

*first introduced Gamuda Cove in September 2018 and its first development is Palma Sands and Maya Bay Residences. It comprises 490 units of two-storey terraced houses and 972 units of service apartments. The Palma Sands is expected to be completed by 2021 while Maya Bay is expected to be completed by 2022. The entire development project is expected to be completed by 2038.*

- *Setia Ecohill 2, Semenyih Setia Ecohill 2 – The 408-hectare township developed by Setia Hill Sdn Bhd and located in Beranang, District of Hulu Langat. It offers mixed development consisting of two-storey terraces, semi-detach and detach houses, detached plot and a commercial park. The development is expected to be completed by 2021.*
- *Raudah City, Selangor Cyber Valley, Cyberjaya – Raudah City will be Malaysia's first modern Islamic city, complemented by educational halls, libraries and computer centers. It will be the center of Islamic knowledge for lifelong learning. This is a mega project developed by PKNS and Raudah City Sdn Bhd. PKNS Raudah Ville is part of Raudah City is expected to be completed by 2020.*

*Other mixed development currently under construction are as follows:*

- *Meta City, Sri Kembangan*
- *Emerald 9 Cheras*
- *Twentyfive.7, Kota Kemuning*
- *Kita @ Cybersouth*
- *Horizon in Sepang*
- *Serenia City, Sepang*

*In the commercial sub-sector, the State Government will develop an integrated development project known as Selangor Business Capital (SBC). This is in line with the ambitions of the state government to make Selangor the leading smart state in Southeast Asia. One of the advantage of the SBC is its strategic location. It is located between Cyberjaya, Putrajaya as well as KLIA 1 and KLIA 2. The estimated gross development value is RM12 billion. The development also provides world-class convention and conference centers, 5-star hotels, shopping malls, office buildings, residential and a host of other support facilities.*

*Meanwhile, the industrial sub-sector plays a significant role in Selangor's economic growth and stability. In pursuit of excellence in the industrial sub-sector, the State Government is aiming at investing RM10 billion in manufacturing. From January to June 2019, 132*

hingga Jun 2019, 132 projek pembuatan telah diluluskan oleh Lembaga Pembangunan Pelaburan Malaysia (MIDA) di Selangor dengan nilai pelaburan RM5.96 bilion. RM2.15 bilion adalah dari pelaburan tempatan manakala RM3.82 bilion adalah daripada pelaburan asing. Kerajaan Negeri, berdasarkan Bajet 2020, merancang untuk membangunkan Kawasan Perindustrian Elektrik dan Elektronik di atas sebidang tanah seluas 242.8 hektar.

Di antara pembangunan industri yang sedang dilaksanakan di Selangor:

- Taman Perindustrian Bandar Bukit Raja
- Kota Seri Langat
- Eco Grandeur
- Taman Perindustrian Serenia City
- Taman Perindustrian Tanjung
- Taman Industri KLIA

*manufacturing projects were approved by the Malaysian Investment Development Authority (MIDA) in Selangor with an investment value of RM5.96 billion. RM2.15 billion is from local investment while RM3.82 billion is from foreign investment. The State Government, based on 2020 Budget, plans to develop the Electric and Electronic Industrial Area on a 242.8-hectare piece of land.*

*Selected ongoing industrial development in Selangor:*

- *Bandar Bukit Raja Industrial Park*
- *Kota Seri Langat*
- *Eco Grandeur*
- *Serenia City Industrial Park*
- *Tanjung Industrial Park*
- *KLIA Industry Park*

# JOHOR





# JOHOR

## GAMBARAN KESELURUHAN

Prestasi pasaran harta tanah negeri meningkat pada kadar yang perlahan dalam tempoh kajian. Terdapat 43,314 transaksi direkodkan, menunjukkan peningkatan kecil 4.0% manakala nilai transaksi menurun sedikit 0.9% kepada RM19.15 bilion berbanding 2018 (41,653 transaksi bernilai RM19.33 bilion). Harta tanah kediaman kekal sebagai subsektor utama, mendominasi 66.7% daripada keseluruhan aktiviti pasaran, diikuti subsektor pertanian dengan 18.1% syer.

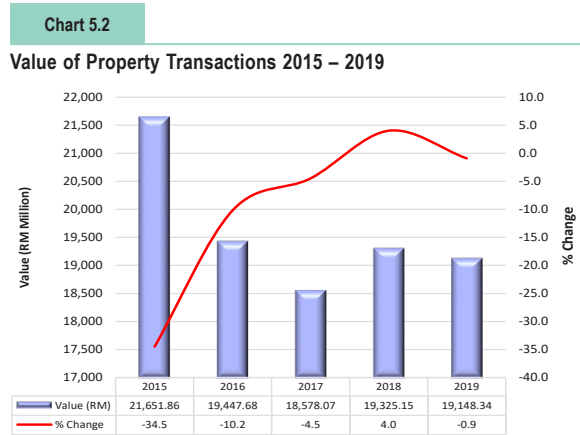
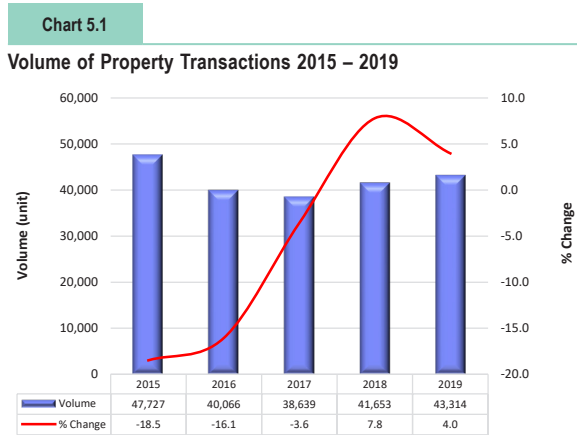
Pergerakan pasaran semua subsektor berada pada aliran menaik kecuali subsektor pertanian yang menurun sedikit kepada 8.6%. Dari segi nilai, subsektor kediaman mencatatkan aliran meningkat sebanyak 15.3%, manakala subsektor lain menunjukkan sebaliknya.

## OVERVIEW

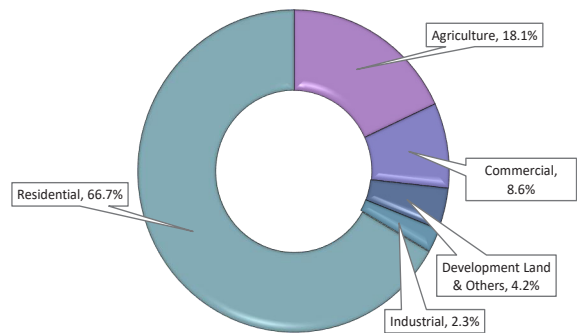
The state's property market performance increased at a slow pace in the review period. There were 43,314 transactions recorded, indicating a marginal increase of 4.0% whilst transactions value decreased by a mere of 0.9% to RM19.15 billion against 2018 (41,653 transactions worth RM19.33 billion). The residential property remained the leading sub-sector, dominating 66.7% of overall market activity, followed by agriculture sub-sector with 18.1% market share.

Market movements across all sub-sectors were on the uptrend except for agriculture sub-sector which decreased by 8.6%. In terms of value, residential sub-sector observed an uptrend of 15.3%, whereas others sub-sectors showed otherwise.

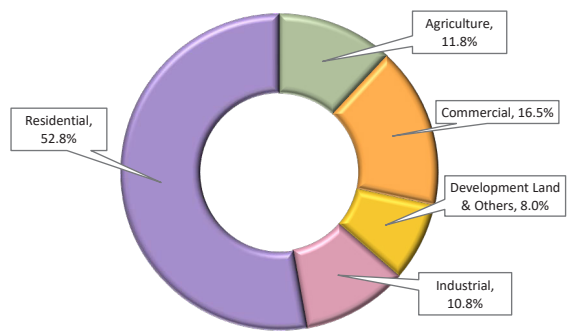
42



**Chart 5.3**  
Contribution to Transaction Volume by Sub-sector 2019



**Chart 5.4**  
Contribution to Transaction Value by Sub-sector 2019



## PROMINENT SALES

Table 5.1

### Summary of Prominent Sales in 2019

No.	Property	Location	Transaction Year
1.	Timjaya Building	Johor Bahru	2019
2.	KPJ Specialist Hospital	Batu Pahat	2019
3.	40.613-hectare estate land	Johor Bahru	2018
4.	25.270-hectare estate land	Segamat	2018
5.	MYDIN Mutiara Rini	Johor Bahru	2018
6.	Selesa Hotel	Johor Bahru	2017
7.	Commercial Building	Johor Bahru	2017
8.	Regency Hospital	Masai	2017

Tempoh kajian juga menyaksikan beberapa pembelian pukal. Antaranya ialah 20 plot berkembar industri di Alam Jaya Bussinees Park, Pontian, lapan plot kediaman di Taman Sri Amar, Johor Bahru, 218 plot kediaman dan komersial di Taman Cantik, Senai dan 100 plot terrace di Taman Permata Impian, Kulai.

*The review period also saw several bulk purchases. Among these were 20 semi-detached industrial plots in Alam Jaya Bussinees Park, Pontian, eight residential plots in Taman Sri Amar, Johor Bahru, 218 residential and commercial plots in Taman Cantik, Senai and 100 terraced plots in Taman Permata Impian, Kulai.*

## HARTA TANAH KEDIAMAN

### Transaksi

Subsektor mencatatkan 28,904 transaksi bernilai RM10.12 bilion, meningkat 7.5% dalam bilangan dan 15.3% dalam nilai. Rumah teres menguasai 53.8% (15,552 unit) transaksi harta kediaman yang merangkumi 6,235 teres satu tingkat dan 9,321 teres dua tingkat.

## RESIDENTIAL PROPERTY

### Transaction

*The sub-sector recorded 28,904 transactions worth RM10.12 billion, increase by 7.5% in volume and 15.3% in value. Terraced houses dominated 53.8% (15,552 units) of the residential property transactions comprising 6,235 single storey terraces and 9,321 double storey terraces.*

Chart 5.5

### Volume of Residential Property Transactions 2015 – 2019

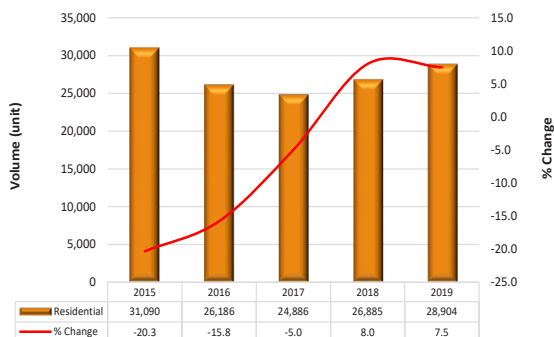
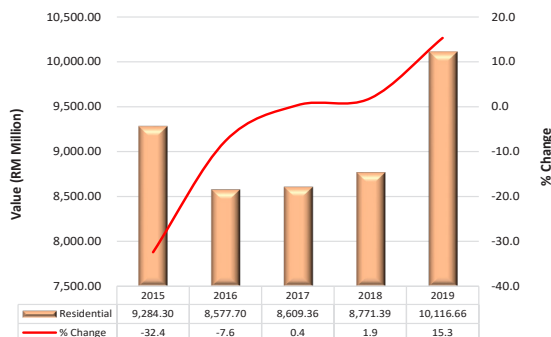


Chart 5.6

### Value of Residential Property Transactions 2015 – 2019



## Pelancaran Baharu

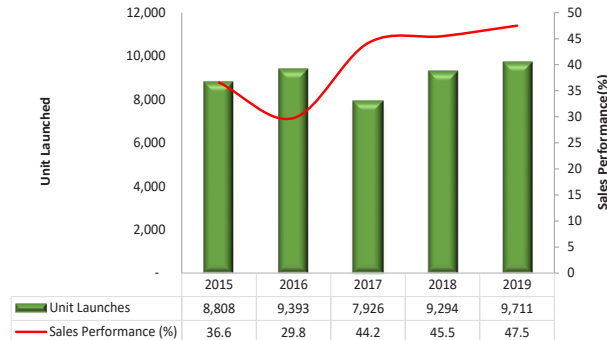
Pasaran kediaman utama menyaksikan 9,711 unit pelancaran baharu, naik 4.5% berbanding 9,294 unit yang direkodkan pada 2018. Begitu juga, prestasi jualan meningkat sedikit kepada 47.5% (2018: 45.5%). Berdasarkan jenis harta, rumah teres dua hingga tiga tingkat membentuk sebahagian besar pelancaran baru, iaitu 53.5% (5,193 unit) daripada jumlah keseluruhan.

## New Launches

The primary residential market saw the launching of 9,711 units, up by 4.5% as compared to 9,294 units recorded in 2018. Similarly, sales performance increase slightly to 47.5% (2018: 45.5%). By property type, two to three storey terrace houses formed the bulk of the new launches, accounting 53.5% (5,193 units) of total.

Chart 5.7

New Launches Trend 2015 – 2019



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## Status Pasaran

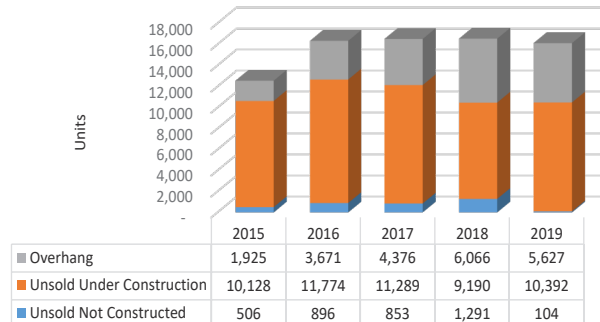
Kediaman siap dibina tidak terjual menyaksikan trend positif di mana pasaran secara beransur-ansur memantau unit-unit yang belum dijual.

## Market Status

The overhang situation saw a positive trend as market gradually observed the unsold completed units.

Chart 5.8

Residential Market Status Trend 2015 – 2019

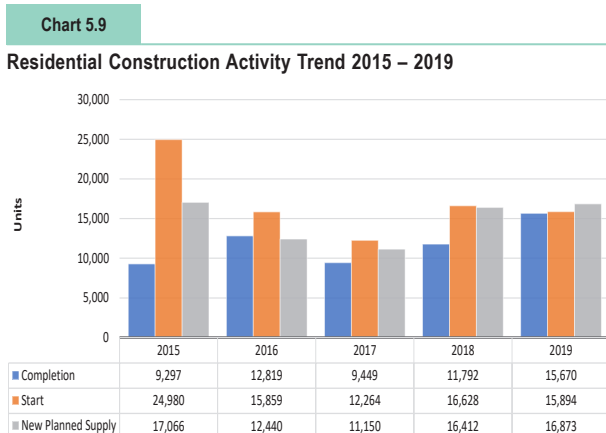


## Aktiviti Pembinaan

Subsektor merekodkan lebih banyak aktiviti pembinaan memandangkan bilangan siap dibina dan penawaran baru dirancang meningkat dalam tempoh kajian. Walau bagaimanapun, mula dibina mencatatkan bilangan lebih rendah berbanding tahun sebelum. Sehingga akhir 2019, terdapat 838,528 unit kediaman sedia ada dengan 59,836 unit lagi dalam penawaran akan datang dan 79,771 unit dalam penawaran yang dirancang.

## Construction Activity

The sub-sector recorded more construction activities as the number of completion and new planned supply raise in the review period. However, start recorded lesser number as compared to previous year. As at end-2019, there were 838,528 existing residential units with another 59,836 units in the incoming supply and 79,771 units in the planned supply.



## Harga dan Sewa

Pergerakan harga harta tanah kediaman berbeza-beza pada tempoh kajian. Teres setingkat di Taman Molek, Taman Skudai dan Taman Pulai Utama di Johor Bahru mencatatkan peningkatan modal 11.1% hingga 12.3% kerana permintaan yang tinggi untuk jenis harta tanah berkenaan. Walau bagaimanapun, teres dua tingkat di Horizon Hill dan Taman Pasir Putih di Johor Bahru menyaksikan penurunan harga, jatuh 5.3% hingga 10.1%. Pada situasi sama, harga kediaman bertingkat tinggi juga menunjukkan tanda sederhana. Pada Q4 2019, Indeks Harga Semua Rumah untuk negeri berada pada 227.3 mata, naik 1.8% daripada 223.3 mata pada Q4 2018. Harga Purata Semua Rumah untuk negeri pada Q4 2019 berada pada RM354,753, meningkat daripada RM348,420 pada Q4 2018.

Pasaran sewa kediaman amnya stabil dengan beberapa pengecualian. Sewa rumah teres dan kediaman bertingkat tinggi di lokasi yang baik, berdekatan pusat bandar dan dilengkapi jaringan jalan yang cekap, terutamanya yang terletak di Johor Bahru menunjukkan peningkatan. Kenaikan ketara yang lain telah direkodkan di Kota Tinggi dan Kluang disebabkan lokasinya yang baik, pembaharuan penyewaan dan semakan sewa serta tarikan kejiranan.

## HARTA TANAH KOMERSIAL

### Transaksi

Subsektor komersial merekodkan 3,706 transaksi dengan jumlah nilai RM3.17 bilion pada 2019. Ini menunjukkan peningkatan 5.8% dalam bilangan manakala nilai turun 2.1% berbanding tahun sebelum (2018: 3,504 transaksi bernilai RM3.23 bilion).

## Price and Rental

*Price movements of residential properties varied during the review period. Single storey terrace in Taman Molek, Taman Skudai and Taman Pulai Utama in Johor Bahru charted capital appreciations of 11.1% to 12.3% due to high demand for the type of property. However, double storey terrace in Horizon Hill and Taman Pasir Putih in Johor Bahru saw prices softening, dropped by 5.3% to 10.1%. On similar note, prices of high-rise units also showed signs of moderating. As at Q4 2019, the All House Price Index for the state stood at 227.3 points, up by 1.8% from 223.3 points in Q4 2018. The average All House Price for the state as at Q4 2019 stood at RM354,753 increased from RM348,420 in Q4 2018.*

*The residential rental market was largely stable with a few exceptions. Rentals of terraces and high-rise units in good location, adjacent to city centres and served with efficient road linkages obtained substantial increase particularly those located in Johor Bahru. Other notable increases were recorded in Kota Tinggi and Kluang due to its good location, tenancy renewals and rental revisions as well as neighbourhood attractions.*

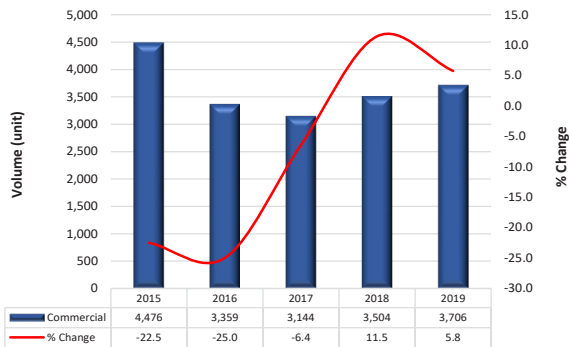
## COMMERCIAL PROPERTY

### Transaction

*The commercial sub-sector recorded 3,706 transactions with a total value RM3.17 billion in 2019. This indicated an increase of 5.8% in volume while value dropped by 2.1% as compared to previous year (2018: 3,504 transactions worth RM3.23 billion).*

Chart 5.10

Volume of Commercial Property Transactions 2015 – 2019



## Kedai

### Transaksi

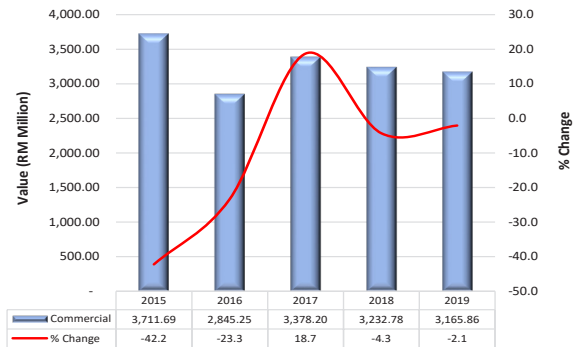
Subsektor kedai merekodkan 2,308 transaksi bernilai RM1.90 bilion pada 2019 (2018: 2,343 unit bernilai RM1.68 bilion) mencakupi 62.3% daripada transaksi harta komersial dan 59.8% daripada jumlah nilai. Kedai dua hingga dua setengah tingkat mendominasi 59.3% (1,369 unit) daripada transaksi harta kedai.

### Status Pasaran

Situasi kedai siap dibina tidak terjual, dalam pembinaan dan belum dibina belum terjual kurang memberansangkan pada tahun kajian. Trend ini ditunjukkan di Carta 13.12.

Chart 5.11

Value of Commercial Property Transactions 2015 – 2019



## Shop

### Transaction

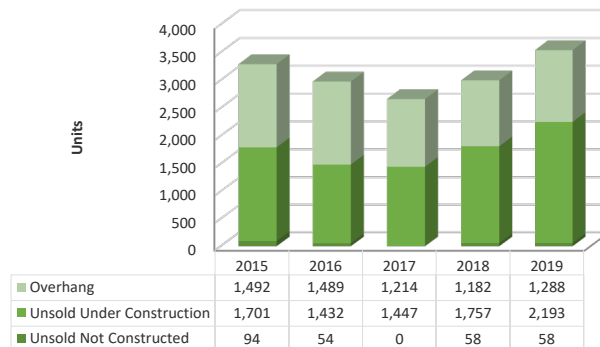
Shop sub-sector recorded 2,308 transactions worth RM1.90 billion in 2019 (2018: 2,343 units worth RM1.68 billion) accounting for 62.3% of the commercial property transactions and 59.8% of the total value. Two to two and a-half storey shops dominated 59.3% (1,369 units) of the shop property transactions.

### Market Status

The shop overhang and unsold situation was less promising in the review period. The trend is shown in Chart 5.12.

Chart 5.12

Shop Market Status Trend 2015 – 2019



## Aktiviti Pembinaan

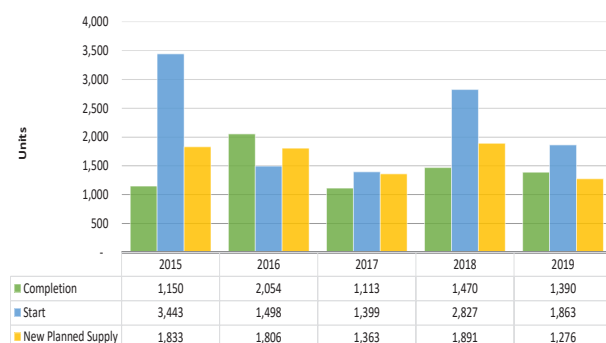
Aktiviti pembinaan berada pada mod sederhana berdasarkan siap dibina, mula dibina dan penawaran baru dirancang menguncup dalam tempoh kajian. Pada akhir 2019, terdapat 87,673 unit kedai sedia ada dengan 10,677 unit lagi dalam penawaran akan datang dan 9,601 unit dalam penawaran yang dirancang.

## Construction Activity

The construction activity was on a low mode as completion, start and new planned supply contracted in the review period. As at end-2019, there were 87,673 units existing shop units with another 10,677 units in the incoming supply and 9,601 units in the planned supply.

**Chart 5.13**

**Shop Construction Activity Trend 2015 – 2019**



## Pangsapuri Khidmat/ SOHO

### Transaksi

Subsektor mencatatkan 516 transaksi bernilai RM238.18 juta pada 2019 (2018: 298 unit bernilai RM128.6 juta mencakupi 13.9% daripada transaksi harta komersial dan 7.5% daripada jumlah nilai.

### Status Pasaran

Terdapat 12,710 unit siap dibina tidak terjual dicatatkan bernilai RM11.81 bilion, meningkat dengan ketara 54.9% dalam bilangan dan 80.7% dalam nilai berbanding tahun sebelumnya (2018: 8,204 unit bernilai RM6.53 bilion). Pada situasi yang lebih baik, dalam pembinaan belum terjual menurun 36.9% kepada 11,579 unit (2018: 18,357 unit).

### Aktiviti Pembinaan

Aktiviti pembinaan menunjukkan pergerakan bercampur-campur dalam tempoh kajian. Siap dibina meningkat dua kali ganda kepada 18,015 unit (2018: 8,576 unit) sementara itu, penawaran baru dirancang naik 5.8% kepada 12,717 unit (2018: 12,023 unit). Sebaliknya, mula dibina merosot 52.8% kepada 3,724 unit (2018: 7,895 unit). Pada akhir 2019, terdapat 81,989 unit pangsapuri khidmat/ SOHO sedia ada dengan 24,695 unit lagi dalam penawaran akan datang dan 61,915 unit dalam penawaran yang dirancang.

### Harga dan Sewa

Trend harga bagi pangsapuri khidmat dan SOHO di seluruh negeri sebahagian besarnya stabil dengan kenaikan marginal dilihat di Scott Towers, Johor Bahru yang dipindahmilik di antara RM365,000 dan RM430,000. Pada situasi sama, pasaran sewa umumnya stabil dengan pergerakan positif direkodkan di beberapa kawasan seperti Prima Regency Service Apartment dan Idaman Residence

## Serviced Apartment/ SOHO

### Transaction

*The sub-sector recorded 516 transactions worth RM238.18 million in 2019 (2018: 298 units worth RM128.6 million) accounting for 13.9% of the commercial property transactions and 7.5% of the total value.*

### Market Status

*There were 12,710 overhang units recorded worth RM11.81 billion, increased substantially by 54.9% in volume and 80.7% in value as compared to previous year (2018: 8,204 units worth RM6.53 billion). On a better note, the unsold under construction declined by 36.9% to 11,579 units (2018: 18,357 units).*

### Construction Activity

*Construction activities showed mixed movements in the review period. Completion increased by more than double to 18,015 units (2018: 8,576 units) meanwhile, new planned supply up by 5.8% to 12,717 units (2018: 12,023 units). On the contrary, start shrank by 52.8% to 3,724 units (2018: 7,895 units). As at end 2019, there were 81,989 existing serviced apartment/ SOHO units with another 24,695 units in the incoming supply and 61,915 units in the planned supply.*

### Price and Rental

*The serviced apartment and SOHO price trend were largely stable across the board with marginal growth observed in Scott Towers, Johor Bahru which was transacted between RM365,000 and RM430,000. On similar note, the rental market generally also stable with positive movements recorded in several area namely Prima Regency Service Apartment and Idaman*

di Nusa Idaman. Penyewaan baru dan lokasi strategik yang dilengkapi rangkaian jalan raya yang cekap adalah antara faktor yang menyumbang kepada kenaikan sewa.

*Residence at Nusa Idaman. New tenancy and strategic locations served with efficient road linkages were among the factors contributed to the rental gain.*

## Kompleks Perniagaan

## Shopping Complex

### Penghunian dan Ketersediaan Ruang

### Occupancy and Space Availability

Prestasi kompleks perniagaan kukuh berdasarkan kadar penghunian pada 75.3%, lebih tinggi daripada 71.7% yang dicatatkan tahun lepas. Subsektor ini menyaksikan ambilan tahunan sebanyak 246,670 m.p., sedikit lebih rendah daripada 276,890 m.p. dicatatkan pada 2018. Pergerakan penyewa utama ditunjukkan di Jadual 5.2.

*The performance of shopping complexes strengthened as the occupancy rate stood at 75.3%, higher than 71.7% recorded last year. Sub-sector witnessed an annual take-up of 246,670 s.m., slightly lower than 276,890 s.m. charted in 2018. Pertinent movements of tenants as shown in Table 5.2.*

Chart 5.14

Supply and Occupancy of Shopping Complex

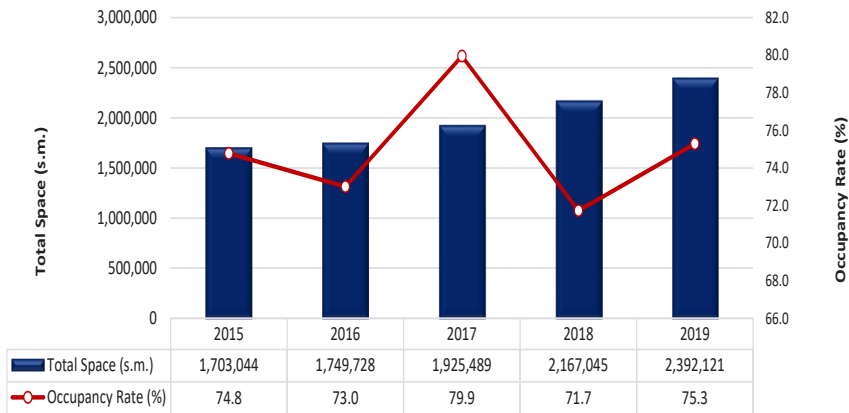


Table 5.2

Pertinent Movements in Shopping Complex

No.	Shopping Complex	Estimated Space (s.m.)	Tenant Movement
1.	Plaza Angsana Mall	9,849	Move In
2.	Nsk Ulu Tiram	4,577	Move In
3.	Nsk Pandan	13,751	Move In
4.	Johor Premium Outlet	12,695	Move In
5.	Komtar Jbcc	12,294	Move In
6.	Today's Mall	5,419	Move In
7.	Plaza Kota Tinggi	4,131	Move In
8.	Paradigm Mall	85,465	Move In
9.	Segamat Central Shopping	20,110	Move In
10.	U Sentral, Segamat	10,474	Move In



## Aktiviti Pembinaan

Aktiviti pembinaan baru terdiri daripada tujuh siap dibina dalam tempoh kajian yang menyuntik sejumlah 279,563 m.p. ruang niaga ke dalam pasaran. Pada akhir 2019, terdapat 153 kompleks membeli-belah sedia ada (2,392,121 m.p.) dengan lima kompleks (115,784 m.p.) dalam penawaran akan datang.

## Construction Activity

*The new construction activity comprised of seven completions in the review period which injected a total of 279,563 s.m. retail space into the market. As at end-2019, there were 153 existing shopping complexes (2,392,121 s.m.) with five complexes (115,784 s.m.) in the incoming supply.*

Table 5.3

List of Completions for Shopping Complex

No.	Property	Location	Floor Area (s.m.)
1.	Tesco Taman Setia Tropika	Johor Bahru	5,147
2.	Southkey Mega Mall	Johor Bahru	126,029
3.	Helious Cove Shopping Mall	Johor Bahru	13,567
4.	R&F Mall	Johor Bahru	39,102
5.	Toppen Shoping Centre	Johor Bahru	46,713
6.	Sunway Big Box	Johor Bahru	46,452
7.	Pasaraya Songmart	Kluang	2,553

## Sewa

Amnya, sewaan ruang niaga stabil dikebanyakan kompleks membeli-belah. Walau bagaimanapun, beberapa kompleks membeli-belah di kawasan utama pinggir bandar seperti Sutera Mall dan Tasek Central di Johor Bahru mengalami penurunan sewa disebabkan oleh keutamaan pasaran yang rendah apabila beberapa kompleks membeli-belah baru berhampiran dibuka kepada umum. Ruang niaga tingkat bawah The Mall, Mid Valley Southkey di Johor Bahru memperoleh sewa premium RM371.36 s.m.p. hingga RM425.18 s.m.p. sebulan disebabkan lokasi yang strategik dan dikunjungi ramai.

## Rental

*Generally, rentals of retail space were stable for most shopping complexes. However, rental of some shopping complexes in suburban prime areas such as Sutera Mall and Tasek Central in Johor Bahru experienced rental downtrend due to low market preference as new shopping complexes hereby opened to the public. Ground floor retail space of The Mall, Mid Valley Southkey in Johor Bahru gained premium rentals of RM371.36 p.s.m. to RM425.18 p.s.m. per month due to its strategic location and high footfall.*

## Pejabat Binaan Khas

### Penghunian dan Ketersediaan Ruang

Segmen pejabat binaan khas menggambarkan prestasi menurun apabila purata kadar penghunian menguncup kepada 71.2% (2018: 75.9%). Ambilan tahunan kekal positif pada 14,785 m.p. lebih rendah daripada 31,786 m.p yang direkodkan pada 2018. Pergerakan penyewa utama ditunjukkan di Jadual 5.4.

## Purpose-Built Office

### Occupancy and Space Availability

*The purpose-built office segment portrayed downward performance as the average occupancy rate contracted to 71.2% (2018: 75.9%). The annual take-up remained positive at 14,785 s.m. lower than 31,786 s.m. recorded in 2018. Pertinent movements of tenants as shown in Table 5.4.*

Chart 5.15

## Supply and Occupancy of Purpose-Built Office

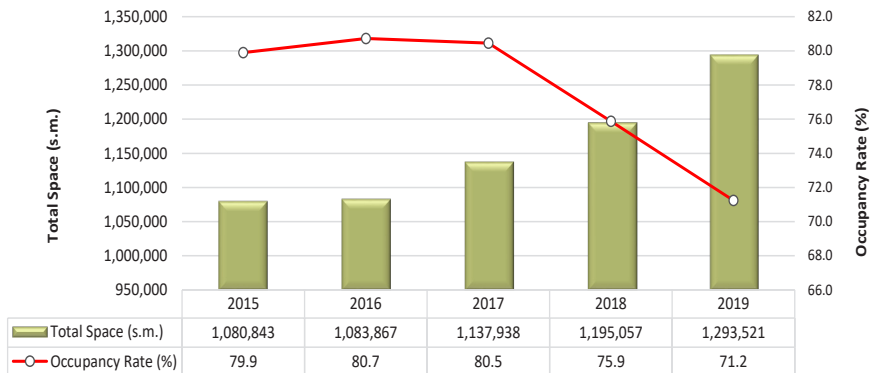


Table 5.4

## Pertinent Movements in Purpose-Built Office

No.	Purpose-built Office Name	Estimated Space (s.m.)	Tenant Movement
1.	Medini 9 @ Medini, Johor Bahru	6,697	Move In
2.	Citrine @ The Lake View, Johor Bahru	16,059	Move In
3.	Pejabat Lembaga Hasil Dalam Negeri Malaysia (LHDNM), Kluang	10,183	Move In
4.	Bangunan Perkeso, Johor Bahru	3,872	Move Out
5.	Menara MDBPB (Tower Block), Batu Pahat	6,055	Move Out
6.	Bangunan Wisma Bunga	5,080	Move Out

50

## Aktiviti Pembinaan

Tempoh kajian mencatatkan empat bangunan baru siap dibina yang menyuntik sejumlah 103,724 m.p. ruang pejabat ke dalam pasaran. Pada akhir 2019, terdapat 219 kompleks membeli-belah sedia ada (1,293,521 m.p.) dengan empat kompleks (109,929 m.p.) dalam penawaran akan datang dan dua lagi (45,301 m.p.) dalam penawaran yang dirancang. Senarai pejabat binaan khas siap dibina adalah seperti di Jadual 5.5.

## Construction Activity

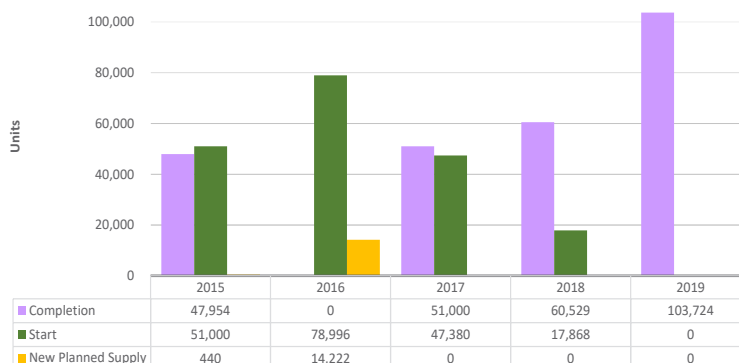
The review period registered the completion of four buildings which injected a total of 103,724 s.m. office space into the market. As at end-2019, there were 219 existing shopping complexes (1,293,521 s.m.) with four complexes (109,929 s.m.) in the incoming supply and another two (45,301 s.m.) in the planned supply. The list of completed purpose-built office is shown in Table 5.5.

Table 5.5

## List of Completion for Purpose-Built Office

No.	Property	Location	Floor Area (s.m.)
1.	Mahkamah Syariah Complex	Kluang	4,614
2.	Lembaga Hasil Dalam Negeri Malaysia (LHDNM) Building	Kluang	13,254
3.	D'Pristine Tower	Johor Bahru	44,436
4.	Menara Majlis Bandaraya Johor Bahru	Johor Bahru	41,420

**Chart 5.16**  
**Purpose-Built Office Market Activity Trend 2015 – 2019**



### Sewa

Sewa ruang pejabat kekal stabil di seluruh daerah. Di kawasan utama pinggir bandar, kenaikan di antara 9.3% dan 11.5% direkodkan di beberapa pejabat binaan khas iaitu Wisma Daiman dan Wisma PERKESO di Johor Bahru serta Bangunan Tabung Haji di Muar.

Pada Q4 2019, Indeks Sewa Pejabat Binaan Khas Johor Bahru berada pada 131.4, naik 0.4% daripada 130.8 mata dalam Q4 2018. Purata Sewa Pejabat Binaan Khas pada Q4 2019 berada pada RM34.54 s.m.p., meningkat daripada RM34.40 s.m.p., direkodkan pada Q4 2018.

### Riadah

Segmen riadah menyaksikan dua hotel baharu siap dibina dikenali sebagai Anantara Desaru Coast Resort & Villas di Desaru dan Hotel Forest City Golf di Johor Bahru, yang menawarkan 438 bilik ke dalam pasaran. Pada akhir 2019, terdapat 476 hotel (31,736 bilik) dalam penawaran sedia ada dengan 11 lagi hotel (3,293 bilik) dalam penawaran akan datang dan sembilan hotel (2,098 bilik) dalam penawaran yang dirancang.

### HARTA TANAH INDUSTRI

#### Transaksi

Subsektor perindustrian merekodkan 1,016 transaksi bernilai RM2.06 bilion, naik 17.3% dalam bilangan manakala nilai menyusut 7.6% (2018: 866 transaksi bernilai RM2.22 bilion).

### Rental

Rental of office spaces remained stable across the district. In suburban prime area, an increase between 9.3% and 11.5% were recorded at several purpose-built office namely Wisma Daiman and Wisma PERKESO in Johor Bahru as well as Tabung Haji Building in Muar.

As at Q4 2019, the Purpose-Built Office Rental Index for Johor Bahru stood at 131.4, up by 0.4% from 130.8 points in Q4 2018. The Purpose-Built Office Average Rental as at Q4 2019 stood at RM34.54 p.s.m., increase from RM34.40 p.s.m., recorded in Q4 2018.

### Leisure

The leisure segment witnessed the completion of two new hotels known as Anantara Desaru Coast Resort & Villas in Desaru and Forest City Golf Hotel in Johor Bahru, offering 438 rooms into market. As at end-2019, there were 476 hotels (31,736 rooms) in the existing supply with another 11 hotels (3,293 rooms) in the incoming supply and nine hotels (2,098 rooms) in planned supply.

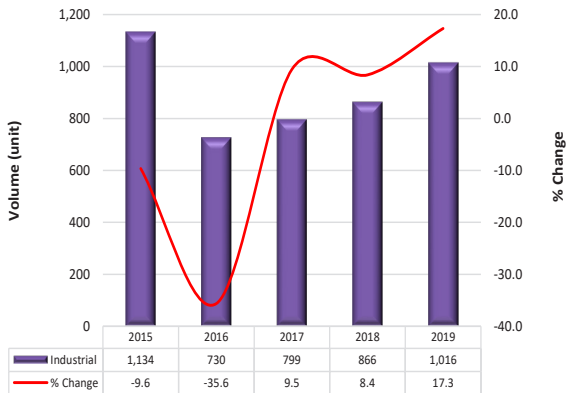
### INDUSTRIAL PROPERTY

#### Transaction

The industrial sub-sector recorded 1,016 transactions worth RM2.06 billion, up by 17.3% in volume whilst value contracted by 7.6% (2018: 866 transactions worth RM2.22 billion).

**Chart 5.17**

**Volume of Industrial Property Transactions 2015 – 2019**

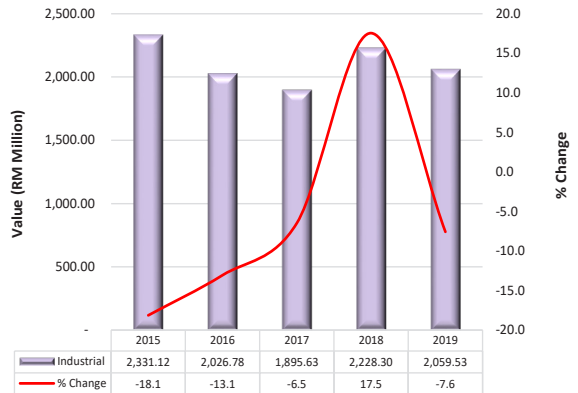


**Status Pasaran**

Situasi industri siap dibina tidak terjual bertambah baik berdasarkan bilangannya yang sedikit berkurang. Trend ini ditunjukkan dalam Carta 5.21.

**Chart 5.18**

**Value of Industrial Property Transactions 2015 – 2019**

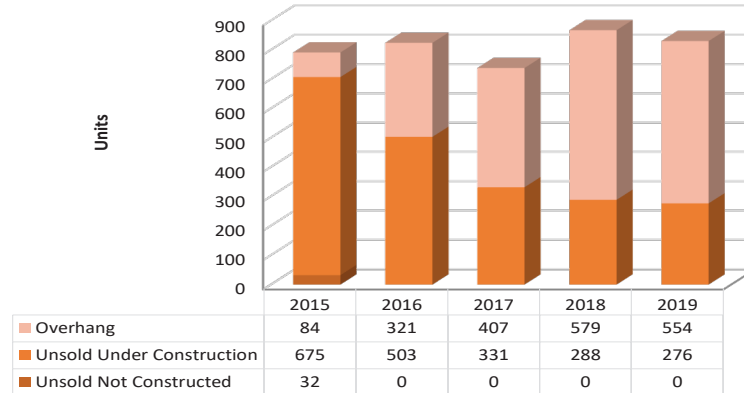


**Market Status**

The industrial overhang and unsold situation improved as the numbers reduced marginally. The trend is shown in Chart 5.21.

**Chart 5.19**

**Industrial Market Status Trend 2015 – 2019**



**Aktiviti Pembinaan**

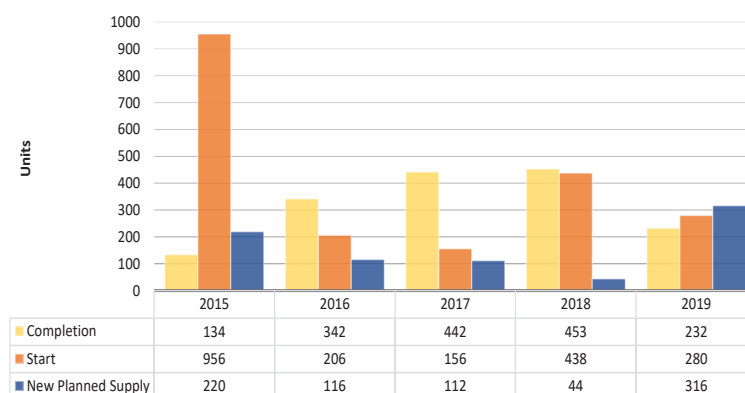
Aktiviti pembinaan adalah sederhana kecuali bagi penawaran baru dirancang yang meningkat dengan ketara enam kali ganda. Pada akhir 2019, terdapat 17,681 unit industri sedia ada dengan 1,305 unit lagi dalam penawaran akan datang dan 940 unit dalam penawaran yang dirancang.

**Construction Activity**

Construction activities moderated except for new planned supply which increased significantly by more than six-fold. As at end-2019, there were 17,681 existing industrial units with another 1,305 units in the incoming supply and 940 units in the planned supply.

Chart 5.20

Industrial Market Activity Trend 2015 – 2019



### Harga

Harga subsektor industri merekodkan pergerakan bercampur-campur. Kilang berkembar dua setengah tingkat di Taman Perindustrian Tiram dan Taman Perindustrian Tropika di Johor Bahru meningkat 7.7% dan 8.0%, masing-masing dipindahmilik pada RM800,000 dan RM2,500,000 seunit. Kenaikan ini disokong oleh akses yang baik dan permintaan daripada industri berskala sederhana di kawasan sekitar. Sebaliknya, harga kilang teres satu setengah tingkat di beberapa kawasan perindustrian di Johor Bahru menguncup sedikit kepada 3.7% dan 5.6%.

### Price

*Price of industrial sub-sector recorded mixed movements. Two and a-half storey semi-detached factory at Taman Perindustrian Tiram and Taman Perindustrian Tropika in Johor Bahru rose by 7.7% and 8.0% transacted at RM800,000 and RM2,500,000 per unit respectively. The increased was supported by good accessibility and demand from medium scale industries in the vicinity. On the contrary, prices of one and a-half storey terraced factory at several industrial areas in Johor Bahru contracted by a mere of 3.7% and 5.6%.*

### PROSPEK 2020

Prospek masa hadapan Johor dijangka cerah, disokong oleh pelbagai beberapa pembangunan semasa, pembangunan akan datang di dalam perancangan dan penganjuran dua acara utama, iaitu Sukan Malaysia (SUKMA) dan juga Tahun Melawat Johor 2020. Di bawah bajet 2020, pelbagai inisiatif telah disediakan untuk memastikan prestasi pasaran harta tanah pada 2020 kekal kukuh terutama dalam menyokong penawaran perumahan mampu miliki dan menarik pelabur asing ke negeri ini. Antara inisiatif adalah:

- Skim Perumahan Prihatin Johor (SPPJ) adalah salah satu inisiatif Kerajaan Negeri untuk membantu kumpulan B40 dengan pendapatan isi rumah RM2,500 dan ke bawah memiliki rumah sendiri. Kerajaan Negeri telah memperuntukkan RM15 juta bagi tempoh dua tahun bermula pada 2020 kepada kumpulan B40 untuk membeli Rumah Mampu Milik Johor Jenis A, yang berharga RM42,000 seunit. Inisiatif strategik ini untuk membantu kumpulan berkenaan dengan menggunakan pendekatan Skim Pemilikan.

### 2020 OUTLOOK

*Johor's future prospects are expected to be bright, backed by various ongoing and future development in the pipeline and organization of two major events, the Malaysian Games (SUKMA) and the Visit Johor 2020. Under budget 2020, various initiatives have been drawn up to ensure that the performance of the property market in 2020 remained strong especially in supporting the supply of affordable housing and attracting foreign investors into the state. Among the initiatives are:*

- *Skim Perumahan Prihatin Johor (SPPJ) is one of the State Government's initiatives to help B40 group with household income of RM2,500 and below to get their own home. The state government provided an allocation of RM15 million for the two-year period beginning in 2020 to the B40 group to buy the Johor Affordable Housing Type A, priced at RM42,000 per unit. It is a strategic initiative to help the group by adopting the Ownership Scheme approach.*

- Skim Perumahan Belia Johor (SPBJ) untuk membantu golongan belia menghuni rumah yang selesa. Inisiatif Kerajaan Negeri ini untuk membantu pasangan muda yang telah berkahwin berumur di antara 21 dan 30 tahun dan mempunyai pendapatan isi rumah RM5,000 ke bawah untuk menyewa rumah mampu milik. Inisiatif ini melibatkan peruntukan sebanyak RM15 juta bagi tempoh dua tahun yang bermula pada tahun 2020.
- Skim Rumah Mampu Milik Johor (RMMJ) kini dikenali sebagai Rumah Mampu Biaya Johor (RMBJ) yang mendapat peruntukan RM150 juta dalam tempoh tiga tahun bermula 2020. Dari 2018 hingga 2019, 7,623 unit rumah telah siap. Bagi tahun 2020 hingga 2023, Kerajaan Negeri menyasarkan 16,865 unit siap di seluruh Johor. Di samping itu, Kerajaan Negeri akan meneruskan insentif untuk mengeluarkan baucar RM1,000 kepada pembeli RMBJ.

Bagi membantu mengurangkan lambakan harta tanah tidak terjual di Johor, Kerajaan Negeri telah bersetuju memperkenalkan dua kempen insentif untuk tempoh masa tertentu bagi tujuan berikut:

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- Kerajaan Negeri bersetuju mengurangkan harga minimum pemilikan harta tanah asing dari RM1 juta kepada RM600,000. Insentif ini hanya ditawarkan untuk projek harta tanah strata seperti pangsapuri, kondominium, pangsapuri servis dan Small Office Home Office (SOHO).
- Melepaskan kuota bumiputera untuk harta tanah berharga RM700,000 dan ke atas. Kadar pelepasan pertama meningkat daripada 30% kepada 60%, manakala kadar pelepasan kedua meningkat dari 30% kepada semua unit yang tinggal. Di samping itu, Kerajaan Negeri telah memanjangkan tempoh bayaran caj gantian pelepasan lot bumiputera dari 90 hari hingga 120 hari, dari tarikh surat kelulusan dikeluarkan. Insentif ini berkuatkuasa selama tempoh satu tahun dari 1 Januari hingga 31 Disember 2020.
- Kerajaan Persekutuan telah meluluskan projek infrastruktur Johor yang melibatkan RM220 juta untuk dua projek iaitu jambatan pintasan Bandar Kota Tinggi dan pembinaan jalan raya di Jalan Senai Desaru (SDE) - Bandar Penawar.
- Kerajaan Persekutuan memperuntukkan RM85 juta untuk menyelesaikan masalah kesesakan di Kompleks Kastam, Imigresen dan Kuarantin (CIQ), Bangunan Sultan Iskandar (BSI) dan Kompleks Sultan Abu Bakar (KSAB) di Linkedua. Di samping itu, Kerajaan Negeri juga berhasrat untuk meneruskan projek Rapid Transit System (RTS) yang menghubungkan Bukit Cagar di Johor Bahru dan Woodlands di Singapura.

*Skim Perumahan Belia Johor (SPBJ) to help youths live in comfortable homes. The initiative by State Government to help young married couples between the ages of 21 and 30 and have household income of RM5,000 and below to rent a affordable house. This initiative involves an allocation of RM15 million for a two-year period beginning in 2020.*

*Johor Affordable Homes (RMMJ) scheme is now known as Rumah Mampu Biaya Johor (RMBJ) receiving an allocation of RM150 million over a three-year period beginning from 2020. From 2018 to 2019, 7,623 units of houses have been completed. For the year 2020 to 2023, the State Government is aiming for 16,865 units to be completed throughout Johor. In addition, the State Government will pass on the incentive for issuing RM1,000 vouchers to RMBJ buyers.*

*To help reduce the dumping of unsold properties in Johor, the State Government has agreed to introduce two incentive campaigns for a specific period of time for the following purposes:*

- *The State Government agreed to reduce the minimum price of foreign property ownership from RM1 million to RM600,000. This incentive offered only for overhang high-rise properties such as apartments, condominiums, serviced apartments and Small Office Home Office (SOHO).*
- *Release of bumiputera quota for the property priced RM700,000 and above. The first release rate increased from 30% to 60%, while the second release rate increased from 30% to all remaining units. In addition, the State Government has extended the payment period for bumiputera lottery replacement charges from 90 days to 120 days, from the date of approval letter issued. This incentive will take place within one year from 1 January to 31 December 2020.*
- *Federal Government has approved the Johor infrastructure project involving RM220 million for two projects namely Bandar Kota Tinggi bypass bridge and the construction of a directional ramp on the Senai Desaru Expressway (SDE)- Bandar Penawar.*
- *Federal government has allocated RM85 million to solve the congestion problem at the Customs, Immigration and Quarantine Complex (CIQ), Sultan Iskandar Building (BSI) and the Kompleks Sultan Abu Bakar (KSAB) in Linkedua. In addition, State Government also intends to continue the Rapid Transit System (RTS) project linking Bukit Cagar in Johor Bahru and Woodlands in Singapore.*



Bagi kesinambungan Projek Pembinaan dan Menaiktaraf Jalan Serta Jambatan di seluruh Negeri Johor 2020, kerajaan negeri telah menyediakan peruntukan sebanyak RM58 juta bagi projek berikut:

- i. Menaik taraf Jalan Ulu Choh ke Gelang Patah-Ulu Pulau, Johor Bahru.
- ii. Membina jalan pintasan dari Sungai Terap ke Paya Panjang, Muar.
- iii. Menaiktaraf empat persimpangan di Benut, Pontian.
- iv. Menaik taraf jalan dan jambatan dari Sawah Ring ke Sungai Mati, Tangkak.
- v. Menaik taraf jalan sedia ada dari dua lorong ke empat lorong di Jalan Masai Lama, Johor Bahru.

Perbandaran baru dan projek yang sedia ada, yang dijangka merangsang pasaran harta tanah di Johor adalah seperti berikut:

- Medini East, Pasir Gudang, Johor Bahru
- Taman Scientex Utama, Kulai
- Taman Pulau Mutiara, Pulau
- Marris @ Desaru, Pengerang
- Taman Kluang Perdana, Kluang
- Taman Setia Mutiara, Kluang
- Taman Tasik Indah, Kluang
- Taman Serom Perdana, Tangkak

Di subsektor komersial, beberapa projek dijangka memberi kesan positif ke atas pasaran harta tanah. Antara projek tersebut ialah:

- Paradigm Mall JB yang telah dibukan kepada umum pada bulan November 2019, adalah sebahagian daripada pembangunan bersepadu yang menggabungkan komersial, peruncitan, kediaman dan hotel. Bangunan 6 tingkat ini menawarkan 500 unit ruang niaga dengan 4,200 ruang letak kereta tertutup. The Paradigm Residence, yang diintegrasikan dengan bangunan itu merupakan sebuah pangsapuri servis 24 tingkat dengan jumlah 263 unit. Di samping itu, 200 bilik hotel, yang dikenali sebagai Hyatt Place Johor Bahru Paradigm Mall, dijangka dibuka untuk umum pada tahun 2022.
- B5 Johor Street Market adalah pusat komersial pelancongan dibangunkan oleh Johor Land Berhad, dengan reka bentuk tradisional Melayu Johor terdiri daripada lima elemen iaitu bazar niaga, taman, trak makanan, kedai makan dan minum serta pusat pameran kebudayaan Johor. Projek pembangunan telah siap sepenuhnya dan sebanyak 231 lot perniagaan disediakan dan akan mula beroperasi pada 2020.

*State Government has allocated RM58 million for the continuation of the "Road Construction and Upgrading Projects and Bridges in Johor 2020", for the following projects:*

- i. Upgrading Jalan Ulu Choh to Gelang Patah-Ulu Pulau, Johor Bahru.*
- ii. Construct a bypass from Sungai Terap to Paya Panjang, Muar.*
- iii. Upgrading the four junction in Benut, Pontian.*
- iv. Upgrading of roads and bridges from Sawah Ring to Sungai Mati, Tangkak.*
- v. Upgrading existing roads from two lanes to four lanes in Jalan Masai Lama, Johor Bahru.*

*Selected new township and existing projects, that are expected to spur property market in Johor are as follows:*

- Medini East, Pasir Gudang, Johor Bahru*
- Taman Scientex Utama, Kulai*
- Taman Pulau Mutiara, Pulau*
- The Marris @ Desaru, Pengerang*
- Taman Kluang Perdana, Kluang*
- Taman Setia Mutiara, Kluang*
- Taman Tasik Indah, Kluang*
- Taman Serom Perdana, Tangkak*

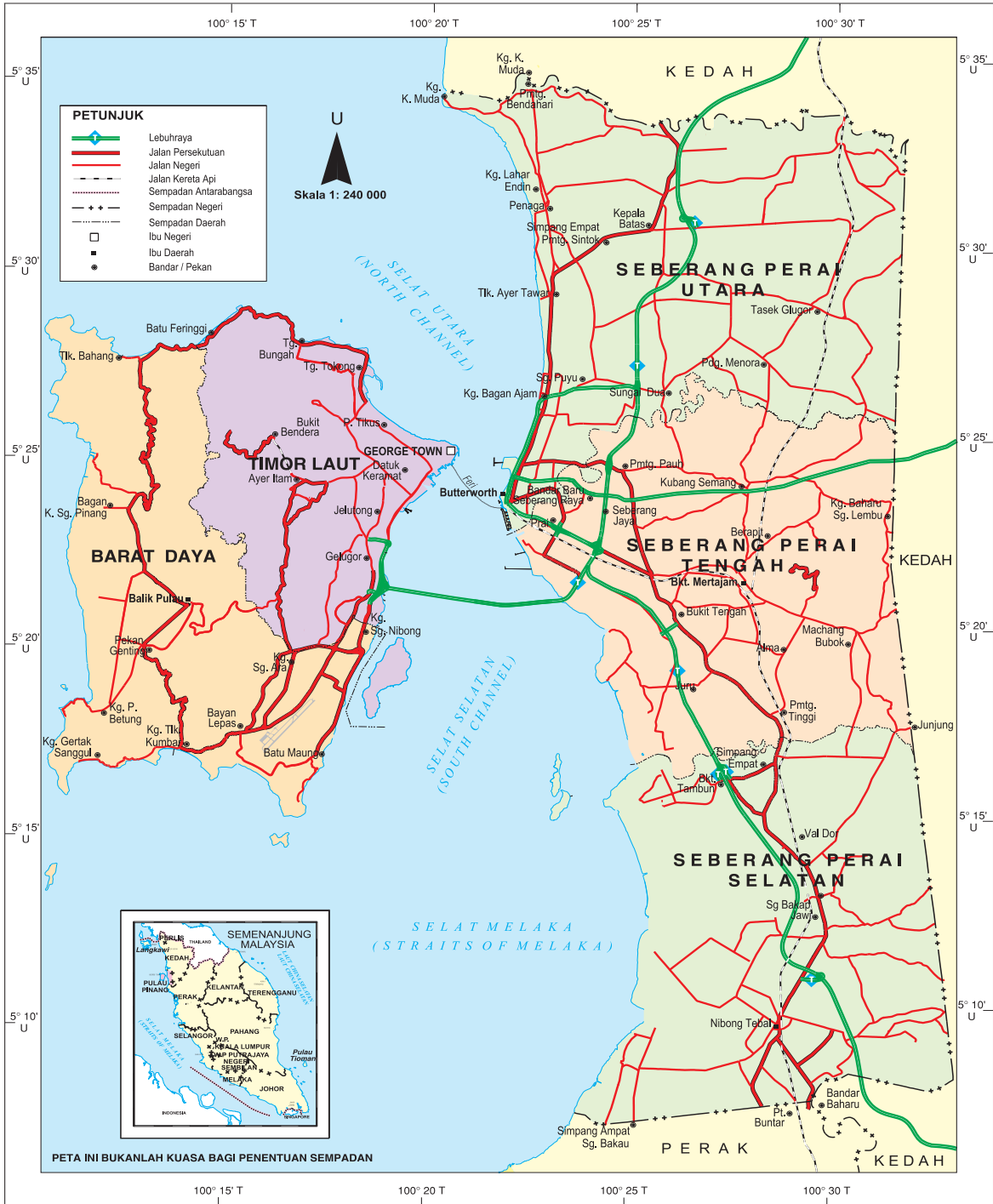
*In the commercial sub-sector, several projects are expected to have a positive spill-over effect on the property market. Among the projects are:*

- Paradigm Mall JB which opened to the public on November 2019, is part of an integrated development that incorporates commercial, retail, residential and hospitality. The 6-storey building offers 500 units of retail space with 4,200 covered parking spaces. The Paradigm Residence, integrated with the building is a 24-storey serviced apartment with total of 263 units. In addition, 200 hotel rooms, known as the Hyatt Place Johor Bahru Paradigm Mall, are expected to open for public in 2022.*
- B5 Johor Street Market is a tourism commercial center developed by Johor Land Berhad, with the character of the Johor Malay traditional design consists of five elements namely a retail bazaars, parks, truck eat, food and beverage outlets as well as a hub of cultural exhibitions Johor. The development project are completed and a total of 231 business lots are set up and will be operational by 2020.*



- Di dalam subsektor industri, beberapa projek pembangunan semasa dan dicadangkan dijangka akan meningkatkan permintaan dan penawaran harta tanah di Johor. Ini termasuk:
- Taman Perabot Muar yang terletak di sepanjang Jalan Bakri-Parit Sulong. Kawasan pembangunan keseluruhan adalah sekitar 994.60 ekar, terdiri daripada kilang sedia ada, tanah komersial, asrama kakitangan dan pusat servis atau terminal trak. Konsep pembangunan adalah pusat industri dan perniagaan bersepadu. Sebanyak 32 syarikat telah memperoleh sijil penyiapan (CCC) pada 55% kemajuan kerja. Pada masa ini, peringkat pembangunan adalah kerja-kerja tanah dan sistem perparitan.
- Kompleks Perindustrian Tanjung Langsung (TLIC) terletak di atas tanah seluas 505.8-hektar yang direka untuk industri minyak dan gas (O & G) serta industri berat dan besar. Inisiatif ini selaras dengan aspirasi kerajaan untuk menggalakkan pertumbuhan ekonomi berasaskan Minyak & Gas dan Industri 4.0 terutamanya di Johor Timur.
- *In the industrial sub-sector, several ongoing and proposed developments projects are expected to boost demand and supply of property in Johor. These includes:*
- *Muar Furniture Park located along Bakri Road-Parit Sulong. The overall development area is about 994.60 acres, comprising ready-made factories, commercial acres, staff dormitories and service centers or truck terminals. The concept of development is an integrated industrial and business center. A total of 32 companies have been awarded certificates of completion (CCC) at 55% of work progress. Currently, the development stage is for land works and drainage systems.*
- *Tanjung Langsung Industrial Complex (TLIC) sited on a 505.8-hactare land designed for oil and gas (O&G) industry as well as heavy and bulk industries. The initiative is in line with the government's aspiration to promote economic growth based on Oil & Gas and Industry 4.0 especially in Eastern of Johor.*

# PULAU PINANG



# PULAU PINANG

## GAMBARAN KESELURUHAN

Prestasi pasaran harta tanah bagi Pulau Pinang menyaksikan sedikit peningkatan dalam aktiviti pasaran. Terdapat 17,118 transaksi bernilai RM8.63 bilion, meningkat hanya 0.2%. Walau bagaimanapun, nilai menurun 15.3% berbanding 2018 (17,087 transaksi bernilai RM10.19 bilion). Subsektor kediaman terus menguasai pasaran keseluruhan, mencakupi 74.3% daripada bilangan transaksi harta tanah negeri ini diikuti oleh subsektor pertanian (8.7%), komersial (8.5%), tanah pembangunan (6.3%) dan industri (2.3%).

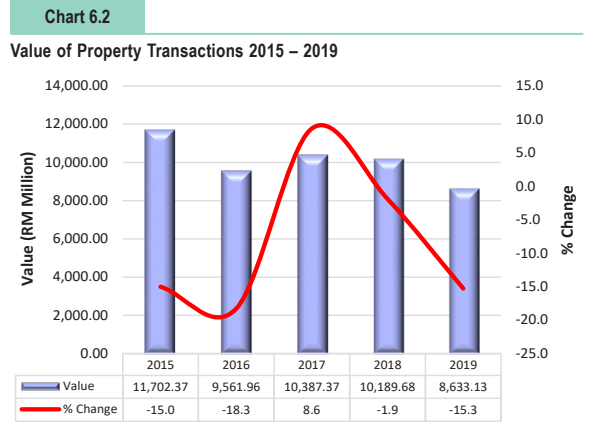
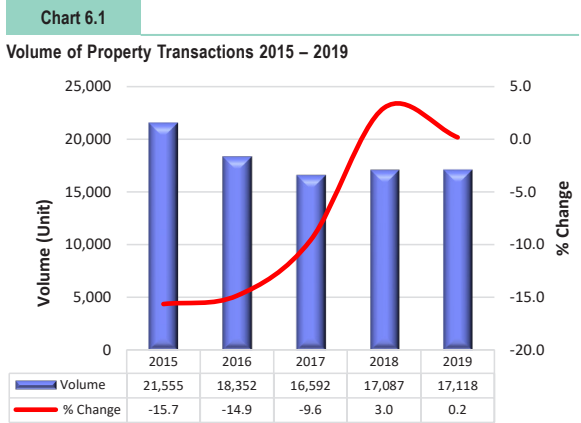
Pergerakan pasaran amnya dalam pergerakan menurun kecuali bagi subsektor kediaman dan komersial yang masing-masing meningkat 1.3% dan 11.0%. Subsektor industri mendahului penurunan sebanyak 14.4%, diikuti oleh tanah pembangunan (-9.8%) dan pertanian (-5.7%). Seiring dengan nilai keseluruhan yang sederhana, semua subsektor mencatatkan trend menurun kecuali subsektor komersial dan pertanian yang masing-masing meningkat 14.2% dan 26.5%.

## OVERVIEW

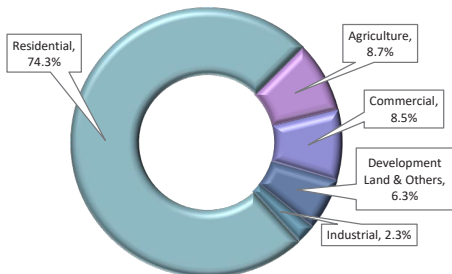
The property market performance for Pulau Pinang saw a slight improvement in market activity. There were 17,118 transactions worth RM8.63 billion, increased by a mere 0.2% in volume. However, value decreased by 15.3% against 2018 (17,087 transactions worth RM10.19 billion). Residential sub-sector remained to dominate the overall market, accounting for 74.3% of the state's property transaction volume followed by agriculture (8.7%), commercial (8.5%), development land (6.3%) and industrial (2.3%) sub-sectors.

Market movements were mainly on downward movements except for residential and commercial sub-sectors which increased by 1.3% and 11.0% respectively. Industrial sub-sector led the decrease by 14.4%, followed by development land (-9.8%) and agriculture (-5.7%). In tandem with the softening of total value, all sub-sectors recorded downward trend with the exception of commercial sub-sector, increased by 14.2%.

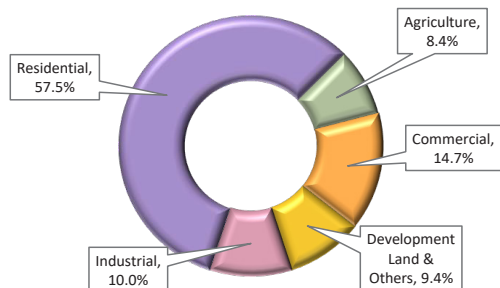
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**Chart 6.3**  
Contribution to Transaction Volume by Sub-sector 2019



**Chart 6.4**  
Contribution to Transaction Value by Sub-sector 2019



## PROMINENT SALE

Table 6.1

Summary of Prominent Sales Recorded in 2019

No.	Property	Location	Transaction Year
1.	Econsave Supermarket	Taman Sungai Jawi, Seberang Perai Selatan	2018
2.	Wisma UMNO	Jalan Bagan Luar, Butterworth	2017
3.	Veenai Hotel	Jalan Bagan Luar, Butterworth	2017

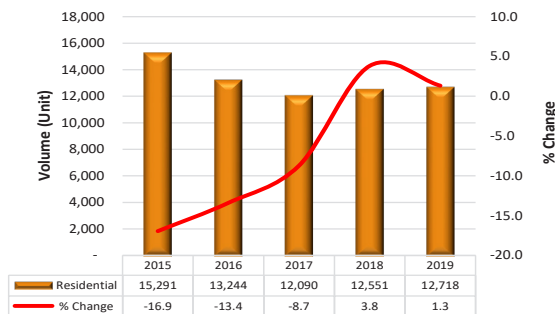
## HARTA HARTA KEDIAMAN

### Transaksi

Subsektor kediaman menunjukkan prestasi lebih baik dengan 12,718 transaksi bernilai RM4.96 bilion, menunjukkan peningkatan kecil 1.3% dalam bilangan. Nilai transaksi menurun 9.2% berbanding 2018 (12,551 transaksi bernilai RM5.47 bilion). Harta tanah bertingkat tinggi yang terdiri daripada kondominium, pangsapuri dan flat terus memacu pasaran kediaman, mencakupi 32.7% daripada jumlah keseluruhan transaksi.

Chart 6.5

Volume of Residential Property Transactions 2015 – 2019

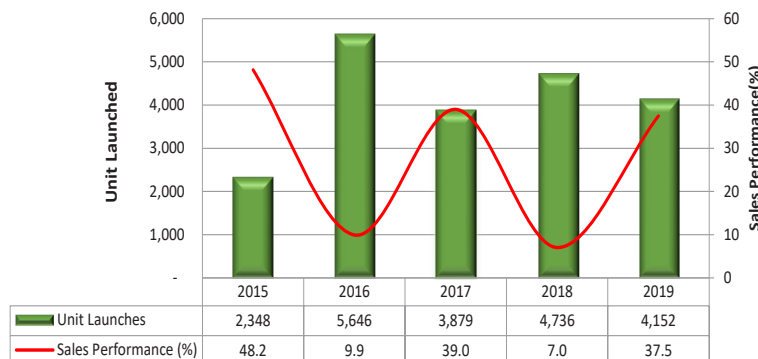


### Pelancaran Baru

Pasaran utama berkurang dengan 4,152 unit dilancarkan dalam tempoh kajian. Walau bagaimanapun, prestasi jualan bertambah baik dengan 37.5%.

Chart 6.7

New Launches Trend 2015 – 2019



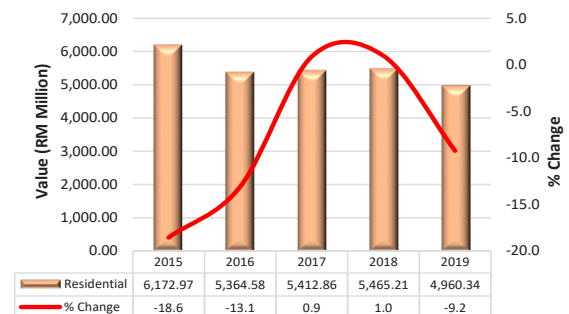
## RESIDENTIAL PROPERTY

### Transaction

The residential sub-sector showed a better performance with 12,718 transactions worth RM4.96 billion, indicating a marginal increase of 1.3% in volume. Transactions value decreased by 9.2% as compared to 2018 (12,551 transactions worth RM5.47 billion). High-rise properties comprising condominium, apartment and flat continued to propel the residential market, accounting for 32.7% of the total transactions.

Chart 6.6

Value of Residential Property Transactions 2015 – 2019



### New Launches

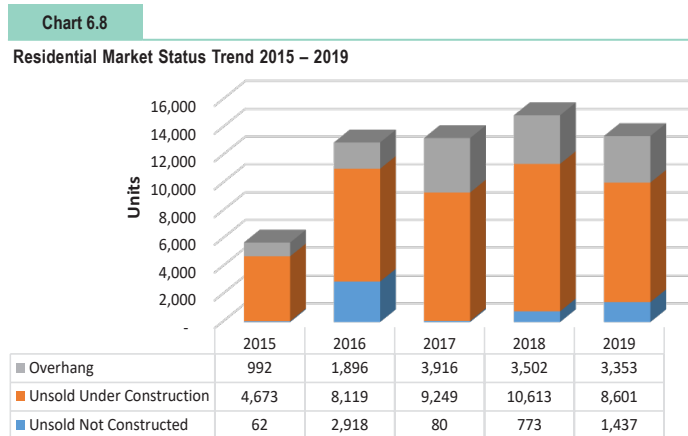
The primary market eased with 4,152 units launched in the review period. However, sales performance improved with 37.5%.

## Status Pasaran

Prestasi unit kediaman siap dibina tidak terjual dan dalam pembinaan belum terjual bertambah baik di mana bilangannya berkurangan dalam tempoh kajian.

## Market Status

The performance of residential overhang and unsold under construction units improved as the number eased in the review period.

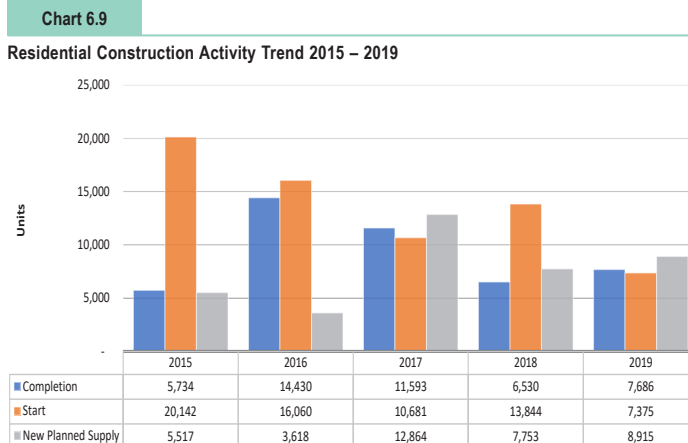


## Aktiviti Pembinaan

Aktiviti pembinaan subsektor kediaman berada pada mod perlahan. Sehingga akhir 2019, terdapat 519,603 unit kediaman sedia ada dengan 43,123 unit lagi dalam penawaran akan datang dan 26,922 unit dalam penawaran yang dirancang.

## Construction Activity

The residential sub-sector's construction activity was on a low mode. As at end-2019, there were 519,603 existing residential units with another 43,123 units in the incoming supply and 26,922 units in the planned supply.



## Harga dan Sewa

Pergerakan harga harta kediaman pelbagai di seluruh negeri. Rumah teres satu dan dua tingkat terletak berhampiran Jambatan Kedua di Seberang Perai Selatan mencatatkan peningkatan nilai modal dua angka. Harta tanah bertingkat tinggi yang terdiri daripada flat, pangsapuri dan kondominium adalah jenis harta yang digemari di negeri ini. Di Seberang Perai Tengah, flat dua bilik tidur menunjukkan pergerakan bercampur marginal sementara flat tiga bilik tidur mencatatkan keuntungan nilai modal yang lebih tinggi terutamanya bagi skim yang terletak strategik berhampiran kawasan perindustrian.

## Price and Rental

Price movements of residential properties varied across the state. Single and double storey terrace houses located nearby Second Bridge in Seberang Perai Selatan recorded a double-digit capital gain. High-rise properties comprising flats, apartments and condominiums were the most sought-after property type in the state. In Seberang Perai Tengah, two-bedroom flats showed marginal mixed movements whilst three-bedroom flats recorded higher capital gains particularly those schemes strategically located nearby industrial areas.

Sehingga pada Q4 2019, Indeks Harga Semua Rumah bagi negeri ini adalah 192.6 mata, turun hanya 0.8% daripada 194.2 mata pada Q4 2018. Purata Harga Semua Rumah bagi negeri ini pada Q4 2019 berjumlah RM431,959, menurun dari RM435,489 pada Q4 2018.

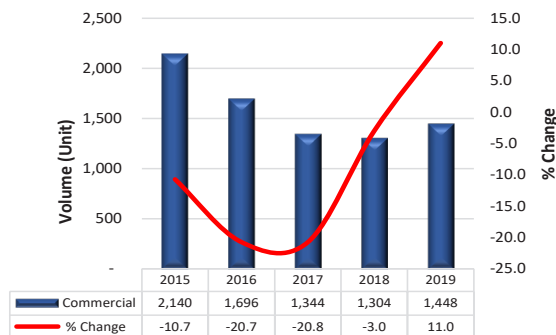
Pasaran sewa kediaman menunjukkan pergerakan bercampur-campur dalam tempoh kajian. Kebanyakan sewa bagi skim adalah stabil dengan kenaikan dicatatkan di lokasi pilihan terutamanya disebabkan oleh pembaharuan sewa dan pembaharuan penyewaan. Ketersediaan terhad teres tingkat di Taman Lip Sin, Timur Laut menyebabkan peningkatan sewa dua angka. Sewa untuk teres dua tingkat bagi skim terpilih di Seberang Perai Utara meningkat sedikit antara 2.7% hingga 5.4%. Sewa unit berstrata sebahagian besarnya stabil di seluruh negeri dengan purata pendapatan kasar antara 2.0% dan 10.5%.

## HARTA TANAH KOMERSIAL

### Transaksi

Subsektor komersial menunjukkan prestasi yang lebih baik dalam tempoh kajian. Terdapat 1,448 transaksi bernilai RM1.27 bilion dicatatkan, meningkat 11.0% dalam bilangan dan 14.2% dalam nilai berbanding 2018 (1,304 transaksi bernilai RM1.11 bilion).

**Chart 6.10**  
Volume of Commercial Property Transactions 2015 – 2019



### Kedai

#### Transaksi

Subsektor kedai mencatat 783 transaksi bernilai RM677.46 juta pada 2019, mencakupi 54.1% daripada transaksi harta tanah komersial dan 53.3% daripada jumlah nilai. Aktiviti pasarannya mengukuh dengan peningkatan 6.1% dalam bilangan walaupun nilai menurun hanya 1.0%.

As at Q4 2019, the All House Price Index for the state stood at 192.6 points, down by a mere 0.8% from 194.2 points in Q4 2018. The average All House Price for the state as at Q4 2019 stood at RM431,959, decreased from RM435,489 in Q4 2018.

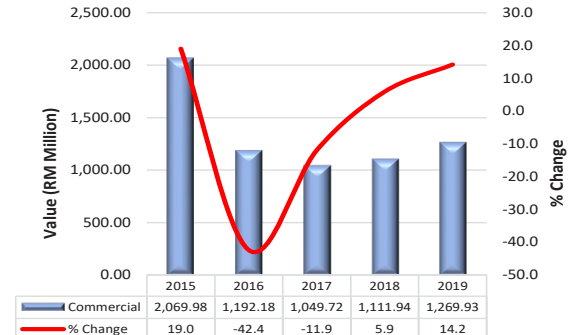
The residential rental market showed mixed movements in the review period. Most rental of the schemes were stable with increases recorded in choice locations mainly due to rental revision and tenancy renewal. Limited availability of single storey terrace in Taman Lip Sin, Timur Laut led to double-digit rental increase. Rentals for double storey terrace for selected schemes in Seberang Perai Utara increased marginally by 2.7% to 5.4%. Rental for stratified units were largely stable across the board with average gross rental yield between 2.0% and 10.5%.

## COMMERCIAL PROPERTY

### Transaction

The commercial sub-sector showed better performance in the review period. There were 1,448 transactions worth RM1.27 billion recorded, increased by 11.0% in volume and 14.2% in value as compared to 2018 (1,304 transactions worth RM1.11 billion).

**Chart 6.11**  
Value of Commercial Property Transactions 2015 – 2019



### Shop

#### Transaction

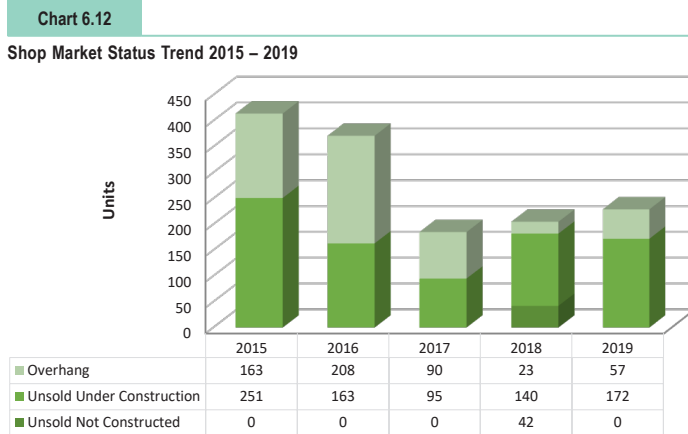
Shop sub-sector recorded 783 transactions worth RM677.46 million in 2019, accounting for 54.1% of the commercial property transactions and 53.3% of the total value. Its market activity firmed up with an increase of 6.1% in volume though the value decreased by a mere 1.0%.

## Status Pasaran

Situasi kedai siap dibina tidak terjual dan dalam pembinaan belum terjual kurang menggalakkan di mana bilangannya meningkat dalam tempoh kajian.

## Market Status

The shop overhang and unsold under construction situation was less encouraging as the number increased in the review period.



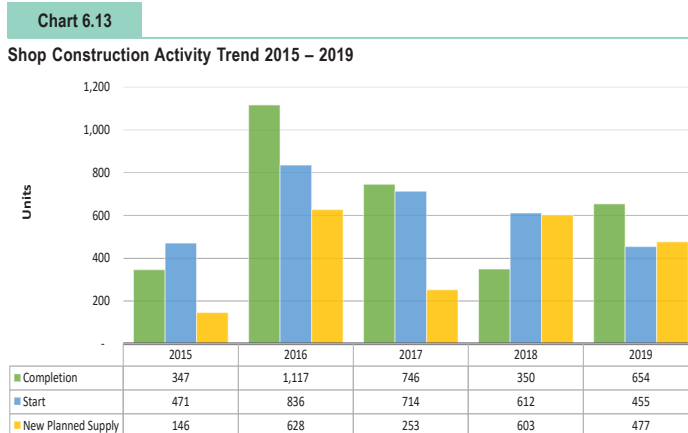
## Aktiviti Pembinaan

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Sub-sektor menyaksikan pergerakan bercampur-campur dalam aktiviti pembinaan. Sehingga akhir 2019, terdapat 37,832 unit kedai sedia ada dengan 1,845 unit lagi dalam penawaran akan datang dan 1,613 unit dalam penawaran yang dirancang.

## Construction Activity

The sub-sector saw mixed movements in construction activity. As at end-2019, there were 37,832 existing shop units with another 1,845 units in the incoming supply and 1,613 units in the planned supply.



## Pangsapuri Khidmat/ SOHO

### Transaksi

Subsektor ini mencatatkan 110 transaksi bernilai RM75.89 juta pada 2019 (2018: sembilan unit bernilai RM25.17 juta) mencakupi 7.6% daripada transaksi harta tanah komersial dan 6.0% daripada jumlah keseluruhan nilai.

## Serviced Apartment / SOHO

### Transaction

The sub-sector recorded 110 transactions worth RM75.89 million in 2019 (2018: nine units worth RM25.17 million) accounting for 7.6% of the commercial property transactions and 6.0% of the total value.



## Status Pasaran

Situasi unit siap dibina tidak terjual bertambah baik dalam tempoh kajian. Terdapat 69 unit siap dibina tidak terjual direkodkan bernilai RM91.31 juta, menurun 51.1% dalam bilangan dan 23.7% dalam nilai berbanding 2018 (141 unit bernilai RM119.61 juta). Walau bagaimanapun, dalam pembinaan belum terjual meningkat 48.7% kepada 1,575 unit (2018: 1,059 unit). Tiada unit belum dibina belum terjual direkodkan dalam tempoh kajian.

## Aktiviti Pembinaan

Aktiviti pembinaan pada umumnya menurun kecuali mula dibina, yang meningkat lebih dari enam kali ganda kepada 2,268 unit (2018: 312 unit). Siap dibina dan penawaran baru dirancang masing-masing menurun 45.1% dan 51.5% kepada 312 unit (2018: 568 unit) dan 2,233 unit (2018: 4,608 unit). Sehingga akhir tahun 2019, terdapat 5,933 unit pangsapuri khidmat/ SOHO sedia ada dengan 7,207 unit lagi dalam penawaran akan datang dan 9,008 unit dalam penawaran yang dirancang.

## Harga dan Sewa

Secara umumnya, harga pangsapuri khidmat berada pada trend menaik. Di Timur Laut, harga mengukuh bagi Arte S dan The Tamarind. Pergerakan positif yang sama dilihat di Bayan City manakala harga untuk Summerton-Priton Heights menunjukkan aliran menurun. Dalam segmen sewa, trend stabil dicatatkan untuk sebahagian besar skim.

## Kompleks Perniagaan

### Ketersediaan Ruang dan Penghunian

Prestasi kompleks perniagaan kekal pada kadar penghunian 73.8%. Segmen ini menyaksikan ambilan tahunan 73,031 m.p., lebih rendah daripada 82,600 m.p. direkodkan pada 2018.

## Market Status

The overhang situation improved in the review period. There were 69 overhang units recorded worth RM91.31 million, decreased by 51.1% in volume and 23.7% in value as compared to 2018 (141 units worth RM119.61 million). However, unsold under construction increased by 48.7% to 1,575 units (2018: 1,059 units). There was no unsold not constructed unit recorded in the review period.

## Construction Activity

Construction activities generally toned down with the exception of start, which increased by more than six-fold to 2,268 units (2018: 312 units). Completion and new planned supply decreased by 45.1% and 51.5% to 312 units (2018: 568 units) and 2,233 units (2018: 4,608 units) respectively. As at end-2019, there were 5,933 existing serviced apartment/ SOHO units with another 7,207 units in the incoming supply and 9,008 units in the planned supply.

## Price and Rental

Generally, price of serviced apartment was on an upward trend. In Timur Laut, price firmed up for Arte S and The Tamarind. Similar positive movement was seen in Bayan City while price for Summerton-Priton Heights showed downtrend. In rental segment, a stable trend was recorded for most of the schemes.

## Shopping Complex

### Occupancy and Space Availability

The performance of shopping complexes sustained at 73.8% occupancy rate. The segment witnessed an annual take-up of 73,031 s.m., lower than 82,600 s.m. recorded in 2018.

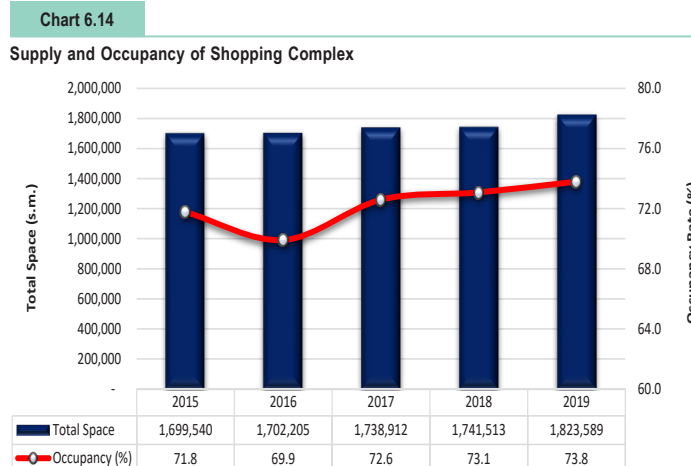


Table 6.2

**Pertinent Movements in Shopping Complex**

No.	Shopping Complex	Estimated Space (s.m.)	Tenant Movement
1.	KOMTAR Podium (Levels 1 – 6)	21,413	Move In
2.	Prangin Mall, KOMTAR	7,165	Move In
3.	Pulau Mutiara Complex	3,574	Move In
4.	Harbour Trade Centre	2,953	Move In
5.	UDINI Square	2,331	Move In
6.	1 <sup>st</sup> Avenue	2,284	Move In
7.	UDINI Square	2,167	Move Out

**Aktiviti Pembinaan**

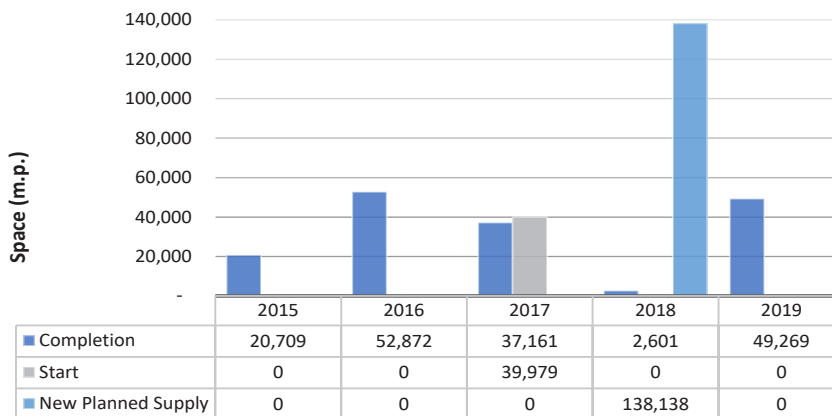
Aktiviti pembinaan baru terdiri daripada dua siap dibina dalam tempoh kajian iaitu IKEA Batu Kawan dan TESCO Bagan Ajam, menyuntik ruang keseluruhan 49,269 m.p. ke dalam pasaran. Tiada aktiviti pembinaan baru lain yang direkodkan. Sehingga akhir 2019, terdapat 107 kompleks perniagaan sedia ada (1,823,589 m.p.) dengan satu kompleks lagi (69,069 m.p.) dalam penawaran yang dirancang.

**Construction Activity**

The new construction activity comprised of two completions in the review period namely IKEA Batu Kawan and TESCO Bagan Ajam, injected a combined space of 49,269 s.m. into the market. No other new construction activity recorded. As at end-2019, there were 107 existing shopping complexes (1,823,589 s.m.) with one complex (69,069 s.m.) in the planned supply.

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Chart 6.15

**Construction Activity of Shopping Complex****Sewa**

Secara umumnya, sewa ruang niaga stabil. Pergerakan sewa menaik dicatat bagi KOMTAR Fasa 1 & 2 disebabkan oleh semakan caj perkhidmatan. Begitu juga di MYDIN, TESCO Bukit Mertajam dan Plaza Bukit Mertajam turut mencatat pertumbuhan sewa. Plaza Gurney mencatatkan sewa premium, mencecah julat sewa tertinggi dari RM63 s.m.p. hingga RM559 s.m.p.

**Rental**

Generally, rental of retail space was stable. Upward rental movements were recorded at KOMTAR Phases 1 & 2 due to service charge revision. Likewise, in Bukit Mertajam MYDIN, TESCO and Plaza Bukit Mertajam also recorded rental growth. Gurney Plaza registered premium rentals, fetching highest rental range from RM63 p.s.m. to RM559 p.s.m.

## Pejabat Binaan Khas

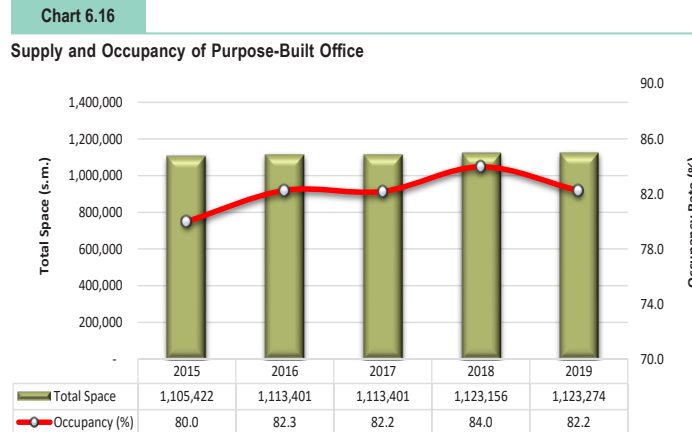
### Ketersediaan Ruang dan Penghunian

Prestasi segmen pejabat kurang memberangsangkan di mana kadar penghunian keseluruhan menurun kepada 82.2%, lebih rendah daripada 84.0% yang dicatat pada 2018. Ambilan tahunan adalah negatif pada 19,405 m.p., berbanding ambilan positif pada 2018 (27,230 m.p.).

## Purpose-Built Office

### Occupancy and Space Availability

The performance of office segment was less promising as the overall occupancy rate declined to 82.2%, slightly lower from 84.0% recorded in 2018. The annual take-up was negative at 19,405 s.m., as compared to positive take-up in 2018 (27,230 s.m.).



**Table 6.3**  
Pertinent Movements in Purpose-Built Office

No.	Purpose-Built Office	Estimated Space (s.m.)	Tenant Movement
1.	Perkeso Building	4,892	Move Out
2.	KWSP building	4,021	Move Out
3.	KOMTAR Tower Block	1,851	Move In
4.	Boustead Tower	1,633	Move Out
5.	KWSP Building	1,493	Move In
6.	Wisma Leader	571	Move In
7.	MWE Plaza	558	Move In

## Aktiviti Pembinaan

Prestasi subsektor itu agak lembab di mana tiada aktiviti pembinaan baru direkodkan pada 2019. Sehingga akhir 2019, terdapat 233 bangunan pejabat binaan khas sedia ada (1,123,274 m.p.) dengan satu bangunan lagi (4,590 m.p) dalam penawaran akan datang.

## Construction Activity

Performance of the sub-sector was sluggish as there was no new construction activity recorded in 2019. As at end-2019, there were 233 existing purpose-built office buildings (1,123,274 s.m.) with another one building (4,590 s.m.) in the incoming supply.

## Sewa

Pasaran sewa pejabat kekal stabil pada 2019. Pergerakan sewa menaik dilihat di Blok Menara KOMTAR, Menara NB, Penang Plaza dan Menara Boustead disebabkan oleh semakan sewa. Sehingga Q4 2019, Indeks Sewa Pejabat Binaan Khas bagi Georgetown berada pada 128.4 mata, naik 1.3% daripada 126.8 mata pada Q4 2018. Sewa Pejabat Binaan Maksud pada Q4 2019 berjumlah RM31.53 psm sebulan, meningkat daripada RM31.14 p.s.m. direkodkan pada Q4 2018.

## Rental

The office rental market remained stable in 2019. Upward rental movements were seen at KOMTAR Tower Block, NB Tower, Penang Plaza and Boustead Tower due to rental revisions. As at Q4 2019, the Purpose-Built Office Rental Index for Georgetown stood at 128.4 points, up by 1.3% from 126.8 points in Q4 2018. The Purpose-Built Office Rental as at Q4 2019 stood at RM31.53 p.s.m. per month, increased from RM31.14 p.s.m. recorded in Q4 2018.

## Riadah

Di subsektor riadah, negeri ini menyaksikan enam hotel siap dibina dalam tempoh kajian menawarkan keseluruhan 397 bilik ke dalam pasaran.

## Leisure

*In the leisure sub-sector, the state witnessed six hotels completed in the review period offering a combined of 397 rooms into the market.*

Table 6.4

List of the Hotel Completions

No.	Hotel Name	Location	Room Nos.
1.	D Mansion Hotel	Jalan Bukit Dumbar	45
2.	Frame Hotel	Lorong Selamat	49
3.	Le Embassy Hotel	Jalan Burmah	33
4.	Loop on Leith Hotel	Leith Street	140
5.	Prestige Hote	Lebuh Gereja, Georgetown	85
6.	WOW Hotel	Jalan Penang	45

## PROSPEK 2020

Pasaran harta tanah negeri ini dijangka dapat bertahan disokong oleh pelbagai projek dalam perancangan dan pembangunan. Antara tumpuan negeri ini ialah pembangunan infrastruktur iaitu:

### Transit Aliran Ringan Bayan Lepas (BLLRT)

Kementerian Pengangkutan telah memberikan kelulusan bersyarat bagi cadangan BLLRT. Projek yang dicadangkan ini akan meliputi 29.9 kilometer terdiri daripada 27 stesen dari KOMTAR ke Lapangan Terbang Antarabangsa Pulau Pinang, dan tiga pulau yang akan ditambah di selatan Pulau Pinang.

### Pembesaran Lapangan Terbang Antarabangsa Bayan Lepas

Projek ini dijangka memulakan pembinaan pada Jun 2020 dan dijangka siap pada 2024. Kawasan pembinaan terminal akan ditambah menjadi 113,005 meter persegi untuk menampung kapasiti 13 juta penumpang setahun selaras dengan peranan Pulau Pinang sebagai Hab Perdagangan dan Pelancongan Antarabangsa.

### Pusat Transformasi Bandar (UTC)

Pusat Transformasi Bandar (UTC) pertama di Pulau Pinang akan dibina di KOMTAR. Penubuhan UTC di KOMTAR akan menarik lebih ramai pelawat ke KOMTAR untuk mendapatkan perkhidmatan yang relevan dan menjadi pemangkin untuk memulihkan peluang perniagaan. Pada peringkat awal, terdapat 15 agensi kerajaan yang akan mula beroperasi di UTC Pulau Pinang pada pertengahan tahun 2020.

### Pan Island Link 1 (PIL 1)

Laporan Penilaian Impak Alam Sekitar (EIA) telah diluluskan oleh Jabatan Alam Sekitar pada April 2019. Pada masa ini, projek ini berada dalam fasa reka bentuk terperinci dan dijangka akan memulakan pembinaan pada 2020 dan akan mengambil masa tujuh tahun untuk disiapkan.

## 2020 OUTLOOK

*The state's property market is expected to sustain backed by various proposed and on-going development projects. Among the state's focus is infrastructure development namely:*

### Bayan Lepas Light Rail Transit (BLLRT)

*The Transport Ministry had granted conditional approval for the proposed BLLRT. The proposed project will cover 29.9 kilometres consisting 27 stations from KOMTAR to the Penang International Airport, and to the three future reclaimed islands in the south of Pulau Pinang.*

### Expansion of Bayan Lepas International Airport

*The project is expected to commence construction in June 2020 and is expected to be completed by 2024. Terminal building area will expand to 113,005 square meters to accommodate capacity of 13 million passengers a year in line with Penang's role as an International Trade and Tourism Hub.*

### Urban Transformation Centre (UTC)

*The first Urban Transformation Centre (UTC) in Penang will be set up in KOMTAR. Establishing UTC in KOMTAR will attract more visitors to KOMTAR to get relevant services and be a catalyst for reviving business opportunities. Initially, there are 15 government agencies that will start operating in UTC Penang by mid-2020.*

### Pan Island Link 1 (PIL 1)

*The Environmental Impact Assessment (EIA) report of the project has been approved by the Environment Department in April 2019. Currently, the project is in the detailed design phase and is expected to begin construction by 2020 and will take seven years to be completed.*

Kerajaan Negeri sedang mencari inisiatif perumahan baru, selain memperluaskan penawaran Perumahan Mampu (RMM), terutama bagi kumpulan B40 dan M40. Inisiatif ini juga penting supaya sasaran 180,000 unit RMM dapat dicapai, seperti yang dinyatakan dalam Wawasan 2030 Pulau Pinang. Sehingga kini, 29,959 unit telah siap, 23,985 unit dalam pembinaan manakala 48,391 unit sedang dalam perancangan. Oleh itu, tambahan sebanyak 77,665 unit akan diusahakan oleh Kerajaan Negeri, melalui kerjasama sektor swasta, syarikat milik kerajaan negeri dan Kerajaan Persekutuan.

Di samping itu, pembangunan GEM Mall dengan keluasan 24,340 meter persegi ruang niaga di kawasan Seberang Perai Tengah dijangka memberi kesan positif terhadap pasaran harta tanah di sekitarnya. Bersebelahan dengannya adalah GEM Residences, sebuah pembangunan seluas 6 hektar yang terletak di Jalan Baru yang menawarkan 978 unit SOHO. Upacara pecah tanah telah dijalankan dan projek itu dijangka siap pada tahun 2022.

Di sektor pelancongan, terdapat cadangan pembangunan dan kerja-kerja menaik taraf infrastruktur kereta kabel Bukit Bendera yang merupakan salah satu tarikan pelancong utama di Pulau Pinang. Laluan kereta kabel ini adalah dari Taman Botani ke puncak Bukit Bendera. Belanjawan 2020 memperuntukkan dana sebanyak RM100 juta bagi projek ini dan kerja pembinaan dijangka bermula pada suku keempat 2020.

Gurney Wharf adalah sebuah taman awam bertaraf dunia di atas 24.28 hektar yang ditambah di tepi pantai Gurney Drive. Projek ini ditambah oleh Tanjung Pinang Development Sdn Bhd (TPD), anak syarikat pemaju harta tanah Eastern & Oriental Berhad (E & O). Pelan induk konsep Gurney Wharf yang dicadangkan meliputi empat ciri yang berbeza termasuk Seaside Retail F & B, Taman Air, Pantai dan Coastal Grove.

Kerajaan Negeri telah merancang pembangunan untuk memastikan penggunaan tanah dimaksimumkan supaya ia dapat memberi kesan positif kepada rakyat Pulau Pinang. Oleh itu, kawasan pinggir pantai Weld Quay untuk bahagian Pulau dan Butterworth di Seberang Perai akan diubah menjadi tarikan baharu Pulau Pinang dan akan dikenali sebagai Teras Bandar Baharu Pulau Pinang (PNCC), yang dijangka menarik peluang pelaburan baharu. PNCC akan menyumbang ke arah pembangunan ekonomi berdasarkan inovasi, budaya dan industri kreatif.

*The State Government is looking at new housing initiatives, in addition to extending the supply of Affordable Housing (RMM), especially for the B40 and M40 groups. These initiatives also important so that target for 180,000 RMM units can be reached, as outlined in the Penang Vision 2030. To date, 29,959 units have been completed, 23,985 units are under construction while 48,391 units are in the pipeline. As such, an additional of 77,665 units will be worked on by the State Government, through the cooperation of the private sector, state-owned companies and the Federal Government.*

*In addition, the development of the GEM Mall with a floor area of 24,340 square meters of retail space in the Seberang Perai Tengah area is expected to have a positive impact on the surrounding real estate market. Adjacent to it is the GEM Residences, a 6-hectare development located on the Jalan Baru that offers 978 units of SOHO. A ground-breaking ceremony was held, and the project is expected to be completed by 2022.*

*In tourism sector, there is a proposed development and upgrading works of the infrastructure of Bukit Bendera's cable car which is one of the main tourist attractions in Penang. This cable car route runs from Botanical Garden to the summit of Bukit Bendera. The 2020 Budget has allocated a fund of RM100 million for the project and construction work is expected to begin in the fourth quarter of 2020.*

*Gurney Wharf is a world-class public park on the 24.28 hectare reclaimed Gurney Drive foreshore. This project is reclaimed by Tanjung Pinang Development Sdn Bhd (TPD), a subsidiary of property developer Eastern & Oriental Berhad (E&O). The proposed Gurney Wharf concept master plan encompasses four distinct character areas including Seaside Retail F&B, Water Gardens, Beach and Coastal Grove.*

*The State Government has planned development to ensure that land use is maximized so that it can have a positive impact to the people of Penang. As such, the waterfront area of Weld Quay for parts of Pulau and Butterworth in Seberang Perai will be transformed into a new Penang attraction and will be known as Penang's New City Core (PNCC), which is expected to attract new investment opportunities. PNCC will contribute towards economic development based on innovation, culture and creative industry.*





# PERAK





# PERAK

## GAMBARAN KESELURUHAN

Prestasi pasaran harta tanah negeri ini bertambah baik pada kadar yang perlahan pada 2019. Terdapat 36,035 transaksi bernilai RM8.26 bilion, meningkat masing-masing 0.6% dan 5.1% dalam bilangan dan nilai berbanding 2018 (35,835 transaksi bernilai RM7.85 bilion). Subsektor kediaman mengekalkan bahagian utamanya dengan 60.8% daripada keseluruhan transaksi, diikuti oleh subsektor pertanian (30.9%), komersial (5.4%), tanah pembangunan (1.5%) dan industri (1.3%).

Pergerakan pasaran pelbagai bagi semua subsektor. Subsektor pertanian dan komersial masing-masing meningkat 5.1% dan 1.7%. Sebaliknya, kediaman (-0.5%), tanah pembangunan (-12.8%) dan industri (-25.4%) menunjukkan sebaliknya. Dari segi nilai, semua subsektor mencatatkan pertumbuhan positif dengan pengecualian industri dan tanah pembangunan.

## OVERVIEW

The state's property market performance improved at a slow pace in 2019. There were 36,035 transactions worth RM8.26 billion, increased by 0.6% and 5.1% in volume and value respectively as compared to 2018 (35,835 transactions worth RM7.85 billion). Residential sub-sector sustained its major share with 60.8% of the total transactions, followed by agriculture (30.9%), commercial (5.4%), development land (1.5%) and industrial (1.3%) sub-sectors.

Market movements were varied across all sub-sectors. Agriculture and commercial sub-sectors increased by 5.1% and 1.7% respectively. On the other hand, residential (-0.5%), development land (-12.8%) and industrial (-25.4%) showed otherwise. In term of value, all sub-sector recorded positive growth with the exception of industrial and development land.

70

Chart 7.1

Volume of Property Transactions 2015 – 2019



Chart 7.2

Value of Property Transactions 2015 – 2019

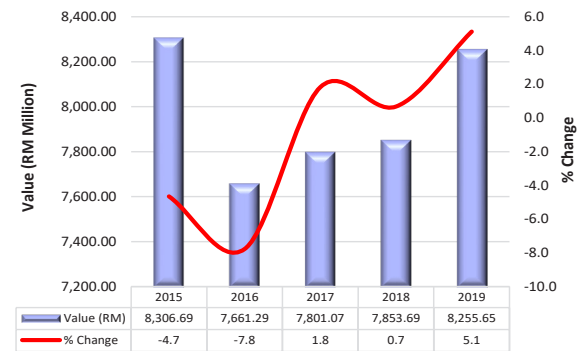


Chart 7.3

Contribution to Transaction Volume by Sub-sector 2019

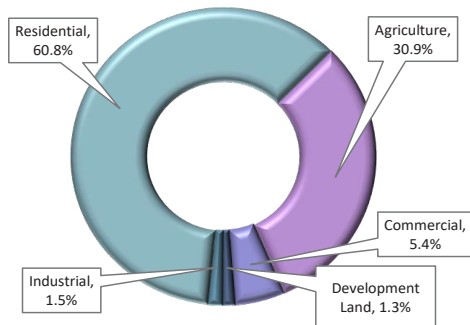
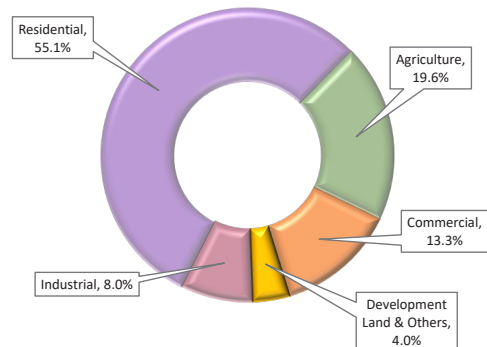


Chart 7.4

Contribution to Transaction Value by Sub-sector 2019



## PROMINENT SALE

**Table 7.1**

**Summary of Prominent Sales Recorded in 2019**

No.	Property	Location	Transaction Year
1.	Maybank Trust Building	Jalan Tun Sambanthan, Ipoh	2019
2.	Marina Jetty	Jalan Teluk Muroh, Marina Island	2019
3.	Awana Estate (100.94 hectares)	Simpang Lima, Manjung	2019
4.	Ganda Estate (765.52 hectares)	Durian Sebatang, Hilir Perak	2018
5.	Pinehill Estate (3,081.85 hectares)	Changkat Jong, Hilir Perak	2018
6.	Impiana Hotel	Jalan Raja Nazrin Shah, Ipoh	2018
7.	Yeob Bay Hotel & Resort	Teluk Senangin, Lumut	2018
8.	UMW Toyota Motor Exhibition Centre	Jalan Kuala Kangsar, Ipoh	2018
9.	Coliseum Square	Jalan Sultan Nazrin Shah, Ipoh	2018
10.	AEON Kinta City	Jalan Azlan Shah, Ipoh	2018

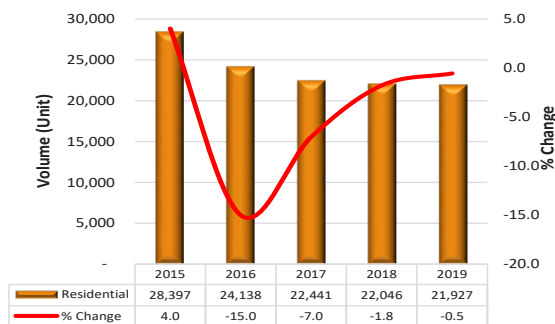
## HARTA TANAH KEDIAMAN

### Transaksi

Prestasi subsektor kediaman adalah sederhana. Terdapat 21,927 transaksi bernilai RM4.52 bilion, menurun sedikit 0.5% dalam bilangan. Nilai transaksi bagaimanapun meningkat 4.4% berbanding 2018 (22,046 transaksi bernilai RM4.33 bilion). Rumah teres membentuk sebahagian besar transaksi kediaman, menyumbang 45.6% daripada jumlah keseluruhan.

**Chart 7.5**

**Volume of Residential Transactions 2015 – 2019**



### Pelancaran Baharu

Pasaran utama menunjukkan prestasi yang lebih baik apabila unit yang dilancarkan dan prestasi jualan meningkat dalam tempoh kajian.

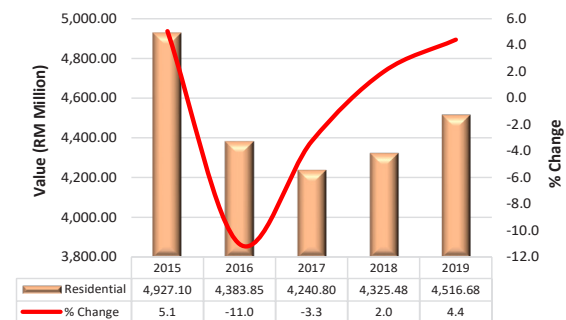
## RESIDENTIAL PROPERTY

### Transaction

The residential sub-sector performance moderated. There were 21,927 transactions worth RM4.52 billion, decreased by a mere 0.5% in volume. Transactions value however, increased by 4.4% as compared to 2018 (22,046 transactions worth RM4.33 billion). Terraced houses formed the bulk of residential transactions, accounting for 45.6% of the total.

**Chart 7.6**

**Value of Residential Transactions 2015 – 2019**

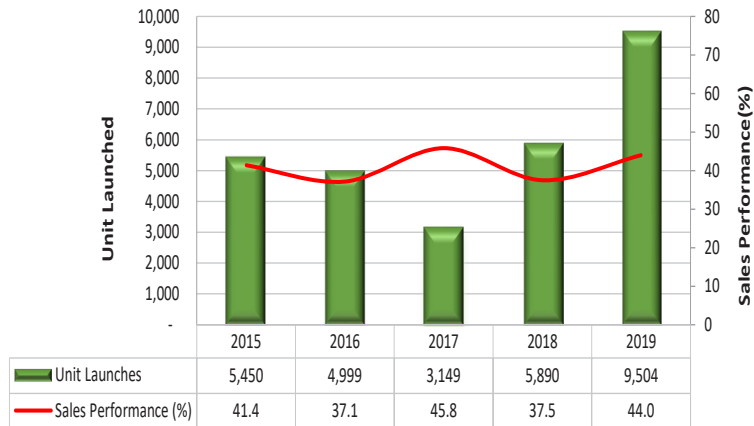


### New Launches

The primary market showed better performance as the units launched and sales performance increased in the review period.

Chart 7.7

New Launches Trend 2015 – 2019



**Status Pasaran**

Prestasi unit kediaman siap dibina tidak terjual bertambah baik di mana bilangannya menurun dalam tempoh kajian.

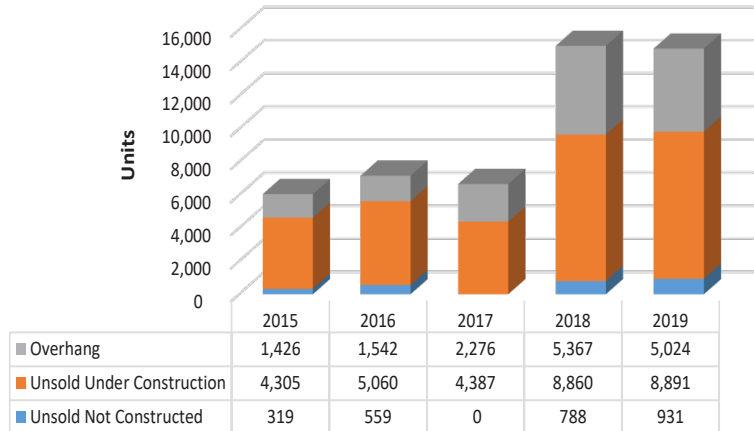
**Market Status**

*The performance of residential overhang units improved slightly as the number reduced in the review period.*

72

Chart 7.8

Residential Market Status Trend 2015 – 2019



**Aktiviti Pembinaan**

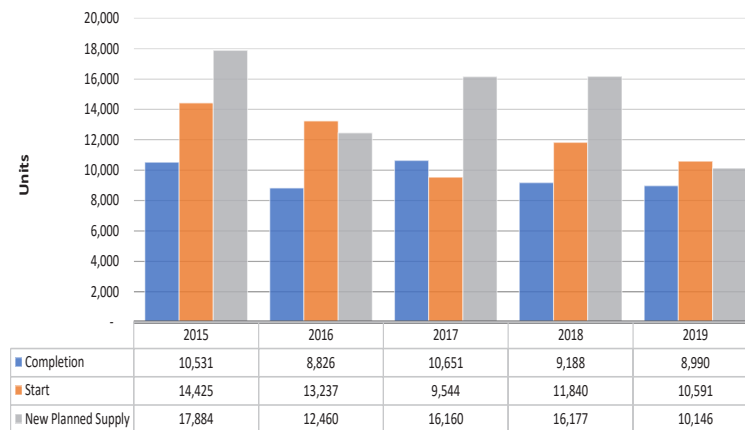
Aktiviti pembinaan subsektor kediaman kurang memberangsangkan ditunjukkan oleh kurangnya aktiviti pembinaan. Sehingga akhir 2019, terdapat 491,240 unit kediaman sedia ada dengan 35,740 unit lagi dalam penawaran akan datang dan 43,616 unit dalam penawaran yang dirancang.

**Construction Activity**

*The residential development was less encouraging evident by fewer new construction activities. As at end-2019, there were 491,240 existing residential units with another 35,740 units in the incoming supply and 43,616 units in the planned supply.*

Chart 7.9

Residential Construction Activity Trend 2015 – 2019



## Harga dan Sewa

Harga harta tanah kediaman menunjukkan pergerakan bercampur-campur secara keseluruhannya. Dalam segmen bertanah, kebanyakan teres dua tingkat mencatatkan pertumbuhan stabil dan positif manakala teres satu tingkat mencatatkan pergerakan negatif kecil bawah 10.0%. Bagi harta tanah bertingkat tinggi, harga unit kondominium stabil dan mengukuh di lokasi terpilih. Walau bagaimanapun, unit pangsapuri di beberapa skim menunjukkan penurunan harga minima. Sehingga pada Q4 2019, Indeks Harga Semua Rumah untuk negeri ini berada pada 189.9 mata, turun 1.8% daripada 186.6 mata pada Q4 2018. Purata Harga Semua Rumah untuk negeri pada Q4 2019 adalah RM217,387, meningkat daripada RM213,662 pada Q4 2018.

Pasaran sewa kediaman stabil dengan pergerakan dicatatkan di beberapa lokasi. Sewa teres dua tingkat meningkat di beberapa lokasi kerana berdekatan dengan pusat industri, pusat bandar dan kejiranan komersial. Sebaliknya, ketersediaan terhad bagi rumah teres dua tingkat di Bandaraya Ipoh menyebabkan peningkatan sewa. Sewa harta tanah bertingkat tinggi juga stabil dengan kenaikan dicatat di beberapa skim di Manjung dan Bandaraya Ipoh.

## HARTA TANAH KOMERSIAL

### Transaksi

Subsektor komersial menunjukkan sedikit peningkatan dalam tempoh kajian. Terdapat 1,936 transaksi bernilai RM1.29 bilion dicatatkan, meningkat masing-masing 1.7% dan 23.6% dalam bilangan dan nilai berbanding 2018 (1,904 transaksi bernilai RM1.04 bilion).

## Price and Rental

*Prices of residential properties showed mix movements across the board. In landed segment, most of double storey terraces recorded stable and positive growth whilst single storey terraces registered marginal negative movements below 10.0%. For high-rise property, price of condominium units was stable and firmed up in choice locations. However, apartment units in several schemes showed a minimal price reduction. As at Q4 2019, the All House Price Index for the state stood at 189.9 points, down by 1.8% from 186.6 points in Q4 2018. The average All House Price for the state as at Q4 2019 stood at RM217,387, increased from RM213,662 in Q4 2018.*

*The residential rental market was stable with movements noted in several locations. Rental of double storey terraces increased in some locations due to its proximity to industrial hub, town centres and commercial neighbourhood. On the other hand, limited availability of double storey low-cost terrace houses in Ipoh City led to the rental increase. Rental of high-rise property was equally stable with increases noted in few schemes in Manjung and Ipoh City.*

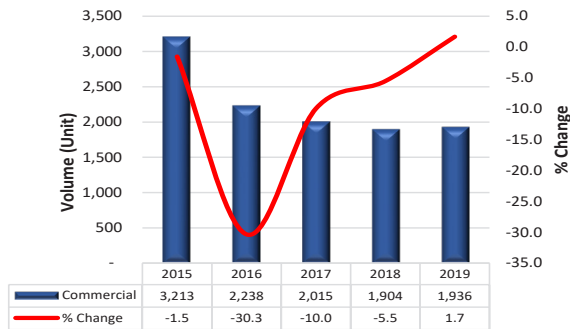
## COMMERCIAL PROPERTY

### Transaction

*The commercial sub-sector showed a slight improvement in the review period. There were 1,936 transactions worth RM1.29 billion recorded, increased by 1.7% and 23.6% in volume in and value respectively as compared to 2018 (1,904 transactions worth RM1.04 billion).*

Chart 7.10

Volume of Commercial Property Transactions 2015 – 2019



## Kedai

### Transaksi

Subsektor kedai merekodkan 1,528 transaksi bernilai RM737.99 juta pada 2019, menyumbang 78.9% daripada transaksi harta tanah komersial dan 57.4% daripada jumlah nilai. Aktiviti pasarannya meningkat 2.8% dalam bilangan dan 2.5% dalam nilai berbanding tahun lepas (1,486 transaksi bernilai RM720.25 juta).

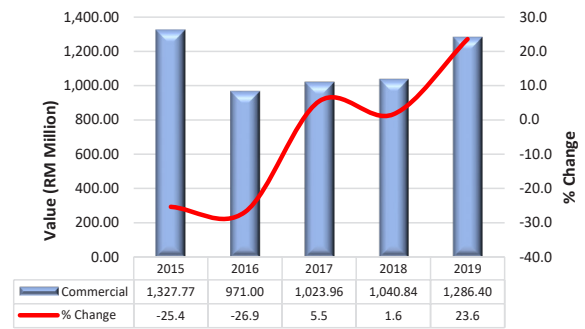
74

### Status Pasaran

Prestasi kedai siap dibina tidak terjual dan unit belum terjual kurang menggalakkan di mana bilangannya meningkat pada 2019.

Chart 7.11

Value of Commercial Property Transactions 2015 – 2019



## Shop

### Transaction

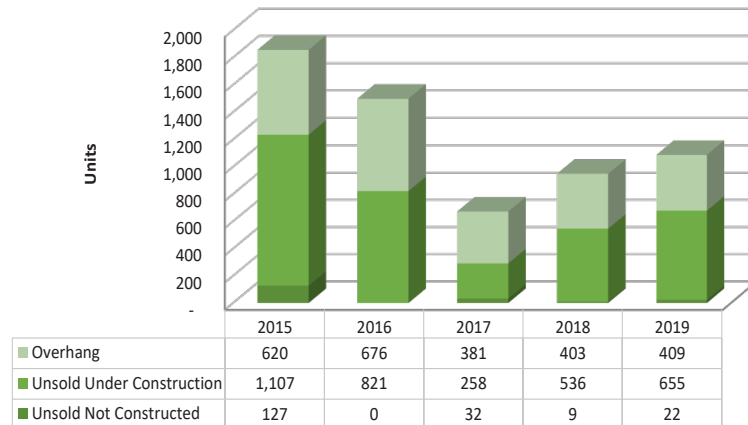
Shop sub-sector recorded 1,528 transactions worth RM737.99 million in 2019, accounting for 78.9% of the commercial property transactions and 57.4% of the total value. Its market activity increased by 2.8% in volume and 2.5% in value as compared to last year (1,486 transactions worth RM720.25 million).

### Market Status

The performance of shop overhang and unsold units were less encouraging as the numbers increased in 2019.

Chart 7.12

Residential Construction Activity Trend 2015 – 2019



## Aktiviti Pembinaan

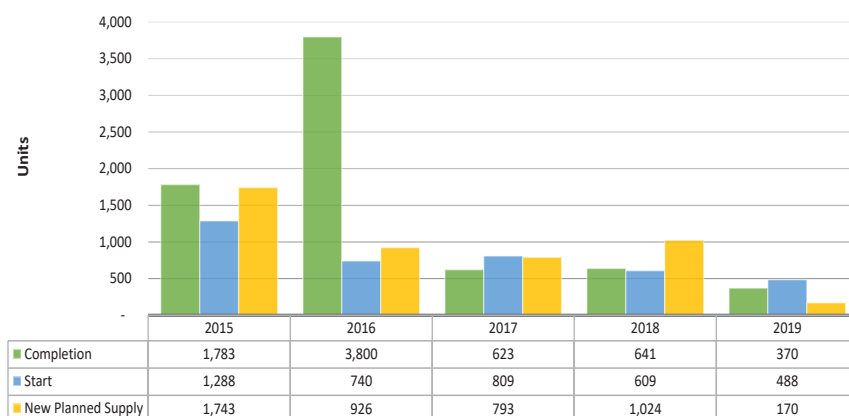
Aktiviti pembinaan subsektor kediaman kurang memberangsangkan kerana aktiviti pembinaan baharu yang sedikit. Sehingga akhir 2019, terdapat 61,723 unit kediaman sedia ada dengan 3,923 unit lagi dalam penawaran akan datang dan 3,089 unit dalam penawaran yang dirancang.

## Construction Activity

The residential development was less promising evident by fewer new construction activities. As at end-2019, there were 61,723 existing residential units with another 3,923 units in the incoming supply and 3,089 units in the planned supply.

Chart 7.13

## Shop Construction Activity Trend 2015 – 2019

**Kompleks Perniagaan****Penghunian dan Ketersediaan Ruang**

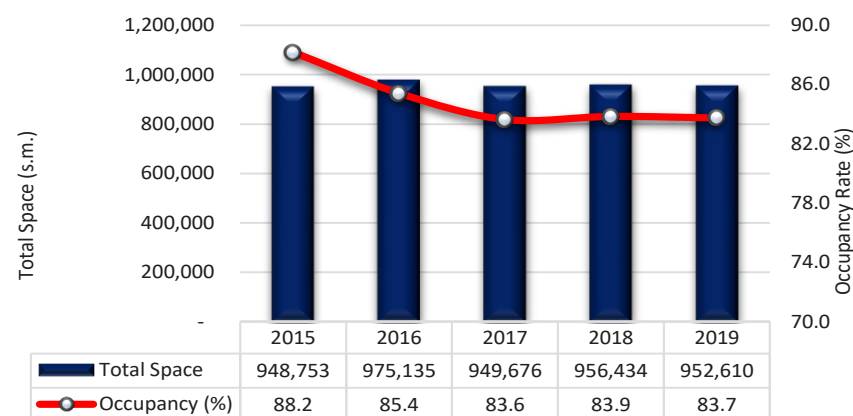
Kadar penghunian keseluruhan kompleks perniagaan adalah 83.7% dengan ambilan tahunan negatif sebanyak 4,215 m.p.

**Shopping Complex****Occupancy and Space Availability**

The overall occupancy rate of the shopping complex stood at 83.7% with a negative annual take up of 4,215 s.m.

Chart 7.14

## Supply and Occupancy of Shopping Complex

**Aktiviti Pembinaan**

Tiada aktiviti pembinaan baru direkodkan dalam tempoh kajian. Sehingga akhir 2019, terdapat 75 kompleks perniagaan sedia ada (952,610 m.p.) dengan tiga kompleks lagi (100,438 m.p.) dalam penawaran akan datang.

**Pejabat Binaan Khas****Penghunian dan Ketersediaan Ruang**

Prestasi pejabat binaan khas tetap teguh dengan purata kadar penghunian 94.3%. Ambilan tahunan adalah positif pada 3,974 m.p.

**Construction Activity**

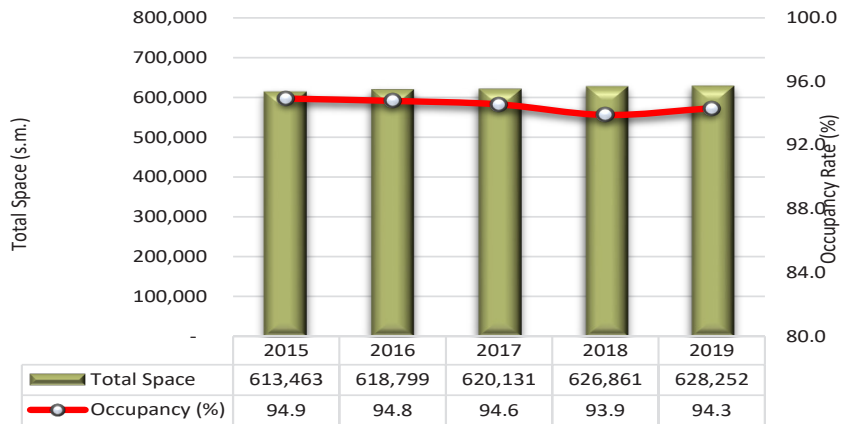
There was no new construction activity recorded in the review period. As at end-2019, there were 75 existing shopping complexes (952,610 s.m.) with another three complexes (100,438 s.m.) in the incoming supply.

**Purpose-Built Office****Occupancy and Space Availability**

The performance of purpose-built office remained firm with an average occupancy rate of 94.3%. The annual take up was positive at 3,974 s.m.

Chart 7.15

## Supply and Occupancy of Purpose-Built Office



## Aktiviti Pembinaan

Negeri mencatatkan bangunan pejabat kerajaan iaitu Pejabat Agama Islam Seri Iskandar seluas 1,342 m.p. siap dibina. Sehingga akhir 2019, terdapat 224 bangunan pejabat sedia ada (628,252 m.p.) dengan lima bangunan lagi (43,697 m.p.) dalam penawaran akan datang.

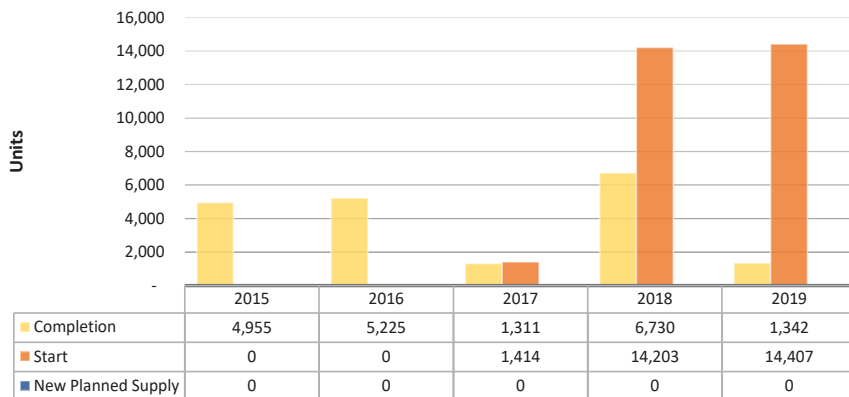
## Construction Activity

The state recorded a completion of government office building namely Seri Iskandar Islamic Religious Office with a total space of 1,342 s.m. As at end-2019, there were 224 existing purpose-built office buildings (628,252 s.m.) with another five buildings (43,697 s.m.) in the incoming supply.

76

Chart 7.16

## Construction Activity of Purpose-Built Office



## Riadah

Di subsektor riadah, negeri ini menyaksikan empat hotel siap dibina dalam tempoh kajian menawarkan sejumlah 201 bilik ke dalam pasaran.

## Leisure

In the leisure sub-sector, the state witnessed four hotels completed in the review period offering a combined of 201 rooms into the market.

Table 7.2

## List of the Hotel Completions

No.	Hotel Name	Location	No. of Rooms
1.	Casa Meru Hotel	Meru	45
2.	O & G Boutique Hotel	Parit Buntar	50
3.	Sojourn Guest House Ipoh	Jalan Sultan Abdul Jalil, Ipoh	41
4.	Tourist Hotel Pangkor	Pangkor	65



## PROSPEK 2020

Pasaran harta tanah dijangka bertahan disokong oleh pelbagai projek pembangunan infrastruktur yang sedang berjalan dan dalam perancangan bagi 2020. Kerajaan Persekutuan telah meluluskan projek-projek persekutuan yang akan dilaksanakan di Perak berjumlah RM2.30 bilion meliputi pelbagai projek. Antara projek pembangunan yang diluluskan adalah:

- **Hospital Kampar**  
Hospital Kampar yang baharu akan dibina di atas tanah seluas 11.3 hektar yang terletak berhampiran Kampung Changkat Baru.
- **Menaik taraf dan meluaskan Lapangan Terbang Sultan Azlan Shah**  
Kerajaan Persekutuan memperuntukkan RM150 juta untuk menaik taraf lapangan terbang ini. Kerja-kerja menaik taraf akan melibatkan pembesaran bangunan terminal dan untuk memanjangkan landasan.
- **Pembinaan Pusat Rehabilitasi teknologi robotik Pertubuhan Keselamatan Sosial (PERKESO)**  
Pusat rehabilitasi baharu itu dijangka akan dibina di atas tanah seluas 40.4 hektar berdekatan dengan jalan keluar Lebuhraya Utara-Selatan. Apabila siap dibina, pusat rehabilitasi ini akan dilengkapi dengan teknologi terkini termasuk robotik, rawatan trauma dan pusat kecemerlangan untuk pencegahan kemalangan.

Dalam segmen kediaman, Dasar Perumahan Negeri Perak (DPNP) telah ditambah baik. DPNP 2019 akan berfungsi sebagai panduan dan mekanisme kawalan bagi Kerajaan Negeri Perak untuk membangunkan perumahan secara lebih sistematik, berkualiti, selesa dan mampu dimiliki. Untuk mencapai sasaran membina 50 ribu unit rumah kos rendah dan sederhana dalam tempoh lima tahun, Kerajaan Negeri akan memperkenalkan insentif berikut kepada pemaju:

- a) Pengecualian fi bagi pembangunan rumah kos rendah dan kos sederhana sama ada rumah bertanah atau berbilang tingkat;
- b) Insentif bayaran premium RM100 seunit bagi setiap unit kos rendah dan RM1,000 seunit bagi setiap unit kos sederhana yang dibangunkan;
- c) Caj pemajuan 5% khusus untuk pembangunan rumah kos rendah dan kos sederhana; dan
- d) Pengecualian caj sumbangan saliran bagi keluasan tanah di dalam kawasan skim yang dibangunkan dengan rumah kos rendah dan kos sederhana.

## 2020 OUTLOOK

*The property market is expected to sustain supported by various infrastructure on-going and proposed development projects for 2020. The Federal Government has approved federal projects to be implemented in Perak amounting to RM2.30 billion covering various projects. Among the approved development projects are:*

- **Kampar Hospital**  
*The new Kampar Hospital will be built on an 11.3 hectares piece of land which is located near Kampung Changkat Baru.*
- **Upgrading and extending the Sultan Azlan Shah Airport**  
*The Federal Government had allocated RM150 million for upgrading the airport. The upgrading works would involve an expansion of the terminal building and to extend the runway.*
- **Construction of robotic technology Social Security Organisation (SOCSO) Rehabilitation Centre**  
*The new rehabilitation centre is expected to be built on a 40.4 hectares piece of land nearby the North-South Expressway exit. Upon completion, the rehabilitation centre will be equipped with the latest technology including robotics, trauma treatment and a centre of excellence for the prevention of accidents.*

*In residential segment, the Perak State Housing Policy (DPNP) has been improved. The DPNP 2019 will serve as a guide and control mechanism for the Perak State Government to develop more systematic, quality, comfortable and affordable housing. To achieve the goal of building 50 thousand units of low and medium cost houses within five years, the State Government will introduce the following incentives to developers:*

- a) *Exemption of fees for low- and medium-cost housing developments of either landed or high-rise;*
- b) *Incentive payment of premiums of RM100 per unit for low-cost units and RM1,000 per unit for medium-cost units developed;*
- c) *5% development charge specifically for low- and medium-cost housing development; and*
- d) *Exemption of drainage contribution charges for land area within the scheme area developed with low and medium cost houses.*

Di samping itu, terdapat beberapa cadangan pembangunan dalam sektor pelancongan untuk menarik lebih banyak pelancong sejajar dengan fokus negeri untuk meningkatkan sektor ini. Terdapat beberapa projek yang akan dibangunkan di Pulau Pangkor iaitu:

- a) Galeri dan Dataran Nelayan Pangko di Sungai Pinang Besar;
- b) menaik taraf jeti penumpang dan kargo;
- c) menaik taraf gerai di Dataran Kurma;
- d) menaik taraf laluan pejalan kaki; dan
- e) kerja-kerja mengindahkan Teluk Baru.

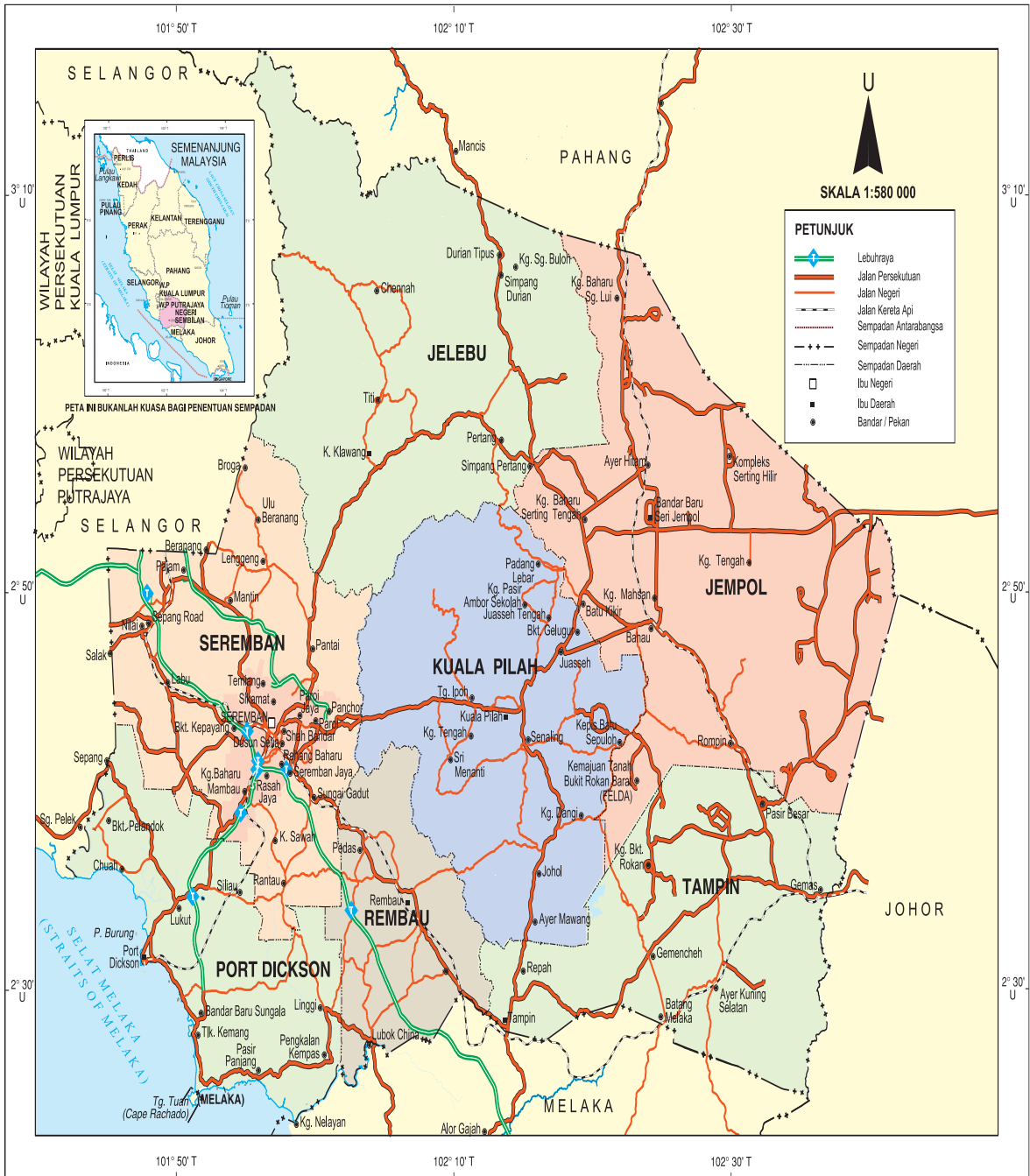
Tambahan pula, pembangunan di kawasan Pintu Sempadan Pengkalan Hulu - Betong juga telah dilaksanakan. Ia adalah satu usaha untuk memperkukuhkan Pengkalan Hulu sebagai Pintu Gerbang Antarabangsa dengan mewujudkan Border Town di kawasan tersebut. Oleh itu, RM1.5 juta akan diperuntukkan untuk menyusun semula gerai-gerai sedia ada dan menambahbaik kemudahan infrastruktur. Inisiatif ini sebagai persediaan limpahan kegiatan ekonomi setempat selari dengan pembangunan Lapangan Terbang Antarabangsa Betong, Thailand yang dijangka siap dan mula digunakan pada tahun 2020.

*In addition, there are several proposed development in tourism sector to attract more tourists in line with the state's focus to boost this sector. There are some projects that will be developed in Pulau Pangkor namely:*

- a) Pangkor Fisherman's Gallery and Square in Sungai Pinang Besar;*
- b) upgrading of passenger and cargo jetty,*
- c) upgrading the booth in Dataran Kurma;*
- d) the upgrading of the pedestrian path; and*
- e) beautifying works of Teluk Baru.*

*Furthermore, development at Pengkalan Hulu - Betong Border Gate area also has been implemented. It is an effort to strengthen the Pengkalan Hulu as an International Gate by establishing Border Town in the area. Thus, RM1.5 million will be allocated to remodel existing stalls and improving infrastructure. The initiative is in preparation for a spill of local economic activity in line with the development of the Betong International Airport, Thailand which is expected to be completed and ready for use by 2020.*

# NEGERI SEMBILAN



# NEGERI SEMBILAN

## GAMBARAN KESELURUHAN

Prestasi pasaran harta tanah di negeri ini adalah perlahan dalam tempoh kajian. Terdapat 16,227 transaksi direkodkan bernilai RM7.42 bilion, susut 8.1% dalam bilangan. Walaubagaimanapun, nilai transaksi meningkat 9.5% berbanding 2018 (17,655 transaksi bernilai RM6.78 bilion). Subsektor kediaman mengekalkan syer terbesar dengan 66.5% daripada bilangan jumlah transaksi diikuti oleh subsektor pertanian (22.6%), subsektor komersial (5.7%), subsektor tanah pembangunan (3.2%) dan subsektor industri (2.2%).

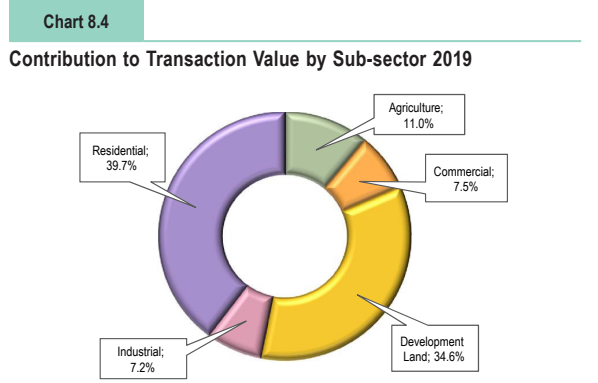
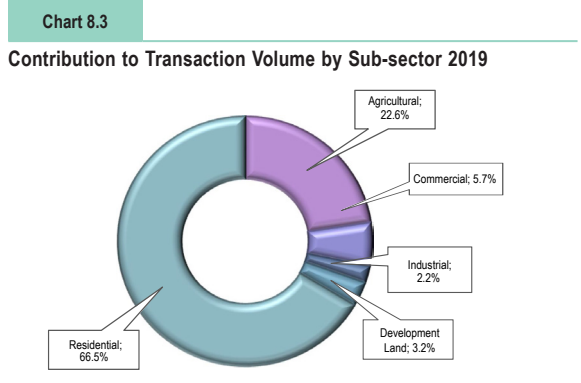
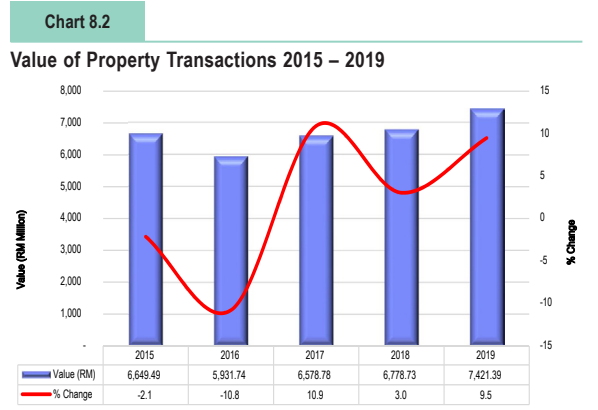
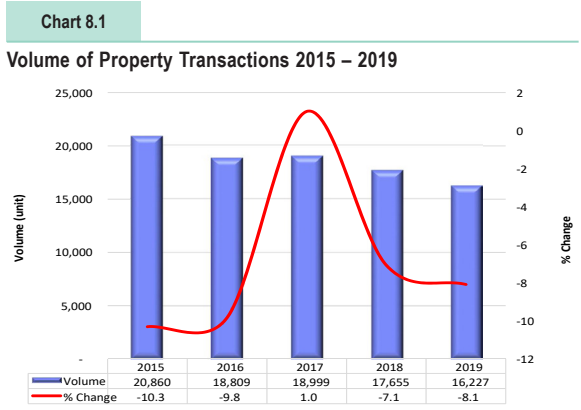
Aktiviti pasaran di semua subsektor menunjukkan pergerakan bercampur. Subsektor industri dan pertanian masing-masing meningkat 8.0% dan 4.8%. Sebaliknya, penurunan dicatatkan bagi subsektor kediaman (-12.3%), komersial (-8.1%) dan tanah pembangunan (-4.7%). Dari segi nilai, semua subsektor mencatat aliran menurun kecuali subsektor pertanian dan tanah pembangunan yang menunjukkan aliran menaik.

## OVERVIEW

The state's property market performance softened in the review period. There were 16,227 transactions recorded worth RM7.42 billion, decreased by 8.1% in volume. Nevertheless, the value of transaction increased by 9.5% over 2018 (17,655 transactions worth RM6.78 billion). The residential sub-sector retained its lion share with 66.5% of the total transactions followed by agriculture (22.6%), commercial (5.7%), development land (3.2%) and industrial (2.2%) sub-sectors.

Market activity across all sub-sectors showed a mixed movements. Industrial and agriculture sub-sectors increased by 8.0% and 4.8% respectively. On the contrary, decline recorded for residential sub-sector (-12.3%), commercial (-8.1%) and development land (-4.7%). In terms of value, all sub-sectors recorded downward trend except for agriculture and development land sub-sectors, which showed uptrend.

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## PROMINENT SALES

Table 8.1

Summary of Prominent Sales Recorded in 2019

No.	Property	Location	Transaction Year
1.	Pelin Estate	Kundur, Rembau	2019
2.	Estate Land	Kampung Baru Gedok, Gemenchek	2019
3.	Estate Land	Kampung Baru Gedok, Gemenchek	2019

Tempoh kajian juga menyaksikan beberapa pembelian pukal. Antaranya ialah 36 plot teres kediaman dan 51 plot berkembar di Taman Regent, Gemenchek dan 22 plot teres kediaman dan 3 plot berkembar di Ulu Lalang, Jalan Sungai Gadut – Rantau, Seremban.

*The review period also saw several bulk purchases. Among these were 36 terraced plots and 51 semi-detached plots in Taman Regent, Gemenchek and 22 terraced plots and 3 semi-detached plots in Ulu Lalang, Jalan Sungai Gadut – Rantau, Seremban.*

## HARTA TANAH KEDIAMAN

### Transaksi

Subsektor ini mencatatkan 10,783 transaksi bernilai RM2.94 bilion, menurun 12.3% dalam bilangan dan 17.2% dalam nilai. Transaksi rumah teres mendominasi 56.2% (6,055 unit) transaksi harta tanah kediaman.

## RESIDENTIAL PROPERTY

### Transaction

*The sub-sector recorded 10,783 transactions worth RM2.94 billion, shrank by 12.3% in volume and 17.2% in value. Terraced houses transactions dominated 56.2% (6,055 units) of the residential property transactions.*

Chart 8.5

Volume of Residential Property Transactions 2015 – 2019

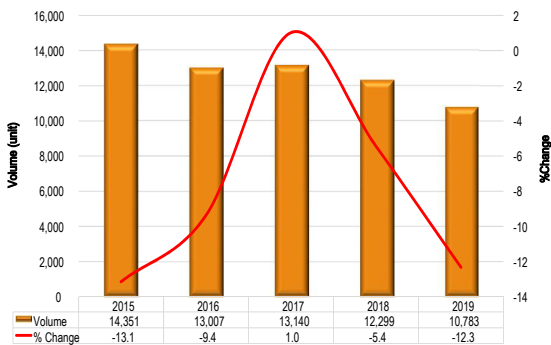
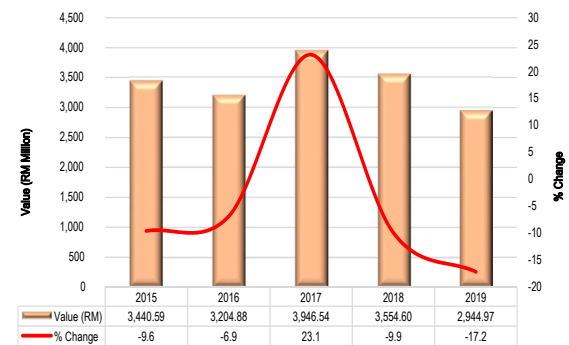


Chart 8.6

Value of Residential Property Transactions 2015 – 2019



## Pelancaran Baharu

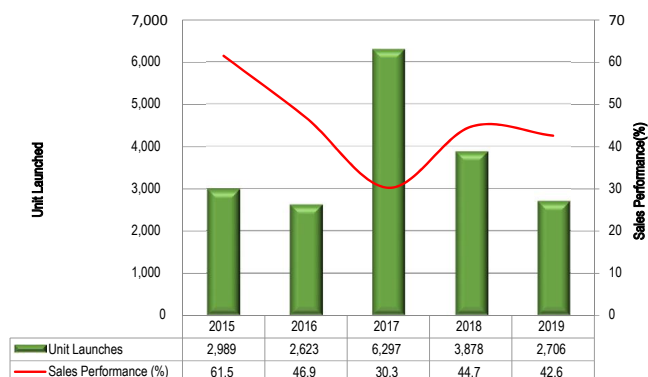
Prestasi pelancaran baharu di pasaran utama menurun 30.2% pada tahun kajian berbanding 2018. Pada perkembangan yang sama, prestasi jualan juga perlahan sedikit berbanding 2018. Teres dua dan tiga tingkat membentuk sebahagian besar pelancaran baharu, menyumbang 80.1% (2,188 unit) daripada keseluruhan.

## New Launches

*The performance of new launches in the primary market decreased by 30.2% in the review period as compared to 2018. On a similar note, the sales performance also slightly slower compared to 2018. Two to three storey terraces formed most of the new launches, accounting for 80.1% (2,188 units) of total.*

Chart 8.7

New Launches Trend 2015 – 2019



### Status Pasaran

Unit kediaman siap dibina tidak terjual dan dalam pembinaan belum terjual menyaksikan peningkatan bilangan manakala belum dibina belum terjual berkurang dalam tempoh kajian.

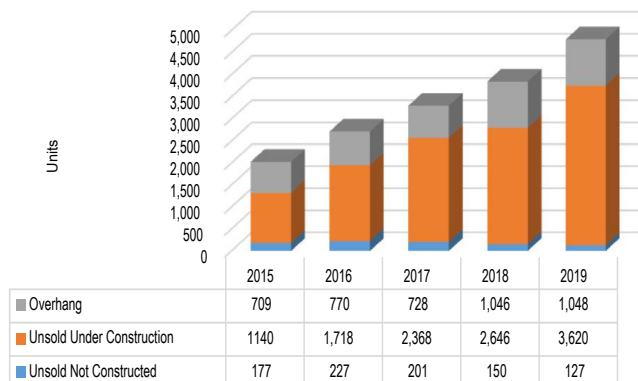
### Market Status

*The residential overhang units and unsold under construction witnessed increasing numbers while the unsold not constructed reduced in the review period.*

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Chart 8.8

Residential Market Status Trend 2015 – 2019



### Aktiviti Pembinaan

Subsektor ini merekodkan lebih banyak aktiviti pembinaan memandangkan bilangan siap dibina, mula dibina dan penawaran baru dirancang meningkat dalam tempoh kajian. Sehingga akhir 2019, terdapat 281,836 unit kediaman sedia ada dengan 17,684 unit lagi dalam penawaran akan datang dan 32,948 unit dalam penawaran yang dirancang.

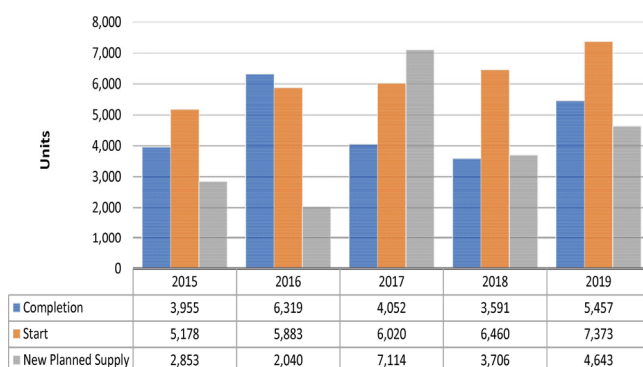
### Construction Activity

*This sub-sector recorded more construction activities as the number of completion, start and new planned supply rose in the review period. As at end-2019, there were 281,836 existing residential units with another 17,684 units in the incoming supply and 32,948 units in the planned supply.*



Chart 8.9

## Residential Construction Activity Trend 2015 – 2019



## Harga dan Sewa

Harta tanah kediaman mencatatkan trend harga yang stabil secara keseluruhan. Rumah yang terletak di kawasan baik dilengkapi rangkaian jalan raya yang cekap dan berdekatan institusi pengajian tinggi mengalami peningkatan modal. Harga rumah teres satu tingkat di Taman Tanjung, Port Dickson and Taman Panchor Jaya I & II, Seremban menikmati kenaikan modal melebihi 15.0%. Rumah teres dua tingkat di Taman Seremban Jaya VI merekodkan kenaikan harga tertinggi 20.8% dengan RM410,000 hingga RM460,000 seunit manakala Taman Tuanku Jaafar IV jatuh 10.7% dengan harga dari RM230,000 hingga RM300,000 seunit. Pada 2019, Indeks Harga Semua Rumah meningkat kepada 190.6 mata, naik 2.0% daripada 186.9 mata pada 2018. Harga Purata Semua Rumah bagi negeri ini pada 2019 adalah RM255,834 meningkat dari RM250,834 pada 2018.

Pasaran sewa kediaman secara amnya adalah stabil. Teres satu tingkat di beberapa skim menunjukkan pertumbuhan dua angka iaitu Taman ACBE, Jempol, Taman Wira Jaya, Kuala Pilah dan Taman Bunga Blossom, Seremban. Sementara itu, sewa unit bertingkat tinggi kekal stabil, cuma Citra Embun, Bukit Citra Pajam dan Desa Jati Apartment, Nilai mencatatkan kenaikan sewa 7.7% hingga 8.3%.

## HARTA TANAH KOMERSIAL

### Transaksi

Subsektor komersial mencatatkan 917 transaksi bernilai RM557.20 juta dalam tempoh kajian. Ini menunjukkan penurunan 8.1% dalam bilangan dan 8.2% dalam nilai (2018: 998 transaksi bernilai RM606.78 juta).

## Price and Rental

*Residential properties registered stable price trend across the board. Houses located in good location served with efficient road linkages and adjacent to higher learning institutions experienced capital appreciation. Single storey terrace houses located in Taman Tanjung, Port Dickson and Taman Panchor Jaya I & II, Seremban enjoy more than 15.0% capital appreciation. The double storey terrace houses at Taman Seremban Jaya VI recorded the highest increment at 20.8% with price ranging from RM410,000 to RM460,000 per unit while Taman Tuanku Jaafar IV drop at 10.7% with price ranging from RM230,000 to RM300,000 per unit. As at 2019, the All House Price Index stood at 190.6 points, increased by 2.0% from 186.9 points in 2018. The average All House Price for the state as at 2019 stood at RM255,834 increased from RM250,834 in 2018.*

*The residential rental market was generally stable. Single storey terraces in several schemes portrayed double-digit growth namely Taman ACBE, Jempol, Taman Wira Jaya, Kuala Pilah and Taman Bunga Blossom, Seremban. Meanwhile, rentals of highrise units remained stable, only Citra Embun, Bukit Citra Pajam and Desa Jati Apartment, Nilai recorded a rental increase of 7.7% to 8.3%.*

## COMMERCIAL PROPERTY

### Transaction

*The commercial sub-sector recorded 917 transactions worth RM557.20 million in the review period. This indicated a decline of 8.1% in volume and 8.2% in value (2018: 998 transactions worth RM606.78 million).*



Chart 8.10

Volume of Commercial Property Transactions 2015 – 2019

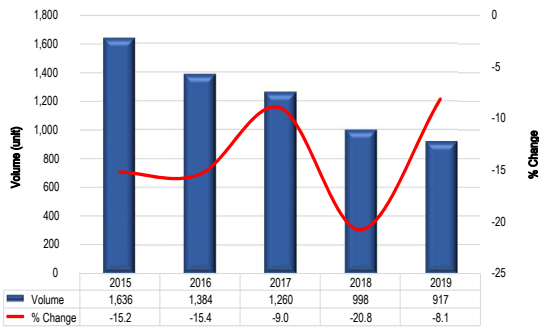
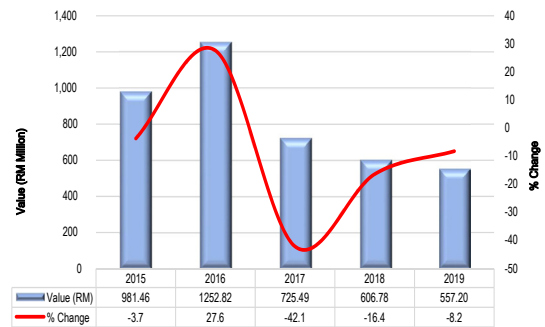


Chart 8.11

Value of Commercial Property Transactions 2015 – 2019



**Kedai**

**Transaksi**

Subsektor kedai mencatat 581 transaksi bernilai RM380.62 juta pada tahun 2019, menyumbang 63.4% transaksi harta tanah komersial dan 68.3% jumlah nilai. Aktiviti pasaran adalah sama menurun, berkurang 20.5% dalam bilangan dan 5.3% dalam nilai. Kedai dua hingga dua setengah tingkat mendominasi 66.1% (384 unit) transaksi kedai.

**Status Pasaran**

Kedai siap dibina tidak terjual memperlihatkan trend bercampur-campur. Unit siap dibina dan unit belum dibina belum terjual menyaksikan peningkatan bilangan, manakala dalam pembinaan belum terjual menyaksikan prestasi lebih baik berdasarkan bilangan yang berkurang dalam tempoh kajian.

**Shop**

**Transaction**

Shop sub-sector recorded 581 transactions worth RM380.62 million in 2019, accounting for 63.4% of the commercial property transactions and 68.3% of the total value. Its market activity was on a similar downtrend, reduced by 20.5% in volume and 5.3% in value. Two to two and a-half storey shops dominated 66.1% (384 units) of the shop transactions.

**Market Status**

Mixed trend was seen in shop overhang and unsold. Overhang unit and unsold not constructed unit witnessed increasing numbers, meanwhile unsold under construction saw a better performance as the numbers declined in the review period.

Chart 8.12

Shop Market Status Trend 2015 – 2019

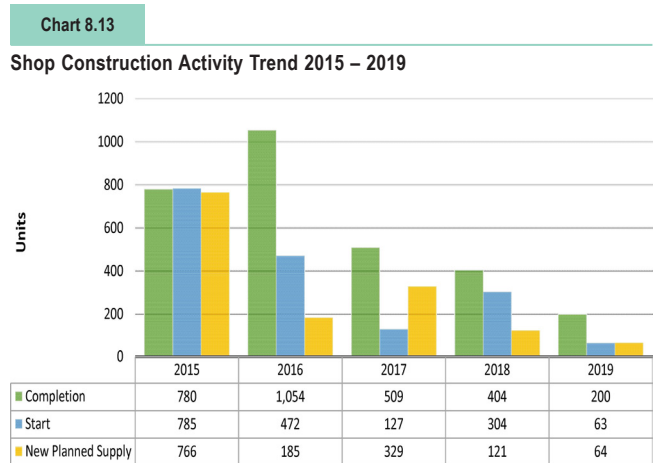


### Aktiviti Pembinaan

Subsektor aktiviti pembinaan keseluruhannya menurun dengan penguncupan dalam siap dibina, mula dan penawaran baru dirancang. Pada akhir 2019, terdapat 25,843 unit kedai sedia ada dengan 1,447 unit lagi dalam penawaran akan datang dan 2,690 unit penawaran yang dirancang.

### Construction Activity

The sub-sector's construction activities generally toned down with contraction in completion, start and new planned supply. As at end-2019, there were 25,843 existing shop units with another 1,447 units in the incoming supply and 2,690 units in the planned supply.



### Kompleks Perniagaan

#### Penghunian dan Ketersediaan Ruang

Keseluruhan kadar penghunian adalah sedikit rendah 69.8% berbanding 70.7% pada 2018. Ambilan meningkat sebanyak 8,473 m.p. disebabkan oleh peningkatan penghunian daripada kompleks perniagaan yang baharu siap dibina.

### Shopping Complex

#### Occupancy and Space Availability

The overall occupancy rate was slightly lower at 69.8% as compared with 70.7% in 2018. The annual take-up was positive at 8,473 s.m. attributed to the additional occupancy from new completion of shopping complexes.

### Aktiviti Pembinaan

Subsektor ruang niaga memperlihatkan dua kompleks baharu bagi tempoh kajian. Kompleks tersebut ialah Econsave Supermarket di Mantin dan UNICITY Mall di Seremban 3 dengan jumlah keseluruhan ruang adalah 18,626 m.p. Pada akhir 2019, terdapat 93 kompleks perniagaan (595,880 m.p) dengan satu kompleks (5,534 m.p) dalam penawaran yang dirancang.

### Construction Activity

The retail sub-sector saw two new complexes in the review period. They were Econsave Supermarket, Mantin and UNICITY Mall in Seremban 3 with a combined space of 18,626 s.m. As at end-2019, there were 93 existing shopping complexes (595,880 s.m.) with another one complex (5,534 s.m.) in the planned supply.

**Table 8.2**  
**List of Completion for Shopping Complex**

No.	Property	Location	Floor Area (s.m.)
1.	Econsave Supermarket	Mantin	3,584
2.	UNICITY Mall	Seremban 3	15,042

## **Sewa**

Secara amnya, sewa ruang niaga adalah stabil secara keseluruhannya dengan peningkatan dicatatkan di Regina Mall, Port Dickson dan Angsana Seremban. Kedua-dua kompleks ini mencatatkan sewaan dalam lingkungan 5.0% hingga 7.0% disebabkan pembaharuan sewa.

## **Pejabat Binaan Khas**

### **Penghunian dan Ketersediaan Ruang**

Prestasi bangunan pejabat binaan khas kekal kukuh dengan purata kadar penghunian 90.8% berbanding 90.3% pada 2018. Ambilan juga positif pada 21,574 m.p. (2018: 4,077 m.p).

### **Aktiviti Pembinaan**

Terdapat sebuah bangunan pejabat binaan khas baharu siap dibina tahun 2019 iaitu Pejabat Agama Daerah Jelebu dengan jumlah ruang 1,965 m.p. Sehingga akhir 2019, terdapat 107 pejabat binaan khas sedia ada (333,083 m.p) dengan tiga bangunan (9,487 m.p) dalam penawaran akan datang dan satu bangunan (2,130 m.p) dalam penawaran yang dirancang.

## **Sewa**

Sewa pasaran pejabat adalah stabil. Bangunan pejabat di lokasi yang baik dan berdekatan atau dalam hab transit bandar adalah antara yang mendapat permintaan yang tinggi dan menikmati sewa yang lebih tinggi. Plaza Seremban mencatatkan kenaikan sewa antara 3.0% dan 9.0%, dari RM10.76 s.m.p hingga RM18.83 s.m.p.

## **PROSPEK 2020**

Pasaran harta tanah negeri dijangka kekal positif disokong oleh pelbagai projek pembangunan semasa dan akan datang. Pembangunan infrastruktur pengangkutan tetap menjadi tumpuan di Daerah Seremban dan Daerah Port Dickson selaras dengan pembangunan Lembah Wawasan Malaysia 2.0 (MVV 2.0). Antaranya projek tersebut ialah:

### **i. Pembinaan Jalan Baharu Dari Nilai-Labu Ke Bandar Enstek**

Jalan baharu sepanjang 16.82 kilometer dua hala dengan kos RM415 juta ini melibatkan pembinaan tiga persimpangan utama, enam jambatan, tembok penahan, lampu jalan serta lampu isyarat dijangka siap sepenuhnya pada Julai 2021.

## **Rental**

*Generally, rental of retail space was stable across the board with increases recorded in Regina Mall, Port Dickson and Angsana Seremban. Both complexes registered rental ranging from 5.0% to 7.0% due to rental renewals.*

## **Purpose-Built Office**

### **Occupancy and Space Availability**

*The performance of purpose-built office remained sturdy with an average occupancy rate of 90.8% in comparison to 90.3% in 2018. Take-up was positive at 21,574 s.m. (2018: 4,077 s.m)*

### **Construction Activity**

*There was one new completion of purpose-built office building recored in 2019 namely Pejabat Agama Daerah Jelebu with a total space of 1,965 s.m. As at end 2019, there were 107 existing purpose-built offices (333,083 s.m.) with another three buildings (9,487 s.m.) in the incoming supply and one building (2,130 s.m.) in the planned supply.*

## **Rental**

*The office rental market was largely stable. Office buildings in good locations with close proximity or within city transit hub are among those which were in demand and fetched higher rents. Plaza Seremban recorded rental increase between 3.0% and 9.0%, ranging from RM10.76 p.s.m. to RM18.83 p.s.m.*

## **2020 OUTLOOK**

*The state's property market would remain on a positive path backed by various on-going and proposed development projects. Transport infrastructure development remains the state's focus in District of Seremban and Port Dickson in line with Malaysia Vision Valley 2.0 (MVV 2.0). Among the projects are:*

### **i. Pembinaan Jalan Baharu Dari Nilai-Labu Ke Bandar Enstek**

*This RM415 million, 16.82 kilometres dual carriageway new road project involves the construction of three major junction, six bridges, retaining walls, street lights and traffic lights are expected to be completed by July 2021.*

**ii. Projek Laluan Rel Pantai Timur (ECRL)**

Projek Laluan Rel Pantai Timur (ECRL) sepanjang 640 kilometer bakal menghubungkan negeri Kelantan, Terengganu, Pahang dengan Negeri Sembilan, Selangor dan Wilayah Persekutuan Putrajaya. Sebanyak dua stesen ECRL akan dibina di Negeri Sembilan iaitu di Nilai dan Kuala Klawang. Stesen Nilai akan dijadikan hub pengangkutan. Sebuah stesen Keretapi Tanah Melayu Bhd (KTM) akan dibina di perhentian ECRL Nilai yang akan dibina tidak lama lagi. Projek RM44 billion ini dijangka siap sepenuhnya pada penghujung tahun 2026.

Di subsektor kediaman, Kerajaan negeri melalui Perbadanan Kemajuan Negeri, Negeri Sembilan (PKNNS) telah menjalankan Projek Perumahan Penjawat Awam Negeri Sembilan pertama di tanah milik PKNNS seluas 45.10 ekar yang melibatkan 351 unit rumah. Yayasan Negeri Sembilan (YNS) turut merancang projek pembinaan rumah mampu milik untuk orang awam dengan keluasan 100 ekar.

Projek-projek pembangunan utama juga dijangkakan dapat memberikan impak yang positif ke atas pasaran harta tanah di Negeri Sembilan. Antara projek tersebut adalah: -

**i. Kompleks Institute of Neuroscience (INS)**

Kompleks INS bernilai RM1.2 billion yang telah mula dibina ini adalah projek usahasama antara Menteri Besar Incorporated (MBI) dengan KIT International Group Sdn. Bhd. (KIG) atas tanah MBI seluas 4 hektar di Pedas. Selain hospital swasta dengan 200 katil khusus dalam Perubatan Neurosains, kompleks INS ini juga menyediakan pusat rehabilitasi, pusat latihan, pusat penyelidikan & pembangunan, hotel empat bintang dan pusat konvensyen & komersial. Apabila siap nanti, INS bakal mewujudkan 1,300 peluang pekerjaan langsung dan 3,000 peluang pekerjaan tidak langsung tempatan.

**ii. Nilai Vision City**

Keseluruhan pembangunan dibahagi kepada dua fasa. Fasa pertama Youth City terdiri daripada 37 & 38 tingkat menara dengan kemudahan mewah bertaraf lima bintang dengan menawarkan 3,021 unit dengan luas binaan dari 460 kaki persegi hingga 1,008 kaki persegi. Fasa kedua pula terdiri daripada pusat pameran dan konvensyen, hotel, taman tema, hab pendidikan antarabangsa dan kompleks membeli-belah. Fasa pertama dijangka akan disiapkan menjelang suku ketiga 2021.

**ii. East Coast Rail Link (ECRL)**

*The 640 kilometres East Coast Rail Link (ECRL) will connect the states of Kelantan, Terengganu, Pahang with Negeri Sembilan, Selangor and Federal Territory Putrajaya. There will be two ECRL station in Negeri Sembilan namely in Nilai and Kuala Klawang. Nilai station would be turned into a transportation hub. A new Keretapi Tanah Melayu Bhd (KTM) station will be built at the soon-to-be-constructed East Coast Rail Link (ECRL) stop in Nilai. This RM44 billion project is expected to be completed fully by end of 2026.*

*In the residential sub-sector, the state government also via Perbadanan Kemajuan Negeri, Negeri Sembilan (PKNNS) have executed the first state government servants housing project on 45.1 acre PKNNS land providing 351 houses. Yayasan Negeri Sembilan (YNS) also have planned affordable housing project for the public with area of 100 acre.*

*Major development projects in Negeri Sembilan are expected to have a positive impact on the property market. The projects are as follows:*

**i. Institute of Neuroscience (INS) Complex**

*The commenced RM1.2 billion INS complex is a joint venture project between Menteri Besar Incorporated (MBI) and KIT International Group, on 4 hectares MBI land in Pedas. Apart from a 200-bed private hospital specialising in neuro-surgery, the INS complex will also have rehabilitation, training, research and development centres, a four-star hotel and a convention and commercial centre. Upon completion, INS will create some 1,300 direct and 3,000 indirect employment opportunities for locals.*

**ii. Nilai Vision City**

*The whole development divided into two phases. The first phase Youth City comprising 37 & 38 storeys towers with five Star luxurious facilities offer 3,021 units with built-ups ranging of 460 square feet to 1,008 square feet. Phase two comprises of exhibition and convention centre, hotel, theme park, international educational hub and shopping complex. Phase one is expected to complete by third quarter 2021.*

**iii. XME Business Park**

XME Business Park akan menjadi taman industri terurus pertama di negeri ini dengan kedudukan strategik bersebelahan Tol Nilai, Lebuhraya Utara-Selatan dan dalam kawasan Pembangunan Malaysian Vision Valley (MVV) 2.0. Pembangunan atas tanah pegangan kekal seluas 28 hektar, taman industri dengan kawalan keselamatan 24 jam ini membabitkan dua fasa dengan jumlah GDV RM500 juta. Fasa pertama meliputi 75 unit kilang berkembar dengan luas binaan dari 5,600 kaki persegi hingga 29,000 kaki persegi dan harga dari RM2.5 juta hingga RM18.5 juta. Pembangunan ini dijangka siap pada suku ketiga 2022.

**iii. XME Business Park**

*The state's first managed industrial park strategically located by Nilai Tol, North-South Expressway and within the development area of Malaysian Vision Valley (MVV) 2.0. Sprawling over 28 hectares of prime and freehold land, the 24-hour security industry park, will be developed over two phases with total GDV of RM500 million. Phase one will have 75 units of semi-detached with built-up areas ranging from 5,600 square feet to 29,000 square feet and priced from RM2.5 million to RM18.5 million. The development is expected to be completed by third quarter 2022.*

# MELAKA





# MELAKA

## GAMBARAN KESELURUHAN

Pasaran harta tanah negeri ini terus berkembang pada 2019. Terdapat 15,354 transaksi bernilai RM5.22 bilion, masing-masing meningkat 9.7% dan 21.3% dalam bilangan dan nilai berbanding 2018 (13,994 transaksi bernilai RM4.30 bilion). Mengikut bahagian pasaran, subsektor kediaman menerajui transaksi keseluruhan dengan 64.7%, diikuti oleh subsektor pertanian (15.6%), tanah pembangunan (9.6%), komersial (7.5%), dan industri (2.6%).

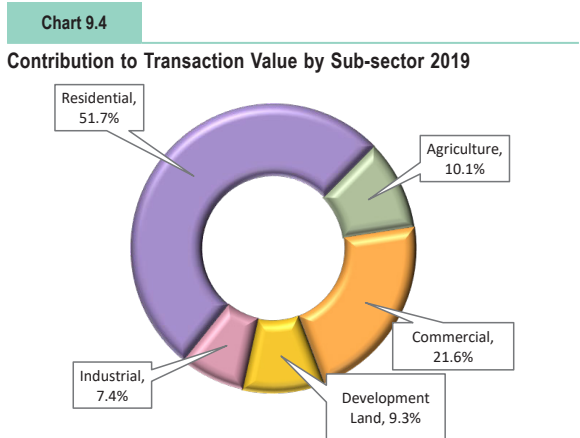
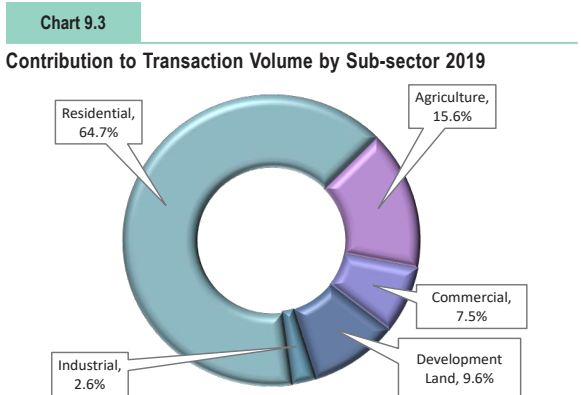
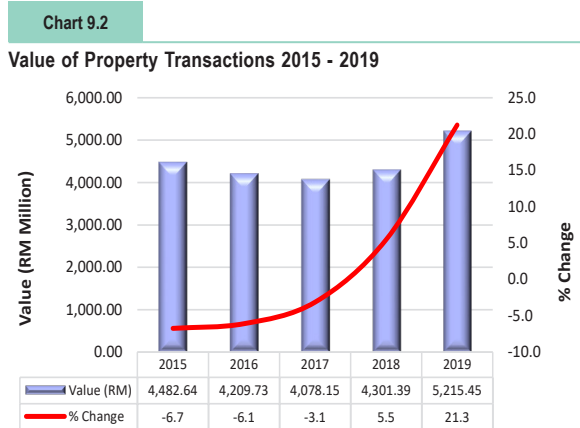
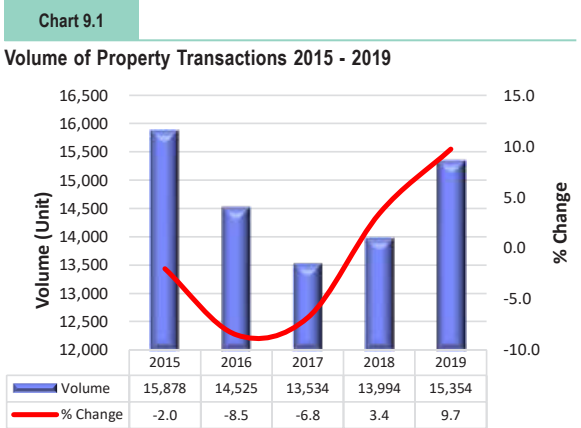
Prestasi semua subsektor berada pada trend menaik kecuali pertanian yang menurun 11.9%. Komersial mendahului peningkatan sebanyak 15.3%, diikuti oleh subsektor kediaman (15.5%), tanah pembangunan (14.3%) dan industri (6.6%). Begitu juga, trend yang sama dilihat dari segi nilai. Semua subsektor mencatat pergerakan positif kecuali subsektor pertanian yang menurun 9.1%.

## OVERVIEW

The state's property market continued to grow in 2019. There were 15,354 transactions worth RM5.22 billion, increased by 9.7% and 21.3% in volume and value respectively in comparison with 2018 (13,994 transactions worth RM4.30 billion). By market share, residential sub-sector spearheaded the overall transactions with 64.7%, followed by agriculture (15.6%), development land (9.6%), commercial (7.5%), and industrial (2.6%) sub-sectors.

Performance of all sub-sector were on upward trend except for agriculture which decreased by 11.9%. Commercial led the increase by 15.3%, followed by residential (15.5%), development land (14.3%) and industrial (6.6%) sub-sectors. Correspondingly, similar trend was seen in terms of value. All sub-sectors recorded positive movements with exception of agriculture sub-sector which decreased by 9.1%.

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## PROMINENT SALE

Table 9.1

Summary of Prominent Sales Recorded in 2019

No.	Property	Location	Transaction Year
1.	Avillion Legacy Hotel	Jalan Hnag Tuah, Melaka	2019
2.	MYDIN Hypermarket	MITC, Ayer Keroh	2019
3.	Faithview Plantation Estate	Jalan Durian Tunggal – Sempang	2018
4.	Estate land (67.31 hectares)	Jalan Bertam – Sungai Udang	2018

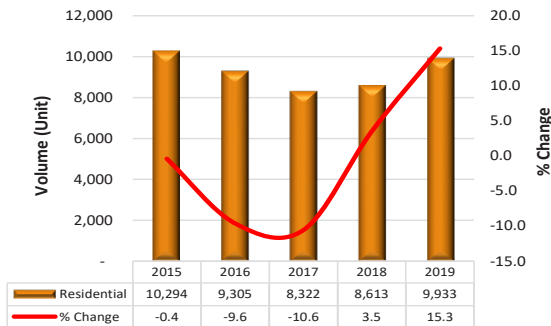
## HARTA TANAH KEDIAMAN

### Transaksi

Prestasi subsektor kediaman bertambah baik dalam tempoh kajian. Terdapat 9,933 transaksi bernilai RM2.69 bilion, masing-masing menunjukkan peningkatan 15.3% dan 22.9% dalam bilangan dan nilai berbanding 2018 (8,613 transaksi bernilai RM2.19 bilion). Mengikut jenis, rumah teres menguasai 56.0% (5,562 transaksi) transaksi harta tanah kediaman yang terdiri daripada 3,935 teres tingkat satu dan 1,627 teres dua tingkat.

Chart 9.5

Volume of Residential Property Transactions 2015 – 2019



### Pelancaran Baharu

Pasaran utama menurun dengan kurang unit yang dilancarkan. Prestasi jualan walau bagaimanapun, bertambah baik berbanding 2018.

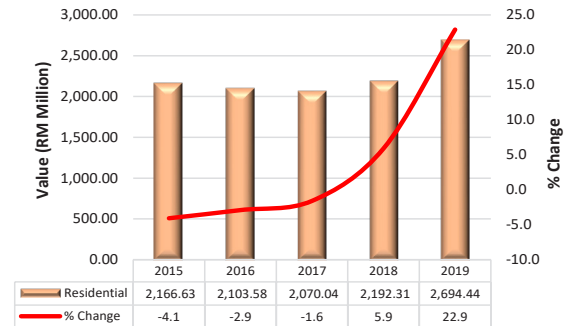
## RESIDENTIAL PROPERTY

### Transaction

The residential sub-sector performance improved in the review period. There were 9,933 transactions worth RM2.69 billion, indicating an increase of 15.3% and 22.9% in volume and value respectively in comparison with 2018 (8,613 transactions worth RM2.19 billion). By type, terraced houses dominated 56.0% (5,562 transactions) of the residential property transactions comprising 3,935 single storey terraces and 1,627 double storey terraces.

Chart 9.6

Value of Residential Property Transactions 2015 – 2019

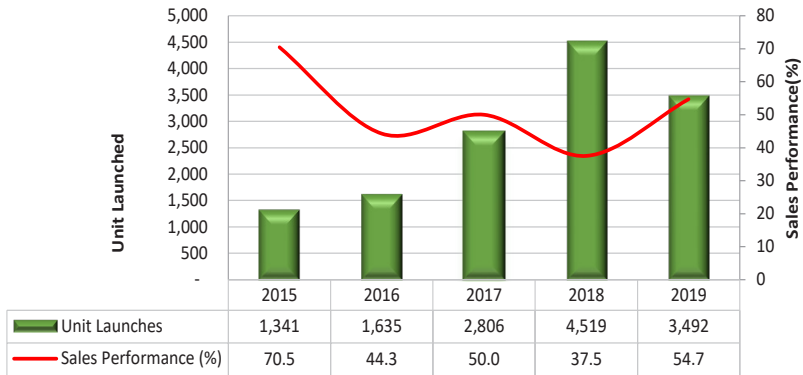


### New Launches

The primary market eased with fewer units launched. Sales performance however, improved as compared to 2018.

Chart 9.7

New Launches Trend 2015 – 2019



**Status Pasaran**

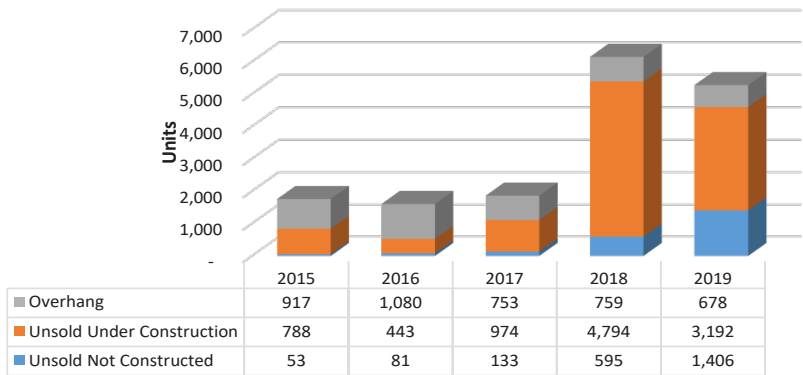
Prestasi unit kediaman siap dibina tidak terjual dan dalam pembinaan belum terjual merekodkan prestasi yang lebih baik di mana bilangannya berkurangan dalam tempoh kajian..

**Market Status**

*The performance of residential overhang and unsold under construction units improved as the number eased in the review period.*

Chart 9.8

Residential Market Status Trend 2015 – 2019



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**Aktiviti Pembinaan**

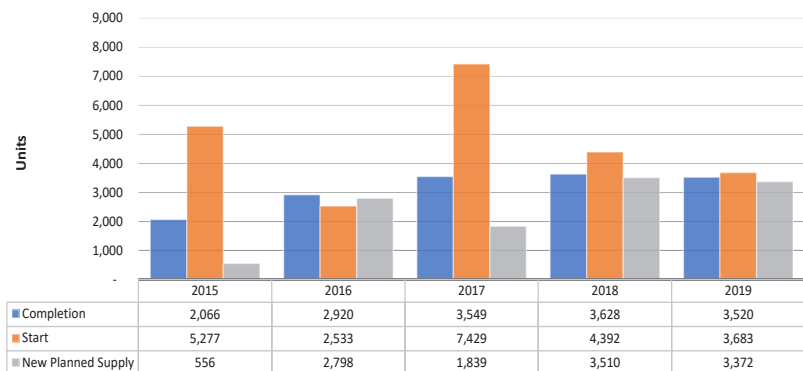
Aktiviti pembinaan subsektor kediaman perlahan dalam tempoh kajian. Sehingga akhir 2019, terdapat 197,024 unit kediaman sedia ada dengan 17,813 unit lagi dalam penawaran akan datang dan 17,888 unit dalam penawaran yang dirancang.

**Construction Activity**

*The residential sub-sector's construction activity softened in the review period. As at end-2019, there were 197,024 existing residential units with another 17,813 units in the incoming supply and 17,888 units in the planned supply.*

Chart 9.9

Residential Construction Activity Trend 2015 – 2019



## Harga dan Sewa

Harga harta tanah kediaman berada pada mod stabil dengan pergerakan bercampur-campur dicatatkan di lokasi terpilih. Teres satu tingkat di Taman Rambai Idaman, Taman Rambai Tengah dan Taman Saujana Indah mencatatkan pertumbuhan dua angka disebabkan oleh lokasi yang strategik. Walau bagaimanapun, trend menurun minima dilihat bagi teres dua tingkat di beberapa skim dalam Melaka Tengah. Begitu juga, trend harga segmen berstrata juga pelbagai. Unit pangsapuri dan kondominium yang terletak di dalam pusat bandar memperoleh peningkatan nilai modal. Sehingga Q4 2019, Indeks Harga Semua Rumah bagi negeri ini adalah 173.0 mata, naik 2.2% daripada 169.3 mata pada Q4 2018. Purata Harga Semua Rumah bagi negeri ini pada Q4 2019 berjumlah RM190,756, meningkat daripada RM186,748 pada Q4 2018. Secara amnya, pasaran sewa kediaman stabil di seluruh negeri.

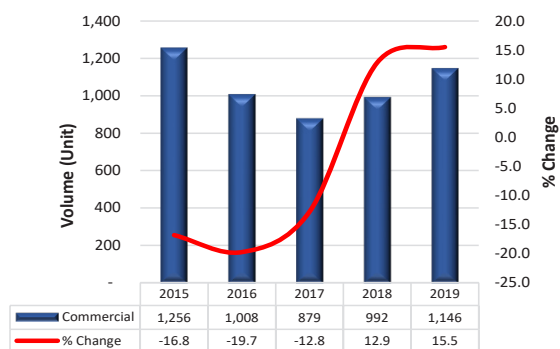
## HARTA TANAH KOMERSIAL

### Transaksi

Subsektor komersial menunjukkan prestasi lebih baik pada 2019. Terdapat 1,146 transaksi bernilai RM1.13 bilion dicatatkan, masing-masing meningkat 15.5% dan 22.8% dalam bilangan dan nilai berbanding 2018 (992 transaksi bernilai RM917.11 juta).

Chart 9.10

Volume of Commercial Property Transactions 2015 – 2019



### Kedai

#### Transaksi

Terdapat 701 transaksi bernilai RM421.32 juta pada 2019, mencakupi 61.2% daripada transaksi harta tanah komersial dan 37.4% daripada jumlah keseluruhan nilai. Aktiviti pasarannya meningkat 20.9% dalam bilangan dan 36.2% dalam nilai berbanding 2018 (580 transaksi bernilai RM309.44 juta).

## Price and Rental

Residential property prices were on a stable mode with mixed movements noted in selected locations. Single storey terraces in Taman Rambai Idaman, Taman Rambai Tengah and Taman Saujana Indah registered a double-digit growth due to their strategic locations. However, minimal downward trend was seen for double storey terraces in several schemes of Melaka Tengah. Likewise, price trend for stratified segment also varied. Apartment and condominium units located within town centre registered capital gains. As at Q4 2019, the All House Price Index for the state stood at 173.0 points, up by 2.2% from 169.3 points in Q4 2018. The average All House Price for the state as at Q4 2019 stood at RM190,756, increased from RM186,748 in Q4 2018. Generally, the residential rental market was stable across the board.

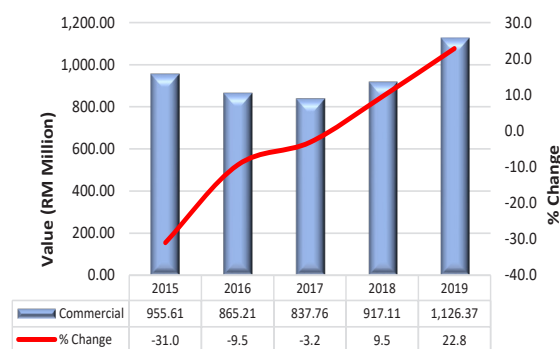
## COMMERCIAL PROPERTY

### Transaction

The commercial sub-sector showed a better performance in 2019. There were 1,146 transactions worth RM1.13 billion recorded, increased by 15.5% and 22.8% in volume and in value respectively as compared to 2018 (992 transactions worth RM917.11 million).

Chart 9.11

Value of Commercial Property Transactions 2015 – 2019



### Shop

#### Transaction

There were 701 transactions worth RM421.32 million in 2019, accounting for 61.2% of the commercial property transactions and 37.4% of the total value. Its market activity increased by 20.9% in volume and 36.2% in value in comparison with 2018 (580 transactions worth RM309.44 million).

## Status Pasaran

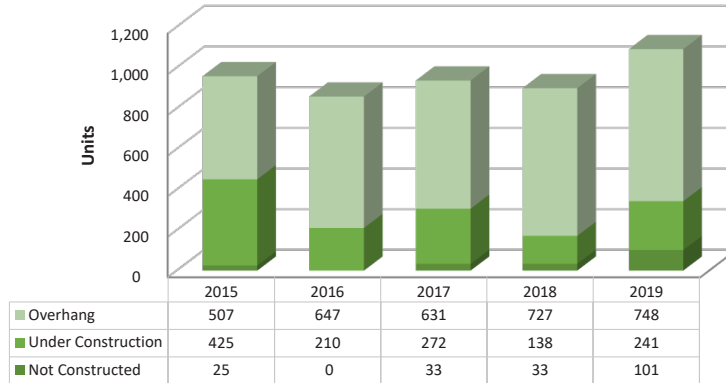
Situasi unit kedai siap dibina tidak terjual dan belum terjual kurang memberangsangkan di mana bilangannya meningkat dalam tempoh kajian.

## Market Status

*The overhang and unsold situation was less promising as the numbers grew in the review period.*

Chart 9.12

Shop Market Status Trend 2015 – 2019



## Aktiviti Pembinaan

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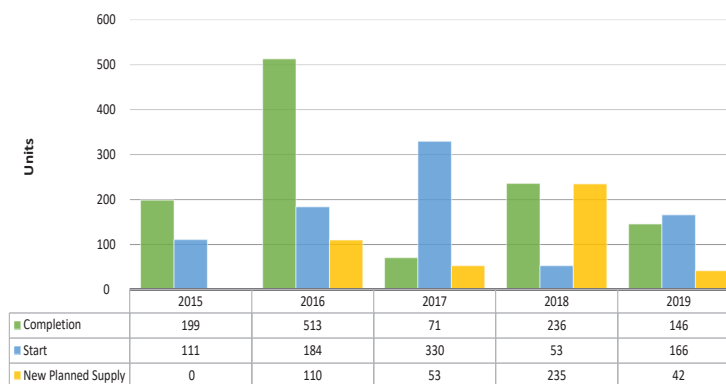
Subsektor ini menyaksikan pergerakan bercampur-campur dalam aktiviti pembinaan. Sehingga akhir 2019, terdapat 22,438 unit kedai sedia ada dengan 1,635 unit lagi dalam penawaran akan datang dan 1,172 unit dalam penawaran yang dirancang.

## Construction Activity

*The sub-sector saw mixed movements in construction activity. As at end-2019, there were 22,438 existing shop units with another 1,635 units in the incoming supply and 1,172 units in the planned supply.*

Chart 9.13

Shop Market Status Trend 2015 – 2019



## Riadah

Di subsektor riadah, negeri ini menyaksikan Hotel Armes siap dibina menawarkan 301 bilik ke dalam pasaran.

## Leisure

*In the leisure sub-sector, the state witnessed the completion of Armes Hotel offering 301 rooms into the market.*

## PROSPEK 2020

Kerajaan Negeri Melaka akan menukar konsep pemilikan rumah daripada penyewaan kepada sewa beli (Rent to Own) untuk projek sedia ada seperti PPR Krubong dan PPR Tehel. Kerajaan Negeri juga merancang untuk membina 500 rumah yang dikenali sebagai 'Rumah Berkat' bagi pasangan yang baru berkahwin untuk disewakan sehingga tiga tahun.

Pembangunan pesat infrastruktur di Melaka ketika ini telah menarik pelabur dan warga asing untuk menjadikan Melaka sebagai tempat kediaman dan perniagaan tetap mereka. Ini dapat dilihat apabila terdapat permintaan yang tinggi oleh pemaaju pembangunan harta tanah yang memohon untuk menaikkan kuota Warga Negara Asing melebihi kadar kuota yang ditetapkan. Kerajaan Negeri bercadang mengenakan caj levi ke atas permohonan kuota tambahan bagi harta tanah jenis kondominium/pangsapuri sebanyak 2%, lot perniagaan termasuk unit komersial dan pangsapuri servis sebanyak 3% peratus dan caj levi kepada hotel tertakluk kepada keputusan Kerajaan Negeri. Kenaikan ini dijangka akan mengurangkan permintaan dari warga asing tetapi akan meningkatkan permintaan warga tempatan.

Isu penyuraian trafik di negeri ini masih diberi penekanan utama oleh Kerajaan Negeri. Antara projek berkaitan yang sedang dan akan dibina termasuk:

- a) menaik taraf Jalan 2 Lorong kepada 4 Lorong dari Persimpangan Bachang ke Persimpangan Batu Berendam Laluan M2 Daerah Melaka Tengah;
- b) menaik taraf Persimpangan Balai Polis Bukit Rambai, Daerah Melaka Tengah;
- c) menaik taraf Jalan Laluan M126 dari Persimpangan IPK Bukit Beruang ke Persimpangan Batu Berendam, Daerah Melaka Tengah;
- d) menaik taraf dan pembesaran jalan di dua Persimpangan Bemban, Daerah Jasin Melaka; dan
- e) membina jalan pintas baharu dari persimpangan Jalan Alor Gajah Lama ke Taman Murai Jaya di Pekan Durian Tunggal.

Terminal Pelayaran Antarabangsa Melaka merupakan sebahagian daripada projek pembangunan Melaka Gateway. Projek ini dibangunkan oleh AJ Development Sdn Bhd. Fasa pertama pembangunan akan mempunyai dua dermaga dan dijangka siap menjelang akhir tahun 2020. Pelabuhan ini terletak bersebelahan dengan daerah perniagaan pusat Melaka (CBD).

Di samping itu, projek pembesaran Pelabuhan Antarabangsa Kuala Lumpur (KLIP) dijangka memulakan pembinaannya menjelang suku pertama tahun 2020.

## 2020 OUTLOOK

*Melaka State Government will change the concept of home ownership from rental to hire purchase (Rent to Own) for existing projects such as Krubong PPR and Tehel PPR. The State Government is also planning to build 500 houses known as 'Rumah Berkat' for newly married couples to rent up to three years.*

*The rapid development of infrastructure in Melaka has attracted investors and foreigners aiming to serve Melaka a place for residence and their permanent businesses. This can be seen when there is a high demand from the property development and developers seeking to raise the quota of the foreign citizens exceeding the fixed rate of quota. The State Government also intends to impose a levy charge for additional quota applications for condominium/ apartment by 2%, business lot including commercial units and serviced apartment by 3% and hotel subjects to the State Government's decision. The increase of levy is estimated to decrease the demand among foreigners but will increase the local demand.*

*The issue of traffic dispersal in the state are still given major emphasis by the State Government. The current and future related projects include:*

- a) *upgrading works from two alleys to four alleys road from Bachang intersection to the Batu Berendam intersection in the M2 area of Melaka Central Line;*
- b) *upgrade the intersection of Bukit Rambai Police Centre in Melaka Central District;*
- c) *upgrade the M126 road from the IPK Bukit Beruang Junction to the Batu Berendam Junction Melaka Central District;*
- d) *upgrade and expand Bemban interchange in Jasin District; and*
- e) *to build a new shortcut road from the intersection of Jalan Alor Gajah Lama to Taman Murai Jaya in Pekan Durian Tunggal.*

*The Melaka International Cruise Terminal is part of the Melaka Gateway development project. The project was developed by AJ Development Sdn Bhd. The first phase of the development will have two berths and it is scheduled to be completed by the end of 2020. The port is located alongside the Melaka central business district (CBD).*

*In addition, the expansion of Kuala Linggi International Port (KLIP) project is expected to commence its construction by the first quarter of 2020. The second*

Fasa kedua pembangunan KLIP akan dilaksanakan oleh TAG Marine Sdn Bhd dengan anggaran kos RM12.5 bilion. Projek ini dijangka akan merancakkan lagi industri pelabuhan di negeri ini.

Dalam sektor pelancongan, Harbour City @ Pulau Melaka dijangka menjadi tarikan baharu pelancong kepada negeri ini. Pembangunan bercampur, bertema laut ini akan mengandungi OKI Splash, taman tema di tingkat atas berukuran sekitar 46,450 meter persegi. Projek itu dijangka dibuka kepada orang ramai pada separuh pertama 2020. Sehingga kini, projek tersebut masih dalam pembinaan dan belum selesai.

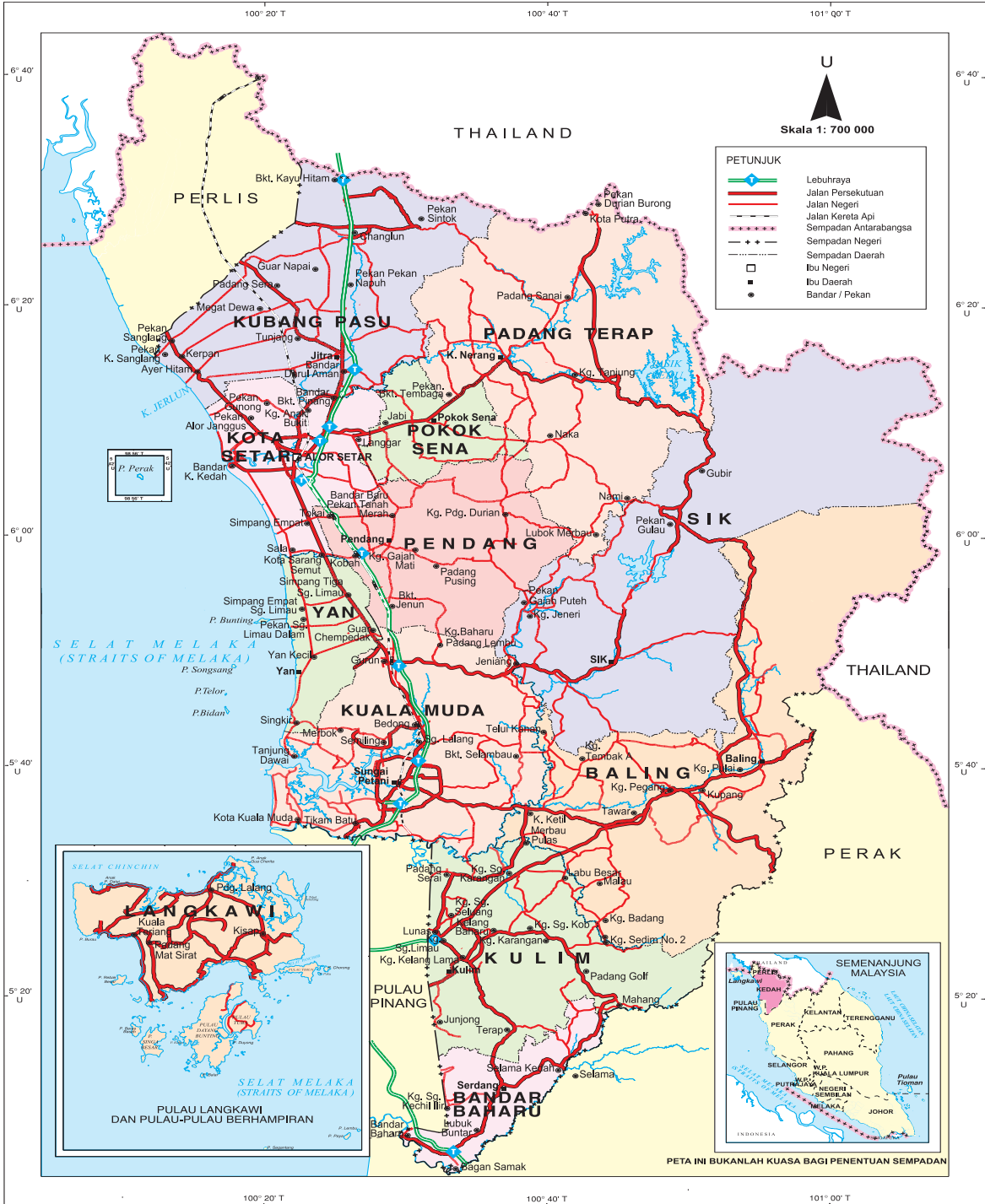
Pada masa ini kerajaan negeri juga telah mencapai fasa terakhir Projek Pembersihan dan Pemindahan Sungai Melaka bagi tujuan pelancongan dengan kos sebanyak RM344.9 juta yang dibiayai oleh Kerajaan persekutuan. Kos projek itu termasuk 3 pakej yang melibatkan jarak keseluruhan 5.2 kilometer.

*phase of the KLIP development would be undertaken by TAG Marine Sdn Bhd with an estimated cost of RM12.5 billion. This project is expected to boost the port industry in the state.*

*In tourism sector, Harbour City @ Pulau Melaka is set to be a new tourist attraction to the state. The mixed use, marine-themed development will consist OKI Splash, a sky-theme park measuring about 46,450 square metres. The project is currently under construction, it is expected to be completed and opened to public in the first half of 2020.*

*Currently the state Government also has reached the final phase of the Cleaning and Transfer Project of Melaka River for tourism purpose with the cost of RM344.9 million funded by the federal Government. The cost of the project includes 3 package which involving a total distance of 5.2 kilometers.*

# KEDAH





# KEDAH

## GAMBARAN KESELURUHAN

Prestasi pasaran harta tanah negeri ini bertambah baik pada 2019. Terdapat 29,957 transaksi bernilai RM5.33 bilion, menunjukkan peningkatan masing-masing 14.6% dan 13.2% dalam bilangan dan nilai berbanding 2018 (26,135 transaksi bernilai RM4.71 bilion). Subsektor kediaman menguasai transaksi keseluruhan dengan 45.1%, diikuti oleh subsektor pertanian (42.2%), tanah pembangunan (8.5%), komersial (3.3%) dan industri (0.9%).

Selaras dengan pemulihan pasaran, semua subsektor berada pada trend menaik kecuali tanah pembangunan yang menurun 7.0%. Pertanian mendahului kenaikan dengan 22.0%, diikuti oleh subsektor kediaman (14.4%), industri (13.6%) dan komersial (0.3%). Begitu juga, trend yang sama dilihat dari segi nilai.

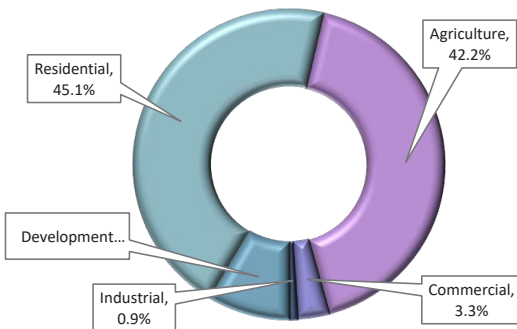
Chart 10.1

Volume of Property Transactions 2015 – 2019



Chart 10.3

Sub-sector Contribution to Volume 2015 – 2019



## OVERVIEW

The state's property market performance improved in 2019. There were 29,957 transactions worth RM5.33 billion, indicating an increase of 14.6% and 13.2% in volume and value respectively as compared to 2018 (26,135 transactions worth RM4.71 billion). Residential sub-sector dominated the overall transactions with 45.1%, followed by agriculture (42.2%), development land (8.5%), commercial (3.3%) and industrial (0.9%) sub-sectors.

In tandem with the market recovery, all sub-sectors were on upward trend except for development land which decreased by 7.0%. Agriculture led the increase by 22.0%, followed by residential (14.4%), industrial (13.6%) and commercial (0.3%) sub-sectors. Likewise, similar trend was seen in terms of value.

Chart 10.2

Value of Property Transactions 2015 – 2019

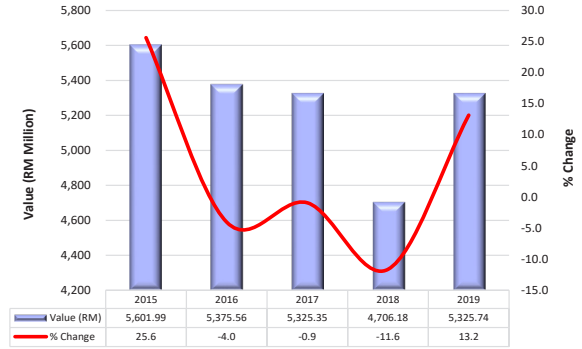
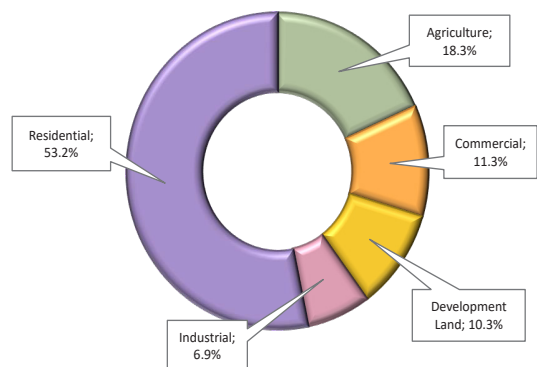


Chart 10.4

Sub-sector Contribution to Value 2015 – 2019



## PROMINENT SALE

Table 10.1

Summary of Prominent Sales Recorded in 2019

No.	Property	Location	Transaction Year
1.	Tabung Haji Hotel	Jalan Anak Bukit, Alor Setar	2019
2.	Billion Supermarket	Pekan Pulai, Baling	2018

Negeri ini juga merekodkan pindah milik pukal melibatkan 128 plot teres yang terletak di Jalan Jitra - Malau dalam tempoh kajian.

*The state also recorded bulk transfer involving 128 terraced plots located in Jalan Jitra – Malau in the review period.*

## HARTA TANAH KEDIAMAN

### Transaksi

Prestasi subsektor kediaman mengukuh dengan 13,519 transaksi bernilai RM2.83 bilion. Aktiviti pasarannya menunjukkan peningkatan masing-masing 14.4% dan 19.9% dalam bilangan dan nilai berbanding 2018 (11,818 transaksi bernilai RM2.36 bilion). Rumah teres membentuk sebahagian besar transaksi kediaman, mencakupi 41.4% (5,600 transaksi) daripada jumlah keseluruhan.

## RESIDENTIAL PROPERTY

### Transaction

*The residential sub-sector performance strengthened with 13,519 transactions worth RM2.83 billion. Its market activity indicated an increase of 14.4% and 19.9% in volume and value respectively in comparison with 2018 (11,818 transactions worth RM2.36 billion). Terraced houses formed the bulk of residential transactions, accounting for 41.4% (5,600 transactions) of the total.*

Chart 10.5

Volume of Residential Transactions 2015 – 2019

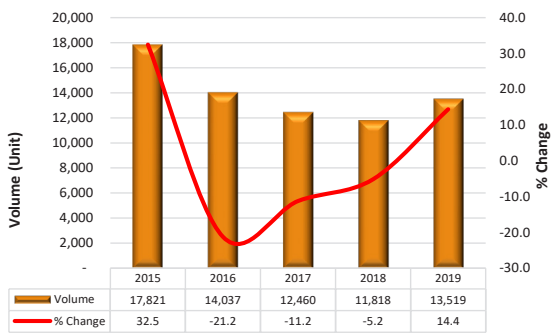
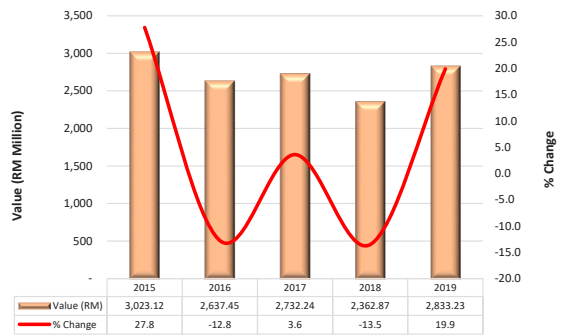


Chart 10.6

Value of Residential Property Transactions 2015 – 2019



### Pelancaran Baharu

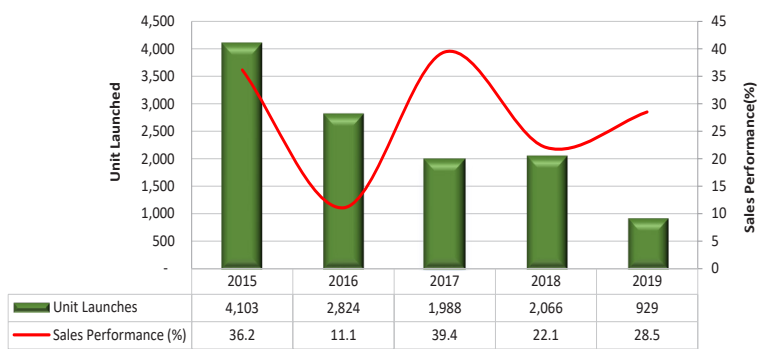
Pasaran utama menyaksikan kurang pelancaran baharu dengan 929 unit. Walau bagaimanapun, prestasi jualan bertambah baik dengan 28.5%.

### New Launches

*The primary market saw less new launches with 929 units. Nevertheless, sales performance improved with 28.5%.*

Chart 10.7

Value of Residential Transactions 2015 – 2019



## Status Pasaran

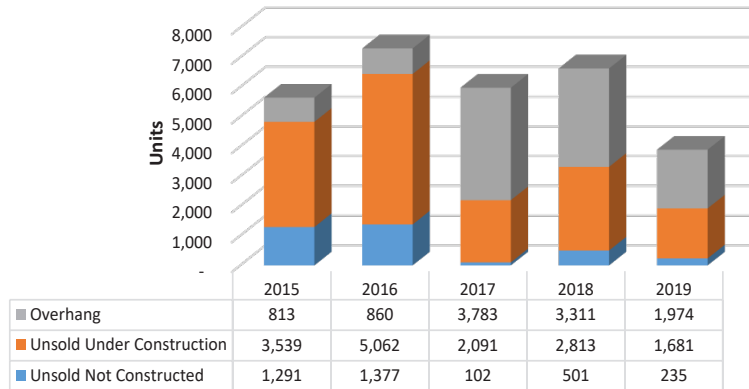
Unit kediaman siap dibina tidak terjual dan dalam pembinaan belum terjual merekodkan prestasi yang lebih baik di mana bilangannya berkurangan dalam tempoh kajian.

## Market Status

The performance of residential overhang and unsold under construction units improved as the number eased in the review period.

Chart 10.8

Residential Market Status Trend 2015 – 2019



## Aktiviti Pembinaan

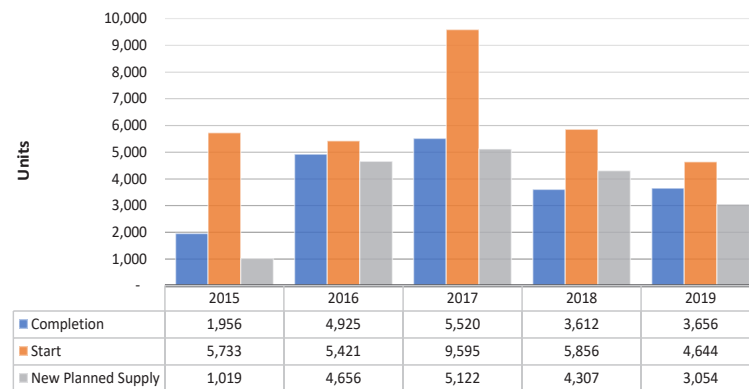
100 Aktiviti pembinaan kurang aktif kecuali siap dibina. Sehingga akhir 2019, terdapat 337,251 unit kediaman sedia ada dengan 15,374 unit lagi dalam penawaran akan datang dan 12,501 unit dalam penawaran yang dirancang.

## Construction Activity

The construction activities were less active except for completions. As at end-2019, there were 337,251 existing residential units with another 15,374 units in the incoming supply and 12,501 units in the planned supply.

Chart 10.9

Residential Construction Activity Trend 2015 – 2019



## Harga dan Sewa

Harga harta tanah kediaman berada pada mod stabil dengan beberapa pergerakan dicatatkan di beberapa lokasi. Harta tanah kediaman bertanah dan bertingkat tinggi di lokasi terpilih menikmati peningkatan nilai modal. Sehingga Q4 2019, Indeks Harga Semua Rumah untuk negeri ini berada pada 178.7 mata, naik 4.1% daripada 171.6 mata pada Q4 2018. Purata Harga Semua Harga Rumah untuk negeri ini pada Q4 2019 berjumlah RM232,268, meningkat daripada RM222,988 pada Q4 2018.

## Price and Rental

Prices of residential property were on a stable mode with some movements noted in several locations. Residential properties both landed and high-rise in selected locations enjoyed capital gains. As at Q4 2019, the All House Price Index for the state stood at 178.7 points, up by 4.1% from 171.6 points in Q4 2018. The average All House Price for the state as at Q4 2019 stood at RM232,268, increased from RM222,988 in Q4 2018.

Pasaran sewa kediaman adalah pada trend yang stabil dengan beberapa kenaikan minima dicatatkan di lokasi pilihan. Sewa rumah teres di lokasi strategik dilengkapi rangkaian perhubungan yang efisien menyaksikan peningkatan marginal.

*The residential rental market was on stable trend with several minimal increases noted in choice locations. Rental of terrace houses at strategic locations served with efficient connectivity saw a marginal increases.*

## HARTA TANAH KOMERSIAL

## COMMERCIAL PROPERTY

### Transaksi

### Transaction

Subsektor komersial menunjukkan sedikit peningkatan dalam tempoh kajian. Terdapat 989 transaksi bernilai RM601.24 juta direkodkan, masing-masing meningkat 0.3% dan 49.9% dalam bilangan dan nilai berbanding 2018 (986 transaksi bernilai RM401.13 juta).

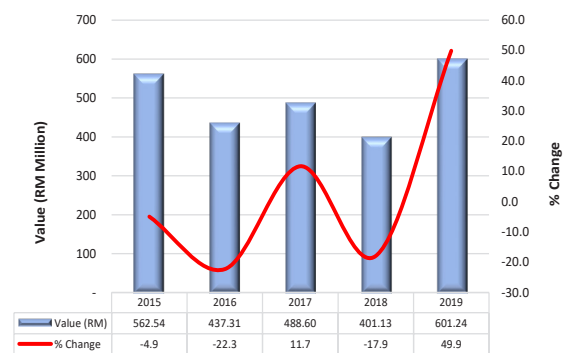
*The commercial sub-sector showed a slight improvement in the review period. There were 989 transactions worth RM601.24 million recorded, increased by 0.3% and 49.9% in volume and value respectively as compared to 2018 (986 transactions worth RM401.13 million).*

Chart 10.10

Chart 10.11

Volume of Commercial Property Transactions 2015 – 2019

Value of Commercial Property Transactions 2015 – 2019



### Kedai

### Shop

### Transaksi

### Transaction

Walau bagaimanapun, prestasi subsektor kedai sederhana. Terdapat 875 transaksi bernilai RM375.71 juta pada 2019, mencakupi 88.5% daripada transaksi harta tanah komersial dan 62.5% daripada jumlah nilai. Aktiviti pasarannya masing-masing meningkat 8.7% dan 13.0% dalam bilangan dan nilai berbanding 2018 (805 transaksi bernilai RM332.49 juta).

*However, performance of shop sub-sector moderated. There were 875 transactions worth RM375.71 million in 2019, accounting for 88.5% of the commercial property transactions and 62.5% of the total value. Its market activity increased by 8.7% and 13.0% in volume and value respectively in comparison with 2018 (805 transactions worth RM332.49 million).*

### Status Pasaran

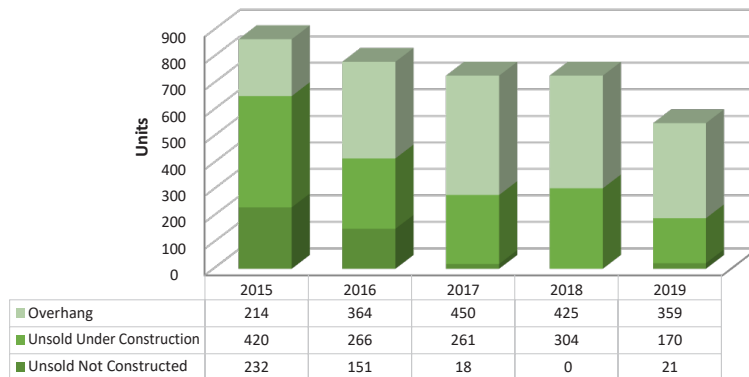
### Market Status

Situasi kedai siap dibina tidak terjual dan dalam pembinaan belum terjual menunjukkan prestasi lebih baik di mana bilangannya menurun dalam tempoh kajian.

*The shop overhang and unsold under construction situation showed better performance as the number decreased in the review period.*

Chart 10.12

Shop Market Status Trend 2015 – 2019



### Aktiviti Pembinaan

Subsektor ini menyaksikan pergerakan bercampur-campur dalam aktiviti pembinaan. Setakat akhir 2019, terdapat 31,398 unit kedai sedia ada dengan 1,004 unit lagi dalam penawaran akan datang dan 1,117 unit dalam penawaran yang dirancang.

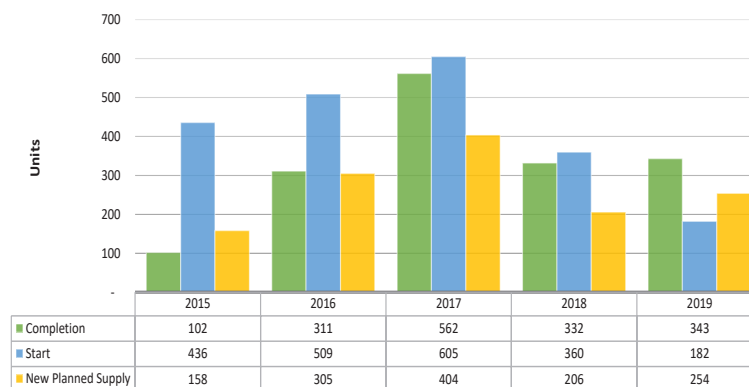
### Construction Activity

The sub-sector saw mixed movements in construction activity. As at end-2019, there were 31,398 existing shop units with another 1,004 units in the incoming supply and 1,117 units in the planned supply.

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Chart 10.13

Shop Construction Activity Trend 2015 – 2019



### Riadah

Di subsektor riadah, negeri ini menyaksikan Hotel T siap dibina menawarkan 96 bilik ke dalam pasaran.

### Leisure

In the leisure sub-sector, the state witnessed the completion of T Hotel offering 96 rooms into the market.

### HARTA TANAH PERTANIAN

### AGRICULTURE PROPERTY

#### Transaksi

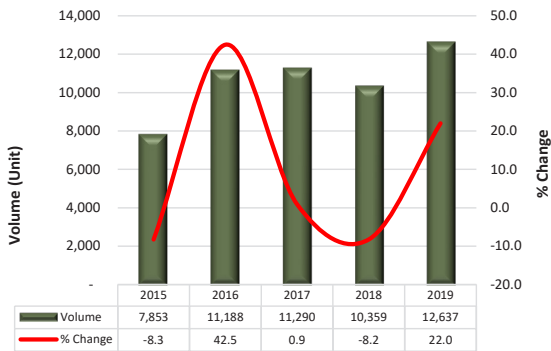
#### Transaction

Subsektor pertanian merupakan penyumbang kedua kepada transaksi hartanah keseluruhan. Terdapat 12,637 transaksi bernilai RM975.43 juta, mencakupi 42.2% daripada jumlah urus niaga hartanah. Aktiviti pasarnya menunjukkan peningkatan sebanyak 22.0% dalam jumlah dan 4.4% berbanding dengan 2018 (10,359 transaksi bernilai RM934.32). Mengikut jenis, tanah padi menguasai 46.7% daripada jumlah urusniaga pertanian negeri.

The agriculture sub-sector was second most contributor to overall property transactions. There were 12,637 transactions worth RM975.43 million, accounting for 42.2% of the total property transactions. Its market activity indicated an increase of 22.0% in volume and 4.4% in value in comparison with 2018 (10,359 transactions worth RM934.32). By type, paddy land dominated 46.7% of the state's total agriculture transactions.

Chart 10.14

Volume of Agriculture Transactions 2015 – 2019



### Harga

Harga harta tanah pertanian stabil secara keseluruhannya dengan kenaikan direkodkan di beberapa lokasi tertentu.

### PROSPEK 2020

Pasaran harta tanah negeri ini dijangka akan kekal positif, disokong oleh beberapa projek pembangunan dalam perancangan dan pembinaan oleh Kerajaan Negeri. Antara projek pembangunan tersebut adalah:

#### Projek Estet Padi

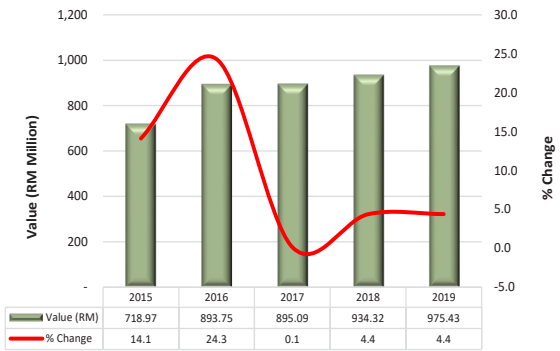
Ia terletak di Jelai melibatkan 143 hektar tanah padi. Projek ini bertujuan untuk meningkatkan pendapatan di kalangan petani kerana kos pengeluaran beras yang semakin meningkat serta menambah baik kecekapan pengurusan ladang di kalangan petani. Di samping itu, estet padi Jelai menghasilkan benih padi yang berkualiti tinggi. Di samping itu, Lembaga Pembangunan Pertanian Muda (MADA) juga menyasarkan untuk meningkatkan estet padi untuk mencapai keluasan 20,000 hektar menjelang 2020.

#### Kedah Rubber City (KRC)

Projek yang terletak di Padang Terap ini memfokuskan kepada tujuh kelompok utama iaitu produk lateks canggih, tayar dan produk berkaitan tayar, produk kejuruteraan getah, bahan berasaskan getah dan getah lanjutan, komponen getah automotif, bioteknologi dan perkhidmatan. Projek ini bermula pada 2 Disember 2019 dan dijangka selesai pada 2 Disember 2021. Ia bermula dengan kerja infrastruktur untuk fasa pertama yang melibatkan 500 hektar tanah. Pelaksana projek ialah Pihak Berkuasa Pelaksanaan Koridor Utara (NCIA). Projek KRC dijangka menjadi pemangkin kepada pertumbuhan ekonomi rakyat dengan menyediakan beribu peluang pekerjaan dan berpotensi menarik pelaburan bernilai RM10 juta.

Chart 10.15

Value of Agriculture Transactions 2015 – 2019



### Price

Prices of agriculture property were mainly stable with some increases recorded in certain locations.

### 2020 OUTLOOK

The state's property market is anticipated to be on a positive path, supported by several proposed and on-going development projects by the State Government. Among the development projects are:

#### Paddy Estate Project

It is located in Jelai involving 143 hectares of paddy land. This project aims to increase income among farmers due to the increasing cost of producing rice as well as improving the efficiency of farm management among farmers. In addition, Jelai paddy estate produces a high-quality paddy seed. In addition, Muda Agricultural Development Authority (MADA) is also aiming to increase paddy estates to reach 20,000 hectares by 2020.

#### Kedah Rubber City (KRC)

The project which is located in Padang Terap focuses on seven main industrial clusters namely advanced latex products, tire and tire related products, rubber engineering products, advanced rubber and rubber materials, automotive rubber components, biotechnology and services. The project commenced on December 2, 2019 and is expected to be completed by December 2, 2021. It commenced with infrastructure work for the first phase involving 500 hectares of land. Project implementer is Northern Corridor Implantation Authority (NCIA). The KRC project is expected to be a catalyst for the economic growth of the people by providing thousands job opportunities and potential to attract RM10 million worth investment.

**Hospital Pendang**

Hospital Pendang yang mempunyai 126 katil akan dibina di atas tanah seluas 17 hektar terletak di Mukim Ayer Puteh, Pendang. Hospital empat tingkat ini akan menyediakan perkhidmatan pesakit dalam dan pesakit luar, perubatan dan penjagaan pembedahan serta dua bilik operasi. Projek ini masih dalam pembinaan dan dijangka siap pada November 2021.

**Perpustakaan Digital Kedah**

Perpustakaan digital bernilai RM15 juta akan dibina di bandar Alor Setar menerusi Pelaksanaan Koridor Utara (NCIA). Perpustakaan ini dijangka beroperasi penuh pada akhir 2020.

***Pendang Hospital***

*The 126-bed Pendang Hospital will be built on a 17-hectare piece of land located in Mukim Ayer Puteh, Pendang. The four-storey hospital will provide inpatient and outpatient services, medical and surgical care as well as two operating theatres. The project is still under construction and expected to be completed in November 2021.*

***Kedah Digital Library***

*The RM15 million digital library will be built in Alor Setar town through the Northern Corridor Implementation (NCIA). The library is expected its full operation in the end of 2020.*



# PAHANG



# PAHANG

## GAMBARAN KESELURUHAN

Pasaran harta tanah negeri menyaksikan sedikit pemulihan pada 2019 seperti yang ditunjukkan oleh pertumbuhan aktiviti pasaran. Terdapat 18,306 transaksi bernilai RM5.54 bilion yang dicatatkan pada 2019, meningkat 3.9% dalam bilangan dan 9.1% dalam nilai berbanding 2018 (17,614 transaksi bernilai RM5.08 bilion). Subsektor kediaman terus mendorong pasaran keseluruhan, menyumbang 63.5% daripada bilangan pasaran harta tanah negeri. Ini diikuti oleh subsektor pertanian (23.8%), komersial (6.4%), tanah pembangunan (5.2%) dan industri (1.0%).

Prestasi semua subsektor bertambah baik kecuali pertanian (-11.2%) dan industri (-6.0%). Subsektor komersial meningkat 26.3%, diikuti oleh tanah pembangunan (15.5%) dan kediaman (8.2%). Dari segi nilai, semua subsektor mencatatkan pergerakan meningkat kecuali bagi subsektor pertanian dan tanah pembangunan.

## OVERVIEW

The state's property market saw a slight rebound in 2019 as indicated by the growth of market activity. There were 18,306 transactions worth RM5.54 billion recorded in 2019, increased by 3.9% in volume and 9.1% in value as compared to 2018 (17,614 transactions worth RM5.08 billion). Residential sub-sector continued to propel the overall market, accounting for 63.5% of the state's property market volume. This was followed by agriculture (23.8%), commercial (6.4%), development land (5.2%) and industrial sub-sectors (1.0%).

The performance of all sub-sectors improved except for agriculture (-11.2%) and industrial (-6.0%). Commercial sub-sector increased by 26.3%, followed by development land (15.5%) and residential (8.2%). In terms of value, all sub-sectors recorded uptrend movement except for agriculture and development land sub-sectors.

Chart 11.1

Volume of Property Transactions 2015 - 2019

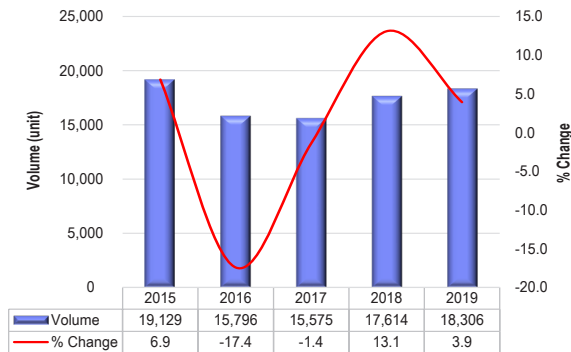


Chart 11.2

Value of Property Transactions 2015 - 2019

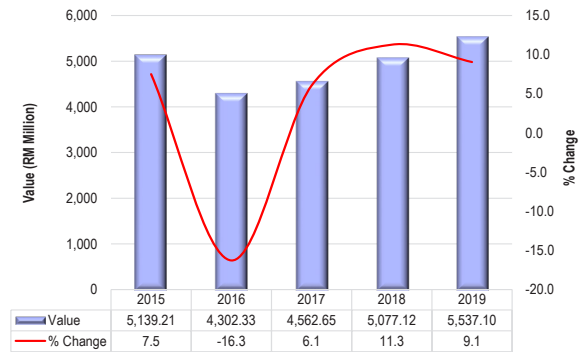


Chart 11.3

Contribution to Transaction Volume by Sub-sector 2019

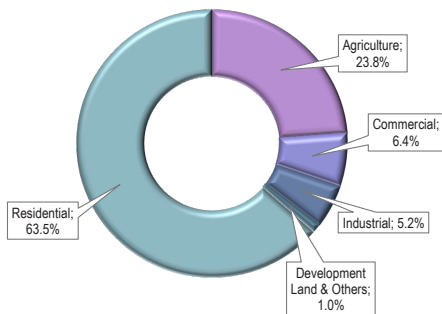
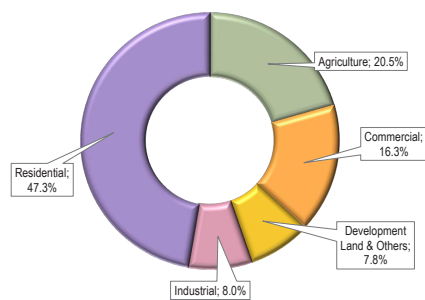


Chart 11.4

Contribution to Transaction Value by Sub-sector 2019



## PROMINENT SALES

Table 11.1

Summary of Prominent Sales in 2019 :

No.	Property	Location	Transaction Year
1.	2,530-hectare estate land	Pekan	2018
2.	40.38-hectare estate land	Bentong	2018
3.	CIMB Building	Jalan Mahkota	2018
4.	854.20-hectare estate land	Rompin	2017

Tempoh kajian juga menyaksikan beberapa pembelian pukal. Antaranya ialah 258 plot teres kediaman di Bandar Rompin, 33 plot pertanian di Bukit Kajang, Raub dan 34 plots teres komersial di Bandar Temerloh.

*The review period also saw several bulk purchases. Among these were 258 residential terraced plots in Bandar Rompin, 33 agriculture plots in Bukit Kajang, Raub and 34 commercial terraced plots in Bandar Temerloh.*

## HARTA TANAH KEDIAMAN

### Transaksi

Terdapat 11,627 transaksi bernilai RM2.62 bilion dicatatkan pada tempoh kajian, meningkat 8.2% dalam bilangan dan 6.2% dalam nilai. Transaksi rumah teres menguasai syer pasaran tertinggi, menyumbang 43.8% (5,095 unit) daripada transaksi harta kediaman iaitu teres setingkat (3,786 unit) dan teres dua tingkat (1,309 unit).

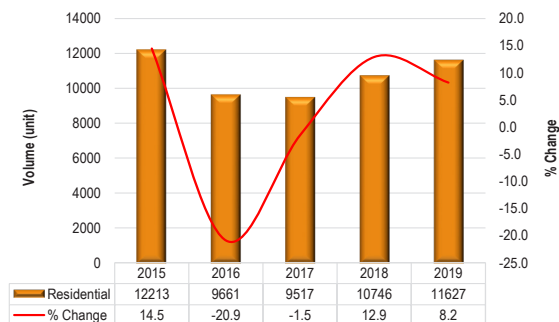
## RESIDENTIAL PROPERTY

### Transaction

*There were 11,627 transactions worth RM2.62 billion recorded in the review period, increased by 8.2% in volume and 6.2% in value. Terrace houses transactions dominated the highest market share, contributed 43.8% (5,095 units) of the residential property transactions attributed to single storey terraces (3,786 units) and double storey terraces (1,309 units).*

Chart 11.5

Volume of Residential Property Transactions 2015 - 2019

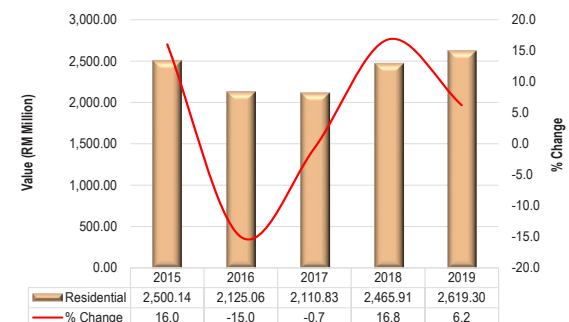


### Pelancaran Baharu

Pasaran utama merekodkan lebih banyak pelancaran baharu. Kebanyakan unit baru dilancar ini adalah teres setingkat, yang mendominasi 47.0% (3,029 unit).

Chart 11.6

Value of Residential Property Transactions 2015 - 2019

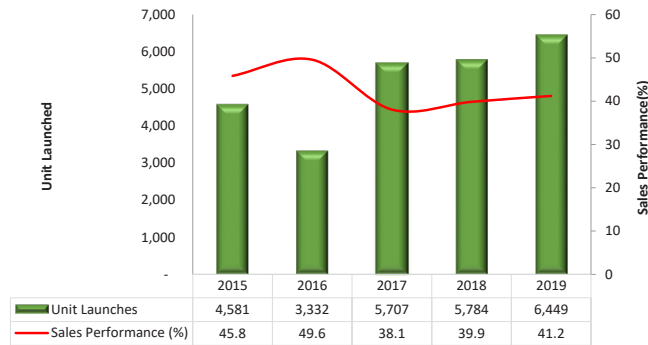


### New Launches

*The primary market recorded more numbers of new launches. Most of these new units were single storey terraces, dominating for 47.0% (3,029 units) of total.*

Chart 11.7

New Launches Trend 2015 – 2019



**Status Pasaran**

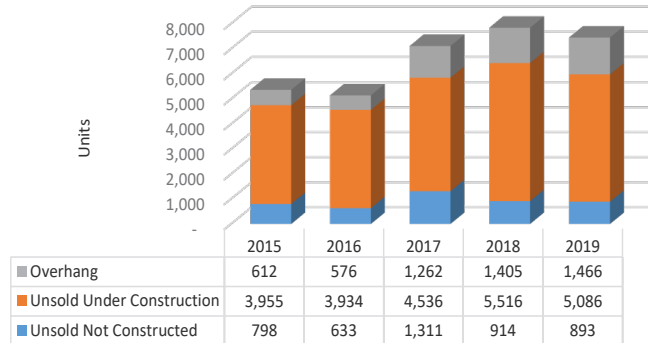
Unit kediaman siap dibina tidak terjual merekodkan prestasi bercampur-campur dalam tempoh kajian. Trend ditunjukkan dalam Carta 11.8.

**Market Status**

The residential overhang and unsold units recorded a mixed performance in the review period. The trend is shown in Chart 11.8.

Chart 11.8

Residential Market Status Trend 2015 – 2019



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**Aktiviti Pembinaan**

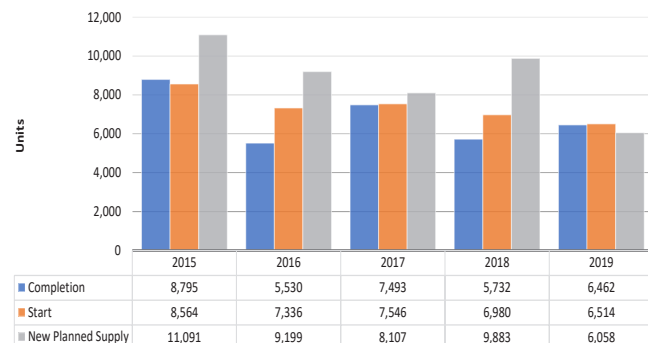
Aktiviti pembinaan subsektor kediaman berada pada mod perlahan kecuali siap dbina. Pada akhir 2019, terdapat 282,968 unit kediaman sedia ada dengan 19,173 unit lagi dalam penawaran akan datang dan 36,640 unit dalam penawaran yang dirancang.

**Construction Activity**

The residential sub-sector's construction activity was on a low mode except for completion. As at end-2019, there were 282,968 existing residential units with another 19,173 units in the incoming supply and 36,640 units in the planned supply.

Chart 11.9

Residential Market Activity Trend 2015 – 2019



## Harga dan Sewa

Trend harga kediaman sebahagian besarnya stabil di seluruh negeri dengan pertumbuhan marginal 6.9% dan 8.2% dilihat bagi rumah teres dua tingkat di Alor Akar dan Bukit Sekilau di Bandar Kuantan, dipindahmilik antara RM300,000 dan RM560,000 seunit disebabkan keutamaan pasaran yang tinggi. Harga harta kediaman berstrata stabil dengan pertumbuhan marginal dicatatkan di beberapa kawasan tertentu. Pada Q4 2019, Indeks Harga Semua Rumah untuk negeri ini berada pada 176.6 mata, naik 1.1% daripada 174.7 mata pada Q4 2018. Purata Harga Semua Rumah bagi negeri pada Q4 2019 berada pada RM233,046, meningkat dari RM230,584 pada Q4 2018.

Pasaran sewa kediaman amnya stabil dengan pergerakan menaik dicatatkan di beberapa kawasan. Penyewaan baru dan lokasi yang strategik berdekatan pusat komersial yang dilengkapi dengan perhubungan yang cekap adalah antara faktor yang menyumbang kepada keuntungan sewa. Sewa untuk rumah teres dua tingkat di Daerah Kuantan amnya di antara RM500 dan RM1,300 sebulan, dengan sewa tertinggi dicatatkan di Promenade Villa.

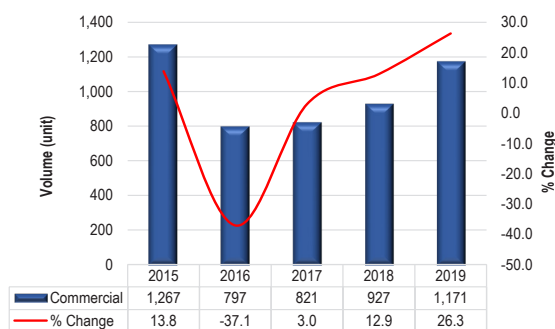
## HARTA TANAH KOMERSIAL

### Transaksi

Prestasi subsektor komersial meningkat pada 2019. Terdapat 1,171 transaksi dengan jumlah nilai RM903.75 juta (2018: 927 transaksi bernilai RM566.53 juta). Ini menunjukkan peningkatan 26.3% dalam bilangan dan 59.5% dalam nilai berbanding tahun sebelum.

Chart 11.10

Volume of Commercial Property Transactions 2015 - 2019



## Price and Rental

The residential price trend was largely stable across the board with marginal growth of 6.9% and 8.2% observed for double storey terrace houses at Alor Akar and Bukit Sekilau in Kuantan Town, transacted between RM300,000 and RM560,000 per unit due to high market preference. Prices of stratified residential types were stable with marginal growth recorded in certain areas. As at Q4 2019, the All House Price Index for the state stood at 176.6 points, up by 1.1% from 174.7 points in Q4 2018. The average All House Price for the state as at Q4 2019 stood at RM233,046, increased from RM230,584 in Q4 2018.

The residential rental market was generally stable with upward movements recorded in several areas. New tenancy and strategic locations nearby commercial centres served with efficient connectivity were among the factors contributed to the rental gains. Rental for double storey terraced houses in Kuantan District generally ranged between RM500 to RM1,300 per month, with the highest rental recorded in Promenade Villa.

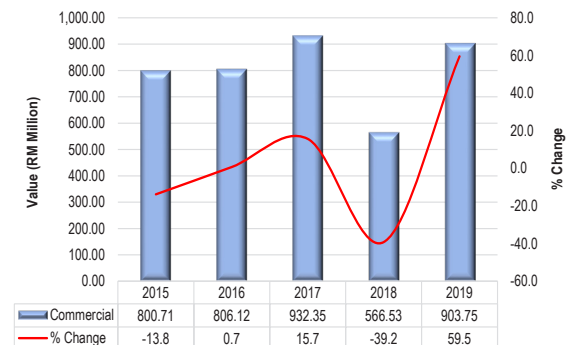
## COMMERCIAL PROPERTY

### Transaction

The performance of commercial sub-sector strengthened in 2019. There were 1,171 transactions with a total value of RM903.75 million (2018: 927 transactions worth RM566.53 million). This indicated an increase of 26.3% in volume and 59.5% in value as compared to previous year.

Chart 11.11

Value of Commercial Property Transactions 2015 - 2019



## Kedai

### Transaksi

Subsektor kedai mencatatkan 686 transaksi bernilai RM489.70 juta dalam tempoh kajian (2018: 660 transaksi bernilai RM437.41 juta). Bilangan dan nilai masing-masing meningkat 3.9% dan 12.0% berbanding 2018.

### Status Pasaran

Situasi kedai siap dibina tidak terjual kurang memberansangkan dalam tempoh kajian. Bagaimanapun, dalam pembinaan dan belum dibina belum terjual bertambah baik. Trend ini ditunjukkan di Carta 11.12.

## Shop

### Transaction

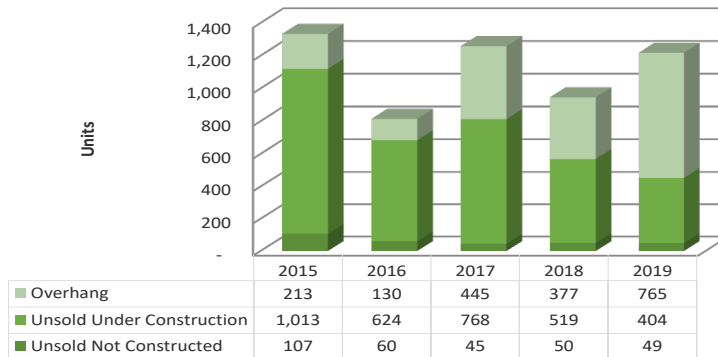
Shop sub-sector recorded 686 transactions worth RM489.70 million in the review period (2018: 660 transactions worth RM437.41 million). The volume and value increased by 3.9% and 12.0% respectively compared to 2018.

### Market Status

The shop overhang situation was less promising in the review period. However, unsold under construction and not constructed are improved. The trend is shown in Chart 11.12.

Chart 11.12

Shop Market Status Trend 2015 – 2019



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### Aktiviti Pembinaan

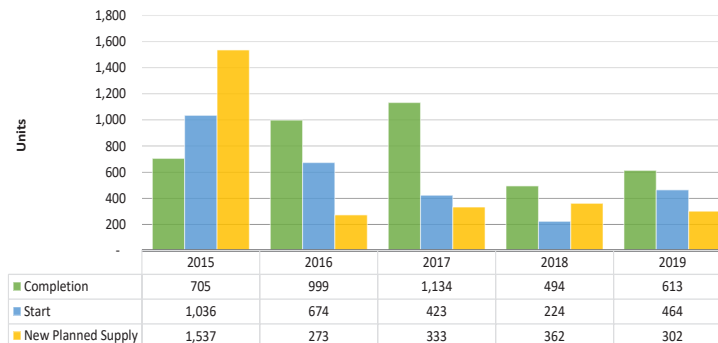
Subsektor menyaksikan pergerakan bercampur-campur dalam aktiviti pembinaan. Sehingga akhir 2019, terdapat 25,029 unit kedai sedia ada dengan 1,635 unit lagi dalam penawaran akan datang dan 3,221 unit dalam penawaran yang dirancang.

### Construction Activity

The sub-sector saw mixed movements in construction activity. As at end-2019, there were 25,029 existing shop units with another 1,635 units in the incoming supply and 3,221 units in the planned supply.

Chart 11.13

Shop Market Activity Trend 2015 – 2019



## Kompleks Perniagaan

### Penghunian dan Ketersediaan Ruang

Subsektor niaga menunjukkan prestasi lebih baik dengan kadar penghunian keseluruhan 71.4% berbanding 67.0% pada 2018. Ambilan tahunan adalah positif pada 37,205 m.p. lebih rendah daripada 41,819 m.p. direkodkan tahun lepas.

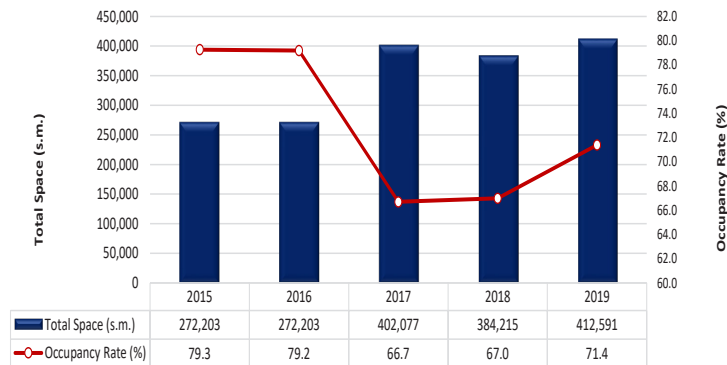
## Shopping Complex

### Occupancy and Space Availability

The retail sub-sector showed a slightly better performance with an overall occupancy rate of 71.4% as compared to 67.0% in 2018. The annual take-up was positive at 37,205 s.m. lower than 41,819 s.m. recorded last year.

Chart 11.14

Supply and Occupancy of Shopping Complex



### Aktiviti Pembinaan

Subsektor niaga menyaksikan empat bangunan baru siap dibina yang menyuntik 22,956 m.p. ke dalam pasaran. Pada akhir 2019, terdapat 40 kompleks membeli-belah sedia ada (412,591 m.p.) dengan dua kompleks (35,005 m.p.) dalam penawaran akan datang dan empat lagi (102,923 m.p) dalam penawaran yang dirancang.

### Construction Activity

The retail sub-sector witnessed four new completions which injected 22,956 s.m., into the market. As at end-2019, there were 40 existing shopping complexes (412,591 s.m.) with two complexes (35,005 s.m.) in the incoming supply and another four (102,923 s.m.) in the planned supply.

Table 11.2

List of Completion for Shopping Complex

No.	Property	Location	Floor Area (s.m.)
1.	TMG Mall Bandar Indera Mahkota	Kuantan	4,974
2.	Cowboyz Supermarket	Kuantan	4,819
3.	TMG Mall Tanjung Lumpur	Kuantan	7,709
4.	Pasaraya Econsave	Maran	5,454

### Sewa

Sewa ruang niaga sebahagian besarnya stabil bagi kebanyakan kompleks membeli-belah dengan beberapa pengecualian. Selari dengan keadaan pasaran yang perlahan, Kuantan Parade merekodkan pergerakan menurun yang minima disebabkan oleh pembukaan kompleks membeli-belah baharu berdekatan.

### Rental

Rental of retail space were largely stable for most shopping complexes with few exceptions. In line with softening market, the Kuantan Parade recorded minimal downtrend rental movements due to the opening of new shopping complexes nearby.



## Pejabat Binaan Khas

### Transaksi

Transaksi Bangunan CIMB di Kuantan dicatatkan dalam tempoh kajian. Pindahmilik tersebut berlaku pada 2018 tetapi didaftarkan dalam tempoh kajian.

### Penghunian dan Ketersediaan Ruang

Prestasi purata kadar penghunian pejabat binaan khas menurun kepada 90.1% pada 2019 berbanding 92.4% pada 2018. Sejajar itu, ambilan tahunan adalah negatif pada 9,339 m.p. (2018: 32,856 m.p.).

## Purpose-Built Office

### Transaction

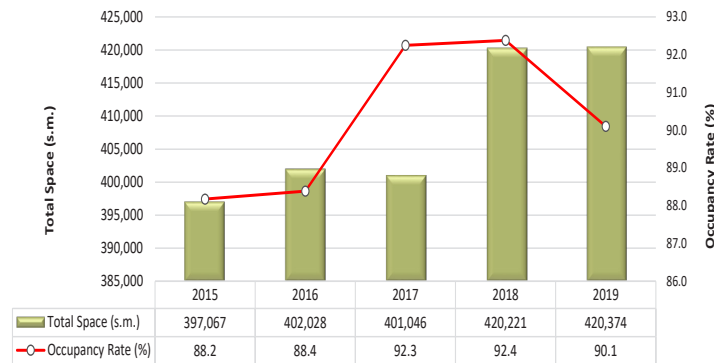
The transaction of CIMB Building in Kuantan was recorded in the review period. The transaction was concluded in 2018 but registered in the review period.

### Occupancy and Space Availability

The average occupancy rate performance for purpose-built office softened to 90.1% in 2019 as compared to 92.4% in 2018. Correspondingly, the annual take-up was negative at 9,339 s.m. (2018: 32,856 s.m.).

Chart 11.15

Supply and Occupancy of Purpose-Built Office



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## Aktiviti Pembinaan

Pada akhir 2019, terdapat 154 pejabat binaan khas sedia ada (420,374 m.p.) dengan satu kompleks (36,375 m.p.) dalam penawaran akan datang dan satu lagi (4,911 m.p.) dalam penawaran yang dirancang.

### Sewa

Subsektor pejabat binaan khas mencatatkan trend sewa stabil dengan beberapa pergerakan ketara direkodkan pada bangunan terpilih. Bangunan Lembaga Tabung Haji di Daerah Pekan menunjukkan peningkatan 5.0% hingga 9.2% disebabkan oleh pembaharuan penyewaan dan semakan sewa.

### Riadah

Tempoh kajian menyaksikan tiga hotel baru siap dibina. Iaitu Swiss-Garden Hotel & Resort Genting Highlands, Geo Resort & Hotel dan chalet di Kampung Cherating yang menyuntik 893 bilik hotel ke dalam pasaran. Pada akhir 2019, terdapat 300 hotel (25,376 bilik) dalam penawaran ada dengan satu lagi hotel (70 bilik) dalam penawaran akan datang dan lima hotel (595 bilik) dalam penawaran yang dirancang.

## Construction Activity

As at end-2019, there were 154 existing purpose-built office (420,374 s.m.) with one complex (36,375 s.m.) in the incoming supply and another one (4,911 s.m.) in the planned supply.

### Rental

The purpose-built office sub-sector recorded a stable rental trend with some notable movements recorded in selected buildings. Lembaga Tabung Haji Building in Pekan District showed an increase of 5.0% to 9.2% due to tenancy renewals and rental revisions.

### Leisure

The review period witnessed three new completions. These are were Swiss-Garden Hotel & Resort Genting Highlands, Geo Resort & Hotel and chalet at Kampung Cherating which injected a combined 893 hotel rooms into the market. As at end-2019, there were 300 hotels (25,376 rooms) in the existing supply with another one hotel (70 rooms) in the incoming supply and five hotels (595 rooms) in the planned supply.

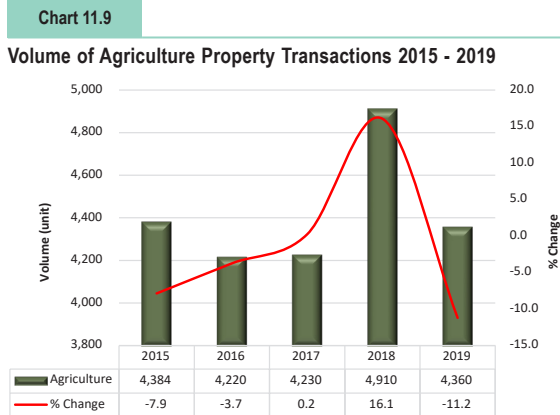
## HARTA TANAH PERTANIAN

### Transaksi

Terdapat 4,360 transaksi bernilai RM1.14 billion, masing-masing menunjukkan penurunan 11.2% dalam bilangan dan 4.0% dalam nilai (2018: 4,910 transaksi bernilai RM1.18 billion).

### Harga

Harga subsektor pertanian adalah stabil di seluruh



daerah. Tanah Durian di Sungai Ruan, Daerah Raub mencecah harga lebih tinggi di antara RM1,179,500 dan RM1,290,600 sehektar disebabkan permintaan yang tinggi.

### PROSPEK 2020

Pada 2020, Kerajaan Negeri mensasarkan kunjungan 15 juta pelancong domestik. Menara Teruntum akan menjadi tarikan baru dan tarikan pelancong ke Bandar Kuantan. Pembinaan Menara setinggi 180-meter itu menelan belanja kira-kira RM53.1 juta yang dibina oleh Majlis Pembangunan Wilayah Ekonomi Pantai Timur (ECERDC), sedang dalam proses mendapatkan Sijil Perakuan Siap dan Pematuhan (CCC). Ia dijangka memulakan operasi pada pertengahan 2020. Pembukaan Menara ini dijangka akan meningkatkan aktiviti ekonomi di sektor pelancongan, khususnya di Daerah Kuantan serta mempunyai kesan positif terhadap pembangunan harta tanah di kawasan sekitarnya.

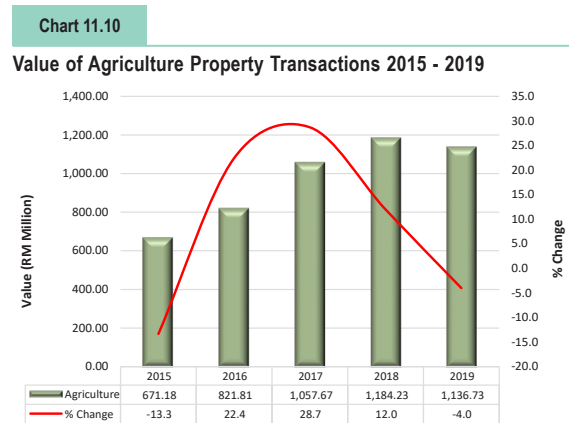
Pusat Pentadbiran Sultan Ahmad Shah (PPSAS), yang pembinaannya telah bermula sejak 2016, dijangka siap menjelang akhir 2020. Ia merupakan pusat pentadbiran Pahang yang baharu dan lebih teratur. Pembinaan PPSAS dilihat sebagai pemangkin bagi pertumbuhan ekonomi di kawasan sekitar terutama di KOTASAS dan

## AGRICULTURE PROPERTY

### Transaction

There were 4,360 transactions worth RM1.14 billion, indicating a decline of 11.2% in volume and 4.0% in value respectively (2018: 4,910 transactions worth RM1.18 billion).

### Price



Prices of agriculture sub-sector were mainly stable across the districts. Durian land in Sungai Ruan, Raub District fetched higher prices transacted between RM1,179,500 and RM1,290,600 per hectare due to high demand.

### 2020 OUTLOOK

In 2020, the State Government is aiming to receive 15 million domestic tourists. The Teruntum Tower will be a new landmark and tourist attraction to Kuantan City. The construction of the 180-metre Tower cost about RM53.1 million built by the East Coast Economic Region Development Council (ECERDC), is in the process of obtaining a Certificate of Completion and Compliance (CCC). It is expected to start operations in mid-2020. The opening of the Tower is expected to boost economic activity in the tourism sector, particularly in the Kuantan District and have a positive impact on property development in the surrounding area.

The Sultan Ahmad Shah Administrative Center (PPSAS), which has begun construction in 2016, is expected to be completed by the end of 2020. It is a new and more organized Pahang administrative center. The construction of the PPSAS has been a catalyst for economic growth in the surrounding areas especially in

Bandar Indera Mahkota dan dijangka akan meningkatkan permintaan dan penawaran harta tanah di subsektor kediaman.

Di sector kediaman, PRIMA Pahang dan Rumah Makmur merupakan inisiatif Kerajaan Negeri dalam menyediakan rumah mampu milik dan berkualiti untuk semua rakyat Pahang. Melalui Rumah Makmur, teres satu tingkat dijual pada harga RM80,000 manakala PRIMA Pahang menawarkan rumah berkembar berharga RM150,000 dan pangsapuri di Cameron Highlands dengan harga RM200,000. Pada 2020, Kerajaan Negeri mensasarkan 1,000 unit PRIMA Pahang siap manakala 2,000 unit daripada projek PRIMA Pahang dan Rumah Makmur akan ditawarkan kepada rakyat Pahang.

Pada 2020 akan diwujudkan dua sub-daerah baharu di Pahang iaitu Sub-Daerah Gebeng dan Sub-Daerah Genting. Pembentukan kedua-dua sub-daerah ini akan meningkatkan sistem penyampaian kerajaan dan dijangka dapat memberikan kesan yang besar kepada pertumbuhan pusat bandar baru yang akan meningkatkan aktiviti pasaran harta tanah di kawasan ini.

114 Dengan kewujudan sub-daerah baharu, projek Laluan Rel Pantai Timur (ECRL) yang sedang berjalan akan membawa kesan limpahan ekonomi yang besar terhadap sektor harta tanah Pahang. Melalui projek ECRL, selain pembinaan sebuah stesen penumpang berhampiran Pelabuhan Kuantan iaitu Stesen Kuantan Port City 1, satu laluan keretapi kargo (spurline) ke dalam kawasan operasi Pelabuhan Kuantan akan turut dibina dalam fasa 2 projek tersebut. Apabila siap, laluan keretapi ini akan menghubungkan Pelabuhan Kuantan ke Pelabuhan Klang yang bakal mewujudkan land bridge yang dijangka dapat meningkatkan mobiliti kargo di antara kedua-dua pelabuhan. Projek yang melibatkan laluan yang menghubungkan lima (5) buah negeri iaitu Selangor, Negeri Sembilan, Pahang, Terengganu dan Kelantan ini dijangka akan siap sepenuhnya pada Disember 2026.

Di bahagian industri, Taman Perindustrian Malaysia-China Kuantan (MCKIP) akan terus menjadi taman industri utama di Negeri Pahang. Pelabur utama ialah Alliance Steel Sdn. Bhd. (ASSB) yang telahpun menjalankan pengeluaran percubaan dengan kapasiti pengeluaran produk besi keluli antara 25% hingga 50%. Kilang ASSB ini dijangka memulakan pengeluaran sepenuhnya pada 2020 dengan kapasiti 3.5 juta tan setahun. Ianya dijangka akan membantu merencanakan pembangunan dan penggunaan Pelabuhan Kuantan.

*KOTASAS and Bandar Indera Mahkota and is expected to boost demand and supply of property market in the residential sub-sector.*

*On the residential sector, the PRIMA Pahang and Rumah Makmur are an initiative of the State Government in providing affordable and quality houses for the people throughout the State of Pahang. Through the Rumah Makmur, single storey terraces are sold at RM80,000 while the PRIMA Pahang offers semi-detached houses at RM150,000 and apartments in Cameron Highlands at RM200,000. In 2020, the State Government is aiming for 1,000 units of the PRIMA Pahang to be completed while 2,000 units from PRIMA Pahang and Rumah Makmur projects will be offers to the Pahang people.*

*In 2020 will see two new sub-districts will establish in Pahang namely Gebeng Sub-District and Genting Sub-District. The establishment of these sub-districts will improve the government's delivery system and is expected to have a significant impact on the growth of the new town centre which will increase property market activity in the area.*

*With the establishment of new sub-districts, the ongoing East Coast Rail Link (ECRL) project, will bring a huge economic spill to the Pahang property market. Through the ECRL project, in addition to the construction of a passenger station near Kuantan Port namely Kuantan Port City 1, a spurline railway into the Kuantan Port operating area will also be built in phase 2 of the project. When completed, the rail link will connect Kuantan Port to Port Klang which will create a land bridge that is expected to increase cargo mobility between the two ports. The project involving a route linking five states namely Selangor, Negeri Sembilan, Pahang, Terengganu and Kelantan are expected to be completed by December 2026.*

*On the industrial side, the Kuantan Malaysia-China Industrial Park (MCKIP) will continue to be the leading industrial park in the state of Pahang. The main investor is Alliance Steel Sdn Bhd (ASSB) has already carried out experimental production with a production capacity of steel products ranging from 25% to 50%. The ASSB factory is expected to start production in 2020 with a capacity of 3.5 million tonnes a year. It is expected to help accelerate the development and use of Kuantan Port.*

Selain itu, Pahang juga bakal menerima kemasukan pelaburan dari China dengan termeterainya Memorandum Persefahaman (MoU) antara Kerajaan Negeri dengan syarikat-syarikat dari negara berkenaan. Pelaburan adalah dalam pelbagai sektor iaitu pengeluaran kertas dan pulpa, penjanaan bersepadu tenaga dan haba, mewujudkan Eco Tourism City di Bukit Tinggi, Bentong, projek pengeluaran kertas dan habuk plastik, projek pembinaan turbin angin untuk menjana tenaga di Pulau Tioman dan pembinaan kilang pengeluaran panel solar untuk kediaman di Kawasan Perindustrian Gebeng, Kuantan.

*In addition, Pahang will also receive investment from China with the signing of a Memorandum of Understanding (MoU) between the State Government and companies from the country. The investments are in various sectors including paper and pulp production, integrated energy and heat generation, the development of Eco Tourism City in Bukit Tinggi, Bentong, plastic paper and dust production, wind turbine construction projects in Tioman Island and solar panel production plant for residential in Gebeng Industrial Area, Kuantan.*



# TERENGGANU



# TERENGGANU

## GAMBARAN KESELURUHAN

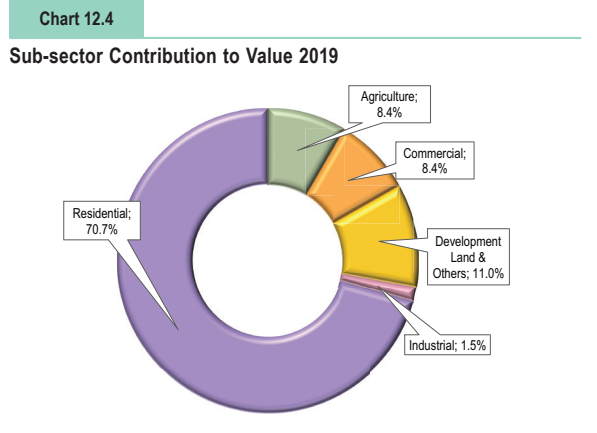
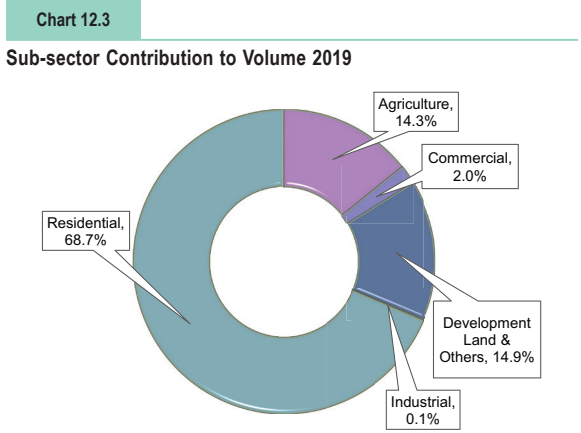
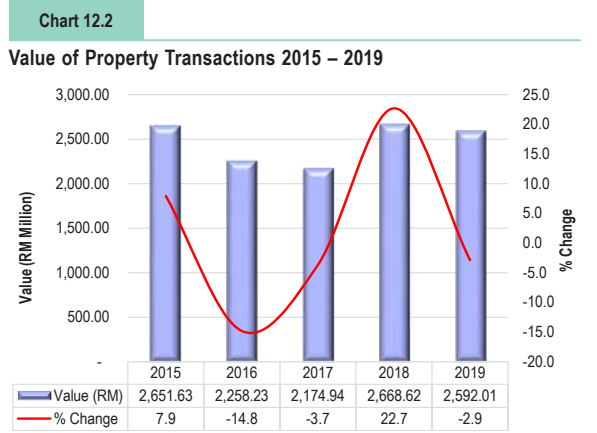
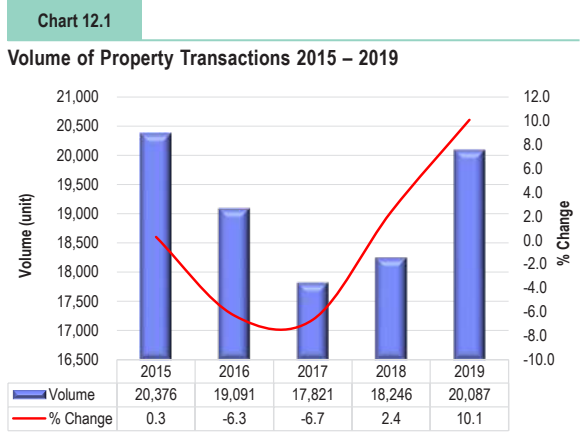
Pasaran harta tanah negeri menyaksikan sedikit pemulihan dalam tempoh kajian yang ditunjukkan oleh pertumbuhan dalam aktiviti pasaran. Terdapat 20,087 transaksi direkodkan, meningkat 10.1% (2018: 18,246 transaksi). Walau bagaimanapun, nilai transaksi sedikit berkurang iaitu 2.9% kepada RM2.59 bilion (2018: RM2.67 bilion). Subsektor kediaman terus menerajui syer pasaran, menyumbang 68.7% daripada bilangan pasaran harta tanah negeri. Ini diikuti oleh subsektor tanah pembangunan (14.9%), pertanian (14.3%), komersial (2.0%) dan industri (0.1%).

Aktiviti pasaran semua subsektor bertambah baik kecuali industri (-31.4%). Subsektor kediaman mendahului aliran menaik dengan 13.1% diikuti oleh komersial (9.8%), pertanian (6.4%) dan tanah pembangunan (1.5%). Dari segi nilai, semua subsektor menyaksikan pertumbuhan positif kecuali subsektor komersial.

## OVERVIEW

The state's property market saw a slight rebound in the review period indicated by the growth in the market activity. There were 20,087 transactions recorded, indicating an increase of 10.1% (2018: 18,246 transactions). Nevertheless, the value of transactions reduced slightly by 2.9% to RM2.59 billion (2018: RM2.67 billion). Residential sub-sector retained its lion market share, contributed 68.7% of the state's property market volume. This was followed by the development land (14.9%), agriculture (14.3%), commercial (2.0%) and industrial sub-sectors (0.1%).

Market activity all sub-sectors improved except for industrial (-31.4%). Residential sub-sector led the uptrend with 13.1% followed by commercial (9.8%), agriculture (6.4%) and development land (1.5%) sub-sectors. In terms of value, all sub-sectors witnessed positive growth except for commercial sub-sector.





## JUAL BELI UTAMA

Negeri menyaksikan pindahmilik bangunan pejabat binaan khas yang terletak di Kuala Terengganu pada 28 Oktober 2018.

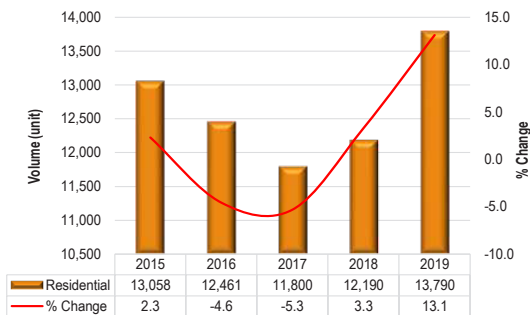
## HARTA TANAH KEDIAMAN

### Transaksi

Terdapat 13,790 transaksi bernilai RM1.83 bilion dicatatkan pada tempoh kajian, meningkat 13.1% dalam bilangan dan 14.3% dalam nilai. Transaksi plot kosong menguasai 69.3% pindahmilik harta kediaman.

Chart 12.5

Volume of Residential Property Transactions 2015 – 2019

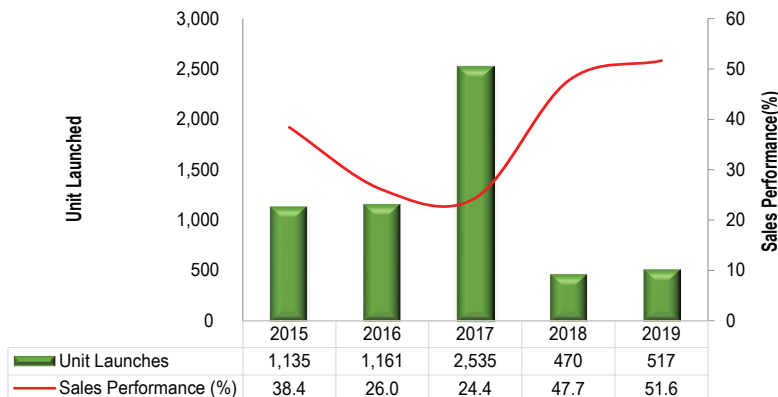


### Pelancaran Baharu

Pasaran utama merekodkan lebih banyak pelancaran baharu. Kebanyakan unit-unit ini adalah teres setingkat, mendominasi 63.2% (327 unit) daripada jumlah keseluruhan.

Chart 12.7

New Launches Trend 2015 – 2019



## PROMINENT SALES

The state witnessed the transfer of a purpose-built office building located in Kuala Terengganu on 28th October 2018.

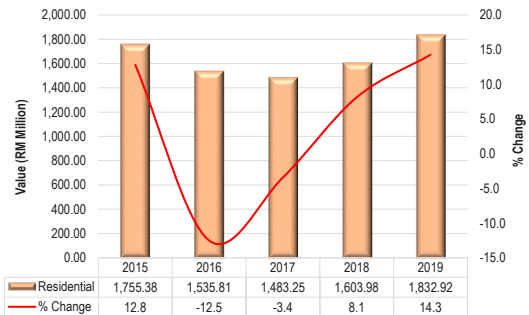
## RESIDENTIAL PROPERTY

### Transaction

There were 13,790 transactions worth RM1.83 bilion recorded in the review period, increased by 13.1% in volume and 14.3% in value. Vacant plot transactions dominated 69.3% of the residential property transactions.

Chart 12.6

Value of Residential Property Transactions 2015 – 2019

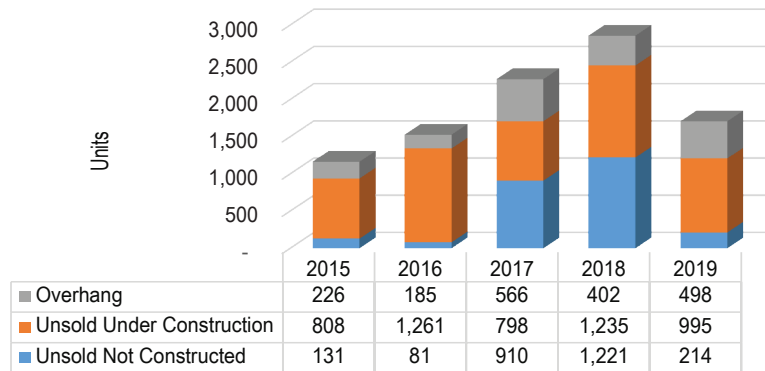


### New Launches

The primary market recorded more numbers of new launches. Most of these units were single storey terraces, dominating for 63.2% (327 units) of total.

Chart 12.8

Residential Market Status Trend 2015 – 2019



### Aktiviti Pembinaan

Aktiviti pembinaan kediaman menunjukkan pergerakan bercampur-campur dalam tempoh kajian. Mula dibina meningkat manakala siap dibina dan penawaran baru dirancang menyaksikan penurunan bilangan. Pada akhir 2019, terdapat 102,235 unit kediaman sedia ada dengan 17,707 unit lagi dalam penawaran akan datang dan 12,022 unit dalam penawaran yang dirancang.

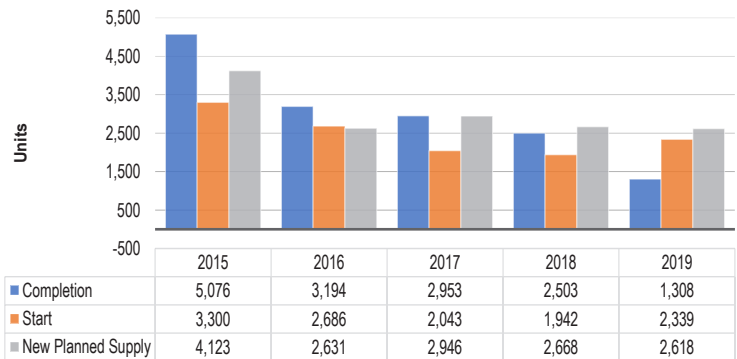
### Construction Activity

The residential construction activity showed mixed movements in the review period. Start increased whereas completion and new planned supply witnessed decreasing in numbers. As at end-2019, there were 102,235 existing residential units with another 17,707 units in the incoming supply and 12,022 units in the planned supply.

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Chart 12.9

Residential Market Activity Trend 2015 – 2019



### Harga dan Sewa

Harga harta tanah kediaman berada pada mod stabil dengan pergerakan positif dicatatkan di beberapa kawasan di Kuala Terengganu dan Dungun. Teres setingkat yang terletak di Kampung Balai Besar/ Gong Pasir di Dungun merekodkan peningkatan modal sehingga 15.0% berikutan permintaan yang tinggi dan penawaran terhad bagi jenis harta ini. Rumah berkembar setingkat di Kampung Bukit di Kuala Terengganu dan Kampung Seberang Pintasan di Dungun merekodkan peningkatan dua angka melebihi 14.0% berikutan permintaan yang tinggi, kesan dari projek Pintasan Kuala Terengganu dan pembinaan jambatan baru. Pada Q4 2019, Indeks Harga

### Price and Rental

Residential property prices were on a stable mode with positive movements noted in several areas in Kuala Terengganu and Dungun. Single storey low-cost terraces within Kampung Balai Besar/ Gong Pasir in Dungun recorded capital appreciation up to 15.0% due to high demand and limited supply for this type of property. Single storey demi-detach houses at Kampung Bukit in Kuala Terengganu and Kampung Seberang Pintasan in Dungun recorded double-digit increase of more than 14.0% due to high demand, impact from the Kuala Terengganu Bypass project and the construction of a new bridge. As at Q4 2019, the All House Price Index for

Semua Rumah untuk negeri ini berada pada 173.4 mata, naik 1.0% daripada 171.6 mata pada Q4 2018. Purata Harga Semua Rumah bagi negeri pada Q4 2019 berada pada RM273,232, meningkat dari RM270,382 pada Q4 2018.

Pasaran sewa kediaman umumnya stabil di kebanyakan kawasan dengan kenaikan minima dicatatkan di lokasi terpilih.

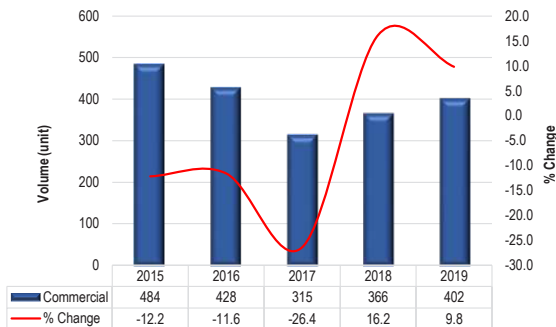
**HARTA TANAH KOMERSIAL**

**Transaksi**

Terdapat 402 transaksi direkodkan pada 2019 dengan jumlah nilai sebanyak RM218.28 juta, meningkat 9.8% dalam bilangan manakala nilai menunjukkan penurunan ketara sebanyak 60.2% (2018: 366 transaksi bernilai RM548.26 juta).

Chart 12.10

Volume of Commercial Property Transactions 2015 – 2019



**Kedai**

**Transaksi**

Subsektor kedai merekodkan 214 transaksi bernilai RM161.51 juta dalam tempoh kajian (2018: 217 transaksi bernilai RM137.32 juta). Bilangan menurun 1.4% manakala nilai meningkat 17.6% berbanding 2018.

**Status Pasaran**

Situasi kedai siap dibina tidak terjual, melegakan berdasarkan bilangan yang semakin berkurang dalam tempoh kajian. Trend ini ditunjukkan di Carta 12.12.

*the state stood at 173.4 points, up by 1.0% from 171.6 points in Q4 2018. The average All House Price for the state as at Q4 2019 stood at RM273,232, increase from RM270,382 in Q4 2018.*

*The residential rental market was generally stable in most areas with minimal increases noted in selected locations.*

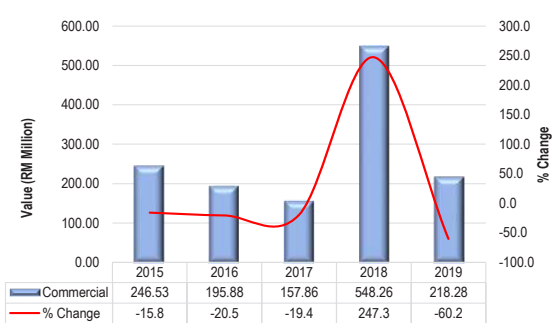
**COMMERCIAL PROPERTY**

**Transaction**

*There were 402 transactions recorded in 2019 with a total value of RM218.28 million, increased by 9.8% in volume whereas value showed a significant decreased of 60.2% (2018: 366 transactions worth RM548.26 million).*

Chart 12.11

Value of Commercial Property Transactions 2015 – 2019



**Shop**

**Transaction**

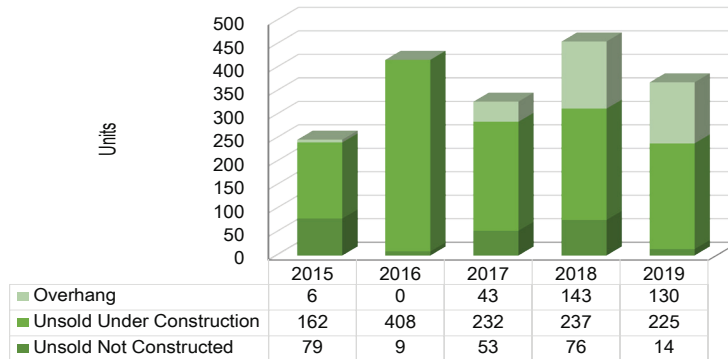
*Shop sub-sector recorded 214 transactions worth RM161.51 million in the review period (2018: 217 transactions worth RM137.32 million). The volume decreased by a mere of 1.4% whereas value increased by 17.6% as compared to 2018.*

**Market Status**

*The shop overhang and unsold situation eased as the numbers decreased in the review period. The trend is shown in Chart 12.12.*

Chart 12.12

Shop Market Status Trend 2015 – 2019



### Aktiviti Pembinaan

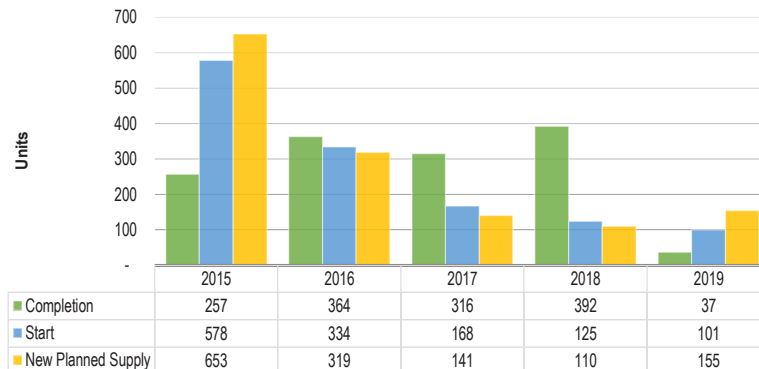
Sub-sektor menyaksikan pergerakan bercampur-campur dalam aktiviti pembinaan. Sehingga akhir 2019, terdapat 8,216 unit kedai sedia ada dengan 1,230 unit lagi dalam penawaran akan datang dan 916 unit dalam penawaran yang dirancang.

### Construction Activity

The sub-sector saw mixed movements in construction activity. As at end-2019, there were 8,216 existing shop units with another 1,230 units in the incoming supply and 916 units in the planned supply.

Chart 12.13

Shop Construction Activity Trend 2015 – 2019



### Kompleks Perniagaan

#### Penghunian dan Ketersediaan Ruang

Subsektor niaga kurang menggalakkan berdasarkan kadar penghunian keseluruhan yang menyusut kepada 70.2%, lebih rendah daripada 72.8% yang direkodkan pada 2018 dengan ambilan tahunan negatif iaitu 4,764 m.p.

### Shopping Complex

#### Occupancy and Space Availability

The retail sub-sector was less encouraging as the overall occupancy rate shrank to 70.2%, lower than 72.8% recorded in 2018 with a negative annual take-up of 4,764 s.m.

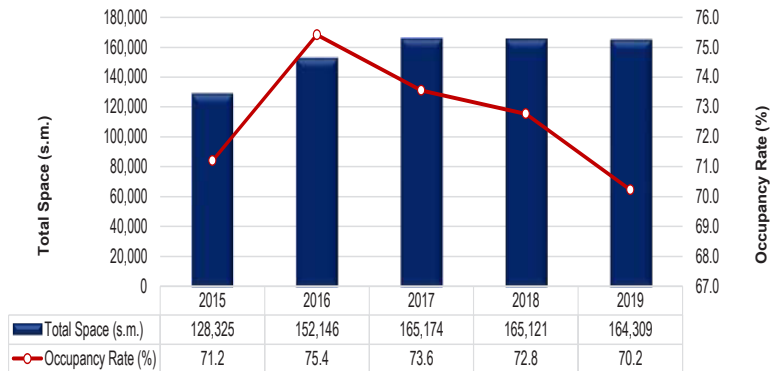
### Aktiviti Pembinaan

Subsektor niaga menyaksikan Jerneh Square di Besut siap dibina yang menyuntik 1,403 m.p. ke dalam pasaran. Pada akhir 2019, terdapat 40 kompleks membeli-belah sedia ada (164,309 m.p.) dengan tiga kompleks (195,796 m.p.) dalam penawaran akan datang dan satu lagi (5,724 m.p.) dalam penawaran yang dirancang.

### Construction Activity

The retail sub-sector witnessed the completion of Jerneh Square in Besut which injected 1,403 s.m. into the market. As at end-2019, there were 40 existing shopping complexes (164,309 s.m.) with three complexes (195,796 s.m.) in the incoming supply and another one (5,724 s.m.) in the planned supply.

**Chart 12.14**  
**Supply and Occupancy of Shopping Complex**



**Sewa**

Sewa ruang niaga sebahagian besarnya adalah stabil di kebanyakan kompleks membeli-belah. Tingkat bawah Mydin Mall di Kuala Terengganu mencatatkan sewa premium di antara RM320.00 s.m.p. dan RM360.00 s.m.p. sebulan.

**Pejabat Binaan Khas**

**Penghunian dan Ketersediaan Ruang**

Segmen pejabat binaan khas merekodkan purata kadar penghunian lebih rendah iaitu 96.3% pada 2019 berbanding 97.3% pada 2018. Ambilan tahunan adalah positif pada 13,811 m.p., lebih tinggi daripada 7,853 m.p. yang dicatatkan pada tahun sebelum.

**Rental**

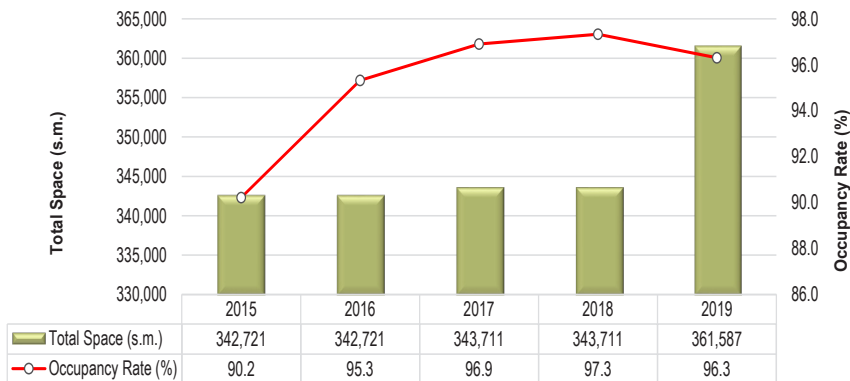
Rental of retail space were largely stable for most shopping complexes. Ground floor of Mydin Mall in Kuala Terengganu registered premium rentals between RM320.00 p.s.m. and RM360.00 p.s.m. per month.

**Purpose-Built Office**

**Occupancy and Space Availability**

The purpose-built office segment recorded a lower average occupancy rate of 96.3% in 2019 as compared to 97.3% in 2018. The annual take-up was positive at 13,811 s.m., higher than 7,853 s.m. recorded previous year.

**Chart 12.15**  
**Supply and Occupancy of Purpose-Built Office**



## Aktiviti Pembinaan

Tempoh kajian menyaksikan empat siap dibina baru dengan gabungan jumlah ruang 16,835 m.p. Pada akhir 2019, terdapat 124 pejabat binaan khas sedia ada (361,587 m.p.) dengan satu bangunan (63,767 m.p.) dalam penawaran akan datang.

## Construction Activity

The review period witnessed four new completions with combined total space of 16,835 s.m. As at end-2019, there were 124 existing purpose-built office (361,587 s.m.) with one building (63,767 s.m.) in the incoming supply.

Table 12.1

List of Completion for Purpose-Built Office

No.	Property	Location	Floor Area (s.m.)
1.	Jabatan Kimia Negeri Terengganu	Kuala Terengganu	7,500
2.	Jabatan Suruhanjaya Pencegahan Rasuah	Kuala Terengganu	4,000
3.	Jabatan Audit Negeri Terengganu	Kuala Terengganu	4,000
4.	Rimbun Tekad Building	Kuala Terengganu	1,335

## Sewa

Segmen pejabat binaan khas merekodkan trend sewa yang stabil dengan beberapa pergerakan ketara direkodkan di bangunan terpilih. Wisma Sri Amar di Kuala Terengganu menunjukkan peningkatan 8.6% hingga 15.7% disebabkan oleh pembaharuan penyewaan dan semakan sewa.

## Rental

The purpose-built office segment recorded a stable rental trend with some notable movements recorded in selected buildings. Wisma Sri Amar in Kuala Terengganu showed an increase of 8.6% to 15.7% due to tenancy renewals and rental revisions.

## Riadah

Tiada penyediaan baru direkodkan dalam tempoh kajian. Pada akhir 2019, terdapat 196 hotel (9,655 bilik) dalam penawaran sedia ada dengan sembilan hotel (568 bilik) lagi dalam penawaran akan datang dan enam hotel (1,035 bilik) dalam penawaran yang dirancang.

## Leisure

No new completion was recorded in the review period. As at end-2019, there were 196 hotels (9,655 rooms) in the existing supply with another nine hotels (568 rooms) in the incoming supply and six hotels (1,035 rooms) in the planned supply.

## HARTA TANAH PERTANIAN

### Transaksi

Terdapat 2,878 transaksi bernilai RM217.99 juta, masing-masing menunjukkan peningkatan 6.4% dalam bilangan dan nilai (2018: 2,706 transaksi bernilai RM204.85 juta).

## AGRICULTURE PROPERTY

### Transaction

There were 2,878 transactions worth RM217.99 million, indicating an increase of 6.4% in volume and value respectively (2018: 2,706 transactions worth RM204.85 million).

Chart 12.16

Volume of Agriculture Property Transactions 2015 – 2019

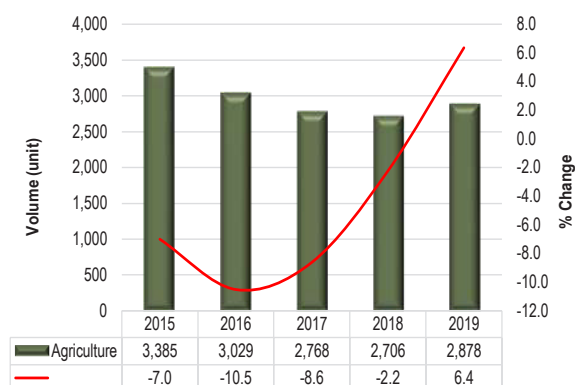
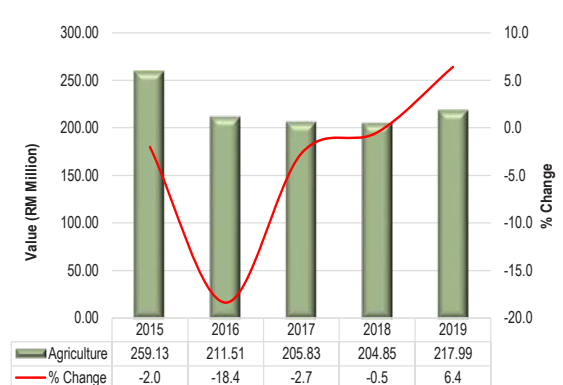


Chart 12.17

Value of Agriculture Property Transactions 2015 – 2019



## Harga

Harga subsektor pertanian kebanyakan stabil di seluruh daerah. Tanah getah berhadapan jalan di Jalan Pekan Kampung Raja-Kampung Lampu di Besut mencecah harga tertinggi di antara RM175,000 dan RM197,000 sehektar disebabkan permintaan yang tinggi.

## PROSPEK 2020

Pasaran harta tanah negeri dijangka positif disokong oleh projek pembangunan yang sedang dijalankan dan dirancang serta inisiatif Kerajaan Negeri dalam menyediakan kemudahan perumahan mampu milik dan kemudahan infrastruktur. Di bawah Belanjawan Terengganu 2020, Kerajaan Negeri memberi keutamaan kepada pembangunan jalan raya dan infrastruktur termasuk menaik taraf rangkaian jalan raya agar lebih efisien, menyediakan sambungan paip air ke kawasan luar bandar, serta bekalan air dan elektrik di seluruh negeri.

Antara polisi dan projek yang akan dilaksanakan pada 2020 yang akan memberi kesan kepada pasaran harta tanah Terengganu ialah:

- i) **Premium Tanah** - Diskaun terhadap premium tanah di antara 10% dan 50%, pembayaran premium tanah secara ansuran selama setahun dan rebat premium tanah sebanyak 30% bagi pemaju yang berjaya menyiapkan projek dalam tempoh yang ditetapkan.
- ii) **Dasar perumahan baru Terengganu** - Objektif utama adalah untuk menarik lebih banyak pelabur melalui penswastan dan pembinaan projek Perumahan Mampu Milik (RMM). Dasar-dasar ini akan diteruskan pada 2020. Untuk memastikan ianya Berjaya terutama bagi golongan sasaran iatu kumpulan B40, sejumlah 4,000 unit RMM akan dibina dengan penambahbaikan dalam pelbagai aspek untuk keselesaan rakyat. Seajar dengan itu, harga jualan akan sedikit meningkat daripada RM68,000 kepada RM80,000 seunit.

Di segmen kediaman, beberapa projek perumahan mampu miliki telah diluluskan untuk pembangunan. Ringkasan projek-projek berkenaan adalah:

## Price

Prices of agriculture sub-sector were mainly stable across the districts. Road frontage rubber lands along Jalan Pekan Kampung Raja-Kampung Lampu in Besut fetched higher prices between RM175,000 and RM197,000 per hectare due to high demand.

## 2020 OUTLOOK

The state's property market is expected be on positive path supported by the on-going and proposed development projects as well as the State Government's initiative in providing affordable housing and infrastructure facilities. In addition, under the Terengganu 2020 Budget, the State's Government prioritizes the development of roads and infrastructure including upgrading efficient road networks, providing water pipe connections to rural areas, as well as supply of water and electricity throughout the state.

Among the policies and projects to be implemented in 2020 that will impact the Terengganu property market are:

- i) **Land Premium** - Discounts on land premiums between 10% and 50%, allowing a one-year installment of land premiums and a 30% rebate on land premiums for developers who successfully complete the project within the stipulated period.
- ii) **Terengganu's new housing policy** – The main objective is to attract more investors through privatization and construction of Affordable Housing (RMM) projects. The policies will continue in 2020. To ensure this successful especially for B40 group, a total of 4,000 RMM units will be built with improvements in various aspects for the people's convenience. Accordingly, the sale price will slightly increase from RM68,000 to RM80,000 per unit.

On the residential segment, several affordable housing projects have been approved for development. The summary of the projects is:

No.	Project	Location	Development Components
1.	Taman Rakyat Seri Bandi	Seri Bandi	Single Storey Terrace – 220 units
2.	RPMM Tok Jembal	Kuala Nerus	4-Storey Apartment – 160 units
3.	RMM Kampung Tajin	Kuala Berang	Single Storey Terrace – 250 units
4.	RMM Kampung Cina	Pasir Akar	Single Storey Terrace – 348 units
5.	Rumah Sejahtera Bukit Payung	Marang	Single Storey Semi-Detach – 50 units



Di samping perumahan mampu milik, projek perumahan lain yang sedang dilaksanakan ialah Taman Cempaka 1 di Mukim Sura, Daerah Dungun. Projek dimajukan oleh YEL Greenland Builders Sdn Bhd, dilancarkan pada pertengahan 2019. Pembangunan ini terdiri daripada 20 unit rumah teres dua tingkat, 8 unit rumah berkembar dua tingkat dan 6 unit rumah sesebuah dua tingkat. Harga jualan untuk rumah teres adalah di antara RM468,000 dan RM686,000 seunit, manakala harga rumah berkembar di antara RM738,000 dan RM768,000 seunit. Projek ini masih dalam pembinaan dan dijangka siap pada Disember 2020.

Mengenai infrastruktur, beberapa projek infrastruktur berskala besar sedang dilaksanakan di Daerah Kuala Nerus dan Marang iaitu:

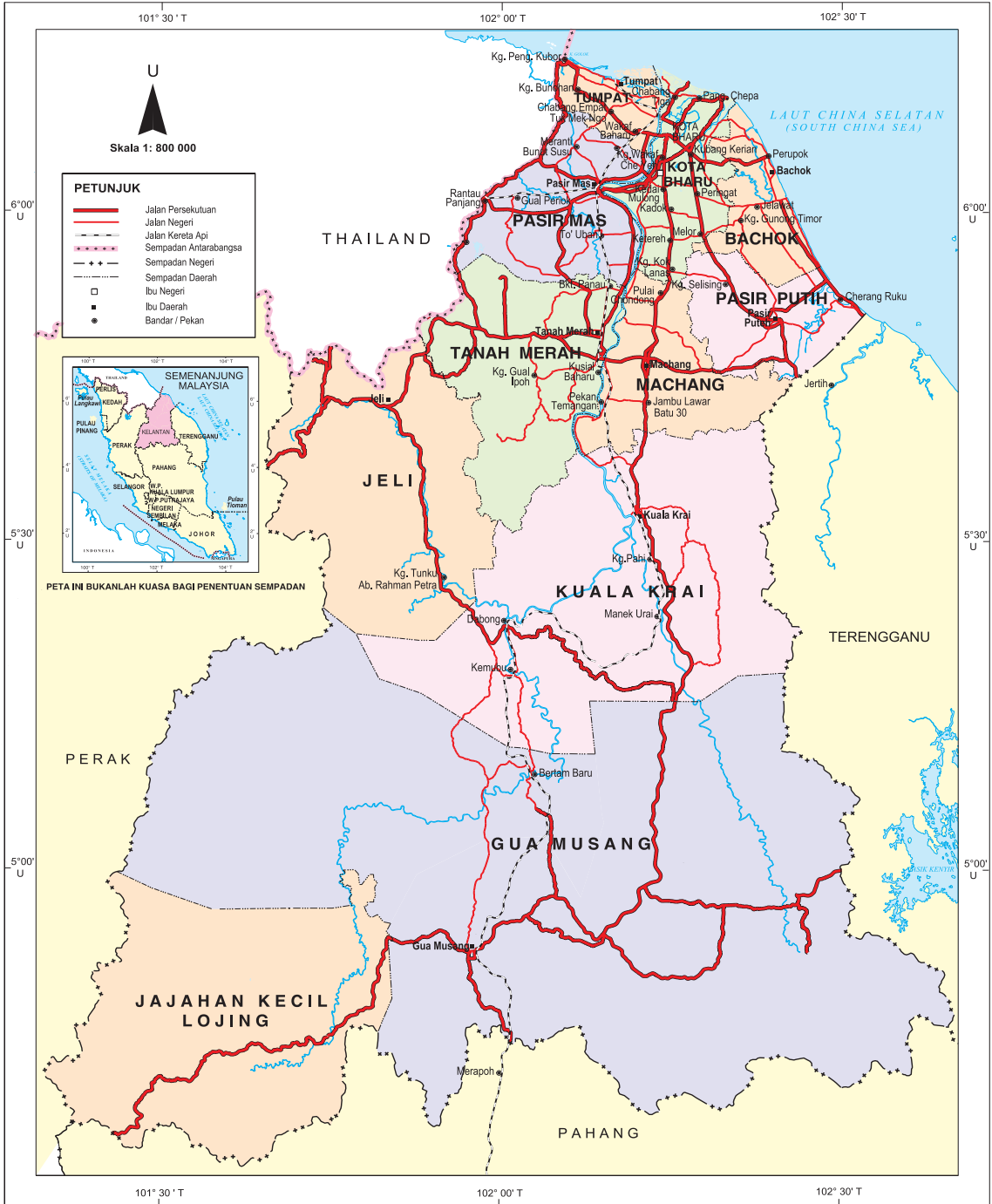
- i) Pembinaan jalan baru dari Kampung Pecah Rotan ke Kampung Mengabang Lekor di Mukim Batu Rakit, Daerah Kuala Nerus. Projek ini bertujuan meningkatkan kemudahan jalan di kawasan sekitar Kampung Pecah Rotan dan Kampung Mengabang Lekor seperti Kampung Terap Pecah Rotan/ Lubuk Mayan, RTK Kawasan Paya Banggol Mengabang Bakung, Telok Mohd Sah, Baruh Tuan Nek dan Pengkalan Attap. Projek sepanjang 3.55 kilometer ini dibina oleh Contracts Fiscal Site Sdn Bhd dijangka siap menjelang pertengahan 2020.
- ii) Pembinaan jalan dari Sekolah Menengah Kebangsaan Tapai Wakaf ke Kampung Lubuk Batu di Mukim Batu Payung, Daerah Marang. Projek jalan raya sepanjang 3.5 kilometer ini dibina oleh TGB Mahligai Sdn Bhd dan dijangka siap menjelang akhir 2020. Apabila siap, ianya dijangka menambahbaik akses keluar masuk penduduk sekitar kawasan berkenaan.

*In addition to affordable housing projects, other housing projects are also underway in Taman Cempaka 1 in Mukim Sura, District of Dungun. The project developed by YEL Greenland Builders Sdn Bhd, was launched in mid-2019. The development consists of 20 units double storey terrace houses, 8 units double storey semi-detach houses and 6 units of double storey detach houses. Sale prices for terraced houses range between RM468,000 and RM686,000 per unit, while price for semi-detached houses between RM738,000 and RM768,000 per units. Currently the project is under construction and expected to be completed by December 2020.*

*On the infrastructure, some of the large-scale infrastructure projects currently underway in the Kuala Nerus and Marang Districts are:*

- i) New road construction from Kampung Pecah Rotan to Kampung Mengabang Lekor in Mukim Batu Rakit, Kuala Nerus District. The project aims to improved road facilities for the areas near Kampung Pecah Rotan and Kampung Mengabang Lekor such as Kampung Terap Pecah Rotan/ Lubuk Mayan, RTK Kawasan Paya Banggol Mengabang Bakung, Telok Mohd Sah, Baruh Tuan Nek and Pengkalan Attap. The 3.55-kilometer project built by Contracts Fiscal Site Sdn Bhd is expected to be completed by mid-2020.*
- ii) Road construction from Tapai Wakaf Secondary School to Kampung Lubuk Batu in Mukim Batu Payung, Marang District. The 3.5-kilometer road project is being built by TGB Mahligai Sdn Bhd and is expected to be completed by the end of 2020. Once completed, it will improve access road to the people around the area.*

# KELANTAN



# KELANTAN

## GAMBARAN KESELURUHAN

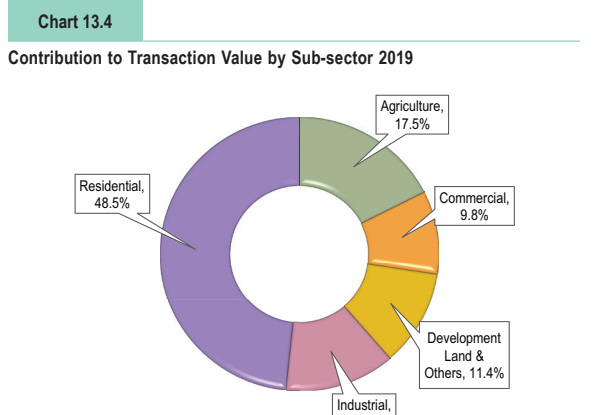
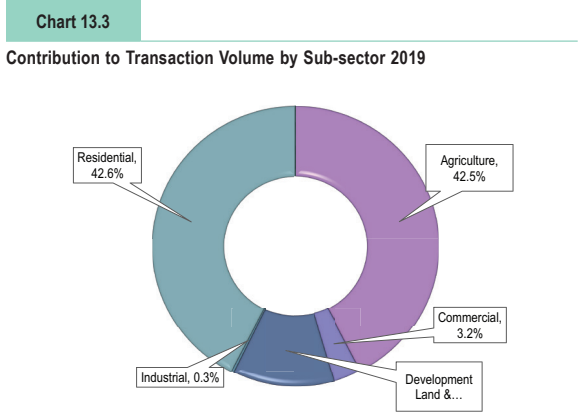
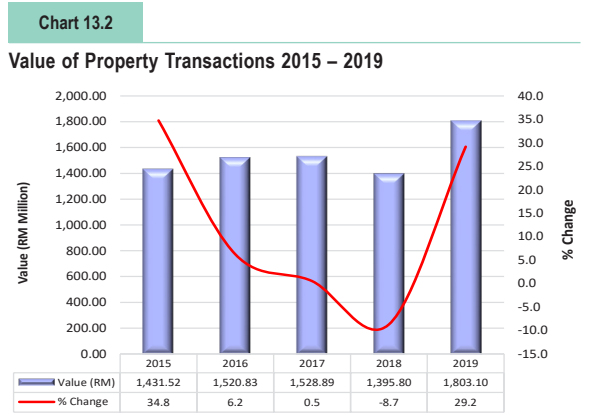
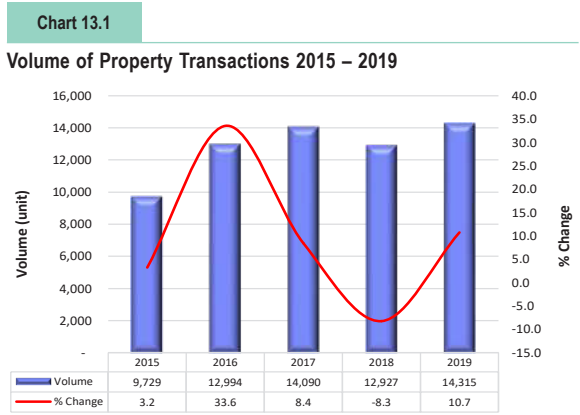
Pasaran harta tanah Kelantan meningkat pada 2019 seperti yang ditunjukkan oleh pergerakan positif dalam aktiviti pasaran. Terdapat 14,315 transaksi dicatatkan yang bernilai RM1.80 bilion, masing-masing naik 10.7% dan 29.2% dalam bilangan dan nilai (2018: 12,927 transaksi bernilai RM1.40 bilion). Subsektor kediaman dan pertanian menguasai pasaran, masing-masing dengan 42.6% dan 42.5% syer. Subsektor penyumbang seterusnya adalah tanah pembangunan dengan 11.4%, diikuti oleh komersial (3.2%) dan subsektor industri (0.3%).

Aktiviti pasaran menunjukkan prestasi yang lebih baik di seluruh daerah. Subsektor industri meningkat hampir dua kali ganda manakala subsektor tanah pembangunan dan pertanian meningkat, masing-masing sebanyak 12.7% dan 11.5%. Dari segi nilai, semua subsektor merekodkan aliran menaik dengan pengecualian kepada subsektor komersial.

## OVERVIEW

Property market in Kelantan firmed up in 2019 as indicated by the positive movements in market activity. There were 14,315 transactions recorded worth RM1.80 billion, up by 10.7% and 29.2% in volume and value respectively (2018: 12,927 transaction worth RM1.40 billion). Residential and agriculture sub-sectors were dominating the total market with 42.6% and 42.5% share respectively. The next leading sub-sector was development land with 11.4%, followed by commercial (3.2%) and industrial sub-sectors (0.3%).

Market activity showed better performance across the board. Industrial sub-sector increased by almost double whilst development land and agriculture sub-sectors rose by 12.7% and 11.5% respectively. In terms of value, all sub-sectors recorded upward trend with the exception of commercial sub-sector.



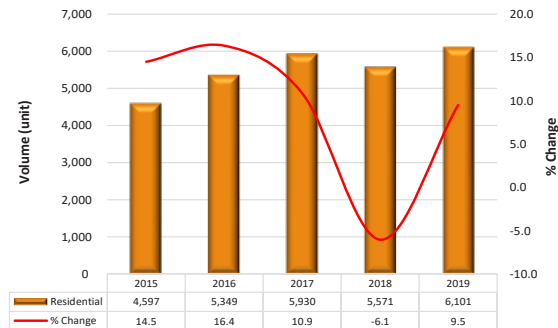
## HARTA TANAH KEDIAMAN

### Transaksi

Terdapat 6,101 transaksi bernilai RM874.85 juta dicatatkan pada tempoh kajian, meningkat 9.5% dalam bilangan dan 15.6% dalam nilai. Plot kosong mendominasi syer pasaran, menyumbang 61.2% (3,734 plot) transaksi harta tanah kediaman.

Chart 13.5

Volume of Residential Property Transactions 2015 – 2019

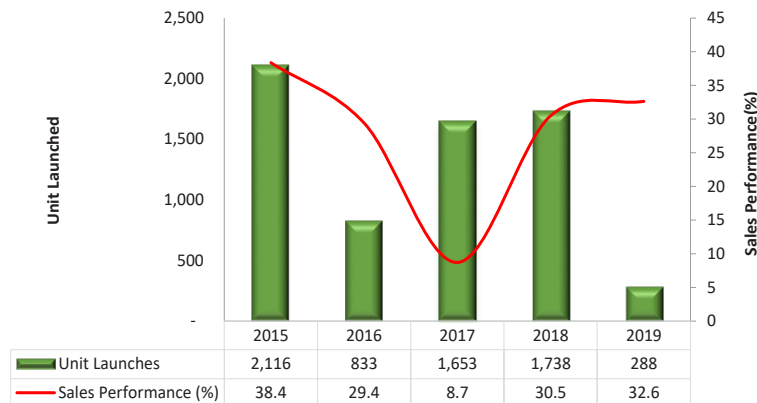


### Pelancaran Baharu

Pasaran utama merekodkan kemerosotan dalam pelancaran baharu. Walau bagaimanapun, prestasi jualan menggalakkan berbanding tahun sebelumnya. Trend ini ditunjukkan di Carta 13.7.

Chart 13.7

New Launches Trend 2015 – 2019



### Status Pasaran

Bilangan kediaman siap dibina tidak terjual menyaksikan peningkatan dalam tempoh kajian dengan pengecualian kepada belum dibina belum terjual yang berkurang 49.4%.

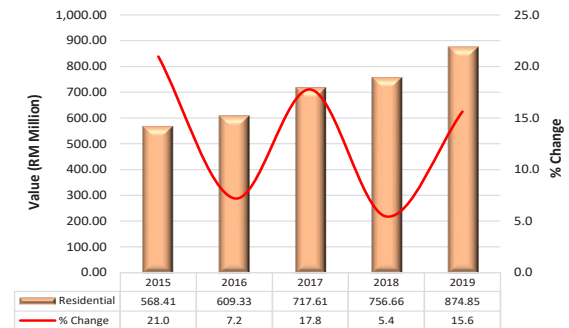
## RESIDENTIAL PROPERTY

### Transaction

There were 6,101 transactions worth RM874.85 million recorded in the review period, increased by 9.5% in volume and 15.6% in value. Vacant plots dominated the market share, contributing 61.2% (3,734 plots) of the residential property transactions.

Chart 13.6

Value of Residential Property Transactions 2015 – 2019



### New Launches

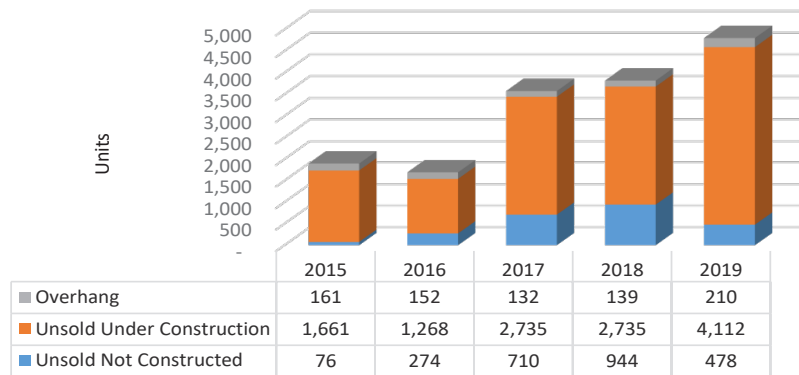
The primary market recorded fewer new launches. However, sales performance was promising as compared to previous year. The trend is shown in Chart 13.7.

### Market Status

The residential overhang witnessed increasing numbers in the review period with the exception of unsold not constructed which reduced by 49.4%.

Chart 13.8

Residential Market Status Trend 2015 – 2019



### Aktiviti Pembinaan

Aktiviti pembinaan harta kediaman menunjukkan pergerakan bercampur-campur. Pada akhir 2019, terdapat 82,904 unit kediaman sedia ada dengan 11,917 unit lagi dalam penawaran akan datang dan 4,055 unit dalam penawaran yang dirancang.

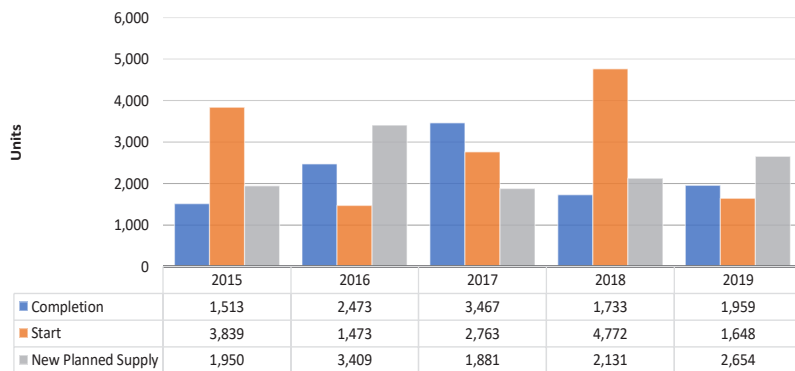
### Construction Activity

*The residential construction activities saw mixed movement. As at end-2019, there were 82,904 existing residential units with another 11,917 units in the incoming supply and 4,055 units in the planned supply.*

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Chart 13.9

Residential Construction Activity Trend 2015 – 2019



### Harga dan Sewa

Harga subsektor kediaman sebahagian besarnya adalah stabil dengan beberapa pergerakan direkodkan di kawasan strategik yang dilengkapi kemudahan yang baik. Rumah berkembar setingkat di Jajahan Kota Bharu menunjukkan pertumbuhan marginal. Begitu juga, rumah sesebuah setingkat di Kampung Pangkal Pisang menyaksikan pertumbuhan dua digit, dipindahmilik pada harga RM400,000 hingga RM470,000. Pada Q4 2019, Indeks Harga Semua Rumah untuk negeri ini berada pada 171.7 mata, naik 7.8% daripada 159.3 mata pada Q4 2018. Purata Harga Semua Rumah bagi negeri pada Q4 2019 berada pada RM196,444, meningkat dari RM182,289 pada Q4 2018.

### Price and Rental

*Prices of residential sub-sector were largely stable with several movements recorded in strategic areas served with good accessibility. Single storey semi-detached houses located in Jajahan Kota Bharu observed marginal growth. Similarly, single storey detached houses in Kampung Pangkal Pisang witnessed double digit growth, transacted in the range of RM400,000 to RM470,000. As at Q4 2019, the All House Price Index for the state stood at 171.7 points, up by 7.8% from 159.3 points in Q4 2018. The average All House Price for the state as at Q4 2019 stood at RM196,444, increase from RM182,289 in Q4 2018.*

Pasaran sewa adalah stabil dengan pergerakan menaik dicatatkan di beberapa kawasan terutamanya bagi rumah teres. Sewa rumah teres setingkat dan berkembar setingkat di Jajahan Machang dan Tanah Merah menunjukkan pertumbuhan dua angka disebabkan penyewaan baru dan lokasi yang baik. Begitu juga, sewaan unit bertingkat tinggi juga stabil dengan pergerakan marginal disaksikan di beberapa lokasi.

The rental market was stable with upward movements recorded in several areas particularly for terraced houses. Rental of single storey terraced and single storey semi-detached houses in Jajahan Machang and Tanah Merah showed double digit growth due to new tenancy and good locations. Similarly, rental of high-rise units was also stable with marginal movements witnessed in few locations.

## HARTA TANAH KOMERSIAL

### Transaksi

Subsektor komersial mencatatkan 453 transaksi bernilai RM176.50 juta (2018: 426 transaksi bernilai RM192.91 juta). Bilangan meningkat 6.3% manakala nilai jatuh 8.5% berbanding 2018.

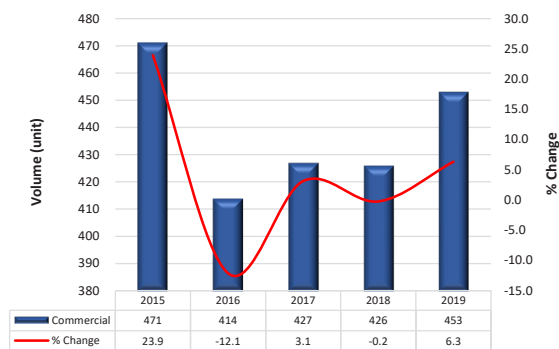
## COMMERCIAL PROPERTY

### Transaction

The commercial sub-sector recorded 453 transactions worth RM176.50 million (2018: 426 transactions worth RM192.91 million). The volume increased by 6.3% whereas value dropped by 8.5% as compared to 2018.

Chart 13.10

Volume of Commercial Property Transactions 2015 – 2019



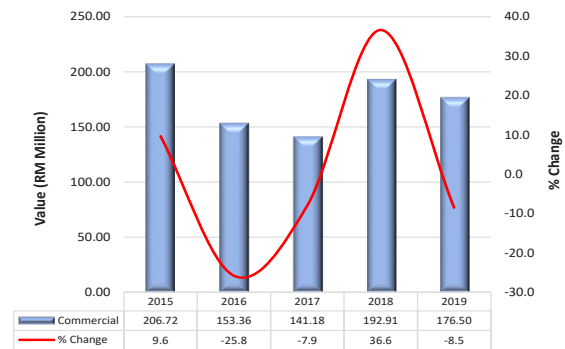
### Kedai

### Transaksi

Subsektor kedai mencatatkan 184 transaksi bernilai RM126.87 juta dalam tempoh kajian (2018: 183 transaksi bernilai RM138.68 juta) meningkat secara marginal sebanyak 0.5% dalam bilangan manakala menurun 8.5% dalam nilai berbanding 2018.

Chart 13.11

Value of Commercial Property Transactions 2015 – 2019



### Shop

### Transaction

Shop sub-sector recorded 184 transactions worth RM126.87 million in the review period (2018: 183 transactions worth RM138.68 million) increased marginally by 0.5% in volume whereas dropped 8.5% in value against 2018.

### Status Pasaran

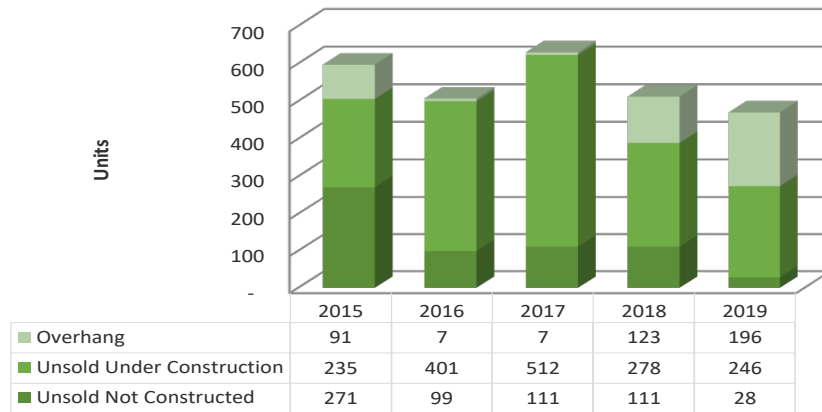
Trend bercampur-campur dilihat bagi kedai siap dibina tidak terjual. Trend ditunjukkan di Carta 13.12.

### Market Status

Mixed trend was seen in shop overhang and unsold units. The trend is shown in Chart 13.12.

Chart 13.12

Shop Market Status Trend 2015 – 2019



### Aktiviti Pembinaan

Sub-sektor menyaksikan pergerakan bercampur-campur dalam aktiviti pembinaan. Sehingga akhir 2019, terdapat 13,543 unit kedai sedia ada dengan 1,318 unit lagi dalam penawaran akan datang dan 873 unit dalam penawaran yang dirancang.

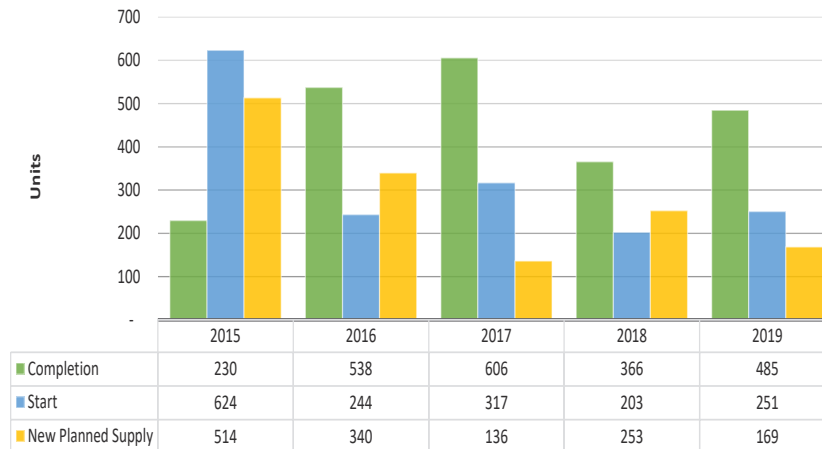
### Construction Activity

The sub-sector saw mixed movements in construction activity. As at end-2019, there were 13,543 existing shop units with another 1,318 units in the incoming supply and 873 units in the planned supply.

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Chart 13.13

Shop Construction Activity Trend 2015 – 2019



### Kompleks Perniagaan

#### Penghunian dan Ketersediaan Ruang

Kadar penghunian bagi kompleks membeli-belah adalah stabil pada 91.4% dalam tempoh kajian. Ambilan tahunan berjumlah 634 m.p., lebih rendah daripada 21,057 m.p. seperti yang dicatatkan pada 2018.

### Shopping Complex

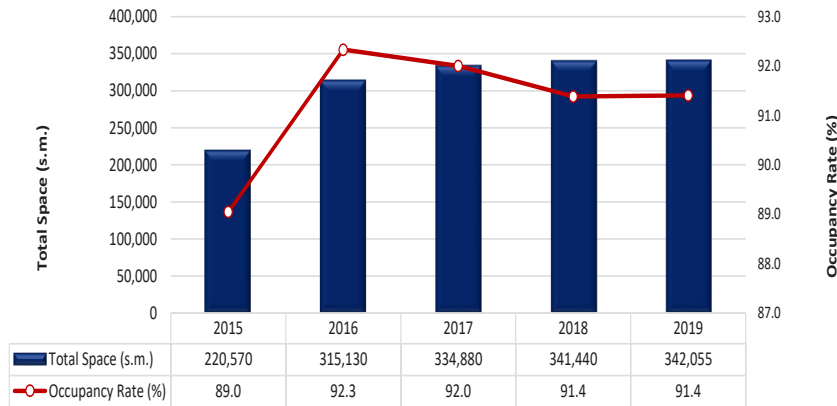
#### Occupancy and Space Availability

The average occupancy rate for shopping complexes was stable at 91.4% in the review period. The annual take-up stood at 634 s.m., lower than 21,057 s.m. as recorded in 2018.



Chart 13.14

Supply and Occupancy of Shopping Complex



### Aktiviti Pembinaan

Tiada aktiviti pembinaan baru direkodkan dalam tempoh kajian. Pada akhir 2019, terdapat 28 kompleks membeli-belah sedia ada (342,055 m.p.) dengan dua kompleks (108,393 m.p.) dalam penawaran akan datang.

### Sewa

Secara amnya, sewa ruang niaga stabil bagi semua kompleks membeli-belah. Tingkat bawah KB Mall di Jajahan Kota Bharu mencatat sewa tertinggi, mencapai RM193.75 s.m.p. sebulan.

### Pejabat Binaan Khas

### Penghunian dan Ketersediaan Ruang

Prestasi segmen pejabat kurang menggalakkan dengan kadar penghunian keseluruhan 94.8%, menurun daripada 97.3% yang dicatatkan pada 2018. Selari dengan itu, ambilan tahunan negatif pada 4,674 m.p. (2018: 4,098 m.p.).

### Construction Activity

*There was no new construction activity recorded in the review period. As at end-2019, there were 28 existing shopping complexes (342,055 s.m.) with two complexes (108,393 s.m.) in the incoming supply.*

### Rental

*Generally, rentals of retail space were stable for all shopping complexes. The ground floor of KB Mall in Jajahan Kota Bharu fetched highest rental, reached RM193.75 p.s.m. per month.*

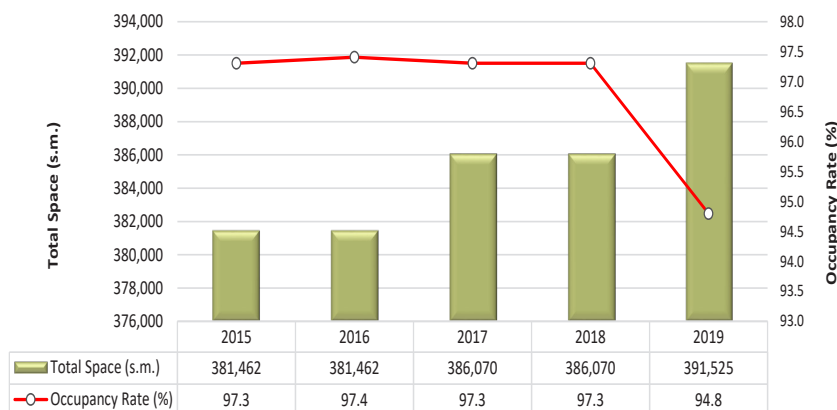
### Purpose-Built Office

### Occupancy and Space Availability

*The performance of office segment was less encouraging with an overall occupancy rate of 94.8%, declined from to 97.3% recorded in 2018. Correspondingly, the annual take-up was negative at 4,674 s.m. (2018: 4,098 s.m.).*

Chart 13.15

Supply and Occupancy of Purpose-Built Office



## Aktiviti Pembinaan

Tempoh kajian merekodkan pembinaan bangunan kerajaan baru iaitu Kompleks Kota Darulnaim (Blok 8) di Jajahan Kota Bharu. Pada akhir 2019, terdapat 289 pejabat binaan khas sedia ada (391,525 m.p.). Manakala penawaran akan datang dan penawaran yang dirancang kekal tiada.

## Sewa

Subsektor pejabat binaan khas merekodkan trend sewa yang stabil. Sewa tertinggi dicatatkan di Bangunan AIA, Kota Bharu dengan sewa bulanan RM28.40 p.s.m. bagi tingkat bawah.

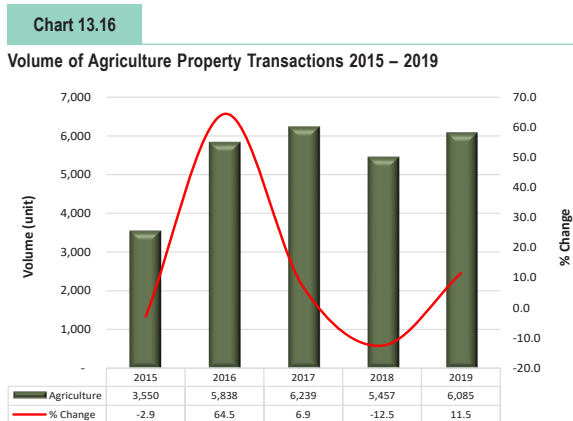
## Riadah

Sehingga akhir 2019, terdapat 91 hotel (4,360 bilik) dalam penawaran sedia ada dengan satu lagi hotel (144 bilik) dalam penawaran akan datang.

## HARTA TANAH PERTANIAN

### 134 Transaksi

Prestasi tanah pertanian adalah menggalakan dalam tempoh kajian. Terdapat 6,085 transaksi bernilai RM316.43 juta, menunjukkan kenaikan 11.5% dalam bilangan dan 11.1% dalam nilai (2018: 5,457 transaksi bernilai RM284.75 juta).



## Harga

Harga harta pertanian adalah stabil di seluruh negeri. Di Kampung Lubok Tembesu, Jajahan Bachok harga tanah buah-buahan terus merekodkan pergerakan positif, dipindahkan RM150,000 sehektar kerana lokasi yang baik. Jenis harta tanah serupa di Jajahan Tumpat dan Pasir Puteh telah dipindahkan pada harga yang tinggi, dijual melebihi RM200,000 sehektar.

## Construction Activity

The review period recorded the completion of a new government building namely Kompleks Kota Darulnaim (Block 8) in Jajahan Kota Bharu. As at end-2019, there were 289 existing purpose-built office (391,525 s.m.). Whereas, incoming supply and planned supply remained nil.

## Rental

The purpose-built office sub-sector recorded a stable rental trend. The highest rental was recorded in AIA Building, Kota Bharu with monthly rental of RM28.40 p.s.m. for its ground floor.

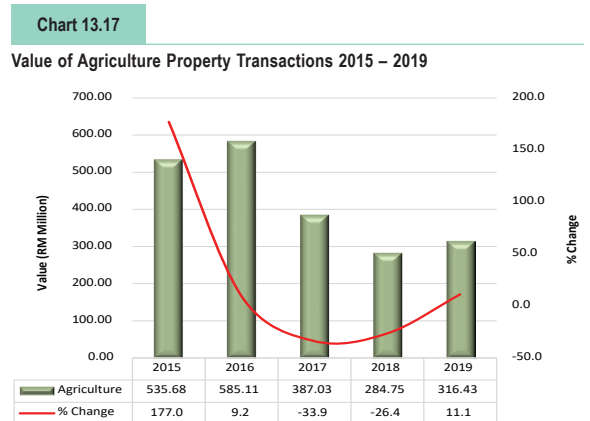
## Leisure

As at end-2019, there were 91 hotels (4,360 rooms) in the existing supply with another one hotel (144 rooms) in the incoming supply.

## AGRICULTURE PROPERTY

### Transaction

The performance of agriculture was promising in the review period. There were 6,085 transactions worth RM316.43 million, indicating an increased of 11.5% in volume and 11.1% in value (2018: 5,457 transactions worth RM284.75 million).



## Price

Prices of agriculture property were mainly stable across the state. In Kampung Lubok Tembesu, Jajahan Bachok price of orchard land continued to record positive movements, transacted at RM150,000 per hectare due to its good location. Similar type of property in Jajahan Tumpat and Pasir Puteh was transacted at a higher price, sold at more than RM200,000 per hectare.

## PROSPEK 2020

Prospek pasaran harta tanah Kelantan dijangka cerah, disokong oleh projek pembangunan yang sedang dijalankan dan akan datang. Di bawah Belanjawan Negeri Kelantan 2020 yang bertemakan “Sederap Usaha Tertuai Sejahtera”, beberapa inisiatif dan rancangan telah disediakan untuk memastikan pasaran harta tanah Kelantan kekal kukuh pada 2020.

Kemudahan infrastruktur masih menjadi pemangkin kepada pembangunan utama negeri. Projek Laluan Rel Pantai Timur (ECRL) bagi jajaran Kelantan sepanjang 58 kilometer akan diteruskan semula pada Februari 2020. Projek-projek lain disenaraikan yang menjadi keutamaan negeri untuk dilaksanakan di bawah Rancangan Malaysia Ke-11 (RM11) harus dilaksanakan oleh Kerajaan Persekutuan seperti menaik taraf Lapangan Terbang Sultan Ismail Petra, pembinaan jalanraya menghubungkan Pasir Puteh-Machang-Jeli, penyiapan Central Spine Road, pembinaan Lebuhraya Pantai Timur Fasa 3 dan pembinaan Jambatan Palekbang.

Di subsektor kediaman, beberapa projek dijangka memberi kesan positif kepada pasaran harta tanah Kelantan, adalah seperti berikut:

## 2020 OUTLOOK

*The prospects of the Kelantan property market are expected to be bright, supported by the upcoming and future development projects. Under the Kelantan State Budget 2020 themed “Sederap Usaha Tertuai Sejahtera”, several initiatives and plans have been drawn up to ensure that the Kelantan property market in 2020 remained strong.*

*Infrastructure facilities are still the catalyst for the State’s major development. The East Coast Rail Line (ECRL) for the 58-kilometre Kelantan line will be resumed in February 2020. Other State priority projects listed for implementation under the Eleventh Malaysia Plan (11MP) should continue to be implemented by the Federal Government such as upgrading Sultan Ismail Petra Airport, construction of road connecting Pasir Puteh-Machang-Jeli, completion of Central Spine Road, construction of East Coast Highway Phase 3 and construction of Palekbang Bridge.*

*In the residential sub-sector, several projects are expected to provide a positive spurt to the Kelantan property market, are as follows:*

Table 13.1

Supply and Occupancy of Purpose-Built Office

No.	Project	Location	Development Components
1.	Bandar Pinggiran Kuala Krai	Kuala Krai	Single Storey Terrace – 123 units
2.	Anggerik Putih	Machang	Single Storey Terrace – 351 units
3.	PPAM Sireh Residence	KB Waterfront City	Apartment – 1,080 units
4.	Suria Villa	Kota Bharu	Apartment – 34 units
5.	Taman Iman Jaya 3	Kota Bharu	Apartment – 56 units
6.	PPAM Taman Nusa Panchor	Kota Bharu	2-Storey Terrace – 28 units
7.	PPAM Taman Sri Kantan, Lubok Jong	Pasir Mas	2-Storey Semi-Detach – 72 units

Projek perumahan yang sedang dibina dijangka meningkatkan kadar populasi penduduk tempatan dan aktiviti perniagaan di kawasan sekitar.

Selain itu, beberapa projek infrastruktur dan kemudahan juga dijangka akan meningkatkan kemudahsampaian dan jaringan perhubungan serta menggalakkan pasaran harta tanah sekitar. Antara projek infrastruktur dan kemudahan yang telah diluluskan oleh Kerajaan Negeri adalah:-

- Projek pembinaan jalan dari Kampung Joh ke kampung Kuala Sat di Jajahan Machang yang melibatkan pengambilan tanah seluas 17.29 hektar. Projek ini dijangka melancarkan aliran

*The ongoing residential development project are expected to increase rate of local populations and commercial activity in the surrounding area.*

*In addition, several infrastructure and amenities projects are also expected to enhance accessibility and communications network as well as encourage the surrounding property market. Among the infrastructure and amenities projects approved by the State Government are as follows:*

- Road construction project from Kampung Joh to Kampung Kuala Sat in Jajahan Machang involving the acquisition of 17.29-hectare of land. The project is expected to smooth traffic flow especially during

trafik terutama pada waktu puncak. Jalan baru ini juga boleh meningkatkan pasaran harta tanah dan aktiviti ekonomi di kawasan sekitar.

- Projek naik taraf jalan dari Bukit Marak Bekelam ke Pengkalan Cina, Bachok.
- Projek Pembangunan Lembangan Sungai Bersepadu (PLSB) Sungai Golok Fasa 1 di Jajahan Pasir Mas dan Tumpat. Projek ini bertujuan mengatasi masalah banjir yang berlaku setiap tahun.
- Bagi merencanakan program sukan luar bandar, pembangunan projek Bandar Sukan telah dirancang. Projek ini terletak di Mukim Bukit Merbau, Jajahan Pasir Puteh bagi aktiviti penganjuran sukan berskala kecil.

Selain itu, melalui Pelan Induk Pembangunan Mampan, Kerajaan Negeri telah merancang untuk membangunkan konsep pembangunan mampan berteknologi hijau dengan mengaplikasikan konsep Bandar Hijau dan Bandar Digital di empat bandar utama iaitu Kota Bharu, Tunjong, Tok Bali dan Lojing Highlands. Sehubungan itu, Kerajaan Negeri telah meluluskan dua projek iaitu Pelan Induk Islamic City di Mukim Tiong, Kota Bharu dan Bangunan Gunasama Persekutuan di Tunjong.

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Bagi menggiatkan keusahawanan, Kerajaan Negeri telah merancang untuk membuka Taman Industri Tok Bali dan membangunkan enam kluster industri iaitu di Jeli Tepi Sungai (130 ekar), Batu Mengkebang (79 ekar), Kuala Nal (365 ekar), Labok (200 ekar), Bandar Tanah Merah (170 ekar) dan Senak (74 ekar).

Dari segi pelancongan, seiring dengan Tahun Melawat Kelantan 2020, projek pembangunan khazanah dan warisan telah dirancang iaitu melalui pembangunan kampung tradisional melibatkan pembangunan infrastruktur pelancongan di Kampung Laut, Tumpat yang akan dijadikan kampung warisan dan destinasi pelancongan tradisi. Selain itu, pelbagai aktiviti promosi giat dijalankan bagi membangunkan kawasan pelancongan di Lojing Highlands dengan membangunkan Taman Konservasi Refflesia di Bandar Baru Lojing yang bakal menarik pelancong ke Kelantan.

*peak hours. This new road may also boost property market and economic activities in the surrounding area.*

- *Road upgrade project from Bukit Marak Bekelam to Pengkalan Cina, Bachok.*
- *Integrated River Basin Development Project (PLSB) Sungai Golok Phase 1 in the Jajahan Pasir Mas and Tumpat. This project aims to address the problem of floods that occur every year.*
- *To boost the rural sports program, a development of the Sports City project has been planned. The project is located in Bukit Merbau, Jajahan Pasir Puteh for small scale sports activities.*

*In addition, through the Sustainable Development Master Plan, the State Government has planned to develop the concept of sustainable green technology development by applying the Green City and Digital City concepts to four major cities, Kota Bharu, Tunjong, Tok Bali and Lojing Highlands. In this regard, the State Government has approved two projects namely the Islamic City Master Plan in Mukim Tiong, Kota Bharu and the Federal Cooperation Building in Tunjong.*

*To boost entrepreneurship, the State Government has planned to open the Tok Bali Industrial Park and develop six industrial clusters, each at the Jeli River (130 acres), Batu Mengkebang (79 acres), Kuala Nal (365 acres), Labok (200 acres), Tanah Merah (170 acres) and Senak (74 acres).*

*On the tourism front, in conjunction with the Visit Kelantan 2020, the khazanah and heritage development was planned through a traditional village development project involving the development of tourism infrastructure in Kampung Laut, Tumpat which will be a heritage village and a traditional tourist destination. In addition, various promotional activities are being carried out to develop tourism at the Lojing Highlands by establishing the Refflesia Conservation Park in Lojing New Town which will attract tourists to Kelantan.*

# PERLIS





# PERLIS

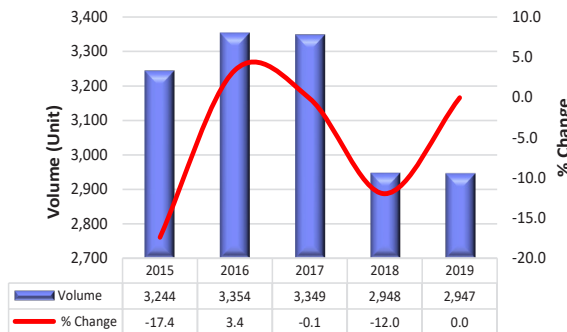
## GAMBARAN KESELURUHAN

Pasaran harta tanah negeri ini kekal dengan 2,947 transaksi bernilai RM416.27 juta. Aktiviti pasaran hampir sama dengan 2018 (2,948 transaksi bernilai RM421.01) dan nilai menurun 1.1%. Subsektor pertanian terus mendahului transaksi keseluruhan dengan 64.4%, diikuti oleh subsektor kediaman (28.9%), komersial (3.3%), tanah pembangunan (2.5%) dan industri (0.8%).

Prestasi semua subsektor pelbagai. Kediaman dan tanah pembangunan masing-masing meningkat 9.8% dan 64.4%. Sebaliknya, subsektor komersial (-21.0%), industri (-14.8%) dan pertanian (-3.9%) menunjukkan trend menurun. Begitu juga pergerakan bercampur-campur yang sama dilihat dari segi nilai.

Chart 14.1

Volume of Property Transactions 2015 – 2019



## OVERVIEW

The state's property market sustained with 2,947 transactions worth RM416.27 million. The market activity almost similar to 2018 (2,948 transactions worth RM421.01) and the value decreased by a mere 1.1%. Agriculture sub-sector continued to propel the overall transactions with 64.4%, followed by residential (28.9%), commercial (3.3%), development land (2.5%) and industrial (0.8%) sub-sectors.

Performance of all sub-sectors varied. Residential and development land increased by 9.8% and 64.4% respectively. On the contrary, commercial (-21.0%), industrial (-14.8%) and agriculture (-3.9%) sub-sectors showed downward trend. Similarly, same mixed movement was seen in terms of value.

Chart 14.2

Value of Property Transactions 2015 – 2019

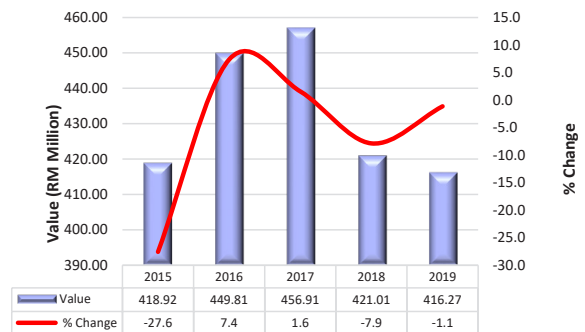


Chart 14.4

Contribution to Volume by Sub-sector 2019

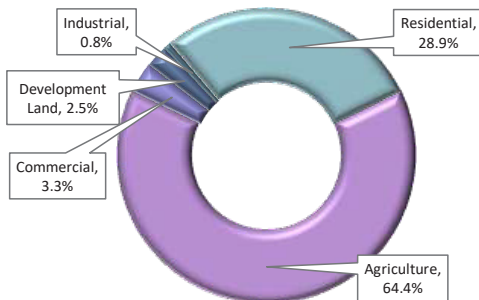
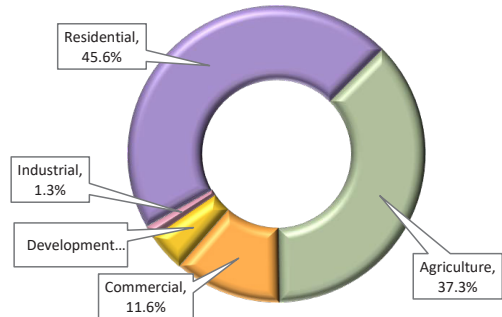


Chart 14.4

Contribution to Value by Sub-sector 2019



## HARTA TANAH KEDIAMAN

### Transaksi

Prestasi subsektor kediaman bertambah baik dalam tempoh kajian. Terdapat 853 transaksi bernilai RM189.93 juta, menunjukkan peningkatan masing-masing 9.8% dan 7.0% dalam bilangan dan nilai berbanding 2018 (777 transaksi bernilai RM177.48 juta). Rumah teres mendahului pasaran kediaman, menguasai 37.2% daripada jumlah transaksi kediaman.

## RESIDENTIAL PROPERTY

### Transaction

The performance of residential sub-sector improved in the review period. There were 853 transactions worth RM189.93 million, indicating an increase of 9.8% and 7.0% in volume and value respectively in comparison with 2018 (777 transactions worth RM177.48 million). Terraced houses led the residential market, dominating 37.2% of the total residential transactions.

Chart 14.5

Volume of Residential Transactions 2015 – 2019

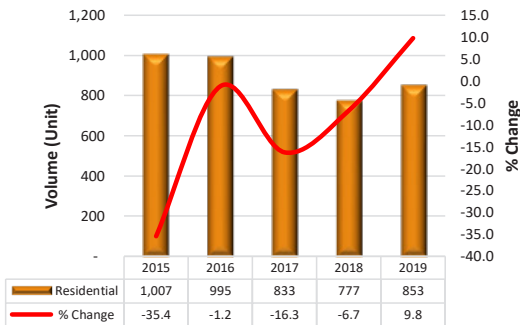
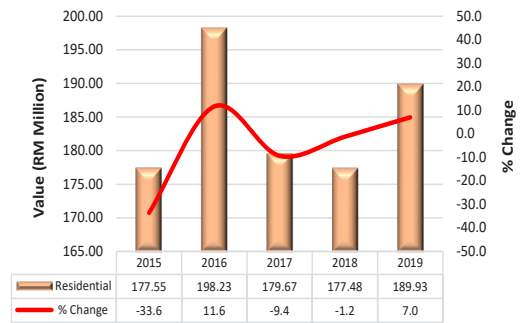


Chart 14.6

Value of Residential Transactions 2015 – 2019



**Pelancaran Baharu**

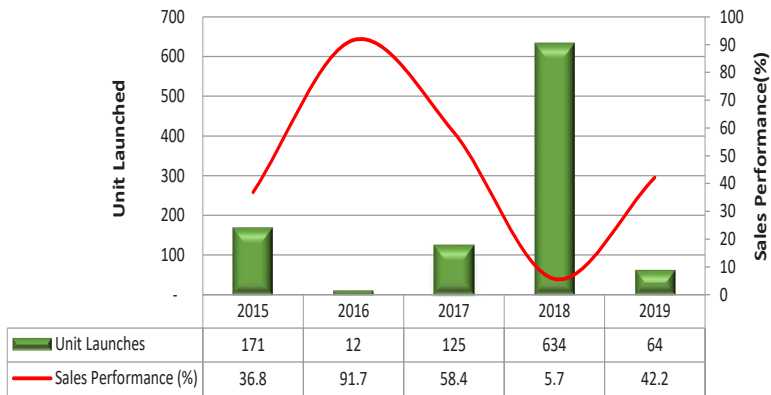
Pasaran utama berkurang dengan 64 unit dilancarkan dalam tempoh kajian.

**New Launches**

*The primary market eased with 64 units launched in the review period*

Chart 14.7

New Launches Trend 2015 – 2019



**Status Pasaran**

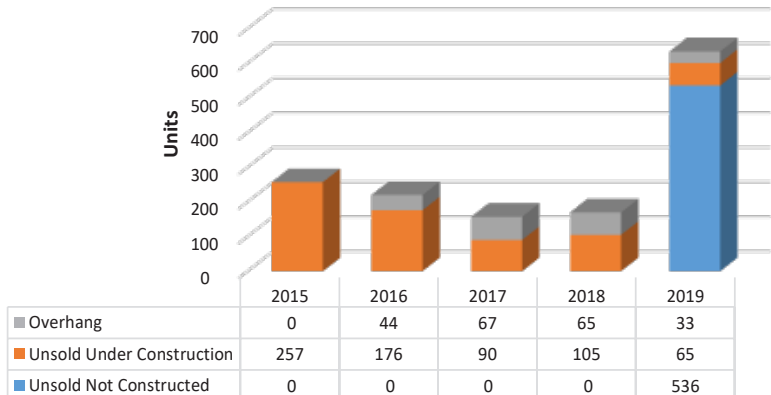
Unit kediaman siap dibina tidak terjual dan dalam pembinaan belum terjual merekodkan prestasi yang lebih baik di mana bilangannya berkurang dalam tempoh kajian.

**Market Status**

*The residential overhang and unsold units recorded a slightly better performance as the number reduced in the review period.*

Chart 14.8

Residential Market Status Trend 2015 – 2019



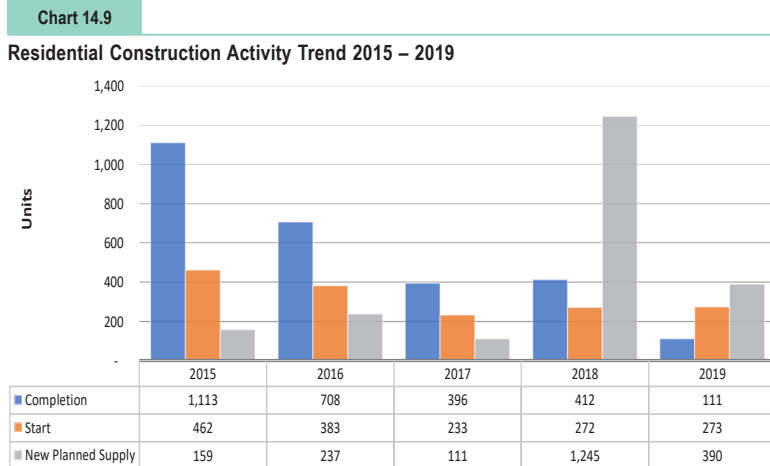


## Aktiviti Pembinaan

Aktiviti pembinaan subsektor kediaman berada pada mod perlahan. Sehingga akhir 2019, terdapat 26,097 unit kediaman sedia ada dengan 1,370 unit lagi dalam penawaran akan datang dan 1,693 unit dalam penawaran yang dirancang.

## Construction Activity

The residential sub-sector's construction activity was on a low mode. As at end-2019, there were 26,097 existing residential units with another 1,370 units in the incoming supply and 1,693 units in the planned supply.



## 140 Harga dan Sewa

Harga harta kediaman adalah stabil dengan peningkatan dicatatkan di lokasi terpilih. Teres kos rendah satu tingkat mencatatkan peningkatan harga bagi skim yang terletak berhampiran Kolej Matrikulasi Perlis dan Institut Latihan Perindustrian Kangar. Kediaman bertanah jenis lain yang terletak dalam bandar juga mencatat peningkatan nilai modal. Sehingga pada Q4 2019, Indeks Harga Semua Rumah untuk negeri ini adalah 185.1 mata, naik 5.5% daripada 175.4 mata pada Q4 2018. Purata Harga Semua Rumah untuk negeri ini pada Q4 2019 berjumlah RM202,047, meningkat daripada RM191,492 pada Q4 2018.

## Price and Rental

Price of residential property was stable with increases noted in selected locations. Single storey low-cost terraces recorded price increases in schemes located nearby Perlis Matriculation College and Kangar Industrial Training Institute. Other types of landed properties located within town also registered capital gains. As at Q4 2019, the All House Price Index for the state stood at 185.1 points, up by 5.5% from 175.4 points in Q4 2018. The average All House Price for the state as at Q4 2019 stood at RM202,047, increased from RM191,492 in Q4 2018.

Pasaran sewa kediaman umumnya stabil dengan pergerakan positif direkodkan di beberapa kawasan. Sewa teres satu tingkat kos rendah meningkat 7.7% hingga 15.3% disebabkan oleh pembaharuan penyewaan. Begitu juga bagi rumah teres satu tingkat dalam skim mantap yang dilengkapi dengan akses yang baik di Kangar. Semakan sewa juga menaikkan sewa bagi teres dua tingkat di Kangar.

The residential rental market was generally stable with positive movements recorded in several areas. Rentals for single storey low-cost terrace grew by 7.7% to 15.3% due to tenancy renewals. Likewise for single storey terraced houses in established schemes served with good accessibility in Kangar. Rental revisions also pushed up the rentals for double storey terrace in Kangar.

## HARTA TANAH KOMERSIAL

## COMMERCIAL PROPERTY

### Transaksi

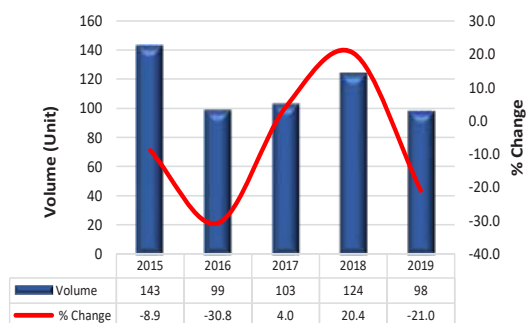
### Transaction

Subsektor komersial sederhana pada 2019 dengan 98 transaksi bernilai RM48.20 juta. Aktiviti pasarannya menunjukkan penurunan dua angka masing-masing sebanyak 21.0% dan 28.3% dalam bilangan dan nilai berbanding 2018 (124 transaksi bernilai RM67.27 juta).

The commercial sub-sector softened in 2019 with 98 transactions worth RM48.20 million. Its market activity indicated a double-digit decrease of 21.0% and 28.3% in volume and value respectively as compared to 2018 (124 transactions worth RM67.27 million).

Chart 14.10

Volume of Commercial Property Transactions 2015 – 2019



## Kedai

### Transaksi

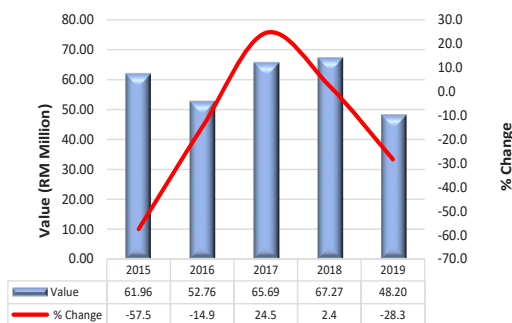
Begitu juga, prestasi subsektor kedai sederhana kerana ia membentuk 83.7% daripada jumlah transaksi komersial. Terdapat 82 transaksi bernilai RM44.28 juta, masing-masing menurun 28.1% dan 31.1% dalam bilangan dan nilai berbanding 2018 (115 transaksi bernilai RM64.24 juta).

### Status Pasaran

Keadaan kedai siap dibina tidak terjual kurang memberangsangkan di mana bilangannya meningkat dalam tempoh kajian. Walau bagaimanapun, prestasi dalam pembinaan belum terjual bertambah baik.

Chart 14.11

Value of Commercial Property Transactions 2015 – 2019



## Shop

### Transaction

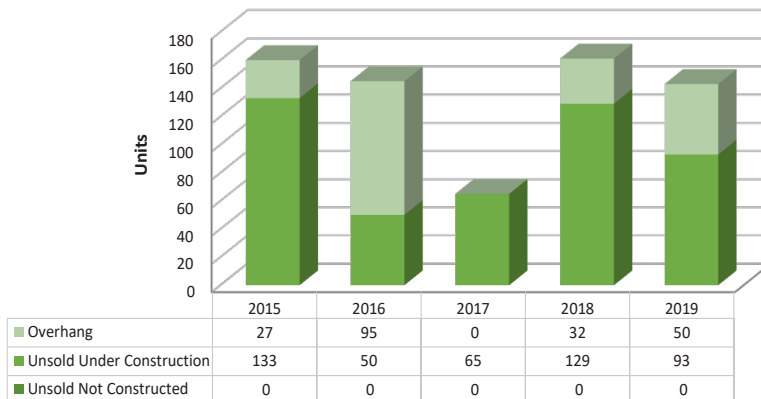
Likewise, performance of shop sub-sector moderated as it formed 83.7% of the total commercial transactions. There were 82 transactions worth RM44.28 million, decreased by 28.1% and 31.1% in volume and value respectively as compared to 2018 (115 transactions worth RM64.24 million).

### Market Status

The shop overhang situation was less encouraging as the number grew in the review period. However, performance of unsold under construction improved.

Chart 14.12

Shop Market Status Trend 2015 – 2019



## Aktiviti Pembinaan

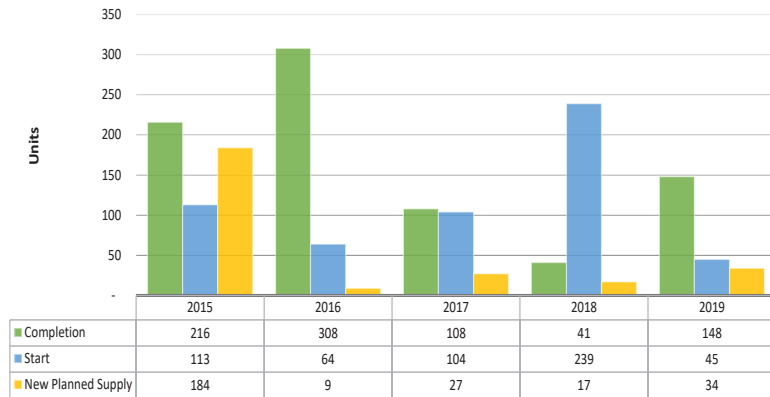
Subsektor ini menyaksikan pergerakan bercampur-campur dalam aktiviti pembinaan. Sehingga akhir 2019, terdapat 5,372 unit kedai sedia ada dengan 466 unit lagi dalam penawaran akan datang dan 856 unit dalam penawaran yang dirancang.

## Construction Activity

The sub-sector saw mixed movements in construction activity. As at end-2019, there were 5,372 existing shop units with another 466 units in the incoming supply and 856 units in the planned supply.

Chart 14.13

Shop Construction Activity Trend 2015 – 2019



## HARTA TANAH PERTANIAN

### Transaksi

Prestasi subsektor pertanian menurun sedikit dalam tempoh kajian. Terdapat 1,898 transaksi bernilai RM155.14 juta, mencakupi 64.4% daripada jumlah transaksi keseluruhan harta tanah. Aktiviti pasarannya menunjukkan penurunan 3.9% dalam bilangan dan 5.0% dalam nilai berbanding 2018 (1,975 transaksi bernilai RM163.34 juta). Mengikut jenis, tanah padi menguasai 62.6% daripada jumlah transaksi keseluruhan pertanian negeri ini.

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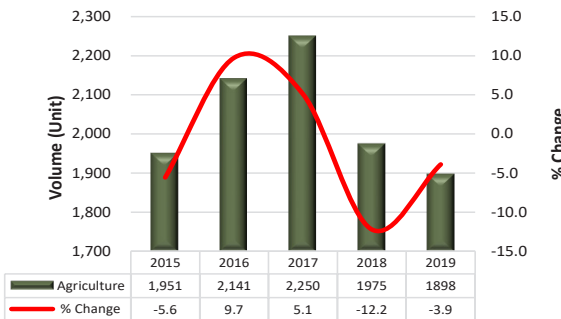
## AGRICULTURE PROPERTY

### Transaction

The agriculture sub-sector's performance eased slightly in the review period. There were 1,898 transactions worth RM155.14 million, accounting for 64.4% of the total property transactions. Its market activity indicated a decrease of 3.9% in volume and 5.0% in value in comparison with 2018 (1,975 transactions worth RM163.34 million). By type, paddy land dominated 62.6% of the state's total agriculture transactions.

Chart 14.14

Volume of Agriculture Property Transactions 2015 – 2019

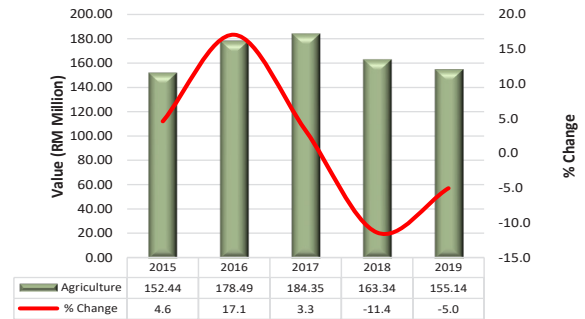


### Harga

Harga subsektor pertanian umumnya stabil di seluruh negeri. Tanah getah bukan Rizab Melayu di Jalan Beseri-Kaki Bukit mencatatkan kenaikan harga dua digit. Begitu juga, tanah padi kelas 1 bukan Rizab Melayu di Jalan Tambun Tulang dan Jalan Syed Hussein masing-masing meningkat 15.4% dan 16.5%.

Chart 14.15

Value of Agriculture Property Transactions 2015 – 2019



### Price

Prices of agriculture sub-sector were mainly stable across the board. Non-Malay Reservation rubber land at Jalan Beseri-Kaki Bukit registered a double-digit price gain. Likewise, non-Malay Reservation paddy class 1 lands at Jalan Tambun Tulang and Jalan Syed Hussein increased by 15.4% and 16.5% respectively.

## PROSPEK 2020

Pasaran harta tanah dijangka akan kekal positif kerana terdapat beberapa projek akan datang dalam perancangan. Cadangan Pavillion Padang Besar, kompleks membeli-belah konsep terbuka dijangka akan mempunyai kesan limpahan terhadap pasaran harta tanah. Projek ini akan dijalankan oleh PZS Development Sdn.Bhd. Ia terletak di Padang Besar dengan keluasan kira-kira empat hektar. Komponen pembangunan projek terdiri daripada unit kedai dan 188 unit kios, laluan pejalan kaki, ruang terbuka, tandas, bilik doa, pejabat pengurusan dan kemudahan awam.

Di samping itu, terdapat cadangan pembangunan Institut Pengangkutan Lestari Kuala Lumpur-Asia (UNIKL ASTI). Projek ini sedang dilaksanakan oleh Makmur UniKL. Ia terletak di Chuping di atas tanah seluas 24.3 hektar. Projek ini melibatkan pembinaan UniKL ASTI Centre of Excellent (COE), halaman kontena dan gudang tertutup/terbuka.

Terdapat juga projek-projek yang sedang dalam pembinaan dan siap dibina seperti Jeti Bersepadu Sanglang dan Pusat Perniagaan Bersepadu (IBC) Fasa 1 Kawasan Perindustrian Lembah Chuping (CVIA). Projek-projek ini dijangka menarik pelabur dan mewujudkan lebih banyak peluang pekerjaan di Perlis serta meningkatkan pasaran harta tanah.

## 2020 OUTLOOK

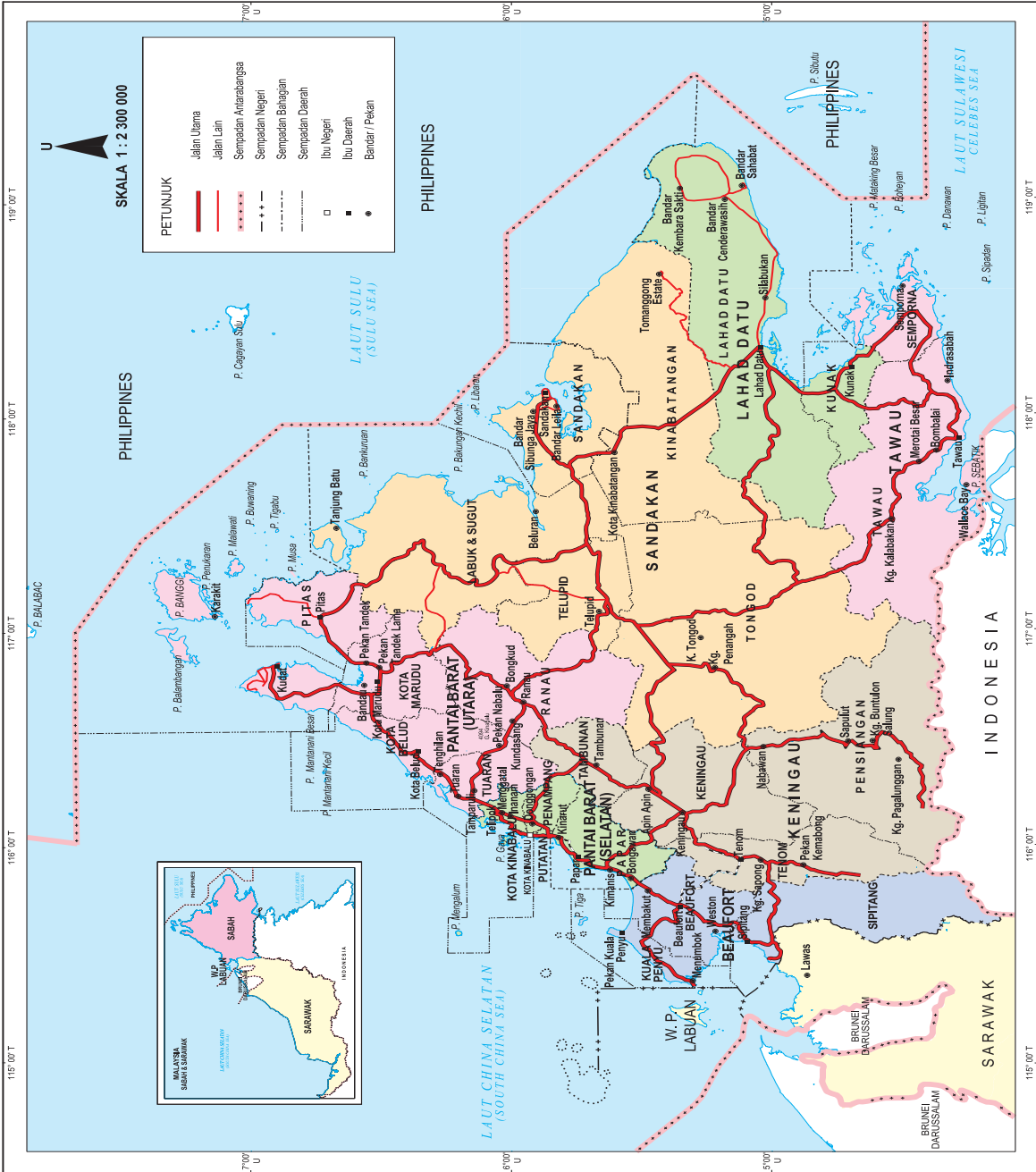
*The property market is expected to maintain on a positive path as there are several future projects in the pipeline. The proposed Pavillion Padang Besar, an open concept shopping complex is anticipated to have spill-over effect on property market. This project will be carried out by PZS Development Sdn.Bhd. It is located in Padang Besar with an area of approximately four hectares. The project's development component comprises shop units and 188 kiosk units, pedestrian walkways, open spaces, toilets, prayer rooms, management offices and public facilities.*

*In addition, there is a proposed development of Kuala Lumpur-Asia Sustainable Transportation Institute (UNIKL ASTI) University. This project is being implemented by Makmur UniKL. It is located in Chuping on a 24.3 hectares piece of land. The project involves the construction of UniKL ASTI Center of Excellent (COE), container yard and closed/ open warehouse.*

*There are also projects which are under construction and recently completed such as Sanglang Intergrated Jetty and Intergrated Business Centre (IBC) Phase 1 of Chuping Valley Industrial Area (CVIA). These projects are set to attract investors and create more job opportunities in Perlis as well as escalate the property market.*



# SABAH



# SABAH

## GAMBARAN KESELURUHAN

Pasaran harta tanah negeri menunjukkan pemulihan pada tahun 2019, ditunjukkan oleh bilangan transaksi yang lebih tinggi berbanding tahun lepas. Tempoh kajian mencatatkan 8,481 transaksi dengan jumlah nilai RM4.73 bilion, meningkat 2.5% dalam bilangan manakala menurun 5.1% dalam nilai (2018: 8,271 transaksi bernilai RM4.98 bilion). Subsektor kediaman terus melonjak pasaran keseluruhan, membentuk 63.3% daripada transaksi negeri, diikuti oleh subsektor pertanian (16.8%), komersial (12.6%), tanah pembangunan (4.5%) dan industri (2.9%).

Aktiviti pasaran menunjukkan prestasi lebih baik secara keseluruhan. Subsektor kediaman dan komersial masing-masing meningkat 7.6% dan 3.8%. Sebaliknya, penurunan kecil dicatatkan bagi subsektor pertanian (-11.1%), tanah pembangunan (-5.9%) dan industri (-2.4%). Dari segi nilai, semua subsektor mencatat aliran menaik kecuali subsektor pertanian yang menunjukkan aliran menurun.

## OVERVIEW

The state's property market showed a rebound in 2019, indicated by higher volume of transactions as compared to last year. The review period registered 8,481 transactions with a total value of RM4.73 billion, increased by 2.5% in volume while decreased by 5.1% in value (2018: 8,271 transactions worth RM4.98 billion). Residential sub-sector continued to propel the overall market, accounting for 63.3% of the state's volume transactions, followed by agriculture (16.8%), commercial (12.6%), development land (4.5%) and industrial (2.9%) sub-sectors.

Market activity showed better performance across the board. Residential and commercial sub-sectors increased by 7.6% and 3.8% respectively. On the contrary, marginal declines were recorded for agriculture (-11.1%), development land (-5.9%) and industrial (-2.4%) sub-sectors. In terms of value, all sub-sectors recorded upward trend except for the agriculture sub-sector, which showed a downward trend.

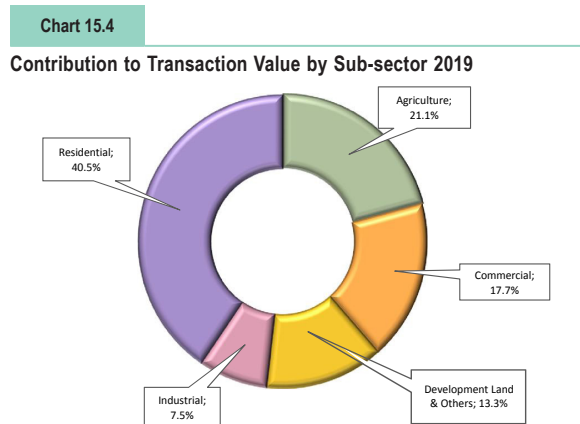
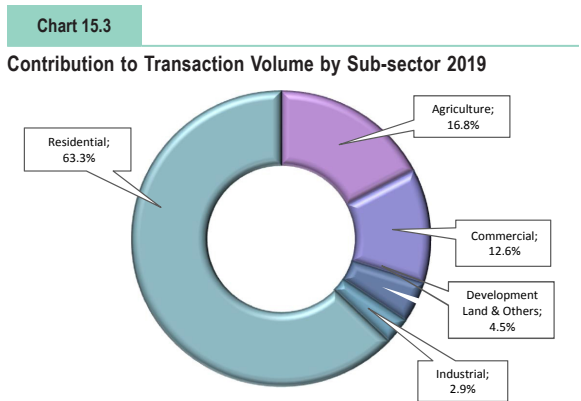
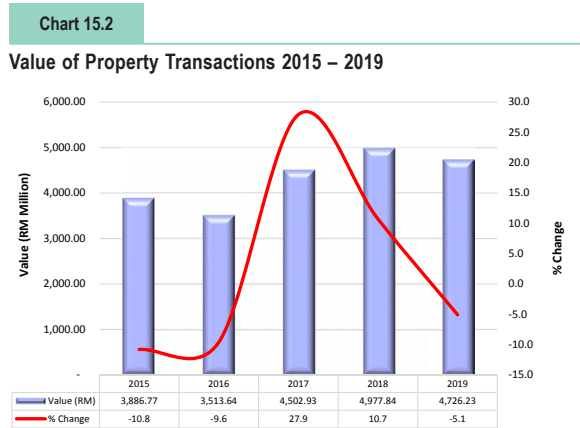
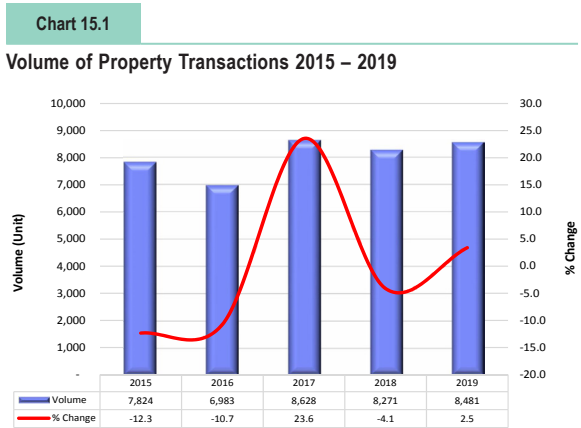




Table 15.1

## Summary of Prominent Sales Recorded in 2019

No.	Property	Location	Transaction Year
1.	Mimpiana Jadi Resort	Tuaran	2019
2.	MB Hotel	Jalan Masjid	2019
3.	Century Hotel	Kota Kinabalu	2018
4.	Kelab Gaya Utama	Jalan Kionsom, Inaman, Kota Kinabalu	2018
5.	Blue Seven (Club House)	Jalan Penampang	2018
6.	Hotel Winner	Lorong Pasar Baru 2, Kampung Air, Kota Kinabalu	2018
7.	Estate Land	Jalan Bintuka, Lubak, Beaufort	2019
8.	Estate Land	Sungai Paitan, Off Jalan Sapi Nangoh - Paitan	2019
9.	Estate Land	Tingkayu, Off Jalan Kunak - Lahad Datu, Kunak	2019
10.	Estate Land	Sapang, Jalan Sempoma - Kunak	2019
11.	Estate Land	Tenegang, Off Jalan Kinabatangan - Lahad Datu	2019
12.	Estate Land	Sungai Segaliud, Off Jalan Sandakan - Lahad Datu	2019
13.	Estate Land	Sungai Pinangah, Off Jalan Tongod	2019
14.	Estate Land	KM8, Off Pekan Muhibbah, Off Jalan Dangdulit	2018
15.	Estate Land	Kampung Bengkoka, Jalan Kalibongan-Pitas, Pitas	2018
16.	Estate Land	Off Jalan Dangdulit, Sandakan	2018
17.	Estate Land	Sungai Koyah, Off Jalan Kinabatangan - Lahad Datu	2018
18.	Estate Land	Batu 70 - 78, Jalan Labuk, Labuk Sugut	2018
19.	Estate Land	Batu 76, Off Jalan Sandakan - Telupid, Labuk Sugut	2018
20.	Vacant Land	Jalan Bukit Manggis, Kimanis, Papar	2019
21.	Vacant Land	Jalan Kg. Bum-Bum, Batu 5.5, Jalan Kudat - Sikuati	2018

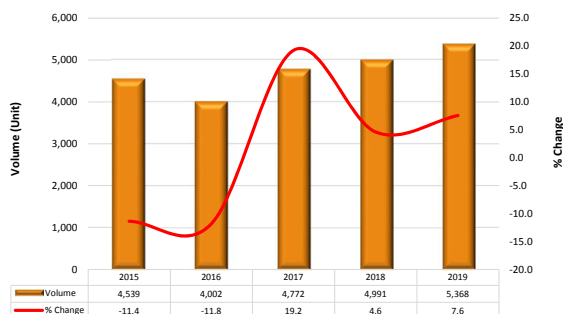
## PROMINENT SALES HARTA TANAH KEDIAMAN

### Transaksi

Subsektor kediaman berada pada trend naik taraf pada tahun 2019. Terdapat 5,368 transaksi bernilai RM1.91 bilion yang dicatat dalam tempoh kajian, meningkat sebanyak 7.6% dalam bilangan dan 5.0% dalam nilai berbanding dengan 2018 (4,991 transaksi bernilai RM1.82 bilion). Rumah teres kekal sebagai jenis harta tanah utama, membentuk 34.0% daripada jumlah transaksi kediaman.

Chart 15.5

#### Volume of Residential Property Transactions 2015 – 2019



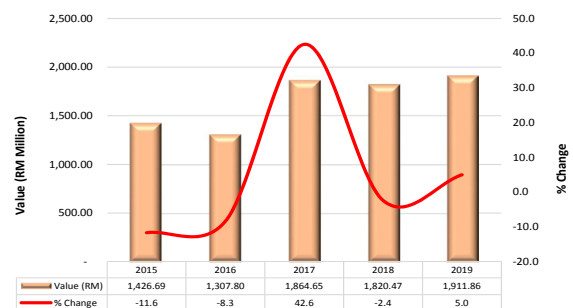
## RESIDENTIAL PROPERTY

### Transaction

Residential sub-sector was on uptrend in 2019. There were 5,368 transactions worth RM1.91 billion recorded in the review period, increased by 7.6% in volume and 5.0% in value as compared to 2018 (4,991 transactions worth RM1.82 billion). Terraced houses remain the leading property type, accounting for 34.0% of the total residential transactions..

Chart 15.6

#### Value of Residential Property Transactions 2015 – 2019

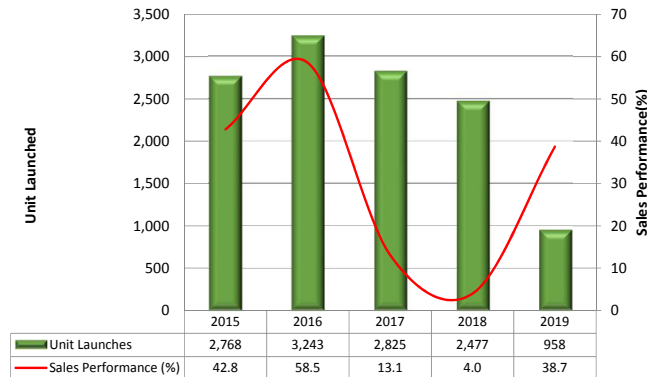


## Pelancaran Baharu

Pasaran utama pada 2019 menurun 61.3% berbanding 2018. Walau bagaimanapun, prestasi jualan keseluruhan adalah lebih baik pada 2019 berbanding 2018. Teres dua dan tiga tingkat membentuk sebahagian besar pelancaran baharu, menyumbang 70.0% (671 unit) daripada keseluruhan.

Chart 15.7

New Launches Trend 2015 – 2019



## New Launches

The primary market in 2019 declined by 61.3% as compared to 2018. However, the overall sales performance was better in 2019 as compared to 2018. Two to three storey terraces formed the bulk of the new launches, accounting for 70.0% (671 units) of the total.

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## Status Pasaran

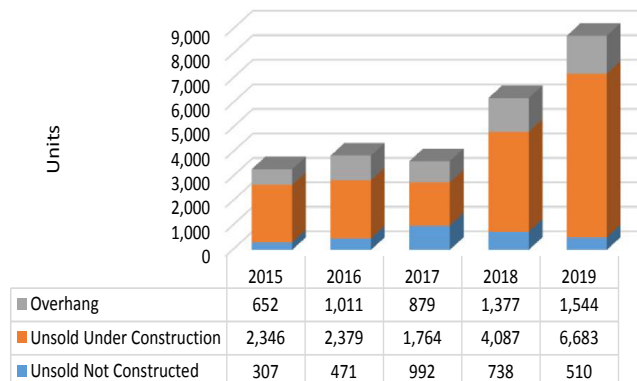
Unit kediaman siap dibina tidak terjual dan dalam pembinaan belum terjual menyaksikan peningkatan bilangan manakala belum dibina belum terjual berkurang dalam tempoh kajian.

## Market Status

The residential overhang units and unsold under construction witnessed increasing numbers while the unsold not constructed reduced in the review period.

Chart 15.8

Residential Market Status Trend 2015 – 2019



## Aktiviti Pembinaan

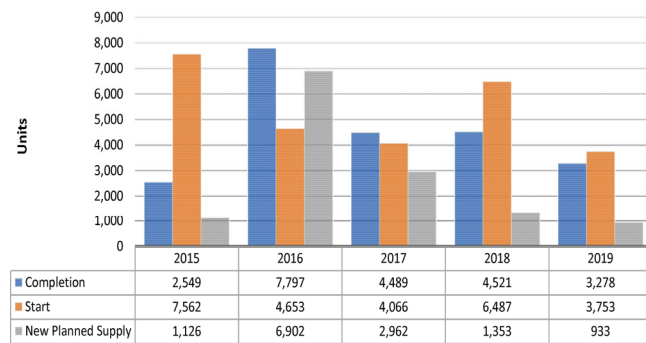
Aktiviti pembinaan menyaksikan aliran perlahan pada tahun 2019. Sehingga akhir tahun 2019, terdapat 219,266 unit kediaman sedia ada dengan 26,400 unit lagi dalam penawaran akan datang dan 24,639 unit dalam penawaran

## Construction Activity

Construction activities witnessed slower trend in 2019. As at end-2019, there were 219,266 existing residential units with another 26,400 units in the incoming supply and

Chart 15.9

Residential Construction Activity Trend 2015 – 2019



yang dirancang.  
**Harga dan Sewa**

Walaupun aktiviti pasaran sederhana, harga harta tanah kediaman pada 2019 menunjukkan pergerakan bercampur-campur di seluruh negeri. Mengikut jenis, rumah teres dua tingkat yang terletak di beberapa skim di Kota Kinabalu dan Sandakan meningkat melebihi 9.0%. Dalam segmen strata, unit pangsapuri dan kondominium juga mencatat kenaikan modal yang sederhana secara keseluruhan. Sehingga 2019, Indeks Harga Rumah Semua untuk negeri ini berada pada 180.7 mata, naik 2.2% daripada 176.9 mata pada 2018. Purata Harga Semua Rumah untuk negeri pada 2019 berada pada RM463,483, meningkat daripada RM453,685 pada 2018.

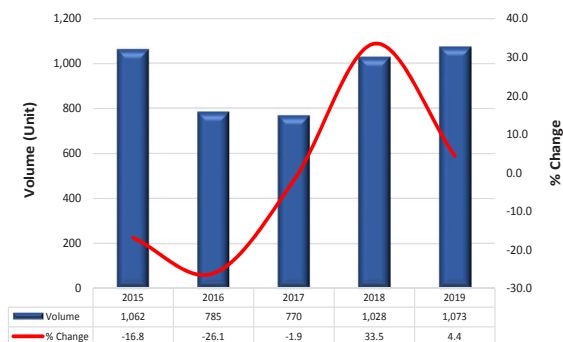
Pasaran sewa kediaman secara amnya adalah stabil dengan purata pulangan sewa antara 1.3% dan 8.4%.

**HARTA TANAH KOMERSIAL**

Prestasi subsektor komersial mengukuh pada 2019. Terdapat 1,067 transaksi direkodkan dengan jumlah nilai RM834.59 juta (2018: 1,028 transaksi bernilai RM653.43 juta). Aktiviti pasaran ini menunjukkan peningkatan 3.8% dan 27.7% masing-masing dalam bilangan dan nilai berbanding 2018.

Chart 15.10

Volume of Commercial Property Transactions 2015 – 2019



24,639 units in the planned supply.  
**Price and Rental**

Despite of moderation in market activities, the residential property prices in 2019 showed a mix movement across the state. By type, double storey terraced houses located in several schemes at Kota Kinabalu and Sandakan increased by more than 9.0%. In the stratified segment, apartment and condominium units also recorded moderate capital gains across the board. As at 2019, the All House Price Index for the state stood at 180.7 points, up by 2.2% from 176.9 points in 2018. The average All House Price for the state as at 2019 stood at RM463,483, increased from RM453,685 in 2018.

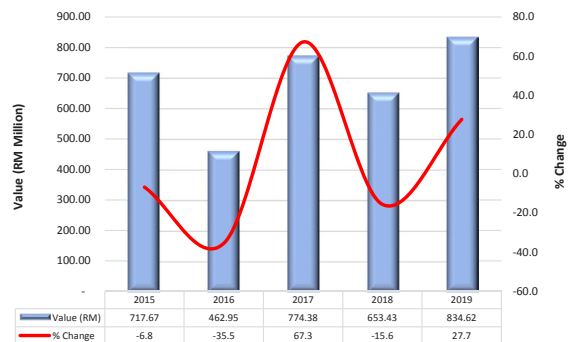
The residential rental market was generally stable with average gross rental yield between 1.3% and 8.4%.

**COMMERCIAL PROPERTY**

The performance of commercial sub-sector strengthened in 2019. There were 1,067 transactions recorded with a total value of RM834.59 million (2018: 1,028 transactions worth RM653.43 million). This market activity indicated an increase of 3.8% and 27.7% in volume and value respectively as compared to 2018.

Chart 15.11

Value of Commercial Property Transactions 2015 – 2019



## Shop

### Transaksi

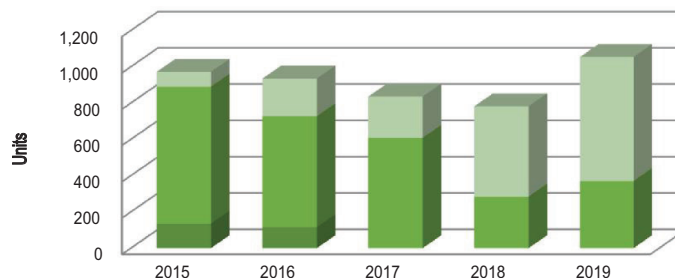
Subsektor kedai terus mencatat aktiviti pasaran aktif dengan 642 transaksi bernilai RM448.93 juta (2018: 555 transaksi bernilai RM355.08 juta). Berbanding tahun 2018, bilangan dan nilai transaksi masing-masing meningkat 15.7% dan 26.4%. Kedai dua hingga dua setengah tingkat menguasai 54.2% daripada jumlah transaksi kedai.

### Status Pasaran

Kedai siap dibina tidak terjual dan unit kedai dalam pembinaan tidak terjual meningkat dalam tempoh kajian. Negeri ini tidak dibebankan dengan mana-mana unit kedai belum dibina belum terjual pada 2019.

Chart 15.12

Shop Market Status Trend 2015 – 2019



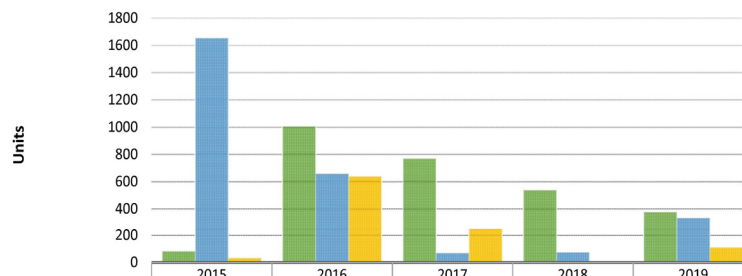
	2015	2016	2017	2018	2019
Overhang	82	208	228	498	684
Under Construction	754	611	608	284	370
Not Constructed	136	116	0	0	0

### Aktiviti Pembinaan

Sub-sektor menyaksikan pergerakan bercampur-campur dalam aktiviti pembinaan. Sehingga akhir 2019, terdapat 31,570 unit kedai sedia ada dengan 1,965 unit lagi dalam penawaran akan datang dan 2,354 unit dalam penawaran yang dirancang.

Chart 15.13

Shop Construction Activity Trend 2015 – 2019



	2015	2016	2017	2018	2019
Completion	82	1,008	772	540	378
Start	1,655	659	69	76	336
New Planned Supply	33	640	255	0	110

## Shop

### Transaction

Shop sub-sector continued to record higher market activity with 642 transactions worth RM448.93 million (2018: 555 transactions worth RM355.08 million). In comparison to 2018, volume and value of transactions increased by 15.7% and 26.4% respectively. Two to two and a-half story shop dominated 54.2% of the total shop transactions.

### Market Status

The shop overhang and unsold under construction unit grew in the review period. The state was unencumbered with any unsold not constructed shop units in 2019.

### Construction Activity

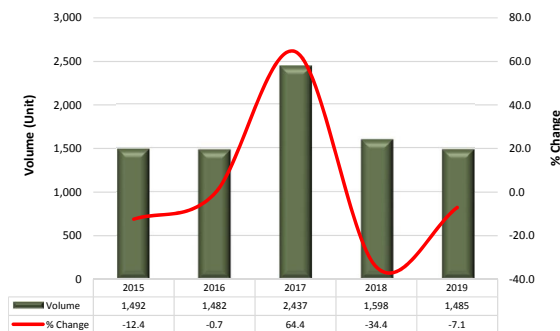
The sub-sector saw mixed movements in construction activity. As at end-2019, there were 31,570 units existing shop with another 1,965 units in the incoming supply and 2,354 units in the planned supply.

## HARTA TANAH PERTANIAN

Prestasi subsektor pertanian mencatat sedikit penurunan pada 2019. Terdapat 1,485 transaksi direkodkan dengan jumlah nilai RM985.68 juta (2018: 1,598 transaksi bernilai RM1.64 bilion). Aktiviti pasaran ini masing-masing menunjukkan penurunan 7.1% dan 39.9% dalam bilangan dan nilai disebabkan pengurangan transaksi tanah ladang berbanding tahun 2018. Negeri itu merekodkan 13 transaksi tanah estet, yang merupakan bilangan tertinggi dalam negara.

Chart 15.14

Volume of Agriculture Property Transactions 2015 – 2019



## Harga

Harga harta tanah pertanian secara amnya stabil di di seluruh negeri.

## PROSPEK 2020

Pasaran harta tanah negeri ini dijangka akan positif disokong oleh pelbagai projek pembangunan yang sedang berjalan dan projek pembangunan akan datang. Projek Lebuhraya Pan Borneo ialah projek pembangunan infrastruktur terbesar yang dilaksanakan oleh Kerajaan Persekutuan di Sabah.

Terdapat 35 pakej di bawah fasa pertama projek Lebuhraya Pan Borneo di Sabah. Pembinaan projek Lebuhraya Pan Borneo di Sabah telah merekodkan kemajuan 22% bagi 12 pakej yang sedang dibina pada hujung tahun 2019 dan dijangka akan siap sepenuhnya pada Jun 2022. Tiga pakej tambahan baharu juga dijangka siap pada penghujung tahun 2023.

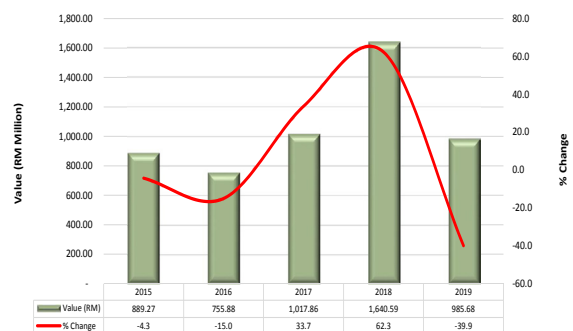
Kerajaan telah meluluskan pembinaan 4,000 kilometer Lebuhraya Trans-Borneo yang menghubungkan Sabah, Sarawak, Kalimantan dan juga Sarawak-Sabah Link Road (SSLR). Fasa pertama RM600 juta Lebuhraya Trans-Borneo menghubungkan Kalabakan, Sabah ke Simangaris, Indonesia akan dilaksanakan

## AGRICULTURE PROPERTY

The performance of agriculture sub-sector recorded a slight decline in 2019. There were 1,485 transactions recorded with a total value of RM985.68 million (2018: 1,598 transactions worth RM1.64 billion). This market activity indicated decrease of 7.1% and 39.9% in volume and value respectively due to the reduce in estate transactions compared to 2018. The state recorded 13 estate land transactions, the highest number in the country.

Chart 15.15

Value of Agriculture Property Transactions 2015 – 2019



## Price

Prices of agriculture property were generally stable across the board.

## 2020 OUTLOOK

The state's property market is expected to be positive, supported by various on-going and proposed development projects. Pan Borneo Highway Project is the biggest infrastructure development project undertaken by Federal Government in Sabah.

There were 35 packages under the first phase of the Pan Borneo Highway project in Sabah. The construction of the Pan Borneo Highway in Sabah has recorded 22% progress of 12 ongoing work packages as at end of 2019 and is expected to be fully completed in stages by June 2022. Another three additional new packages are expected to be completed by end of 2023.

Government had also approved the construction of the 4,000 kilometres Trans-Borneo Highway, connecting Sabah, Sarawak and Kalimantan as well as the Sarawak-Sabah Link Road (SSLR). The first phase of the RM600 million Trans-Borneo Highway, connecting Kalabakan in Sabah to Simangaris in Indonesia, would

tahun 2020.

Projek infrastruktur yang lain ialah:-

**i) Jambatan Labuan – Menumbok (Jambatan Labuan)**

Jambatan Labuan – Menumbok ialah sebuah jambatan baharu yang menyambungkan Wilayah Persekutuan Labuan dan Menumbok di Sabah. Projek ini dijangka akan dilancar pada separuh tahun kedua 2020.

**ii) Hospital Tawau**

Projek naiktaraf RM223.64 juta melibatkan pembinaan sebuah blok baharu dan kemudahan lain dijadualkan siap pada tahun 2020.

**iii) Pemanjangan Lapangan Terbang Sandakan**

Projek dijangka siap pada 2021.

Di subsektor komersial, Pusat Konvensyen Antarabangsa Sabah (SICC) dijangka akan dibuka pada awal 2020, adalah satu pusat konvensyen yang dibina khas dalam negeri. SICC akan menjadi destinasi utama pertemuan bertaraf dunia, galakan, persidangan dan destinasti pameran (MICE). SICC menawarkan dewan konvensyen tanpa tiang, ruang pameran bersama bilik mesyuarat yang fleksibel, lounge VIP beserta Pusat Persembahan Seni bertaraf dunia dengan tempat duduk dua tingkat yang boleh menampung seramai 1,250 orang penonton. Kemudahan lain termasuk sebuah plaza terbuka, medan makan dan minum, kafeteria di samping lebih 1,000 tempat letak kereta.

*be implemented in year 2020.*

*Other infrastructure projects are: -*

**i) Labuan – Menumbok Bridge (Labuan Bridge)**

*Labuan–Menumbok Bridge is a new planned bridge connecting Labuan Island in Federal Territory of Labuan and Menumbok in Sabah. This project is expected to be launched in the second half 2020.*

**ii) Tawau Hospital**

*The RM223.64 million upgrading project including construction a new block and many other sophisticated facilities is scheduled to be completed by 2020.*

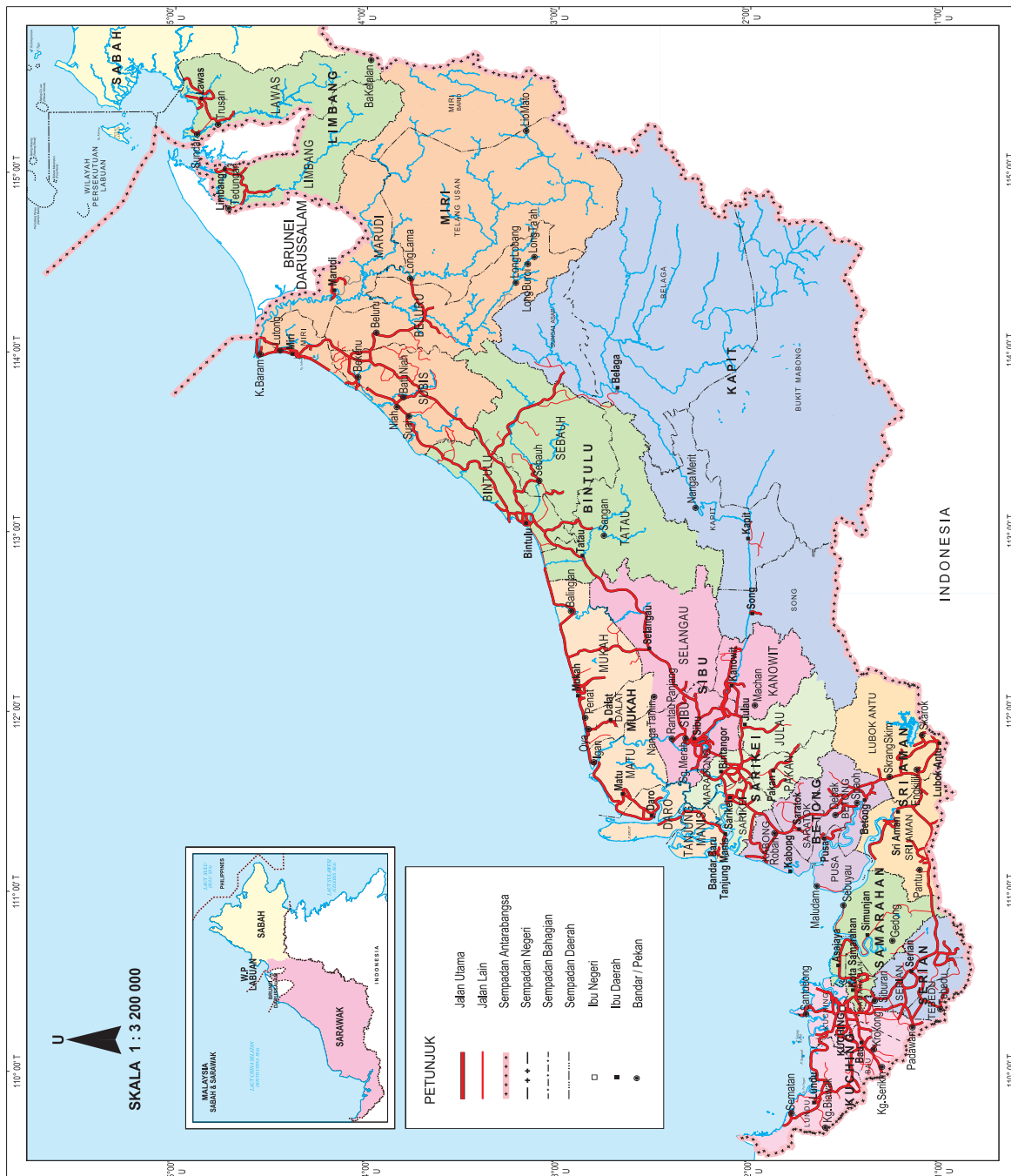
**iii) Expansion of Sandakan Airport**

*The project is expected to be completed by 2021.*

*In the commercial sub-sector, the Sabah International Convention Centre (SICC) is scheduled to open in early 2020, it will be the only purpose-built convention centre in the state. SICC is envisaged to be the main driver to attract MICE (meetings, incentives, conference and exhibition) visitors. SICC offers column-free convention hall, exhibition hall alongside with meeting rooms, VIP Lounges as well as a world standard Performing Arts Centre with a permanent two-tier seating for 1,250 audiences. Other facilities included an open plaza, food and beverage outlets, cafeteria and more than 1,000 parking bays.*



# SARAWAK





# SARAWAK

## GAMBARAN KESELURUHAN

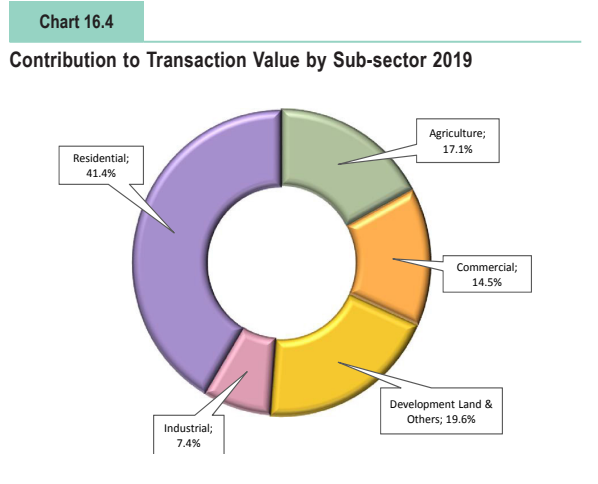
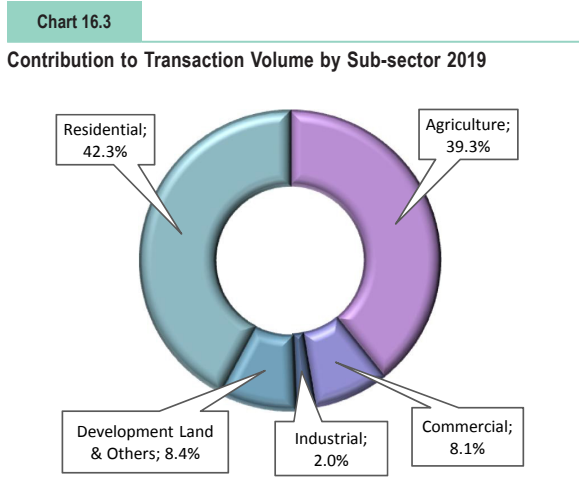
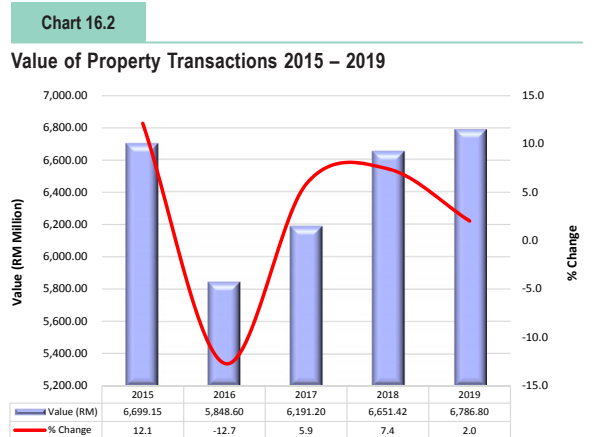
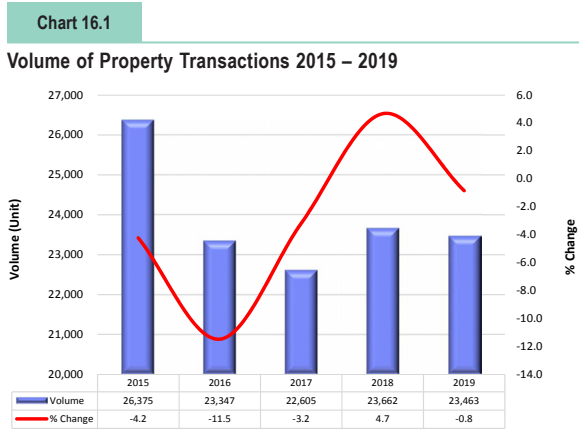
Prestasi pasaran harta tanah negeri masih stabil dalam tempoh kajian. Aktiviti pasaran mencatat 23,463 transaksi bernilai RM6.79 bilion, menurun sedikit 0.8% dalam bilangan. Walau bagaimanapun, nilai transaksi menyaksikan peningkatan kecil 2.0% berbanding 2018 (23,662 transaksi bernilai RM6.65 bilion). Subsektor kediaman kekal sebagai subsektor utama, menguasai 42.3% bilangan daripada transaksi, diikuti dengan subsektor pertanian (39.3%), tanah pembangunan (8.4%), komersial (8.1%), dan subsektor industri (2.0%).

Aktiviti pasaran berada pada aliran menaik di semua subsektor kecuali tanah pembangunan (-12.0%) dan pertanian (-4.8%). Subsektor industri meningkat 23.1%, diikuti oleh subsektor kediaman 4.0%, dan komersial 3.5%. Dari segi nilai, semua subsektor mencatatkan aliran menaik kecuali subsektor pertanian dan tanah pembangunan yang merekodkan penurunan.

## OVERVIEW

The state's property market performance stabled in the review period. The market activity recorded 23,463 transactions worth RM6.79 billion, a marginal decline of 0.8% in volume. Nevertheless, the value of transactions saw a marginal increase of 2.0% as compared to 2018 (23,662 transactions worth RM6.65 billion). Residential sub-sector remained the leading sub-sector, dominating 42.3% of the volume transactions, followed by the agriculture (39.3%), development land (8.4%), commercial (8.1%), and industrial (2.0%) sub-sectors.

Market activity was on upward trend in all sub-sectors except for development land (-12.0%) and agriculture (-4.8%). Industrial sub-sector expanded by 23.1%, followed by residential sub-sector 4.0% and commercial 3.5%. In term of value, all sub-sectors recorded upward trend except for agriculture and development land sub-sectors which recorded otherwise.



## PROMINENT SALES

Table 16.1

### Summary of Prominent Sales Recorded in 2019

No.	Property	Location	Transaction Year
1.	Wisma MAA	Jalan Central Timur, Kuching	2019
2.	209.9 hectare estate Land	Jalan Ensegei-Samarahan, Samarahan	2019
3.	Commercial Vacant Land	Jalan Lapangan Terbang, Kuching	2019
4.	Commercial Vacant Land	Jalan Kedandi, Tabuan Jaya, Kuching	2019
5.	Potential Land	Sungai Kuap, Kuching	2019
6.	Potential Land	Lebuhraya Kuching-Samarahan, Samarahan	2019
7.	Commercial Vacant Land	Krokop, Miri	2018

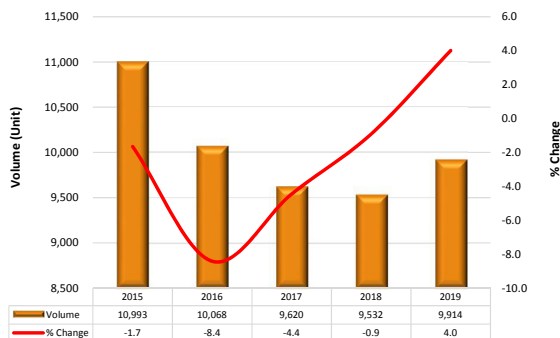
## HARTA TANAH KEDIAMAN

### Transaksi

Prestasi pasaran subsektor kediaman meningkat dalam tempoh kajian. Terdapat 9,914 transaksi bernilai RM2.81 bilion, meningkat 4.0% dan 5.4% masing-masing dalam bilangan dan nilai berbanding 2018 (9,532 transaksi bernilai RM2.66 bilion). Rumah teres menguasai 45.7% daripada bilangan transaksi kediaman.

Chart 16.5

### Volume of Residential Property Transactions 2015 – 2019



### Pelancaran Baharu

Pasaran utama pada 2019 menurun 3.3% berbanding 2018. Walau bagaimanapun, prestasi jualan keseluruhan adalah lebih baik pada 2019 berbanding 2018. Kebanyakan unit baharu ini adalah pangsapuri/kondominium, yang menguasai 36.6% (859 unit) daripada jumlah keseluruhan.

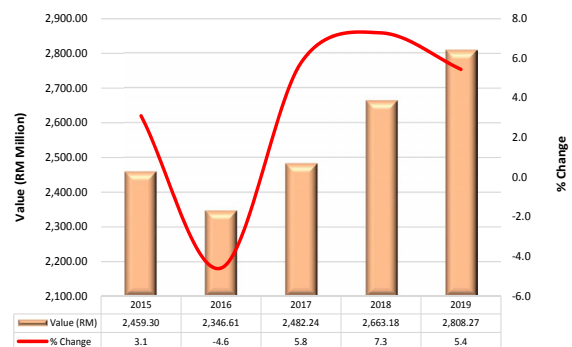
## RESIDENTIAL PROPERTY

### Transaction

The residential sub-sector's market performance improved in the review period. There were 9,914 transactions worth RM2.81 billion, an increase of 4.0% and 5.4% in volume and value respectively in comparison to 2018 (9,532 transactions worth RM2.66 billion). Terraced houses dominated 45.7% of the total residential transactions.

Chart 16.6

### Value of Residential Property Transactions 2015 – 2019

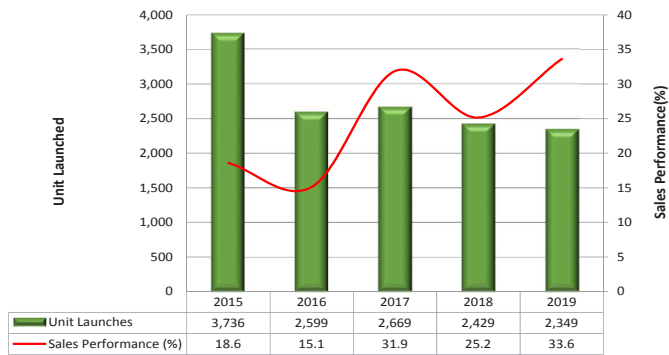


### New Launches

The primary market in 2019 decreased by 3.3% as compared to 2018. However, the overall sales performance was better in 2019 as compared to 2018. Most of these new units were apartments/condominiums, dominating for 36.6% (859 units) of the total.

Chart 16.7

New Launches Trend 2015 – 2019



**Status Pasaran**

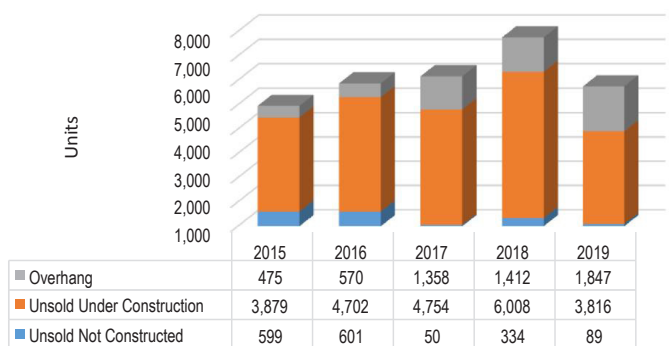
Unit kediaman siap dibina tidak terjual menyaksikan peningkatan bilangan dalam tempoh kajian manakala dalam pembinaan dan belum dibina belum terjual merekodkan prestasi yang lebih baik.

**Market Status**

*The residential overhang units witnessed increasing numbers in the review period while the unsold under construction and not constructed recorded better performance as the numbers reduced.*

Chart 16.8

Residential Market Status Trend 2015 – 2019



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**Aktiviti Pembinaan**

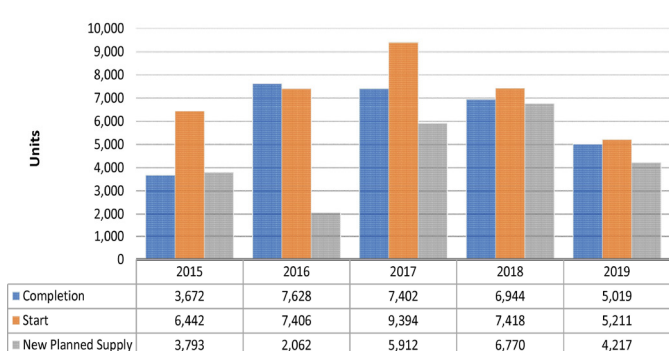
Aktiviti pembinaan menyaksikan pergerakan kurang aktif. Sehingga akhir 2019, terdapat 261,627 unit kediaman sedia ada dengan 21,576 unit lagi dalam penawaran yang akan datang dan 5,583 unit dalam penawaran yang dirancang.

**Construction Activity**

*Construction activities recorded less active movement. As at end-2019, there were 261,627 existing residential units with another 21,576 units in the incoming supply and 5,583 units in the planned supply.*

Chart 16.9

Residential Construction Activity Trend 2015 – 2019



## Harga dan Sewa

Harga harta tanah kediaman pada 2019 menunjukkan pergerakan bercampur-campur di seluruh negeri. Rumah teres satu tingkat yang terletak di beberapa skim di Bahagian Kuching dan Sibul menyaksikan trend menaik disebabkan berdekatan dengan pusat bandar, bandar pelabuhan serta kawasan perindustrian. Pada perkembangan yang sama, unit teres dua tingkat di Bahagian Kuching, Miri dan Bintulu juga mencatat kenaikan modal kerana berdekatan dengan pusat komersial, kompleks perniagaan dan dilengkapi jaringan jalan raya yang baik. Di segmen berstrata, unit pangsapuri dan kondominium turut mencatatkan kenaikan harga terutamanya unit yang terletak berhampiran kawasan aktif terutamanya pusat komersial. Sehingga 2019, Indeks Harga Semua Rumah untuk negeri ini berada pada 177.7 mata, naik 2.8% daripada 172.8 mata pada 2018. Purata Harga Semua Rumah pada 2019 berada pada RM453,152, meningkat daripada RM440,152 pada 2018.

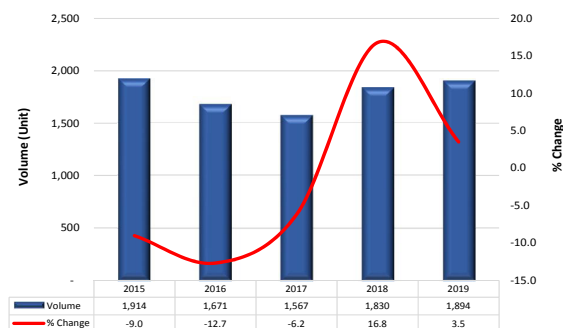
Pasaran sewa kediaman secara umumnya adalah stabil. Lokasi yang strategik berdekatan pusat bandar dan permintaan yang tinggi dari kawasan perindustrian yang dilengkapi dengan jaringan perhubungan yang cekap adalah antara faktor-faktor penyumbang kepada kadar sewa yang lebih tinggi bagi rumah kos rendah satu tingkat di Bahagian Sibul dan Bintulu.

## HARTA TANAH KOMERSIAL

Subsektor komersial mencatat 1,894 transaksi dengan jumlah nilai RM986.41 juta pada tahun 2019. Aktiviti pasaran ini menunjukkan peningkatan marginal 3.5% dan 4.8% dalam bilangan dan nilai masing-masing berbanding 2018 (1,830 transaksi bernilai RM941.01 juta).

Chart 16.10

Volume of Commercial Property Transactions 2015 – 2019



## Price and Rental

The residential property prices in 2019 showed a mixed movement across the state. Single storey terraced houses located in several schemes at Bahagian Kuching and Sibul saw upward trend due to their proximity to the town centres, port town as well as industrial area. On a similar note, double storey terraced houses in Bahagian Kuching, Miri and Bintulu also registered capital gains due to the proximity to commercial centres, shopping complex and served with good road linkages. In the stratified segment, apartment and condominium units also recorded price increases for units located near active areas, especially commercial centres. As at 2019, the All House Price Index for the state stood at 177.7 points, up by 2.8% from 172.8 points in 2018. The average All House Price for the state as at 2019 stood at RM453,152, increased from RM440,683 in 2018.

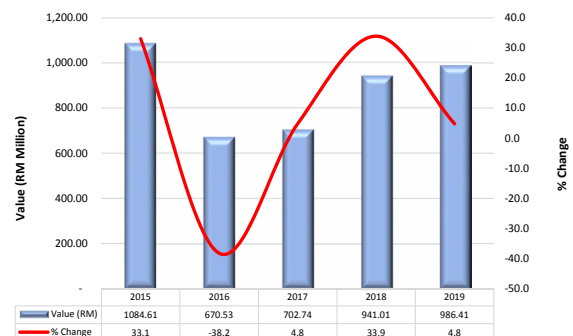
The residential rental market was generally stable. Strategic locations nearby town centres and high demand from industrial area served with efficient connectivity were among the factors contributed to the higher rental rate for single storey low-cost houses in Bahagian Sibul and Bintulu.

## COMMERCIAL PROPERTY

The commercial sub-sector recorded 1,894 transactions with a total value of RM986.41 million in 2019. This indicated a marginal increase of 3.5% and 4.8% in volume and value respectively as compared to 2018 (1,830 transactions worth RM941.01 million).

Chart 16.11

Value of Commercial Property Transactions 2015 – 2019



## Kedai

### Transaksi

Subsektor kedai terus mencatat aktiviti pasaran yang meningkat pada 2019 dengan 1,617 transaksi bernilai RM827.22 juta (2018: 1,596 transaksi bernilai RM831.40 juta). Berbanding tahun 2018, bilangan transaksi meningkat 1.3% manakala nilai transaksi menurun 0.5%. Transaksi kedai tiga hingga tiga setengah tingkat menguasai 49.9% (807 unit) daripada jumlah transaksi kedai.

### Status Pasaran

Situasi kedai siap dibina tidak terjual kurang memberancarkan dalam tempoh kajian. Bagaimanapun, dalam pembinaan dan belum dibina belum terjual bertambah baik.

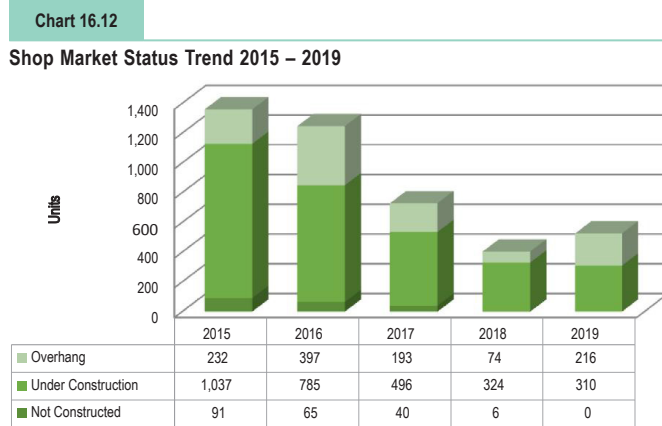
## Shop

### Transaction

Shop sub-sector continued to growth in 2019 with 1,617 transactions worth RM827.22 million (2018: 1,596 transactions worth RM831.40 million). In comparison to 2018, volume of transactions increased by 1.3% while value decreased by 0.5%. Three to three and a-half story shop transactions dominated 49.9% (807 units) of the total shop transactions.

### Market Status

The shop overhang situation was less promising in the review period. However, unsold under construction and not constructed improved.



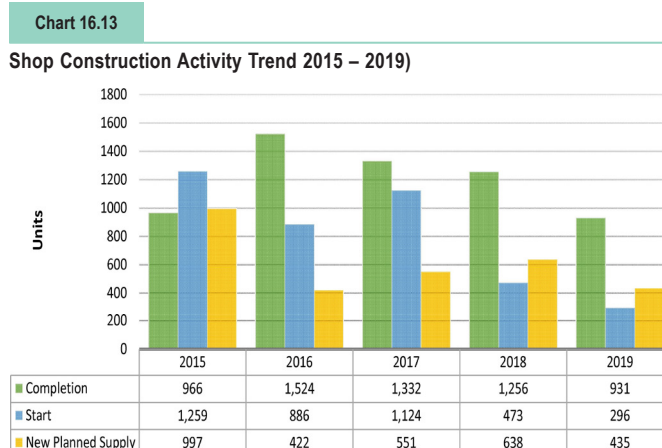
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### Aktiviti Pembinaan

Aktiviti pembinaan terus perlahan ditunjukkan oleh penguncupan dalam siap dibina, mula dan penawaran baru dirancang. Sehingga akhir 2019, terdapat 34,822 unit kedai sedia ada dengan 1,768 unit lagi dalam penawaran akan datang dan 2,448 unit dalam penawaran yang dirancang.

### Construction Activity

Construction activity continued to be slow indicated by the contraction in completion, start and new planned supply. As at end-2019, there were 34,822 units existing shop with another 1,768 units in the incoming supply and 2,448 units in the planned supply.



## PROPSPEK 2020

Pasaran harta tanah negeri akan terus positif disokong pelbagai projek. Antaranya Projek Lebuhraya Pan Borneo merupakan projek pembangunan infrastruktur terbesar yang dilaksanakan oleh Kerajaan Persekutuan di Sarawak. Projek ini bukan sekadar pemangkin kepada pertumbuhan ekonomi tetapi penggalak perubahan yang akan membawa perubahan besar kepada Negeri. Lebuhraya Pan Borneo melibatkan jumlah panjang jalan 1,060 kilometer, daripada itu, kira-kira 193 kilometer melibatkan laluan dua hala. Projek ini telah mencapai kesiapan 42%, berbanding 43% yang dijadualkan pada hujung tahun 2019.

Kerajaan telah meluluskan pembinaan 4,000 kilometer Lebuhraya Trans-Borneo yang menghubungkan Sabah, Sarawak, Kalimantan dan juga Sarawak-Sabah Link Road (SSLR). Dengan adanya cadangan jalan hubungan ini, pengguna yang berjalan dari Sabah ke Sarawak dan sebaliknya tidak perlu melalui Brunei. Kos Sarawak-Sabah Link Road (SSLR) yang berjarak 425 kilometer dianggarkan RM5.2 bilion dan dijangka siap pada 2030. Fasa pertama projek melibatkan kos RM1.2 bilion dari Lawas ke Pa' Berunut di Sarawak dengan jarak 90 kilometer dijangka siap pada tahun 2024.

Projek infrastruktur yang lain ialah Jambatan Bintulu Jepak. Jambatan RM467 juta yang menyambungkan Bandar Bintulu dengan Kampung Jepak telah mula dibina pada Julai 2019. Jambatan 1,283 meter panjang ini akan memendekkan jarak perjalanan 20 kilometer dari Sibul/Mukah/Tatau dan Lapangan Terbang Bintulu ke Bandar Bintulu. Projek ini dijadual siap pada 2024.

Beberapa pembangunan yang dijangka menjadi pemangkin untuk pasaran harta tanah adalah:

### i. Kemena Heights

Kemena Heights ialah sebuah projek integrasi yang merangkumi 3 menara 441 unit pangsapuri Treetops dan 100 unit Kemena Heights komersial/runcit, pejabat dan pasar raya. Projek pembangunan bercampur dalam pembinaan ini meliputi kawasan seluas 24 ekar yang terletak di antara Lapangan Terbang Bintulu dan Pusat Bandar Bintulu. Jambatan Bintulu Jepak yang dalam pembinaan dijangka akan memendekkan jarak perjalanan 20 kilometer dari Bandar Bintulu.

## 2020 OUTLOOK

*The state's property market would remain positive, supported by various projects. Among them, the Pan Borneo Highway Project is the biggest infrastructure development project undertaken by the Federal Government in Sarawak. This project not just a catalyst for economic growth but a game-changer that would bring huge transformation to the State. The Pan Borneo Highway Sarawak covered a total length of 1,060 kilometre, of which 193 kilometres consists of a dual carriageway. The project has progressed to a completion rate of 42%, compared to the scheduled 43%, as at end of 2019.*

*Government had also approved the construction of the 4,000 kilometres Trans-Borneo Highway, connecting Sabah, Sarawak and Kalimantan as well as the Sarawak-Sabah Link Road (SSLR). With the proposed link road, road user travelling from Sabah to Sarawak or vice versa will not have to go through Brunei. The 425 kilometres Sarawak-Sabah Link Road (SSLR) which is estimated to cost RM5.2 billion, will be completed by 2030. The first phase of the project would cost RM1.2 billion from Lawas to Pa' Berunut in Sarawak, with a distance of about 90 kilometre will be completed by 2024.*

*Other infrastructure project is the Bintulu Jepak Bridge. The RM467 million bridge set to connect Bintulu town with Kampung Jepak was commenced in July 2019. The 1,283-metre bridge will shorten the traveling distance from Sibul/Mukah/Tatau and Bintulu Airport to Bintulu town by 20 kilometres. It was scheduled to be completed by 2024.*

*Several developments that are expected to be the catalyst for the property market are:*

### i. Kemena Heights

*Kemena Heights is an integrated project comprising of 3 towers of 441 Treetops apartment units and 100 units of Kemena Heights commercial/retail, offices and supermarket. The on-going mixed development spanning across the 24-acre land is located between Bintulu's airport and the centre of Bintulu town. The ongoing Kemena Jepak Bridged project is expected to shorten the travelling distance from Bintulu town by 20 Kilometers.*



**ii. Borneo Samariang Resort City**

Borneo Samariang Resort City, ialah sebuah resort city dalam Bandar Baru Samariang yang juga merupakan sebuah bandar satelit baharu di utara Kuching. Borneo Samariang Resort City ialah sebuah Bandar Bersepadu. Taman air telah dibuka kepada awam pada 2018. Projek pembangunan seluas 500 ekar ini dijangka siap pada 2023.

**ii. Borneo Samariang Resort City**

*Borneo Samariang Resort City is a Resort City within Bandar Baru Samariang, which is a new satellite township rapidly taking shape to the north of Kuching. Borneo Samariang Resort City is an Integrated Resort City for leisure and suburban living. The Water Park has opened its doors to public in 2018. This 500-acre development project is expected to complete in 2023*



**CATATAN TEKNIKAL**  
***TECHNICAL NOTES***

**Catatan Teknikal**  
**Technical Notes**

Lampiran I

Appendix I

**LAPORAN PASARAN HARTA**  
**2019**

**PROPERTY MARKET REPORT**  
**2019**

**1. Tempoh Kajian**

Tempoh kajian Laporan Pasaran Harta ini adalah keseluruhan tahun 2019, iaitu Januari hingga Disember.

**1. Review Period**

The review period for this Property Market Report is the whole year of 2019 i.e. January to December.

**2. Sektor Harta Tanah**

Pada amnya, kandungan laporan tertumpu kepada subsektor harta tanah berikut:

- (i) Kediaman
- (ii) Pejabat
- (iii) Komersial
- (iv) Industri
- (v) Pertanian
- (vi) Tanah Pembangunan
- (vii) Harta Riadah

**2. Property Sectors**

Generally, the report contents focus on the following property sub-sectors:

- (i) Residential
- (ii) Office
- (iii) Commercial
- (iv) Industrial
- (v) Agriculture
- (vi) Development Land
- (vii) Leisure Property

Klasifikasi kegunaan tanah bagi setiap subsektor harta tanah dinyatakan di Lampiran II.

Land use classification for each property sector is given in Appendix II.

**3. Stok**

Rujukan stok diperoleh daripada Laporan Stok Harta Kediaman, Laporan Stok Harta Komersial dan Industri, Laporan Stok Harta Riadah dan Laporan Status Pasaran Harta Tanah yang diterbitkan oleh Pusat Maklumat Harta Tanah Negara (NAPIC), Jabatan Penilaian dan Perkhidmatan Harta. Definisi adalah seperti di Lampiran III.

**3. Stock**

Stock refers to stock as defined in the Residential Property Stock Report, Commercial and Industrial Property Stock Report, Leisure Property Stock Report and The Property Market Status Report published by the National Property Information Centre (NAPIC), Valuation and Property Services Department. The definition is given in Appendix III.

**4. Definisi**

(i) Saiz Sampel = Bilangan unit pemerhatian (*observations*) yang dipilih secara rambang daripada jumlah jualan/sewaan yang terdapat di sesuatu lokasi pada tempoh kajian.

**4. Definition**

(i) Sample Size = The number of elementary units selected randomly from the total sales/ lettings available in a location within the review period.

Bilangan unit pemerhatian yang akan digunakan untuk analisis adalah jumlah keseluruhan unit yang didapati di sesuatu lokasi ATAU satu sampel yang boleh memberikan gambaran jualan/sewaan yang ada di lokasi itu.

The number of elementary units that are to be drawn into the analysis are either the total elementary units found in a location OR a sample size which can provide inferences to the total sales/lettings available.

(ii) Keluasan Purata Tanah = 
$$\frac{\text{Jumlah keluasan tanah bagi semua jualan untuk sesuatu lokasi}}{\text{Bilangan jualan terpilih di sesuatu lokasi}}$$

(ii) Average Land Area = 
$$\frac{\text{Total land area of all selected sales for the location}}{\text{Number of selected sales for the location}}$$

(iii) Keluasan Purata Lantai/Plot = 
$$\frac{\text{Jumlah keluasan lantai/plot bagi semua jualan/sewaan terpilih sesuatu lokasi}}{\text{Bilangan jualan terpilih di sesuatu lokasi}}$$

(iii) Average Floor/Plot Area = 
$$\frac{\text{Total floor/plot area of all selected sales/ lettings for the location}}{\text{Number of selected sales/ lettings for the location}}$$

'Keluasan Lantai' untuk pelbagai jenis harta adalah sebagaimana takrif di dalam 'Uniform Methods of Measurement of Buildings' yang diterbitkan oleh Pertubuhan Juru Ukur Malaysia.

The 'Floor Area' for various types of properties is as defined in the 'Uniform Methods of Measurement of Buildings' published by the Institution of Surveyors, Malaysia.

iv) Lingkungan Harga/Sewa = Julat/lingkungan yang menunjukkan harga/sewa terendah hingga tertinggi bagi semua jualbeli terpilih di sesuatu lokasi. Sebagai contoh, sekiranya harga terendah ialah RM18,000 sehektar dan harga tertinggi ialah RM25,000 sehektar, lingkungan harga adalah di antara RM18,000 hingga RM25,000 sehektar.

iv) Price/Rental Range = It is a range denoting the lowest to the highest price/rental of all sales selected for a location. For example, if the lowest price is RM18,000 per hectare and the highest price is 25,000 per hectare, the range is between RM18,000 and RM25,000 per hectare.

v) Harga/Sewa (RM/m.p.) =  $\frac{\text{Harga Jualan/Sewa (RM)}}{\text{Keluasan Lantai (m.p.)}}$

v) Price/Rental (RM/s.m.) =  $\frac{\text{Sale Price/Rental (RM)}}{\text{Floor Area (m.p.)}}$

Ia adalah harga jualan/sewa individu yang dinyatakan semasa pertukaran hakmilik/sewa di pasaran terbuka.

It is the individual sale price/rental declared during the change of ownership/letting in the open market.

vi) Perubahan Harga/sewa Purata (%) =  $\left\{ \frac{\text{harga/sewa purata 2019 bagi sesuatu lokasi}}{\text{harga/sewa purata 2018 bagi sesuatu lokasi}} - 1 \right\} \times 100$

vi) Average Price/Rental Change (%) =  $\left\{ \frac{\text{2019 average price/rental for the location}}{\text{2018 average price/rental for the location}} - 1 \right\} \times 100$

vii) Huruf 'NA' menandakan keadaan di mana tiada bukti jualan/sewa pada 2018 yang boleh dibandingkan dengan sampel yang dipilih pada 2019.

vii) The letter 'NA' denotes that there are no sale/rental evidences available in 2018 which are comparable to the sample selected for 2019.

viii) Huruf 'ND' menandakan keadaan di mana perubahan harga/sewa yang dikira tidak dapat memberikan gambaran yang sebenar.

viii) The letter 'ND' denotes that the calculated average price/rental change is misleading as to the true situation.

## KLASIFIKASI KEGUNAAN TANAH

## LAND USE CLASSIFICATION

Berikut adalah klasifikasi kegunaan tanah yang digunakan di dalam Laporan Pasaran Harta 2019:

The following are the land use classifications used in the Property Market Report 2019:

Perihal Harta	Catatan	Property Description	Remarks
<b>1. KEDIAMAN</b>		<b>1. RESIDENTIAL</b>	
a. Rumah Teres		a. Terraced House	
(i) Kos rendah satu tingkat }	} Mengikut bilangan tingkat dan kos pembinaan	(i) Single storey low-cost }	} Subdivided by reference to the number of storeys and cost of construction
(ii) Satu tingkat }		(ii) Single storey }	
(iii) Kos rendah dua tingkat }		(iii) Double storey low-cost }	
(iv) Kos sederhana dua tingkat }		(iv) Double storey medium-cost }	
(v) Dua tingkat }		(v) Double storey }	
(vi) 2 hingga 3 tingkat }		(vi) 2 to 3 storey }	
b. Berkembar		b. Semi-Detached	
(i) Kos rendah }	} Mengikut bilangan tingkat dan kos pembinaan	(i) Low-cost }	} Subdivided by reference to the number of storeys and cost of construction
(ii) Kos sederhana }		(ii) Medium-cost }	
(iii) Satu tingkat }		(iii) Single storey }	
(iv) Dua tingkat }		(iv) Double storey }	
(v) 2 hingga 3 tingkat }		(v) 2 to 3 storey }	
c. Sesebuah		c. Detached	
(i) Satu tingkat di kawasan perumahan		(i) Single storey within housing estate	
(ii) Dua tingkat di kawasan perumahan		(ii) Double storey within housing estate	
(iii) Rekabentuk individu		(iii) Individually-designed	
d. Rumah Pangsa/ Pangsapuri/ Kondominium		d. Flat/Apartment/ Condominium	
(i) Rumah pangsa kos rendah }	} Jenis standard dan mewah	(i) Low-cost flat }	} Standard and luxury types
(ii) 1 - 2 bilik tidur }		(ii) 1 - 2 bedrooms }	
(iii) 3 bilik tidur atau lebih }		(iii) 3 bedrooms or more }	
e. Tanah Untuk	} Tanah dengan kelulusan untuk pembangunan sahaja	e. Land For Residential Development	} Land with permission for housing only
f. Pembangunan Kediaman			
f. Pecahan Lot Untuk Sebuah Rumah		f. A Subdivided Lot For One House	
(i) Plot sesebuah }	} Suatu lot atau bahagian yang tidak dipecah bahagi untuk tidak melebihi tiga buah rumah	(i) Single plot }	} A lot or undivided share of a lot for up to three houses
(ii) Tapak kecil }		(ii) Small site }	
<b>2. PEJABAT</b>		<b>2. OFFICE</b>	
a. Blok pejabat binaan khas		a. Purpose-built office block	
b. Ruang pejabat di rumah kedai		b. Office space in shophouse	

**3. KEDAI & KOMPLEKS PERNIAGAAN**

- a. Kedai sebelum perang } Dengan/tanpa pemilikan kosong
- b. Kedai selepas perang } Pelbagai tingkat
- c. Lot perniagaan di kompleks perniagaan
- d. Kedai tanpa inap } Unit kedai di tingkat blok rumah pangsa/ pangsapuri
- e. Plot tanah kosong }

**4. INDUSTRI**

- a. Kilang  
(i) Teres } Reka bentuk untuk proses pembuatan am dan lazimnya untuk jualan/disewa ATAU  
(ii) Berkembar } binaan khas untuk proses pembuatan khusus  
(iii) Sesebuah }
- b. Gudang  
(i) Teres } Gudang yang direka untuk tujuan penyimpanan  
(ii) Berkembar }
- (iii) Sesebuah }
- c. Kompleks Perindustrian } Bangunan direka bentuk khas mengikut kesesuaian proses perindustrian
- d. Kilang Bertingkat } Unit industri berstrata di dalam bangunan bertingkat rendah
- e. Tapak Perindustrian - Plot Perindustrian

**5. PERTANIAN/ LUAR BANDAR**

- a. Getah }  
b. Kelapa Sawit } Kategori-kategori ini adalah untuk kebun kecil sahaja  
c. Padi }  
d. Kelapa }  
e. Koko }  
f. Nenas }  
g. Dusun/Hortikultur } Tanah yang berkeluasan 40 hektar atau lebih dan ditanam dengan tanaman komersil seperti getah, kelapa sawit dan koko  
h. Tanah Ladang }
- i. Perhutanan
- j. Tanah Kampong } Kebun kecil dengan kegunaan kediaman kampong dan pertanian. Berbeza daripada (a-g) di atas dari segi harga. Tidak dianggap sebagai plot sesebuah, kerana terlalu besar untuk sebuah keluarga. Oleh itu, ia berada di antara harta luar bandar dan harta bandar }

**3. SHOP & SHOPPING COMPLEX**

- a. Pre-war shop } With/ without vacant possession
- b. Post-war shop } Various storeys
- c. Retail lot in shopping complex
- d. Lock-up shop } Shop unit on ground floor or flat/ apartment
- e. Vacant Plot }

**INDUSTRIAL**

- a. Factory  
(i) Terrace } Designed for general manufacturing process and normally is for sale/ letting OR purpose-built for specialised manufacturing process  
(ii) Terrace }  
(iii) Semi-detach }  
(iv) Detach }
- b. Warehouse  
(i) Terrace } Godowns designed for storage use  
(ii) Semi-detach }  
(iii) Detach }
- c. Industrial Complex } Individually designed buildings to suit an industrial process
- d. Flatted factory } Industrial units within a low-rise multi-storey stratified building
- e. Industrial Site - Industrial plot

**5. AGRICULTURE/ RURAL**

- a. Rubber }  
b. Oil alm } These categories are for small holdings only  
c. Paddy }  
d. Coconut }  
e. Cocoa }  
f. Pineapple }  
g. Orchard/Horticulture } Land of 40 hectares or more and planted with commercial crops such as rubber, oil palm and cocoa  
h. Estate Land }
- i. Forestry
- j. Kampung Land } Smallholdings with rural residential and agricultural uses. They are distinct from the above mentioned smallholdings (a-g) by their higher land prices. Cannot be regarded as detached plots since they are too large for single family use. Therefore, it falls between rural and urban properties }

## 5. TANAH PEMBANGUNAN

- a. Kediaman } Termasuk tanah yang
- b. Komersil } belum ditukar syarat atau
- c. Perindustrian } diluluskan untuk kegunaan
- d. Campuran } lebih tinggi atau telah
- } ditukar syarat tetapi belum
- } dipecah sempadan
- } }

## 7. HARTA RIADAH

- a. Hotel
- b. Motel
- c. Tempat peranginan
- d. Taman rekreasi
- e. Padang golf
- f. Marina

## 5. AGRICULTURE/ RURAL

- a. *Residential* } Include not converted
- b. *Commercial* } lands or approved for
- c. *Industrial* } higher use or converted
- d. *Mixed* } but not divided
- } }

## 6. LEISURE PROPERTY

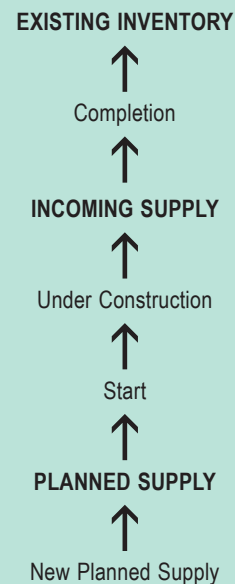
- a. *Hotel*
- b. *Motel*
- c. *Resort*
- d. *Recreation park*
- e. *Golf course*
- f. *Marina*

**STOK**

1. **Tempoh kajian**  
Laporan Stok Harta Tanah pada tahun 2019 adalah seperti berikut:  
Q1 : 1 Januari 2019 - 31 Mac 2019  
Q2 : 1 April 2019 - 30 Jun 2019  
Q3 : 1 Julai 2019- 30 September 2019  
Q4 : 1 October 2019 - 31 Disember 2019
2. **Peringkat Penyebaran**  
Laporan terbahagi adalah pada 3 peringkat pembangunan yang utama dan subperingkat berpandukan jadual di bawah:

**STOCK**

1. **Review Periods**  
*The quarters in the 2019 of the Property Stock Report are as follows:*  
Q1 : 1 January 2019 - 31 March 2019  
Q2 : 1 April 2019 - 30 June 2019  
Q3 : 1 July 2019 - 30 September 2019  
Q4 : 1 October 2019 - 31 December 2019
2. **Stages of Dissemination**  
*Information at the 3 main stages of development and their sub-stages according to the chart below:*



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- i) **Inventori Sedia Ada (Stok)**  
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 harta tanah sedia ada yang terdapat dalam laporan terdiri daripada:

- a) Suku sebelumnya  
Inventori sedia ada pada akhir suku sebelumnya ditambah dengan pelarasan yang berlaku dalam tempoh tersebut tetapi belum dimasukkan dalam laporan sebelumnya.

- i) **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.*

*The existing property inventory in the publications comprises of:*

- a) *Previous Quarter*  
*The existing inventory as at the end of the previous quarter plus the adjustments that occurred within that period but was not included in the previous publication.*



Pelarasan yang dibuat bagi inventori yang diterbitkan sebelumnya merangkumi:

- **Pertambahan kawasan liputan kajian.** Pengiraan inventori adalah berterusan dan belum mencapai liputan 100%,
- **Data tertunda dari suku sebelumnya tetapi diterima dalam suku semasa,**
- **Kesilapan dalam operasi.**

b) Suku Kajian

Inventori sedia ada pada akhir suku sebelumnya (selepas pelarasan) ditambah dengan unit yang siap dibina yang memperoleh CF/TCF serta sebarang perubahan yang berlaku dalam tempoh kajian. Perubahan termasuk:

- **Sebarang unit yang menukar kategori kegunaan.**
- **Sebarang unit yang musnah/dibina semula (dan tidak terdapat dalam penawaran yang baru dirancang).**
- **Sebarang perubahan dalam ruang yang dihuni.**

(ii) **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. Angka dalam peringkat siap dibina bukan merupakan angka terkumpul dari unit siap dibina suku-suku sebelumnya tetapi mewakili hanya satu suku kajian sahaja.

(iii) **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-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.

*Adjustments made to previous published inventory include:*

- **Increase in coverage.** The inventory count is on going and has not reached a 100% coverage,
- **Delayed data from the previous quarter but received during the review period,**
- **Operational errors.**

b) *Review Quarter*

*The existing inventory at the end of the previous review period (after the above adjustments) plus completed units issued with CF/TCF plus any change that occurred within the review period. Change includes:*

- **Any unit with a change in the category of use.**
- **Any unit destroyed/rebuilt (and not in the new planned supply).**
- **Any change in the space occupied.**

(i) **Completion**

*Completions is the term used when the building construction works are completed and a CF/TCF is issued within the review period. The figures under completion are not accumulated from previous quarter but represent only one review quarter.*

(ii) **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 for 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 3 years from the date the development was approved.

(iv) **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,**
- **lanya tidak termasuk kerja-kerja membersihkan, merata dan menyediakan infrastruktur.**

Angka dalam peringkat mula dibina bukan merupakan angka terkumpul dan mewakili bangunan yang memulakan pembinaan dalam suku kajian sahaja.

(v) **Penawaran yang Dirancang**  
Penawaran yang 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 yang dirancang termasuk jumlah terkumpul daripada suku-suku sebelumnya ditambah dengan unit dalam penawaran yang baru dirancang dalam suku kajian. Pengiraan penawaran yang dirancang adalah berterusan dan belum menyamai jumlah bilangan penduduk. Penawaran yang dirancang yang disebarkan dalam sebarang laporan suku tahunan merangkumi penawaran yang dirancang yang diselaraskan bagi suku sebelumnya dan penawaran yang baru dirancang dalam suku kajian. Penawaran yang dirancang suku sebelumnya perlu diselaraskan dalam suku kajian atas sebab-sebab berikut:

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

**2.6 Penawaran Baru**  
Penawaran baru dalam perancangan merangkumi unit di mana kelulusan pelan bangunan telah diperolehi dari pihak berkuasa tempatan dalam suku kajian. Angka dalam peringkat penawaran yang baru bukan merupakan angka terkumpul dan mewakili bangunan yang memperoleh kelulusan pelan bangunan dalam suku kajian sahaja.

**2.4 Start**  
*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 clearing, levelling and laying of infrastructure.**

*The figures disseminated under starts are not accumulative and represents buildings that started within a review quarter.*

**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 for the following reasons:*

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

**2.6 New Planned Supply**  
*New planned supply comprises units where building plan approval have been obtained within the review period. The figures disseminated under new planned supply are not accumulative and represents buildings that have obtained building plan approval in that review quarter.*

3. **Penawaran hadapan** yang digunakan dalam laporan ini menunjukkan penawaran akan datang dan penawaran yang dirancang.

#### 4. **Terma Am**

(i) **Struktur**

Struktur termasuk kekal, separuh kekal dan sementara.

(ii) **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.

(iii) **Kadar Serapan**

Perubahan dalam ruang dihuni (termasuk ruang siap dibina yang dihuni), dibahagikan dengan jumlah ruang kosong pada suku sebelumnya dan ruang siap dibina pada suku semasa (ataupun ruang boleh dihuni pada suku semasa).

(iv) **Serapan Ruang Baru**

Ruang dihuni dalam bangunan yang siap dibina dibahagikan dengan jumlah ruang siap dibina pada suku semasa.

(v) **Serapan Ruang Terdahulu**

Perubahan ruang dihuni daripada stok sedia ada pada suku sebelumnya dibahagikan dengan ruang kosong pada suku tersebut (atau ruang boleh dihuni pada suku sebelumnya).

(vi) **Kadar Ambilan**

Perubahan ruang dihuni antara suku semasa dengan suku sebelumnya dan dibahagikan dengan jumlah ruang dalam suku semasa.

(vii) **Kadar Penghunian**

Ruang yang dihuni pada suku semasa dibahagikan dengan jumlah ruang sedia ada pada suku semasa.

(viii) **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.

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

#### 4. **General Term**

(i) **Structures**

*The structures included permanent, semi-permanent and temporary construction.*

(ii) **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.*

(iii) **Absorption Rate**

*Change in occupied space including the occupation of completed space divided by the vacant space in the previous quarter plus the completed space that is vacant in the current quarter (or available space in the current quarter).*

(iv) **Absorption of New Space**

*The occupied space in completed buildings divided by the total space completed in the current quarter.*

(v) **Absorption of Previous Space**

*The change in occupied space in the current quarter from the accumulated space of the previous quarter divided by the vacant space in the previous quarter (or available space in the previous quarter).*

(vi) **Take-up Rate**

*The change in occupied space in the review quarter compared to the previous quarter divided with the total space in the review quarter.*

(vii) **Occupancy Rate**

*The occupied space in the review quarter divided with the total space in the review quarter.*

(viii) **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.

- (x) **Harga Jualan** unit adalah balasan yang dinyatakan semasa pindahmilik (Borang 14A Kanun Tanah Negara), yang menggambarkan nilai pasaran.
- (xi) **Min** ialah purata mudah daripada harga jualan.
- (xii) **Median** ialah harga jualan di mana separuh daripada cerapan akan berada di atas paras harga jualan dan separuh daripada cerapan akan berada di bawahnya.
- (xiii) **25 percentile** ialah harga jualan di mana 25% daripada cerapan berada di bawah paras tersebut.
- (xiv) **75 percentile** ialah harga jualan di mana 25% daripada cerapan berada di atas paras tersebut.
- (xv) **Minimum** ialah harga yang paling rendah bagi beberapa cerapan yang diperolehi.
- (xvi) **Maksimum** ialah harga yang paling tinggi bagi beberapa cerapan yang diperolehi.

- (x) **Sale Prices** of units are declared considerations stated on transfer (Form 14A of the National Land Code), which reflects market value.
- (xi) **Mean** is a simple average of sales prices.
- (xii) **Median** is the sales price for which one-half of the observations will lie above that price and one-half will lie below it.
- (xiii) **25 percentile** is the sales price for which 25% of the observations fall below that price.
- (xiv) **75 percentile** is the sales price for which 25% of the observations fall above that price.
- (xv) **Minimum** is the lowest price for a given number of observations.
- (xvi) **Maximum** is the highest price for a given number of observations.

## 5. Harta Tanah Kediaman

- (i) **Definisi**  
Rumah tempat tinggal adalah termasuk mana-mana bangunan, tenaman 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 digunakan untuk perniagaan dan sebahagian lagi untuk tempat tinggal adalah dikecualikan daripada harta tanah kediaman tetapi dilaporkan sebagai kedai.

### Seksyen 3, Akta Pemaju Perumahan 1966 (Kawalan dan Lesen) dan (Pindaan 2002)

Laporan ini termasuk pangsapuri khidmat yang didefinisikan sebagai penginapan jangka pendek samada dimiliki oleh individu sebagai rumah kedua, rumah korporat atau sebagai pelaburan yang dijadikan sebagai hotel. Pangsapuri khidmat yang dimiliki oleh individu mempunyai ciri-ciri berikut:

- **Unit berstrata dengan syarat nyata sebagai kediaman atau komersil.**
- **Unit yang dibina di atas tanah komersil hendaklah diperuntukan sebanyak 15% daripada ruang binaan sebagai kemudahan untuk kegunaan awam. Pangsapuri khidmat yang dibina di atas tanah kediaman memerlukan pengagihan kawasan kemudahan kurang daripada 10% yang mana ianya tidak dibuka kepada orang ramai tetapi bagi kegunaan penduduk setempat sahaja.**
- **Pemilik mungkin mendiaminya sendiri atau melantik syarikat pengurusan untuk menyewakannya secara harian, mingguan, bulanan, tahunan atau pengongsian masa.**

Laporan ini tidak termasuk pangsapuri khidmat yang dijalankan sebagai hotel yang mempunyai lesen hotel dan unit yang dimiliki oleh pengusaha hotel.

## 5. Residential Property

- (i) **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.

### Section 3, The Housing Development (Control and Licensing) Act 1966 (as amended 2002)

This report included serviced apartments which is defined as short-term accommodation either owned by an individual as a second home, as corporate housing or as an investment that may be run as a hotel. The serviced apartment owned by individuals has the following features:

- **Stratified units with title condition as residential or commercial use.**
- **The units that are built upon commercial titled lands are required to allocate more than 15% of the built up space not for supporting facilities that are open to the public. Serviced apartments built upon residential titled lands are required to allocate less than 10% of the built up space to supporting facilities that are not open to the public but facilitate internal residents only.**
- **The owner may occupy the unit himself or elect a management company to rent the unit on a daily, weekly, monthly, yearly or timesharing basis.**

This report excluded serviced apartments that are run with hoteliers licence and those units owned by hoteliers.

- (ii) **Jenis Harta Tanah**  
Data diperolehi secara tinjauan dalam kawasan pihak berkuasa tempatan. Jenis harta tanah termasuk teres, berkembar, sesebuah, unit kos rendah, rumah pangsa, pangsapuri/kondominium, unit berkelompok dan rumah bandar di semua peringkat.

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

## 6. HARTA TANAH KOMERSIAL

### (i) Kedai

#### Definisi

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

Kedai adalah merangkumi:

- Rumah kedai/pangsapuri
- Pejabat kedai
- Kedai dengan kegunaan perniagaan
- Kedai makan binaan khas

Kedai tidak termasuk:

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

#### Jenis Harta Tanah

Data berdasarkan lawat periksa dalam kawasan pihak berkuasa tempatan. Jenis harta tanah kedai adalah termasuk teres, berkembar, sesebuah, kedai tanpa inap dan kedai sebelum perang.

### (ii) Pejabat Binaan Khas

#### 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.

### (ii) Property Types

The data is conducted by survey within the 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. COMMERCIAL PROPERTY

### (i) Shops

#### Definition

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

Shops include:

- Shop house/apartments
- Shop offices
- Shop with retail use
- Purpose-built eateries

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.

#### Property Types

The data is conducted by survey within the local authority area. Property types include terraced, semi-detached, detached, lock-up and pre-war.

### (ii) Purpose-Built Offices

#### 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, communication and other office activity.



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 Juru Ukur 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

### (iii) Kompleks Perniagaan

#### Definisi

Kompleks perniagaan termasuk pelbagai unit ruang perniagaan 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 membeli-belah ialah ruang 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 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 terpilih 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

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 lettable area. Office space information is disseminated based on the net lettable floor area according to the *Uniform Methods of Measurement of Buildings* published by the Institution of Surveyors Malaysia.

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

### (iii) Shopping Complex

#### Definition

Shopping complexes include 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

- 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 yang terletak di sebelah atau kedua-dua belah laluan kedai tersebut. Bagi pengumpulan dan penyebaran maklumat oleh NAPIC, kegunaan dominan bermaksud kegunaan perniagaan 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.

Inventori arked beli-belah 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 di dalam laporan ini adalah:

- Ruang niaga dalam bangunan pelbagai guna di mana kegunaannya boleh bertukar ganti dengan kegunaan pejabat, kediaman, hotel dan perindustrian.
- 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.

- *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.*

*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.*



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 di bawah satu bumbung.

Tidak termasuk di dalam laporan ini adalah:

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

#### (iv) Harta Tanah Riadah

##### Definisi

Merangkumi hotel yang menyediakan penginapan jangka pendek yang mana tetamu hotel atau pengunjung perlu membayar untuk 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.

Termasuk di dalam laporan ini adalah pangsapuri khidmat yang dimiliki oleh syarikat yang mengurusnya dengan lesen pengusaha hotel.

Tidak termasuk di dalam laporan ini adalah pangsapuri khidmat yang dimiliki oleh individu tetapi diuruskan oleh pihak pengurusan yang mana unit-unit ini disewakan dalam tempoh mingguan, bulanan atau tahunan. Bagi mereka yang tidak mempunyai lesen hotel tidak termasuk dalam Laporan Stok Harta Tanah Riadah.

*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 sm.*
- *Operated by a single owner/corporation with common facilities/amenities.*
- *A freestanding building under one roof.*

*Excluded from publication:*

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

#### (iv) Leisure Property

##### 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, kampung 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 houses.*

*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.*

*Included in the leisure property stock report are serviced apartments owned by companies who operate them with a hotel operator's licence.*

*Excluded from the leisure stock are serviced apartments owned by individuals but managed by corporations who rent out the units on a weekly, monthly or yearly period. They do not have an hotelier's licence and therefore excluded from the leisure property stock report.*

### **Jenis Harta Tanah**

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

### **Pengelasan**

Penerbitan adalah termasuk hotel yang diberi penarafan atau tidak. Pengelasan hotel ditentukan oleh Kementerian Pelancongan Malaysia berdasarkan standard 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.

### **Kadar Purata Penginapan**

Adalah berdasarkan maklumat yang diterima daripada pengusaha hotel. Maklumat penginapan berdasarkan tempoh kajian yang dinyatakan di atas dan mungkin berbeza dengan suku tahunan kalendar.

## **7. Harta Tanah Industri**

### **Definisi**

Unit 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 penggunaan, 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 tersendiri atau gudang yang tidak disebut di dalam definisi ICA. Walau bagaimanapun, laporan ini belum mengumpul data bagi kemudahan penyimpanan.

### **Jenis Harta Tanah**

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

### **Property Types**

*NAPIC dissemination includes all hotels within the state boundary.*

### **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 on going and carried out by the Ministry of Tourism.*

### **Average Occupancy Rate**

*Is based on responses given by the hotel operators. Occupancy data is based on review periods as stated above and may differ from the calendar quarter.*

## **7. Industrial Property**

### **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 this publication has not captured the data on storage facilities.*

### **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.*

## STATUS

1. **Tempoh kajian** laporan ini adalah meliputi separuh tahun pertama 2019 berakhir pada **30 Disember 2019**.
2. Liputan kajian ini hanya merangkumi unit kediaman kedai dan industri.
3. Pelancaran Jualan Harta Tanah adalah aktiviti untuk memulakan pemasaran unit harta tanah dalam sesuatu projek secara rasmi oleh pemaju. Pelancaran boleh dilakukan selepas mendapat permit iklan dan jualan daripada Kementerian Perumahan dan Kerajaan Tempatan.

Seandainya satu skim dilancarkan semula, tarikh baru pelancaran diambilkira. Pelancaran tidak rasmi (soft Launch) adalah peristiwa pemasaran bagi membekalkan maklumat mengenai projek sebelum kelulusan permit iklan dan jualan diperolehi. Tarikh tidak rasmi tidak diambilkira dalam pengumpulan data.

4. **Pelancaran baru** mengandungi harta tanah dalam skim perumahan yang telah dilancarkan pada tahun 2019.

**Prestasi jualan** merujuk kepada peratusan bilangan unit yang telah dijual atas jumlah unit yang dilancarkan bagi sesuatu jenis harta tanah dalam tempoh kajian. Dua jenis prestasi jualan telah dikira di dalam laporan ini iaitu prestasi jualan suku tahunan dan prestasi jualan terkumpul.

5. Mulai 1 Januari 2003, harta tanah siap dibina tidak terjual telah didefinisikan sebagai unit kediaman, kedai dan industri yang telah siap dibina DAN telah mendapat Sijil Penyiapan dan Pematuhan/ Sijil Layak Menduduki Sementara tetapi kekal tidak terjual melebihi tempoh sembilan bulan selepas ianya dilancarkan untuk jualan pada atau selepas 1 Januari 1997.
6. **Harta tanah siap dibina tidak terjual** merangkumi unit kediaman, kedai dan industri yang telah siap dibina dan mendapat Sijil Layak Menduduki / Sijil Layak Menduduki Sementara/ Sijil Penyiapan Dan Pematuhan dalam tempoh kajian. Unit ini masih tidak terjual melebihi tempoh sembilan bulan dari tarikh pelancaran atau selepas 1 Januari 1997.
7. **Nilai** harta tanah yang tidak terjual diperolehi daripada harga jualan purata oleh pemaju mengikut jenis harta tanah yang ditawarkan untuk jualan dikalikan dengan bilangan harta tanah yang tidak terjual pada penghujung tempoh kajian.
8. **Harta tanah dalam pembinaan belum terjual** merangkumi unit kediaman, kedai dan industri yang sedang dalam pembinaan dan memperolehi kelulusan pelan bangunan. Unit ini tidak terjual melebihi tempoh sembilan bulan daripada tarikh dilancarkan untuk jualan atau selepas 1 Januari 1997.

## STATUS

1. **The review period** of this report covers the first half of the year 2019 ending on **31<sup>st</sup> December 2019**.

*The coverage of the survey was confined to residential, shops and industrial units.*

2. **Launch of Property Sales** is an activity to start marketing formally the property units of a project by the developer. The launch can be done after obtaining the advertisement and sales permit from the Ministry of Housing and Local Government

*If a scheme was re-launched, the new launch date is considered. The unofficial launch (soft Launch) is a marketing event to provide information about the project before the approval of advertisement and sales permit is obtained. The unofficial date is not considered in data collection.*

3. **New launches** comprise properties in residential schemes launched in year 2019.

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

4. Starting January 1, 2003, "property overhang" has been defined as residential, shops and industrial units that have been completed and issued with a Certificate of Completion and Compliance / Temporary Certificate of Fitness for Occupation but remained unsold for more than nine months after it was launched for sales on or after 1st January 1997.
5. **Property overhang** comprises residential units, shops units and industrial units that are completed with Certificate of Completion and Compliance / Temporary Certificate of Fitness for Occupation in the review period. These units remained unsold for more than nine months from the date of or after 1<sup>st</sup> January 1997.
6. **The value** of overhang properties is derived from the average selling price for the particular type of property offered for sale by the developer multiplied by the number of overhang property at the end of the review period.
7. **Unsold Under Construction property** comprises residential units, shops units and industrial units with building plan approval that are under constructed. These Units remained unsold for more than nine months from the date of launch or after 1st January 1997.

8. **Harta tanah belum dibina belum terjual** merangkumi unit kediaman, kedai dan industri yang belum dibina dan memperolehi kelulusan pelan bangunan. Unit ini tidak terjual melebihi tempoh sembilan bulan daripada tarikh dilancarkan untuk jualan atau selepas 1 Januari 1997.

9. **Sebuah skim perumahan** adalah projek perumahan yang mengandungi sekurang-kurang lima atau lebih bangunan yang digunakan untuk tujuan kediaman. Satu skim perumahan adalah satu identiti. Ianya boleh dibangunkan di atas sekeping tanah dengan satu hakmilik, atau banyak tanah dengan hakmilik yang lebih dari satu, serta boleh dibangunkan dalam beberapa fasa. Pembangunan tersebut boleh bercampur dengan bangunan untuk kegunaan lain seperti perniagaan, industri dan institusi.

8. **Unsold not constructed property** comprises residential units, shops units and industrial units with building plan approval that are not yet constructed. These units remained unsold for more than nine months from the date of launch or after 1st January 1997

9. **A residential scheme** is a housing project comprised a minimum of five or more buildings mainly used for dwelling purposes. A residential scheme has one identity. It may be developed on a land with a single title or on lands with multiple titles and could be developed in phases. The developments can be mixed with buildings for other uses like retail, industrial or institutional.

**SENARAI CAWANGAN  
JABATAN PENILAIAN DAN PERKHIDMATAN HARTA**

Ketua Pengarah Penilaian  
Jabatan Penilaian dan Perkhidmatan Harta,  
Kementerian Kewangan Malaysia,  
Aras 9, Perbendaharaan 2,  
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Faks : 603 - 8886 9001

Pengarah  
Pusat Maklumat Harta Tanah Negara (NAPIC)  
Kementerian Kewangan Malaysia,  
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No. 7, Persiaran Perdana, Presint 2,  
Pusat Pentadbiran Kerajaan Persekutuan  
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Penilai Daerah Kuala Lumpur  
Jabatan Penilaian dan Perkhidmatan Harta,  
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Penilai Daerah Labuan  
Jabatan Penilaian dan Perkhidmatan Harta,  
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Persiaran Perbandaran  
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Tel. : 603 - 5518 4603/ 603- 5519 7825  
Faks : 603 - 5510 7397

Penilai Daerah Shah Alam  
Jabatan Penilaian dan Perkhidmatan Harta,  
Tingkat 3 & 4, Plaza Perangsang,  
Persiaran Perbandaran  
**40000 Shah Alam, Selangor**  
Tel. : 603 - 5519 4823  
Faks : 603 - 5510 8622

Penilai Daerah Segamat  
Jabatan Penilaian dan Perkhidmatan Harta,  
No. 49 & 49-1, Tingkat Bawah & 1, Jalan Genuang,  
**85000 Segamat, Johor**  
Tel. : 607 - 932 3300  
Faks : 607 - 932 4322

Penilai Daerah Bangi  
Jabatan Penilaian dan Perkhidmatan Harta,  
Tingkat 1 & 3, Komplek PKNS,  
Persiaran Bangi,  
**43650 Bandar Baru Bangi, Selangor**  
Tel. : 603 - 8925 5467  
Faks : 603 - 8925 1041

Penilai Daerah Gombak  
Jabatan Penilaian dan Perkhidmatan Harta,  
17A-C & 16B, Lorong Batu Caves 2,  
Wisma Keringat 2,  
**68100 Batu Caves, Selangor**  
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Penilai Daerah Klang  
Jabatan Penilaian Dan Perkhidmatan Harta  
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Jalan Meru  
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Penilai Daerah Sepang  
d/a Jabatan Penilaian Dan Perkhidmatan Harta  
Institut Penilaian Negara (INSPEN)  
Jabatan Penilaian dan Perkhidmatan Harta  
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Penilai Daerah Johor Bahru  
Jabatan Penilaian dan Perkhidmatan Harta,  
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**80100 Johor Bahru, Johor**  
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Penilai Daerah Batu Pahat  
Jabatan Penilaian dan Perkhidmatan Harta,  
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Jalan Bakau Condong,  
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Penilai Daerah Kluang  
Jabatan Penilaian dan Perkhidmatan Harta,  
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Jalan Batu Pahat,  
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Faks : 607 - 774 3810

SENARAI CAWANGAN  
JABATAN PENILAIAN DAN PERKHIDMATAN HARTA

Penilai Daerah Muar  
Jabatan Penilaian dan Perkhidmatan Harta,  
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Jabatan Penilaian dan Perkhidmatan Harta,  
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Penilai Daerah Seberang Perai  
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Jabatan Penilaian dan Perkhidmatan Harta,  
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Penilai Daerah Seremban  
Jabatan Penilaian dan Perkhidmatan Harta,  
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Jalan Yam Tuan,  
**70000 Seremban, Negeri Sembilan**  
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Faks : 606 - 763 9306

Penilai Daerah Jempol  
Jabatan Penilaian dan Perkhidmatan Harta,  
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Faks : 606 - 454 6597/ 606 - 454 6599

Penilai Daerah Alor Setar  
Jabatan Penilaian dan Perkhidmatan Harta,  
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Bandar Muadzam Shah, Anak Bukit  
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Tel. : 604 - 700 1900  
Faks : 604 - 700 1905

Pengarah Penilaian Negeri  
Jabatan Penilaian dan Perkhidmatan Harta,  
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Jalan Sultan Idris Shah,  
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Penilai Daerah Ipoh  
Jabatan Penilaian dan Perkhidmatan Harta,  
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Jalan Sultan Idris Shah,  
**30593 Ipoh, Perak**  
Tel. : 605 - 241 4577  
Faks : 605 - 252 4658

Penilai Daerah Taiping  
Jabatan Penilaian dan Perkhidmatan Harta,  
Tingkat 7, Wisma Persekutuan, Jalan Istana Larut  
**34000 Taiping, Perak**  
Tel. : 605 - 807 2344  
Faks : 605 - 807 2464

Penilai Daerah Teluk Intan  
Jabatan Penilaian dan Perkhidmatan Harta,  
Tingkat 1 & 2, Kompleks SKOMK, Jalan Mahkamah,  
**36000 Teluk Intan, Perak**  
Tel. : 605 - 622 3711  
Faks : 605 - 622 7122

Pengarah Penilaian Negeri  
Jabatan Penilaian dan Perkhidmatan Harta,  
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Jalan MITC, Hang Tuah Jaya,  
**75450 Melaka**  
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Faks : 606 - 232 8202

Penilai Daerah Melaka  
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Penilai Daerah Sungai Petani  
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**08000 Sungai Petani, Kedah**  
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SENARAI CAWANGAN  
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Pusat Bandar Kuah,  
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Faks : 604 - 966 8832

Penilai Daerah Kulim  
Jabatan Penilaian dan Perkhidmatan Harta,  
69-70, Jalan Kelang Lama,  
Taman Manggis,  
**09000 Kulim, Kedah**  
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Faks : 04 - 490 7362

Pengarah Penilaian Negeri  
Jabatan Penilaian dan Perkhidmatan Harta,  
Tingkat 2, Bangunan KWSP,  
Bandar Indera Mahkota  
**25200 Kuantan, Pahang**  
Tel. : 609 - 571 5111  
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