



KEMENTERIAN KEWANGAN  
MALAYSIA

# LAPORAN PASARAN HARTA

## Property Market Report



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





**LAPORAN PASARAN HARTA**  
2022

***PROPERTY MARKET REPORT***  
2022

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

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**GLOSARI**  
**GLOSSARY**

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

**GLOSARI**  
**GLOSSARY**

|  |  |
|--|--|
| 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>                 |
| 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>                       |

## GLOSARI GLOSSARY

|                                  |  |
|----------------------------------|--|
| 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>Preceding 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 mencatatkan pertumbuhan sebanyak 7.0% pada Q4 2022, disokong oleh pengembangan berterusan dalam permintaan domestik, pemulihan dalam pasaran buruh, permintaan produk E&E yang berdaya tahan dan pemulihan aktiviti pelancongan. Penyederhanaan daripada pertumbuhan tinggi sebanyak 14.2% pada suku sebelumnya berikutan langkah rangsangan ekonomi yang semakin berkurangan dan juga kesan asas yang rendah pada suku ketiga 2021.

Secara keseluruhan, prestasi ekonomi Malaysia meningkat kepada 8.7% pada tahun 2022 berbanding 3.1% pada tahun 2021 yang merupakan pertumbuhan tahunan tertinggi yang dicatatkan dalam tempoh 22 tahun (2000: 8.9%).

Sejajar dengan itu, pasaran harta tanah mencatatkan peningkatan pada tahun 2022 didokong oleh prestasi yang lebih baik dalam semua sektor berbanding tahun sebelumnya. Pada tahun 2022, bilangan dan nilai transaksi meningkat sebanyak 29.5% dan 23.6%, masing-masing kepada 389,107 transaksi dan RM179.07 bilion (2021: 300,497 transaksi; RM144.87 bilion). Jumlah bilangan transaksi pada tahun 2022 adalah bilangan transaksi tertinggi yang dicatatkan dalam tempoh 10 tahun (2012: 427,520 transaksi) manakala jumlah nilai transaksi adalah lebih tinggi daripada rekod tertinggi sebelumnya yang dicatatkan pada 2014 (162.97 bilion).

Menurut Jabatan Perangkaan Malaysia (DOSM), Indeks Pengeluaran Perindustrian Malaysia (IPI) bagi tahun 2022 mengecil kepada 6.9% daripada 7.2% yang dicatatkan pada tahun sebelumnya. Pertumbuhan itu disumbangkan oleh pengembangan dalam sektor pembuatan, elektrik dan perlombongan masing-masing sebanyak 8.2%, 4.5% dan 2.8%.

**Table 1 – Percentage Change from Corresponding Quarter of Preceding Year**

| Year        | 2021 | Q1 21 | Q2 21 | Q3 21 | Q4 21 | 2022 | Q1 22 | Q2 22 | Q3 22 | Q4 22 |
|-------------|------|-------|-------|-------|-------|------|-------|-------|-------|-------|
| GDP (% yoy) | 3.1% | -0.5% | 16.1% | -4.5% | 3.6%  | 8.7% | 5.0%  | 8.9%  | 14.2% | 7.0%  |

Source: Department of Statistics Malaysia/ Bank Negara Malaysia

Pelaburan Langsung Asing (FDI) di Malaysia merekodkan aliran masuk bersih yang lebih tinggi sebanyak RM19.3 bilion pada Q4 2022 berbanding RM12.3 bilion pada suku sebelumnya disebabkan oleh aliran masuk dalam instrumen hutang dan suntikan ekuiti berterusan oleh pelabur asing. Pelaburan ini disalurkan terutamanya ke dalam sektor pembuatan dan subsektor perkhidmatan bukan kewangan terutamanya dalam informasi dan komunikasi. Penerimaan FDI utama adalah dari Amerika Syarikat, Switzerland dan Singapura. Secara

## 1.0 OVERVIEW OF THE PROPERTY MARKET

*The Malaysian economy recorded a growth of 7.0% in Q4 2022, supported by the continued expansion in domestic demand, improving labour market conditions, resilient demand for E&E goods and recovery in tourism activities. The moderation from the high growth of 14.2% in the previous quarter reflects waning support from stimulus measures and low base effect from the negative growth in the third quarter of 2021.*

*Overall, Malaysia's economy performance boosted to 8.7% in 2022 as compared to 3.1% in 2021 which is the highest annual growth recorded within the period of 22 years (2000: 8.9%).*

*Correspondingly, the property market recorded an increase in 2022 supported by a better performance in all sectors compared to the previous year. In 2022, total transactions volume and value increased by 29.5% and 23.6%, respectively to 389,107 transactions and RM179.07 billion (2021: 300,497 transactions; RM144.87 billion). Total transactions volume in 2022 is the highest volume recorded within the period of 10 years (2012: 427,520 transactions) whilst total transactions value is higher than the previous record high in 2014 (162.97 billion).*

*According to Department of Statistics Malaysia (DOSM), The Malaysia's Industrial Production Index (IPI) for the year of 2022 narrowed to 6.9% from 7.2% recorded in previous year. The growth was contributed by the expansion in manufacturing, electricity and mining sector which were 8.2%, 4.5% and 2.8% respectively.*

*Foreign Direct Investment (FDI) in Malaysia recorded a higher net inflow of RM19.3 billion in Q4 2022 as compared to RM12.3 billion in the previous quarter due to inflows in debt instruments and continued equity injections by foreign investors. These investments were channelled mainly into the manufacturing sector and non-financial services subsectors particularly in information and communication. Major FDI receipts are mainly from the United State of America, Switzerland and Singapore. Overall in 2022, total net FDI inflows*

keseluruhannya pada 2022, jumlah aliran masuk bersih FDI sebanyak RM73.3 bilion, meningkat sebanyak RM25.1 bilion berbanding tahun lepas (2021: RM48.1 bilion; purata 2011-2019: RM36.6 bilion).

Menurut Institut Penyelidikan Ekonomi Malaysia (MIER), Indeks Sentimen Pengguna terus meningkat dengan berhati-hati pada Q4 2022 pada 105.3 mata (Q3 2022: 98.4), melebihi mata ambang 100 walaupun Indeks Keadaan Perniagaan menyaksikan penurunan ketara pada 85.9 mata (Q3 2022: 99.8), jauh di bawah ambang optimisme. Walaupun CSI masih mengekalkan secara positif berikutan jangkaan peningkatan dalam pendapatan dan peluang pekerjaan, dan jangkaan penurunan inflasi dalam kalangan pengguna, perbelanjaan pengguna yang terancang kekal berhati-hati, dengan pengguna berhasrat untuk menyimpan lebih banyak sekiranya berlaku situasi penurunan pada masa depan. Keyakinan perniagaan telah merosot dengan ketara pada Q4 2022, terutamanya disebabkan oleh penurunan ketara dalam jualan dengan kedua-dua pesanan domestik dan luaran yang berkurangan.

Pasaran harta tanah terus menunjukkan pertumbuhan pada tahun 2022, disokong oleh pelaksanaan pelbagai inisiatif dan bantuan kerajaan, keadaan pasaran buruh yang bertambah baik dan ketibaan pelancong yang lebih tinggi.

Beberapa inisiatif yang digariskan di bawah Bajet 2022 oleh kerajaan telah membantu meningkatkan aktiviti pasaran harta tanah. Inisiatif tersebut adalah:

- i. Peruntukan RM1.5 bilion bagi projek perumahan kumpulan berpendapatan rendah iaitu rumah mesra rakyat dan program bantuan penyelenggaraan.
- ii. Menarik balik pengenaan Cukai Keuntungan Harta Tanah ke atas pelupusan harta tanah pada tahun ke-6 dan seterusnya oleh warganegara Malaysia, pemastautin tetap dan selain daripada syarikat.
- iii. Menjamin sehingga RM2 bilion kepada bank melalui Skim Jaminan Kredit Perumahan (SJKP) dalam membantu pekerja gig, usahawan kecil dan petani dalam mendapatkan pembiayaan rumah.

Kadar Dasar Semalaman (OPR) dinaikkan secara beransur-ansur dari paras terendah 1.75% sejak Mei 2022 sebanyak 25 mata asas masing-masing pada Mei, Julai, September dan November 2022 kepada 2.75%. Jawatankuasa Dasar Monetari (MPC) telah mengambil keputusan untuk membuat pelarasan selanjutnya terhadap tahap akomodasi monetari berikutan prospek pertumbuhan ekonomi Malaysia yang positif dan juga mengurangkan tekanan inflasi yang disebabkan oleh keadaan permintaan yang kukuh, pasaran buruh yang ketat, dan harga komoditi yang tinggi, meskipun keadaan rantaian bekalan global bertambah baik.

*amounted to RM73.3 billion, increased by RM25.1 billion as compared to last year (2021: RM48.1 billion; average 2011-2019: RM36.6 billion).*

*According to Malaysian Institute of Economic Research (MIER), the Consumer Sentiment Index continued to improve cautiously in Q4 2022 at 105.3 points (Q3 2022: 98.4), above the 100-point threshold though Business Conditions Index saw the reverse, as the index has weakened significantly at 85.9 points (Q3 2022: 99.8), far below the optimism threshold. While the CSI still maintain in positive manner due to expected increases in incomes and job opportunities, and expected decrease in inflation among consumers, planned consumer spending remains cautious, with consumer intending to save more in case of a future downturn. The business confidence has weakened significantly in Q4 2022, mainly due to significant drops in sales with both domestic and external orders reduced.*

*The property market continued to record growth in 2022, supported by the implementation of various government initiatives and assistance, improving labour market conditions and higher tourist arrivals.*

*Several initiatives which outlined under Budget 2022 by the government to a certain extent helped improve property market activities. These are:*

- i. RM1.5 billion allocation for low-income groups housing projects i.e. rumah mesra rakyat and maintenance assistance programmes.*
- ii. Lifting the imposition of Real Property Gains Tax on the disposal of properties in the 6th year onwards by Malaysian citizens, permanent residents and other than companies.*
- iii. Guarantees of up to RM2 billion to banks via Skim Jaminan Kredit Perumahan in assisting gig works, small entrepreneurs and farmers in obtaining home financing.*

*The Overnight Policy Rate (OPR) has increased gradually from the lowest level of 1.75% since May 2022 by 25 basis points each in May, July, September and November 2022 to 2.75%. The MPC decided to further adjust the degree of monetary accommodation amid positive growth prospects for the Malaysian economy and to reduce inflationary pressures due to strong demand conditions, tight labour markets, and the elevated commodity prices, despite some improvements in global supply chain conditions.*

| Date      | Change in OPR (%) | New OPR Level (%) |
|-----------|-------------------|-------------------|
| 9-Mar-23  | 0                 | 2.75              |
| 19-Jan-23 | 0                 | 2.75              |
| 3-Nov-22  | 0.25              | 2.75              |
| 8-Sept-22 | 0.25              | 2.50              |
| 6-Jul-22  | 0.25              | 2.25              |
| 11-May-22 | 0.25              | 2.00              |
| 3-Nov-21  | 0                 | 1.75              |
| 9-Sep-21  | 0                 | 1.75              |
| 6-May-21  | 0                 | 1.75              |
| 20-Jan-21 | 0                 | 1.75              |
| 3-Nov-20  | 0                 | 1.75              |
| 10-Sep-20 | 0                 | 1.75              |
| 7-Jul-20  | -0.25             | 1.75              |
| 5-May-20  | -0.50             | 2.00              |
| 3-Mar-20  | -0.25             | 2.50              |
| 22-Jan-20 | -0.25             | 2.75              |

Source: Bank Negara Malaysia

Dari segi permintaan, permohonan pinjaman dan kelulusan untuk pembelian kediaman masing-masing meningkat sebanyak 28.7% dan 48.7% pada tahun 2022. Tahap yang lebih tinggi direkodkan pada 2022 apabila data dikemaskinikan mengikut definisi dan keperluan data terkini. Data permohonan dan kelulusan baharu akan berdasarkan permohonan dan kelulusan masa sebenar pada bulan tersebut, tanpa mengambilkira sela masa atau penarikan balik permohonan oleh pelanggan pada bulan yang sama. Walaupun pertumbuhan yang lebih tinggi direkodkan tetapi trend pertumbuhan kekal sama secara amnya. Begitu juga, permohonan pinjaman dan kelulusan pembelian bukan kediaman juga meningkat masing-masing pada 33.8% dan 92.8%.

*On the demand side, loan applications and approvals for residential purchase increased by 28.7% and 48.7% respectively in 2022. Higher levels recorded in 2022 as the data updated in accordance with the latest data definition and requirement. The new application and approval data will be based on real-time application and approval during the month, irrespective of time lag or application withdrawal by customer in the same month. Though higher growth recorded but the growth trends remain broadly similar. Similarly, loan applications and approval for non-residential purchase also increased at 33.8% and 92.8% respectively.*

Table 3 - Loan Application and Loan Approval for Purchase of Residential

| Year | Purchase of Residential       |                            |                           |                        | Approval/<br>Application (%) |
|------|-------------------------------|----------------------------|---------------------------|------------------------|------------------------------|
|      | Loan Application (RM Billion) | Loan Approval (RM Billion) | % Change Loan Application | % Change Loan Approval |                              |
| 2017 | 239.81                        | 101.52                     | 13.1                      | 15.9                   | 42.3                         |
| 2018 | 240.90                        | 103.70                     | 0.4                       | 2.1                    | 43.1                         |
| 2019 | 260.77                        | 112.57                     | 8.3                       | 8.6                    | 43.2                         |
| 2020 | 266.44                        | 93.12                      | 2.2                       | -17.3                  | 35.0                         |
| 2021 | 349.60                        | 122.00                     | 31.2                      | 31.0                   | 34.9                         |
| 2022 | 450.07                        | 181.37                     | 28.7                      | 48.7                   | 40.3                         |

Source: Bank Negara Malaysia

**Table 4 - Loan Application and Loan Approval for Purchase of Non-Residential**

| Year | Purchase of Residential       |                            |                           |                        | Approval/       |
|------|-------------------------------|----------------------------|---------------------------|------------------------|-----------------|
|      | Loan Application (RM Billion) | Loan Approval (RM Billion) | % Change Loan Application | % Change Loan Approval | Application (%) |
| 2017 | 86.04                         | 31.12                      | 7.6                       | -5.4                   | 36.2            |
| 2018 | 96.93                         | 35.15                      | 12.7                      | 12.9                   | 36.3            |
| 2019 | 97.57                         | 36.55                      | 0.7                       | 4.0                    | 37.5            |
| 2020 | 68.34                         | 22.96                      | -30.0                     | -37.2                  | 33.6            |
| 2021 | 91.49                         | 33.45                      | 33.9                      | 45.7                   | 36.6            |
| 2022 | 122.38                        | 64.49                      | 33.8                      | 92.8                   | 52.7            |

Source: Bank Negara Malaysia

## 2.0 AKTIVITI PASARAN HARTANAH

Pasaran hartanah merekodkan sejumlah 389,107 transaksi bernilai RM179.07 bilion pada 2022. Ini menunjukkan peningkatan sebanyak 29.5% dalam bilangan dan 23.6% dalam nilai berbanding 2021. Daripada jumlah transaksi yang dicatatkan pada tahun tersebut, sebanyak 20.7% (80,373) dan 76.5% (297,700) telah dipindah milik masing-masing pada tahun 2021 dan 2022 manakala peratusan bahagian selebihnya merupakan pindah milik pada tahun sebelumnya. Pasaran utama membentuk 13.8% (53,698 transaksi) daripada jumlah transaksi (pembelian daripada pemaju) manakala yang selebihnya merupakan pasaran sekunder dengan 86.2% (335,409 transaksi).

Bilangan transaksi semua subsektor menunjukkan pergerakan menaik. Subsektor harta tanah kediaman, perdagangan, industri, pertanian dan tanah pembangunan masing-masing mencatatkan pertumbuhan tahun ke tahun masing-masing pada 22.3%, 46.3%, 44.5%, 44.6% dan 35.7%.

Nilai transaksi bergerak seiring dengan subsektor harta tanah kediaman, perdagangan, industri, pertanian dan tanah pembangunan masing-masing mencatatkan peningkatan sebanyak 22.6%, 16.7%, 24.8%, 50.5% dan 16.6%.

Subsektor kediaman menerajui keseluruhan pasaran harta tanah, dengan sumbangan 62.5% dalam bilangan. Ini diikuti oleh pertanian (21.1%), perdagangan (8.4%), tanah pembangunan dan lain-lain (5.9%) dan industri (2.1%). Dari segi nilai, kediaman mendahului dengan bahagian 52.6%, diikuti oleh perdagangan (18.2%), industri (11.8%), pertanian (10.0%) dan tanah pembangunan dan lain-lain (7.4%).

## 2.0 PROPERTY MARKET ACTIVITY

*The property market recorded a total of 389,107 transactions worth RM179.07 billion for 2022. This indicated an increase of 29.5% in volume and 23.6% in value compared to 2021. Of the total transactions recorded in the review year, 20.7% (80,373) and 76.5% (297,700) were transfers dated 2021 and 2022 respectively while the remaining percentage share was for prior years' transfer. Primary market formed 13.8% (53,698 transactions) of the total transactions (purchase from developers) while secondary market took up the remaining 86.2% (335,409 transactions).*

*Volume of transactions across the sub-sectors showed upward movements. Residential, commercial and industrial, agriculture and development land sub-sectors recorded year-on-year growths of 22.3%, 46.3%, 44.5%, 44.6% and 35.7% respectively.*

*Value of transactions moved in tandem with residential, commercial, industrial, agriculture and development land sub-sectors recorded an increase of 22.6%, 16.7%, 24.8%, 50.5% and 16.6% respectively.*

*The residential sub-sector led the overall property market, with 62.5% contribution in volume. This was followed by agriculture (21.1%), commercial (8.4%), development land and others (5.9%) and industrial (2.1%). In terms of value, residential led with 52.6% share, followed by commercial (18.2%), industrial (11.8%), agriculture (10.0%) and development land and others (7.4%).*

Chart 1

Overall Volume of Transactions 2018 – 2022

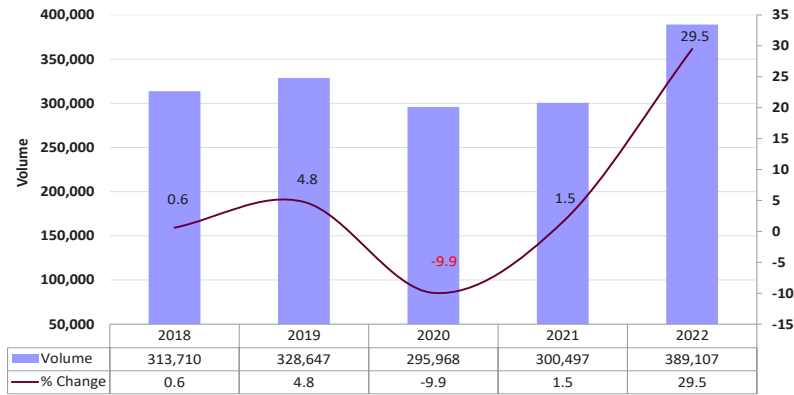


Chart 2

Overall Value of Transactions 2018 – 2022

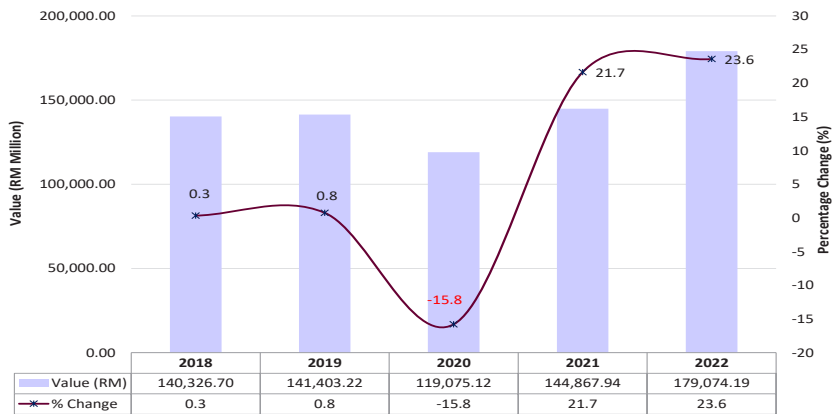


Chart 3

Contribution to Transaction Volume by Sub-sector 2022

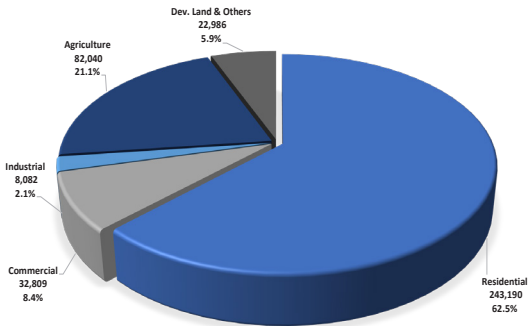
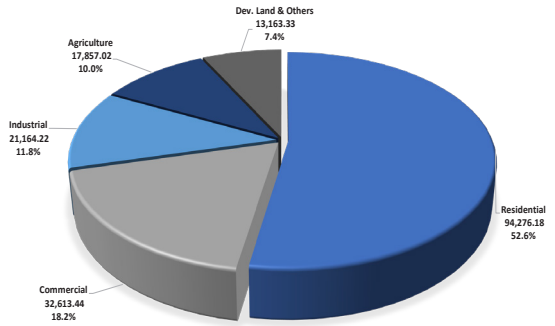


Chart 4

Contribution to Transaction Value by Sub-sector 2022





## 2.1 Harta Kediaman

### Transaksi

Terdapat 243,190 transaksi bernilai RM94.28 bilion dicatatkan pada 2022, meningkat 22.3% dalam bilangan dan 22.6% dalam nilai berbanding tahun 2021. Pasaran sekunder membentuk kira-kira 80.0% (194,749 transaksi) daripada jumlah transaksi manakala pasaran utama (pembelian daripada pemaju) membentuk hampir 20.0% (48,441 transaksi).

Semua negeri mencatatkan jumlah pasaran yang lebih tinggi kecuali WP Labuan yang mencatatkan penurunan dalam aktiviti pasaran. Aliran menaik yang dicatatkan di Pulau Pinang (31.1%), Johor (24.3%), Perak (18.9%), WP Kuala Lumpur (18.4%) dan Selangor (15.9%) menyokong peningkatan keseluruhan dalam subsektor tersebut. Digabungkan, negeri ini membentuk kira-kira 60% daripada jumlah kediaman nasional.

Selangor menyumbang bilangan dan nilai tertinggi terhadap syer pasaran negara, dengan 23.2% dalam bilangan (56,514 transaksi) dan 32.4% dalam nilai (RM30.58 bilion). WP Kuala Lumpur merekodkan 13,182 transaksi tetapi menduduki tempat kedua tertinggi dalam nilai RM11.79 bilion, menyumbang 12.5% syer pasaran. Permintaan terus tertumpu kepada rumah teres, membentuk sekitar 42.0% daripada jumlah transaksi kediaman, diikuti dengan plot kosong (15.1%), unit bertingkat tinggi (15.0%) dan rumah/flat kos rendah (10.6%).

Mengikut kategori harga, RM300,000 dan ke bawah menyumbang 55.8% daripada jumlah keseluruhan, diikuti oleh RM300,001 hingga RM500,000 (24.2%) dan melebihi RM500,000 (20.0%).

## 2.1 Residential Property

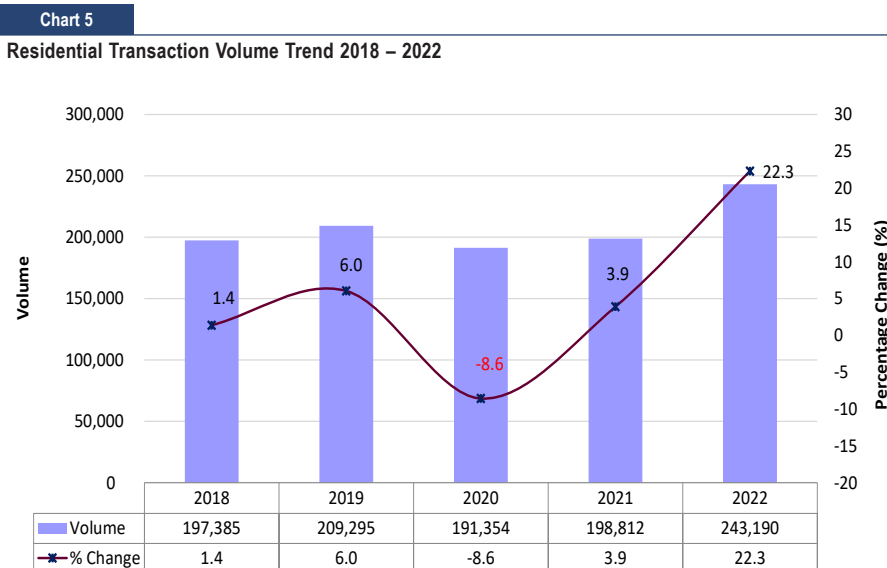
### Transaction

There were 243,190 transactions worth RM94.28 billion recorded in 2022, increased by 22.3% in volume and 22.6% in value as compared with 2021. Secondary market formed about 80.0% (194,749 transactions) of the total transactions while primary market (purchase from developers) formed nearly 20.0% (48,441 transactions).

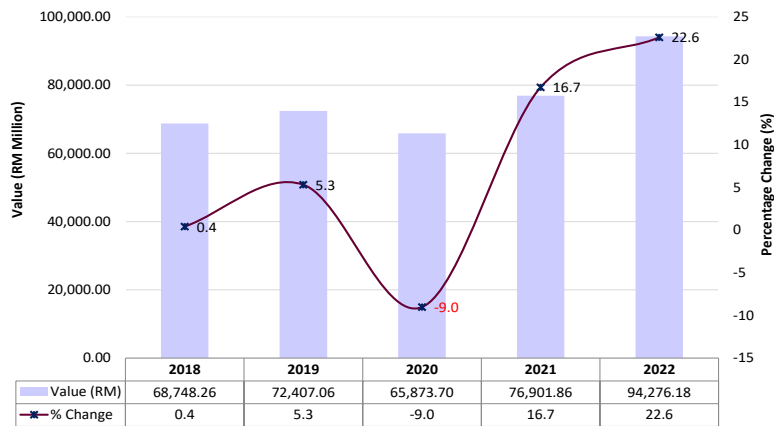
All states recorded higher market volume except for WP Labuan which recorded decline in market activity. The uptrend recorded in Pulau Pinang (31.1%), Johor (24.3%), Perak (18.9%), WP Kuala Lumpur (18.4%) and Selangor (15.9%) supported the overall increase in the sub-sector. Combined, these states formed about 60% of the total national residential volume.

Selangor contributed the highest volume and value to the national market share, with 23.2% in volume (56,514 transactions) and 32.4% in value (RM30.58 billion). WP Kuala Lumpur recorded 13,182 transactions but ranked the second highest in value at RM11.79 billion, contributing 12.5% market share. Demand continued to focus on terraced houses, formed around 42.0% of the total residential transactions, followed by vacant plots (15.1%), high-rise units (15.0%) and low-cost houses/flats (10.6%).

By price category, RM300,000 and below accounted for 55.8% of the total, followed by RM300,001 to RM500,000 (24.2%) and more than RM500,000 (20.0%).



**Chart 6**  
**Residential Transaction Value Trend 2018 -2022**



### Pelancaran Baharu

Pasaran utama merekodkan lebih daripada 54,000 unit pelancaran baharu pada 2022. Walaupun terdapat peningkatan dalam pelancaran baharu, pasaran kekal berhati-hati kerana jumlahnya lebih rendah daripada yang dicatatkan pada tahun-tahun sebelum pandemik. Prestasi jualan adalah sederhana pada 36.0%.

Selangor (11,176 unit), Kuala Lumpur (10,324 unit) dan Johor (7,718 unit) merupakan tiga negeri utama dengan pelancaran baharu yang lebih tinggi. Kedua-dua Kuala Lumpur dan Johor mencatatkan prestasi jualan yang lebih baik iaitu melebihi 40.0% berbanding Selangor, yang mencatatkan kadar yang lebih rendah sebanyak 26.9%.

Unit kondominium/pangsapuri mendominasi pelancaran baharu, menguasai 45.0% (24,366 unit) daripada jumlah keseluruhan, diikuti rumah teres dengan syer 42.2%, terdiri daripada teres satu tingkat (9,422 unit) dan dua hingga tiga tingkat (13,403 unit).

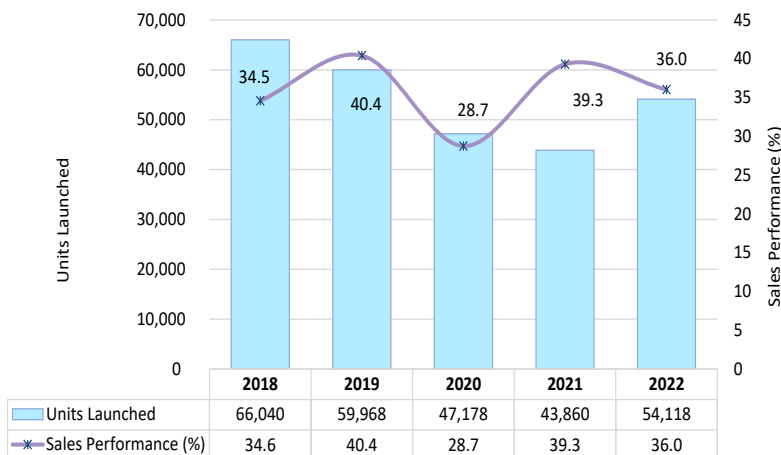
### New Launches

The primary market recorded more than 54,000 newly-launched units in 2022. In spite of the increase in new launches, market remained cautious as the numbers were lower than those recorded in the pre-pandemic years. Sales performance was moderate at 36.0%.

Selangor (11,176 units), Kuala Lumpur (10,324 units) and Johor (7,718 units) were the three leading states with higher new launches. Both Kuala Lumpur and Johor recorded better sales performance at more than 40.0% as compared to Selangor, which recorded a lower rate of 26.9%.

Condominium/apartment units dominated the new launches, capturing 45.0% (24,366 units) of the total, followed by terraced houses with 42.2% share, comprised single storey (9,422 units) and two to three storey (13,403 units).

**Chart 7**  
**New Launches & Sales Performance 2018 – 2022**



## Status Pasaran

Keadaan kediaman siap dibina tidak terjual bertambah baik dengan bilangannya yang berkurangan berbanding tahun sebelumnya. Sebanyak 27,746 unit siap dibina tidak terjual bernilai RM18.41 bilion dicatatkan pada 2022, masing-masing berkurangan sebanyak 24.7% dan 19.2% dalam bilangan dan nilai berbanding 2021 (36,863 unit bernilai RM22.79 bilion).

Johor mengekalkan jumlah dan nilai siap dibina tidak terjual tertinggi dalam negara dengan 5,258 unit bernilai RM4.33 bilion, masing-masing merangkumi 19.0% dan 23.5% dalam jumlah nasional. Ia diikuti oleh Selangor (3,698 unit), Pulau Pinang (3,593 unit) dan WP Kuala Lumpur (3,429 unit). Dari segi nilai, yang kedua tertinggi ialah Selangor (RM3.36 bilion), diikuti WP Kuala Lumpur (RM3.15 bilion) dan Pulau Pinang (RM2.74 bilion).

Kondominium/pangsapuri membentuk 61.9% (17,162 unit) daripada jumlah siap dbina tidak terjual nasional, diikuti oleh rumah teres (20.3%; 5,636 unit). Mengikut lingkungan harga, harta tanah dengan harga RM500,001 hingga RM1.0 juta membentuk 33.6% (9,323 unit) daripada jumlah keseluruhan, lebih tinggi daripada 30.2% pada 2021. Harga dalam lingkungan RM300,001 dan RM500,000 menduduki tempat kedua, merangkumi 29.3% (8,128 unit). Manakala, rumah dalam lingkungan harga mampu milik di bawah RM300,000 membentuk 23.5% (6,509 unit) daripada jumlah keseluruhan dan diikuti oleh lingkungan harga melebihi RM1.0 juta membentuk 13.6% (3,786 unit).

Unit dalam pembinaan belum terjual bertambah baik apabila jumlahnya menurun kepada 57,649 unit (2021: 70,231 unit), dikurangkan sebanyak 17.9% manakala belum dibina belum terjual mencatatkan penurunan mendadak sebanyak 49.7% dalam jumlah dengan 11,053 unit (2021: 21,960 unit).

## Market Status

The residential overhang situation improved as the numbers reduced compare to previous year. A total of 27,746 overhang units worth RM18.41 billion recorded in 2022, reduced by 24.7% and 19.2% in volume and value respectively against 2021 (36,863 units worth RM22.79 billion).

Johor retained the highest number and value of overhang in the country with 5,258 units worth RM4.33 billion, accounting to 19.0% and 23.5% respectively of the national total. Selangor (3,698 units), Pulau Pinang (3,593 units) and WP Kuala Lumpur (3,429 units) followed suit. In terms of value, the second highest was Selangor (RM3.36 billion), followed by WP Kuala Lumpur (RM3.15 billion) and Pulau Pinang (RM2.74 billion).

Condominium/apartment formed 61.9% (17,162 units) of the national total overhang, followed by terraced houses (20.3%; 5,636 units). By price range, those priced at RM500,001 to RM1.0 million formed 33.6% (9,323 units) of the total, higher than 30.2% in 2021. Price range between RM300,001 and RM500,000 came second, accounting for 29.3% (8,128 units). Meanwhile, houses in the affordable price range of below RM300,000 formed another 23.5% (6,509 units) of the total and followed by more than RM1.0 million price range formed 13.6% (3,786 units).

The unsold under construction improved as the numbers dropped to 57,649 units (2021: 70,231 units), declined by 17.9% meanwhile unsold not constructed recorded sharply decrease by 49.7% in number with 11,053 units (2021: 21,960 units).

**Chart 8**  
Residential Market Status 2018 – 2022

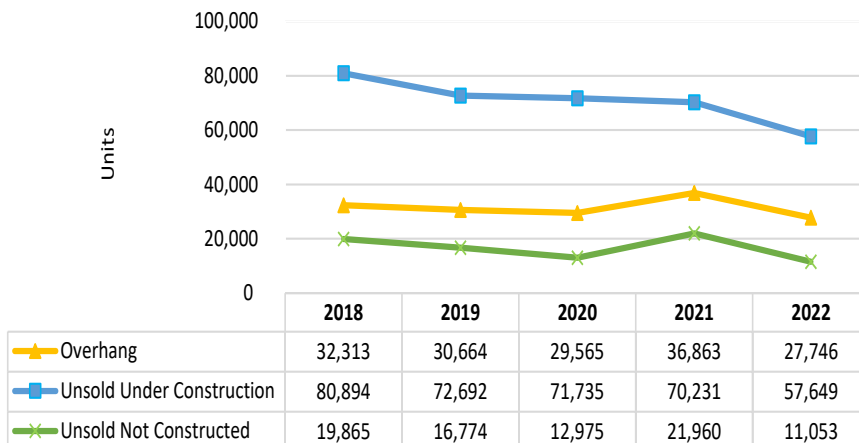
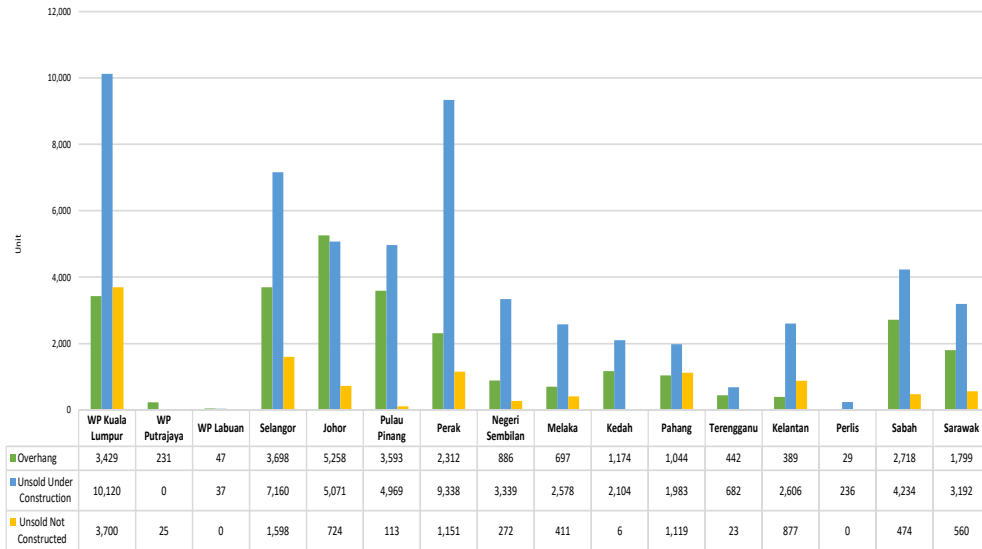




Chart 9

Residential Market Status by State 2022



### Aktiviti Pembinaan

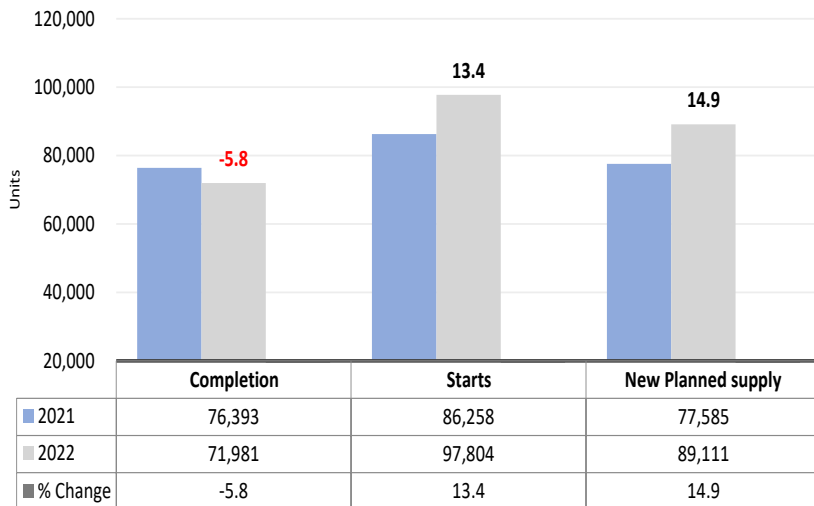
Dalam segmen pembinaan, unit kediaman mula dibina meningkat sebanyak 13.4% kepada 97,804 unit pada 2022 berbanding 2021, diterajui Selangor dengan 18,253 unit. Begitu juga, penawaran baharu dirancang meningkat 14.9% kepada 89,111 unit diterajui oleh WP Kuala Lumpur dengan 26,769 unit. Sebaliknya, siap dibina berkurangan sebanyak 5.8% kepada 71,981 unit. Terdapat hampir 6.08 juta unit kediaman sedia ada dengan lebih 0.41 juta unit penawaran akan datang dan hampir 0.39 juta unit penawaran dirancang pada akhir tahun.

### Construction Activity

In the construction segment, housing starts up by 13.4% to 97,804 units in 2022 compared to 2021, led by Selangor with 18,253 units. Similarly, new planned supply increased 14.9% to 89,111 units led by WP Kuala Lumpur with 26,769 units. Contrarily, completions reduced by 5.8% to 71,981 units. There were nearly 6.08 million existing residential units with slightly more than 0.41 million in the incoming supply and nearly 0.39 million in the planned supply as at year-end.

Chart 10

Residential Construction Activity



## Pergerakan Harga

Indeks Harga Rumah Malaysia (MHPI) berada pada 208.4 mata pada 2022P dengan pertumbuhan tahunan yang rendah sebanyak 2.8%. Mengikut jenis, rumah teres mencatatkan pertumbuhan tahunan tertinggi sebanyak 3.7% diikuti oleh unit bertingkat tinggi (3.4%) dan berkembar (2.9%) manakala sesebuah menurun sebanyak 2.9%. Semua negeri mencatat pertumbuhan tahun ke tahun pada 2022 kecuali WP Kuala Lumpur, turun sedikit sebanyak 0.2%. Selangor, Johor dan Pulau Pinang masing-masing mencatatkan pertumbuhan tahun ke tahun sebanyak 3.4%, 2.2% dan 3.2%.

## Price Movements

The Malaysian House Price Index (MHPI) stood at 208.4 points in 2022P with a low annual growth of 2.8%. By type, terraced houses recorded the highest annual growth of 3.7% followed by high-rise (3.4%) and semi-detached (2.9%) whereas detached dropped by 2.9%. All states recorded annual growth in 2022 except for WP Kuala Lumpur, down marginally by 0.2%. Selangor, Johor and Pulau Pinang recorded an annual growth of 3.4%, 2.2% and 3.2% respectively.

Chart 11

MHPI: Point and Annual Changes by Type 2010 –2022<sup>P</sup>

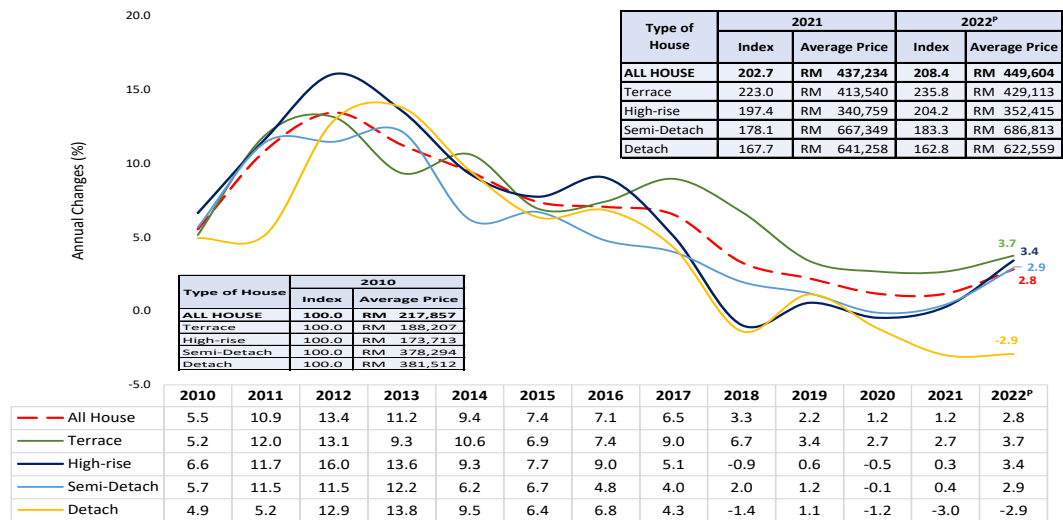
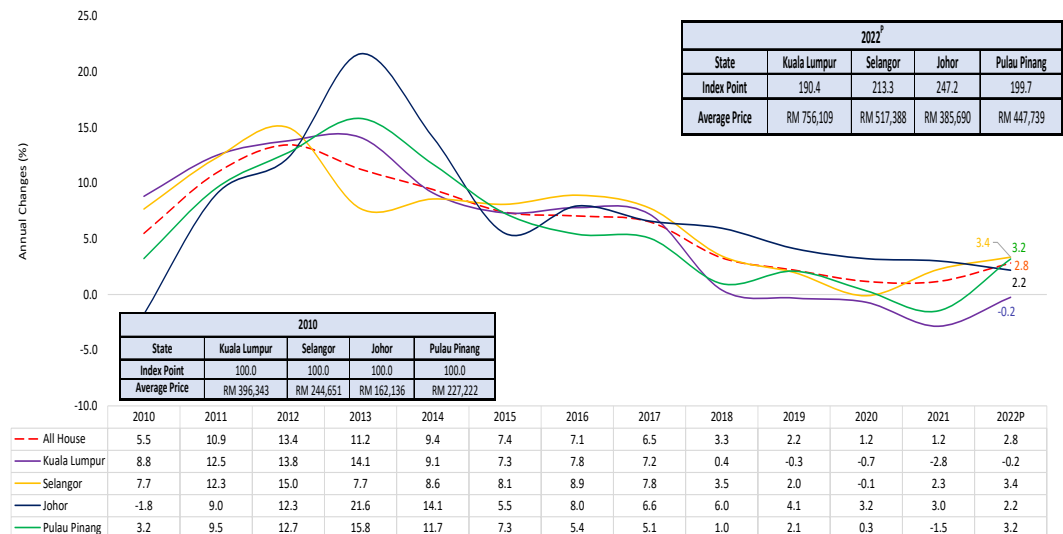


Chart 12

MHPI: Point and Annual Changes in Major States 2010 - 2022<sup>P</sup>



## Sewa

Pasaran sewa pada umumnya stabil dengan pergerakan menaik direkodkan di kawasan pilihan yang mempunyai jaringan perhubungan yang cekap, bersebelahan dengan stesen LRT dan MRT serta yang terletak berhampiran institusi pengajian tinggi. Di WP Kuala Lumpur, pasaran kediaman secara amnya stabil untuk rumah teres manakala bangunan tinggi mencatatkan trend meningkat dalam beberapa skim strata iaitu 11 Mont Kiara, Almaspuri, 1 Razak Mansion, The Z Residence dan Trinity Aquata.

Selangor dan Johor menyaksikan pasaran sewa yang stabil. Teres dua tingkat di USJ 1- USJ 20 berjualat antara RM1,200 hingga RM2,000 sebulan manakala rumah serupa di Horizon Hills dan Taman Laguna di Johor Bahru mencatatkan sewa lebih tinggi antara RM1,700 hingga RM2,500 sebulan. Di wilayah utara, pasaran sewa di Pulau Pinang secara amnya stabil dengan beberapa pergerakan menaik untuk rumah teres di semua daerah kecuali Daerah Seberang Perai Tengah. Seri Tanjung Pinang menyaksikan teres tiga tingkatnya memperoleh sewa sebanyak RM3,800 sebulan.

## 2.2 Harta Perdagangan

### Transaksi

Subsektor itu mencatatkan peningkatan dalam aktiviti pasaran pada 2022. Terdapat 32,809 transaksi bernilai RM32.61 bilion direkodkan pada 2022, meningkat sebanyak 46.3% dalam bilangan dan 16.7% dalam nilai berbanding 2021 (22,428 transaksi bernilai RM27.94 bilion). Peningkatan di dalam semua negeri dan transaksi utama yang melibatkan kompleks perniagaan dan pejabat binaan khas yang direkodkan dalam tempoh kajian telah menyumbang kepada keseluruhan pasaran yang lebih baik.

Selangor menyumbang bilangan dan nilai tertinggi kepada syer pasaran nasional, dengan 26.4% dalam bilangan (8,654 transaksi) dan 31.7% dalam nilai (RM10.35 bilion). WP Kuala Lumpur menduduki tempat kedua dengan 14.6% dalam bilangan (4,777 transaksi) dan 26.0% dalam nilai (RM8.49 bilion) dan Johor dengan 14.6% dalam bilangan (4,787 transaksi) dan 14.0 % dalam nilai (RM4.57 bilion).

## 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 WP Kuala Lumpur, residential market was generally stable for terrace houses while high-rise charted upward trend in several strata schemes namely 11 Mont Kiara, Almaspuri, 1 Razak Mansion, The Z Residence and Trinity Aquata.*

*Selangor and Johor saw stable rental market. Double-storey terrace in USJ 1- USJ 20 ranged from RM1,200 to RM2,000 per month while similar houses in Horizon Hills and Taman Laguna in Johor Bahru recorded higher rental ranging from RM1,700 to RM2,500 per month. In the northern region, the rental market in Pulau Pinang was stable generally with some upward movements for terrace houses in all districts except Seberang Perai Tengah District. Seri Tanjung Pinang saw its three-storey terrace fetching rental of RM3,800 per month.*

## 2.2 Commercial Property

### Transaction

*The sub-sector recorded a further increase in market activity in 2022. There were 32,809 transactions worth RM32.61 billion recorded in 2022, increased by 46.3% in volume and 16.7% in value as compared with 2021 (22,428 transactions worth RM27.94 billion). The increase in all states and major transactions involving shopping complex and purpose-built office recorded in the review period contributed to the overall improved market.*

*Selangor contributed the highest volume and value to the national market share, with 26.4% in volume (8,654 transactions) and 31.7% in value (RM10.35 billion). WP Kuala Lumpur came second with 14.6% in volume (4,777 transactions) and 26.0% in value (RM8.49 billion) and Johor with 14.6% in volume (4,787 transactions) and 14.0 % in value (RM4.57 billion).*

Chart 13

Commercial Transactions Volume 2018 – 2022

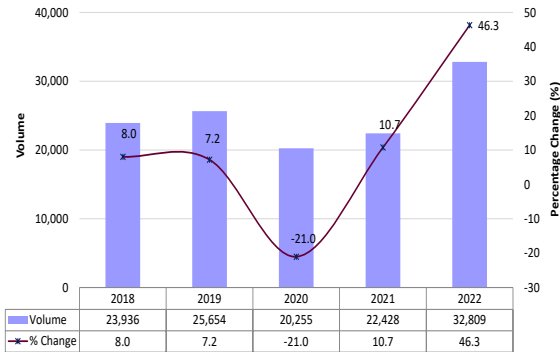
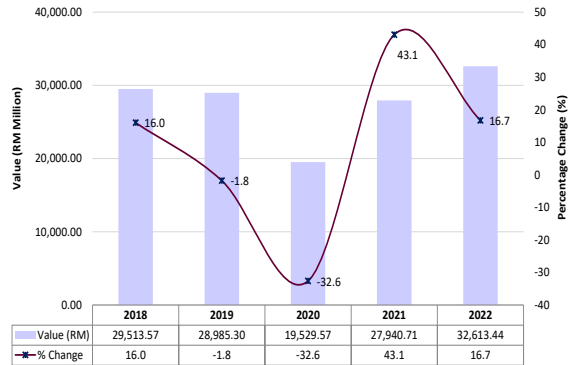


Chart 14

Commercial Transactions Value 2018 – 2022



### 2.2.1 Kedai (Kedai 1 - 6½ tingkat & Kedai Pra-perang)

#### Transaksi

Segmen kedai merekodkan 16,862 transaksi bernilai RM14.2 bilion, menguasai 51.4% daripada bilangan transaksi harta tanah perdagangan dan 43.5% daripada jumlah nilai. Aktiviti pasaran mencatatkan peningkatan sebanyak 45.7% dalam bilangan dan 48.2% dalam nilai (2021: 11,574 transaksi bernilai RM9.6 bilion).

Selangor menyumbang bilangan dan nilai tertinggi kepada syer pasaran, dengan 19.0% (3,207 transaksi) dan 29.9% daripada jumlah nilai (RM4.2 bilion) diikuti Johor dengan 17.1% (2,880 transaksi) dan 16.3% daripada jumlah nilai ( RM2.3 bilion). Mengikut jenis, kedai dua hingga dua setengah tingkat menguasai lebih daripada 53.0% (8,970 transaksi) syer pasaran kedai, diikuti oleh kedai tiga hingga tiga setengah tingkat, mencatatkan 27.4% syer (4,628 transaksi).

#### Status Pasaran

Segmen kedai siap dibina tidak terjual meningkat kepada 6,720 unit dengan nilai RM5.84 bilion, meningkat sebanyak 1.6% dalam bilangan dan naik 1.1% dalam nilai berbanding 2021. Kedai dalam pembinaan belum terjual dan belum dibina belum terjual menyaksikan sebaliknya, turun sebanyak 28.8% (2,777 unit) dan 9.0% (365 unit). Johor menyumbang hampir 26.0% daripada bilangan kedai siap dibina tidak terjual dan 28.7% dalam nilai (1,731 unit bernilai RM1.67 bilion) dan dalam pembinaan belum terjual dengan 36.2% syer (1,005 unit).

### 2.2.1 Shop (1 - 6½ storey Shop & Pre-war Shop)

#### Transaction

Shop segment recorded 16,862 transactions worth RM14.2 billion, dominating 51.4% of the commercial property transactions volume and 43.5% of the total value. Market activity recorded an increase of 45.7% in volume and 48.2% in value (2021: 11,574 transactions worth RM9.6 billion).

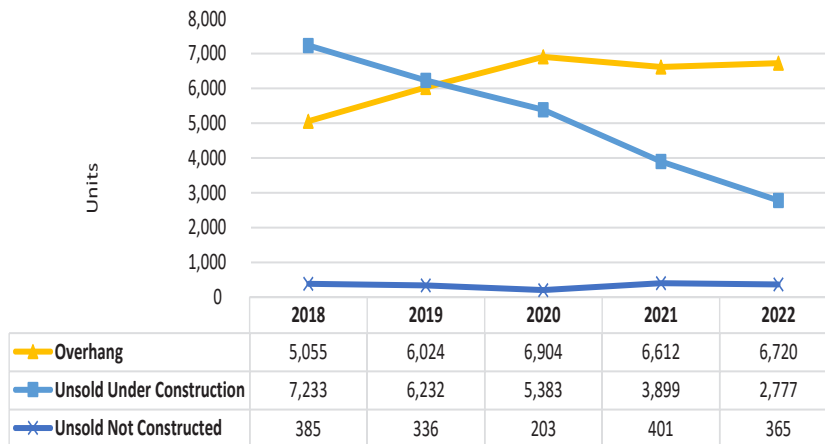
Selangor contributed the highest volume and value to the market share, with 19.0% (3,207 transactions) and 29.9% of the total value (RM4.2 billion) followed by Johor with 17.1% (2,880 transactions) and 16.3% of the total value (RM2.3 billion). By type, two to two and a-half storey shops captured more than 53.0% (8,970 transactions) of the shops' market share, followed by three to three and a-half storey shops, registering 27.4% share (4,628 transactions).

#### Market Status

Shop overhang segment increased to 6,720 units with a value of RM5.84 billion, up by 1.6% in volume and up 1.1% in value against 2021. The unsold under construction and not constructed saw the reverse, down by 28.8% (2,777 units) and 9.0% (365 units). Johor accounted for nearly 26.0% of shop overhang volume and 28.7% in value (1,731 units worth RM1.67 billion) and the unsold under construction with 36.2% share (1,005 units).

Chart 15

## Shop Market Status 2018 - 2022



## Aktiviti Pembinaan

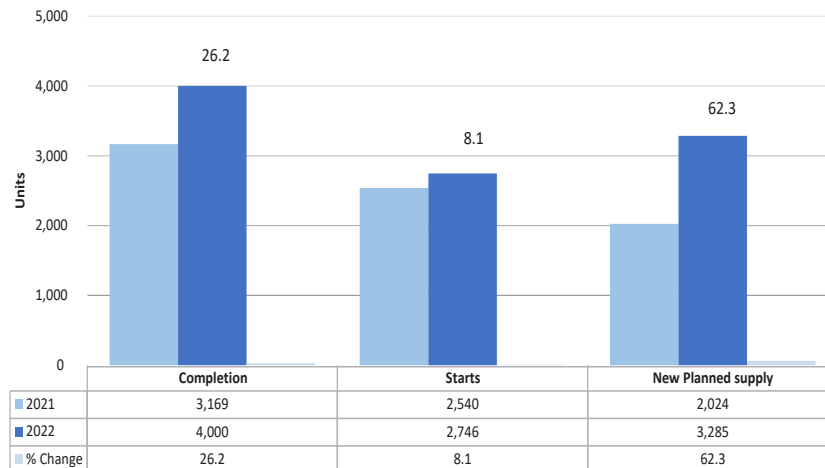
Dari segi penawaran, aktiviti pembinaan mencatatkan peningkatan dalam siap dibina, mula dibina dan penawaran baharu dirancang, masing-masing meningkat sebanyak 26.2% kepada 4,000 unit, 8.1% kepada 2,746 unit dan 62.3% kepada 3,285 unit. Pada akhir tahun, terdapat hampir 548,000 kedai sedia ada dengan lebih daripada 25,000 unit penawaran akan datang dan hampir 30,000 unit penawaran dirancang.

## Construction Activity

On the supply front, construction activity recorded an increase in completion, starts and new planned supply, each up by 26.2% to 4,000 units, 8.1% to 2,746 units and 62.3% to 3,285 units respectively. As at year-end, there were nearly 548,000 existing shops with more than 25,000 units in the incoming supply and nearly 30,000 units in the planned supply.

Chart 16

## Shop Construction Activity



## Harga

Harga kedai menyaksikan prestasi bercampur-campur secara menyeluruh. Di WP Kuala Lumpur, kedai tiga tingkat di Rimbunan Avenue dan Taman Tun Dr. Ismail dipindah milik di antara RM3.2 juta dan RM6.1 juta, masing-masing meningkat 14.1% dan 8.8%. Di Selangor, kedai dua tingkat di Damansara Promenade dipindahmilik

## Price

Prices of shops witnessed mixed performance across the board. In WP Kuala Lumpur, three storey shops in Rimbunan Avenue and Taman Tun Dr. Ismail were transacted between RM3.2 million and RM6.1 million, increased by 14.1% and 8.8% respectively. In Selangor, two storey shops in Damansara Promenade

pada RM1.43 juta hingga RM1.45 juta, meningkat 6.9%. Walau bagaimanapun, kedai yang sama di Sime UEP Industri Park dan Shah Alam Utama (Cahaya Alam) masing-masing menurun sebanyak 8.5% dan 9.0%. Di Johor, kedai dua tingkat di Taman Bukit Indah dan Taman Century, Johor Bahru masing-masing meningkat 6.2% dan 6.7% kepada RM1.10 juta – RM1.62 juta dan RM1.60 juta.

### Sewa

Penyewaan kedai di tingkat bawah pada umumnya stabil. Di WP Kuala Lumpur, sewa kedai tingkat bawah kekal tinggi di Changkat Bukit Bintang dari RM22,000 kepada RM30,200 sebulan. Pandan Indah, Bandar Tasik Selatan dan Fraser Business Park masing-masing mengalami peningkatan sebanyak 7.3%, 6.8% dan 6.1%.

Di Selangor, sewa secara amnya stabil dengan Daerah Petaling, Klang dan Gombak menunjukkan pergerakan bercampur. Seksyen 25 Shah Alam (Sri Muda) dan Bandar Saujana Utama mencatatkan pertumbuhan kecil masing-masing sebanyak 7.6% dan 7.1%. Terdapat beberapa skim di Cyberjaya mengalami sedikit penurunan di antara 2.7% hingga 5.8% dengan sewa dalam lingkungan RM3,500 hingga RM5,500 sebulan.

Di Johor Bahru, sewa kedai di tingkat bawah adalah stabil di kawasan utama pusat bandar, sementara di Jalan Wong Ah Fook dan Jalan Station kekal tinggi pada RM6,900 hingga RM14,000 sebulan. Sewa meningkat dengan ketara sebanyak 20.8% di Taman Tasik Indah dengan sewa yang tinggi di antara RM1,300 hingga RM1,600 sebulan.

Di Pulau Pinang, sewa kedai tingkat bawah adalah stabil kecuali di luar pusat bandar yang menunjukkan pergerakan bercampur. Kedai baharu dengan reka bentuk moden seperti Juru Sentral dan Pusat Perniagaan Sentral Jaya mencatatkan harga sewa yang tinggi di antara RM7,000 hingga RM15,000 sebulan.

## 2.2.2 Pangsapuri Khidmat

### Transaksi

Segmen pangsapuri khidmat merekodkan 6,821 transaksi bernilai RM4.50 bilion, membentuk 20.8% daripada jumlah transaksi harta tanah perdagangan dan 13.8% daripada nilai. Prestasi pasaran mencatatkan peningkatan sebanyak 56.5% dalam bilangan dan 59.4% dalam nilai transaksi (2021: 4,359 transaksi bernilai RM2.82 bilion). Mengikut negeri, WP Kuala Lumpur dan Selangor menyumbang jumlah pasaran yang lebih tinggi kepada jumlah nasional, masing-masing dengan syer 41.3% (2,817 transaksi) dan 35.7% (2,435 transaksi).

was transacted at RM1.43 million to RM1.45 million, increased by 6.9%. However, similar shops in Sime UEP Industri Park and Shah Alam Utama (Cahaya Alam) decreased by 8.5% and 9.0% respectively. In Johor, two storey shops in Taman Bukit Indah and Taman Century, Johor Bahru increased by 6.2% and 6.7% to RM1.10 million – RM1.62 million and RM1.60 million respectively.

### Rental

The ground-floor shop rentals were generally stable. In WP Kuala Lumpur, ground floor shop rents remained high in Changkat Bukit Bintang from RM22,000 to RM30,200 per month. Pandan Indah, Bandar Tasik Selatan dan Fraser Business Park experienced an increase of 7.3%, 6.8% and 6.1% respectively.

In Selangor, rental was generally stable with Petaling, Klang and Gombak Districts saw mixed movements. Seksyen 25 Shah Alam (Sri Muda) and Bandar Saujana Utama recorded a marginal increase of 7.6% and 7.1% respectively. Several schemes in Cyberjaya experienced slight decrease of 2.7% to 5.8% with rental ranging from RM3,500 to RM5,500 per month.

In Johor Bahru, ground floor shop rents were stable in the central town prime area, while Jalan Wong Ah Fook and Jalan Station remained high at RM6,900 to RM14,000 per month. There was a significant increase of 20.8% in Taman Tasik Indah, rental ranging from RM1,300 to RM1,600 per month.

In Pulau Pinang, ground floor shop rents were stable except outside city center showing a mixed movement. New shops with modern designs such as Juru Sentral and Pusat Perniagaan Sentral Jaya recorded high rental rates ranging from RM7,000 to RM15,000 per month.

## 2.2.2 Serviced Apartment

### Transaction

Serviced apartment segment recorded 6,821 transactions worth RM4.50 billion, formed 20.8% of the commercial property transactions volume and 13.8% of the value. Market performance recorded an increase of 56.5% in volume and 59.4% in value of transactions (2021: 4,359 transactions worth RM2.82 billion). By state, WP Kuala Lumpur and Selangor contributed higher market volume to the national total, each with 41.3% (2,817 transactions) and 35.7% (2,435 transactions) market share.



## Status Pasaran

Keadaan bilangan unit siap dibina tidak terjual pangsapuri khidmat bertambah baik sedikit dengan 23,978 unit bernilai RM20.19 bilion, turun sebanyak 1.3% di dalam kedua-dua bilangan dan nilai berbanding 2021 (24,295 unit dengan nilai RM20.46 bilion).

Mengikut negeri, Johor adalah negeri yang mempunyai pangsapuri khidmat siap dibina tidak terjual yang tertinggi dengan 58.9% syer dalam bilangan (14,132 unit) dan 60.6% dalam nilai (RM12.23 bilion); hampir semua unit siap dibina tidak terjual ini berada di Daerah Johor Bahru (14,014 unit). Kebanyakan harga unit tidak terjual berada dalam lingkungan harga ini, iaitu melebihi RM500,000 hingga RM1.00 juta (15,837 unit, 66.0%) dan melebihi RM1.00 juta (5,441 unit, 22.7%).

Begitu juga, unit dalam pembinaan belum terjual berkurang kepada 33,101 unit, turun sebanyak 21.4% tetapi unit belum dibina belum terjual meningkat kepada 10,644, naik sebanyak 27.3%. WP Kuala Lumpur memegang jumlah tertinggi unit dalam pembinaan tidak terjual, dengan 43.5% syer (14,401 unit), diikuti oleh Selangor dengan 24.8% syer (8,212 unit) dan Johor 17.7% (5,851 unit).

## Market Status

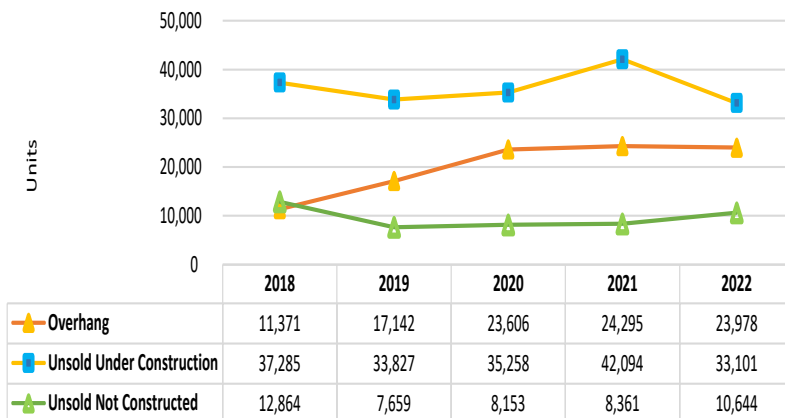
*Serviced apartment segment overhang situation slightly improved with 23,978 overhang units worth RM20.19 billion, down by 1.3% in both volume and value against 2021 (24,295 units with a value of RM20.46 billion).*

*By state, Johor was the highest serviced apartment overhang state with 58.9% share in volume (14,132 units) and 60.6% share in value (RM12.23 billion); almost all of these overhang units were in Johor Bahru District (14,014 units). Most of the overhang fell in these two price brackets, namely above RM500,000 to RM1.00 million (15,837 units, 66.0%) and above RM1.00 million (5,441 units, 22.7%).*

*Similarly, the unsold under construction decreased to 33,101 units, down by 21.4% but not constructed increased to 10,644, up by 27.3%. WP Kuala Lumpur held the highest number of unsold under construction, with 43.5% share in volume (14,401 units), followed by Selangor with 24.8% share (8,212 units) and Johor 17.7% (5,851 units).*

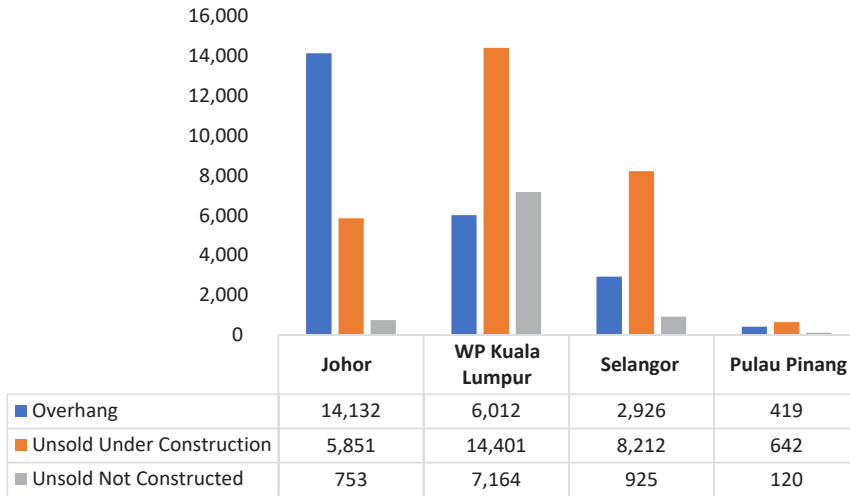
Chart 17

Serviced Apartment Market Status 2018 – 2022



**Chart 18**

**Serviced Apartment Market Status in Major States 2022**



**Aktiviti Pembinaan**

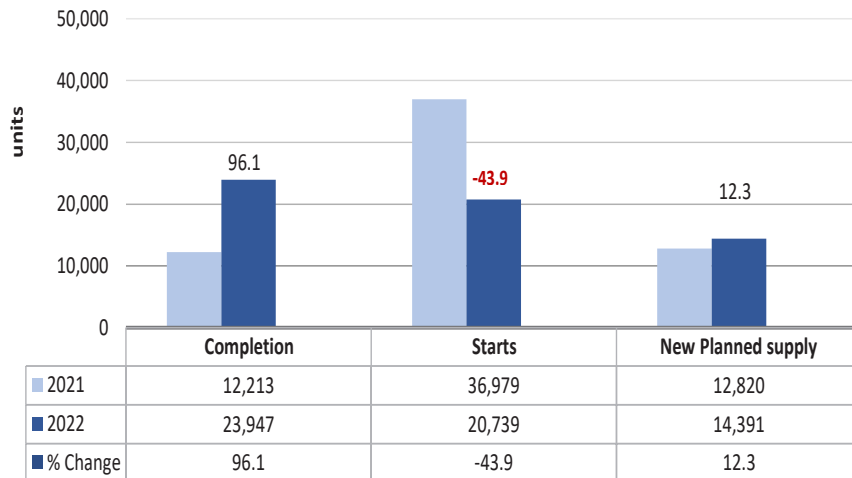
Dari segi penawaran, aktiviti pembinaan menyaksikan aliran bercampur-campur dengan unit siap dibina meningkat hampir satu kali ganda kepada 23,947 unit manakala mula dibina menurun sebanyak 43.9% kepada 20,739 unit dan penawaran baharu dirancang meningkat 12.3% kepada 14,391 unit. Terdapat lebih daripada 319,000 unit pangsapuri khidmat sedia ada dengan lebih daripada 158,000 unit dalam penawaran akan datang dan 146,000 unit dalam penawaran dirancang pada akhir tahun.

**Construction Activity**

On the supply front, construction activity saw mixed trend with completion increased by nearly one-fold to 23,947 units whereas starts decreased by 43.9% to 20,739 units and new planned supply increased 12.3% to 14,391 units. There were more than 319,000 existing serviced apartments units with more than 158,000 units in the incoming supply and 146,000 units in the planned supply as at year-end.

**Chart 19**

**Serviced Apartment Construction Activity**



**Harga dan Sewa**

Harga pangsapuri khidmat menunjukkan prestasi bercampur di beberapa lokasi. Di WP Kuala Lumpur, pangsapuri khidmat berharga melebihi RM1 juta, seperti di Four Seasons Place menguncup sebanyak 14.3%.

**Price and Rental**

Prices of serviced apartments showed a mixed performance in a few locations. In WP Kuala Lumpur, serviced apartments priced above RM1 million, such as Four Seasons Place contracted by 14.3%. Likewise,



Begitu juga, Casa Residency, G Residences dan Menara Soho juga menguncup masing-masing pada 12.6%, 11.8% dan 10.0%. Walau bagaimanapun, Vogue Suites One, Residensi Opus dan Pangsapuri Aria masing-masing meningkat pada 16.5%, 13.8% dan 11.5%. Di Selangor, pangsapuri khidmat di Serdang Skyvillas dan Vista Alam mencatatkan peningkatan harga masing-masing sebanyak 11.3% dan 10.0%. Begitu juga, harga pangsapuri khidmat di Johor Bahru menunjukkan prestasi bercampur dengan 8scape Residensi meningkat sebanyak 10.0% manakala Teega Residence @ Puteri Harbour menurun sebanyak 10.3%.

Pasaran sewa secara amnya stabil di WP Kuala Lumpur manakala Selangor menggambarkan pergerakan yang bercampur-campur. Purata kadar pulangan kasar di seluruh negeri berada dalam julat 2.5% hingga 6.8%. Di Kuala Lumpur Section 1-100, 188 Suites memperoleh julat sewa bulanan yang lebih tinggi antara RM2,900 hingga RM3,700 (2021: RM2,900 sebulan) meningkat sebanyak 14.0%. Begitu juga, Gravit 8 di Daerah Klang, Selangor menyaksikan peningkatan sebanyak 9.6% walaupun pada julat sewa yang lebih rendah iaitu RM1,200 hingga RM1,300 sebulan (2021: RM1,000 – RM1,350 sebulan).

### 2.2.3 Kompleks Perniagaan

#### Transaksi

Tahun ini mencatatkan sembilan transaksi kompleks perniagaan dengan jumlah nilai RM377.9 juta. Ringkasan transaksi adalah seperti yang disenaraikan di bawah:

| No | State           | Lot / Name of Property   | Location/Mukim/ Daerah  | Transaction Year | Consideration (RM) |
|----|-----------------|--|---|------------------|--------------------|
| 1  | WP Kuala Lumpur | Boulavard Bussiness Park   | Jalan Kuching/Kuala Lumpur                                      | 2022             | 56,000,000         |
| 2  | Johor           | Pasaraya Econsave<br>Taman Scientex                              | Taman Scientex, Pasir Gudang/<br>Johor Bahru                    | 2022             | 25,000,000         |
| 3  | Melaka          | MYDIN Hypermarket  | Jalan MITC/Bukit Katil  | 2022             | 142,000,000        |
| 4  | Sarawak         | Aiman Mall   | Aiman Commercial Centre,<br>Jalan Datuk Mohd Musa/<br>Samarahan | 2022             | 30,000,000         |
| 5  | Selangor        | LOTUS Kajang   | Taman Saujana Impian  | 2021             | 79,900,000         |
| 6  | Negeri Sembilan | Pasaraya Gmart   | Off Bandar Gemas/Tampin,<br>Bandar Gemas                        | 2021             | 6,000,000          |
| 7. | Perak           | Pasaraya Econsave<br>Jelapang                                    | Jelapang/Kinta  | 2021             | 17,000,000         |
| 8. | WP Putrajaya    | Kompleks Lanai   | Precinct 10/Putrajaya   | 2021             | 12,000,000         |
| 9. | Sabah           | Bataras Hypermarket<br>(Formerly known as Giant<br>Indah Permai) | Taman Indah Permai/ Kota<br>Kinabalu                            | 2021             | 10,000,000         |

#### Penghunian

Prestasi kompleks perniagaan terus sederhana pada 2022, apabila kadar penghunian negara menurun kepada 75.4%. Lima negeri merekodkan kadar penghunian melebihi 80.0%. Negeri Sembilan dan Melaka mencatatkan kadar penghunian terendah di dalam negara masing-masing pada 66.6% dan 61.2%.

*Casa Residency, G Residences and Menara Soho also contracted at 12.6%, 11.8% and 10.0% respectively. However, the Vogue Suites One, Residensi Opus and Pangsapuri Aria increased by 16.5%, 13.8% and 11.5% respectively. In Selangor, serviced apartments at Serdang Skyvillas and Vista Alam recorded price increase of 11.3% and 10.0% respectively. Similarly, serviced apartment prices in Johor Bahru showed a mixed performance with 8scape Residensi increased by 10.0% while Teega Residence @ Puteri Harbour decreased by 10.3%.*

*The rental market was generally stable in WP Kuala Lumpur whilst Selangor portrayed mixed movements. Average gross rental yield across the states were in the range of 2.5% to 6.8%. In Kuala Lumpur Section 1-100, 188 Suites secured higher monthly rental range between RM2,900 to RM3,700 (2021: RM2,900 per month) up by 14.0%. Similarly, Gravit 8 in Klang District, Selangor saw an increase of 9.6% though at a lower rental range of RM1,200 to RM1,300 per month (2021: RM1,000 – RM1,350 per month).*

### 2.2.3 Shopping Complex

#### Transaction

*The year recorded nine shopping complex transactions with an accumulative worth of RM377.9 million. The summary of transactions is as listed below:*

#### Occupancy

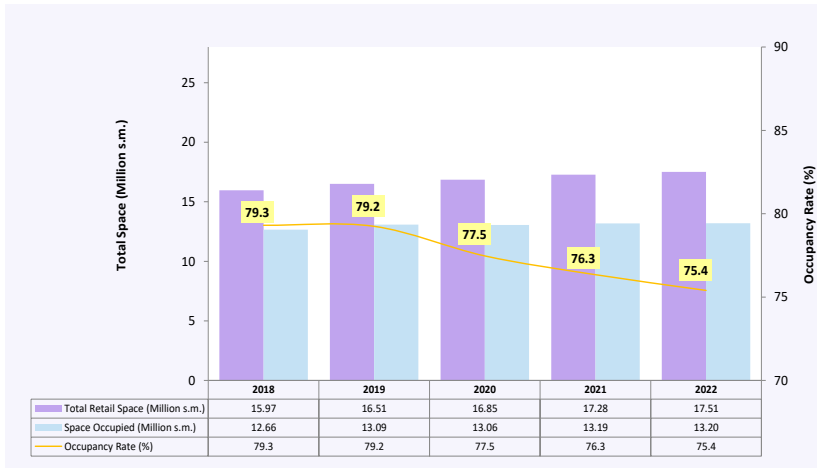
*The performance of shopping complex continued to moderate in 2022, as the occupancy rate declined to 75.4%. Five states recorded occupancy rate more than 80.0%. Negeri Sembilan and Melaka recorded among the lowest occupancy rates in the country at 66.6% and 61.2% respectively.*

Sejajar dengan itu, ketersediaan ruang terus meningkat kepada 4.31 juta m.p. merangkumi 817 bangunan di seluruh negara. Selangor merekodkan jumlah tertinggi dalam negara, mendominasi 20.7% (889,460 m.p.) daripada jumlah keluasan keseluruhan. Johor berada di tempat kedua dengan 17.8% (765,194 m.p.) dan diikuti oleh WP Kuala Lumpur dengan 13.1% (563,412 m.p.).

Correspondingly, the available space escalated to 4.31 million s.m. from the 817 buildings throughout the country. Selangor recorded the highest number in the country, dominating 20.7% (889,460 s.m.) of the national total. Johor ranked second with 17.8% (765,194 s.m.) and followed by WP Kuala Lumpur with 13.1% (563,412 s.m.).

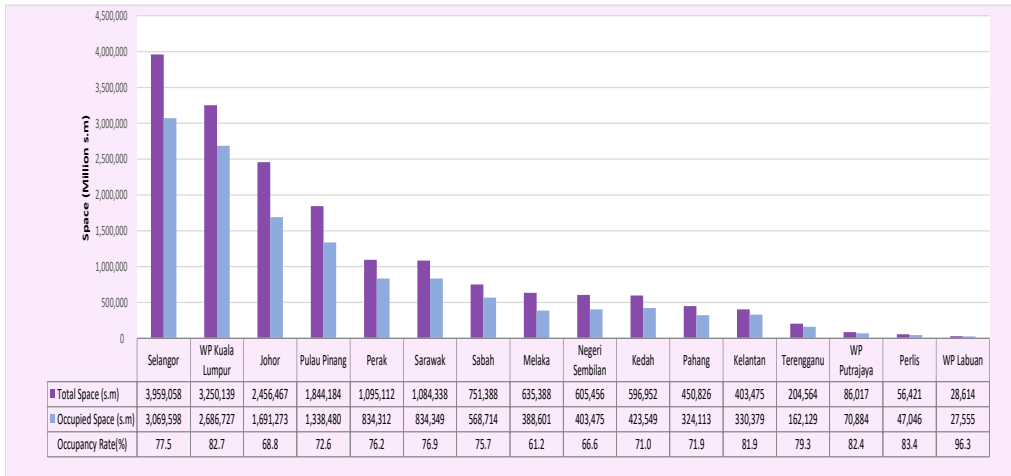
**Chart 20**

**Supply and Occupancy of Shopping Complex 2018 – 2022**



**Chart 21**

**Supply & Occupancy of Shopping Complex by State 2022**



**Aktiviti Pembinaan**

Sepuluh kompleks perniagaan baharu siap dalam tempoh kajian, menambah hampir 264,000 m.p. ruang niaga ke dalam pasaran. Terdapat sekitar 17.51 juta m.p. ruang niaga sedia ada daripada 1,064 kompleks perniagaan pada akhir tahun; majoritinya adalah pusat membeli-belah (554 bangunan; 13.28 juta m.p.). Selangor menguasai ruang niaga sedia ada dengan 156 kompleks perniagaan menawarkan hampir 4.0 juta m.p. Terdapat 40 lagi kompleks dengan 1.38 juta m.p. dalam penawaran akan

**Construction Activity**

Ten new complexes completed in the review period, adding nearly 264,000 s.m. of retail space into the market. There were around 17.51 million s.m. existing retail space from 1,064 shopping complexes as at year-end; majority of which were shopping centres (554 buildings; 13.28 million s.m.). Selangor dominated the existing retail space with 156 shopping complexes offering nearly 4.0 million s.m. There were another 40 complexes with 1.38 million s.m. in the incoming supply

datang dan 9 kompleks dengan 0.35 juta m.p. dalam penawaran dirancang. Kompleks perniagaan berikut telah siap pada tahun 2022:

and 9 complexes with 0.35 million s.m. in the planned supply. The following shopping complexes were completed in 2022:

| State           | Name of Property               | Location  | NLA (s.m.)     |
|-----------------|--------------------------------|---|----------------|
| WP Kuala Lumpur | Malaysia Grand Bazaar          | Jalan Pudu  | 9,290          |
| Selangor        | Datum Mall Jelatek             | Jalan Jelatek                                     | 29,449         |
|                 | IOI City Mall (Fasa 2)         | Lebuhraya SKVE                                    | 92,900         |
|                 | KSL Esplanade Mall             | Persiaran Bestari 2/KS09                          | 54,743         |
| Pulau Pinang    | Sunway Carnival Mall Expansion | Jalan Todak                                       | 32,500         |
| Kedah           | Lotus's Bandar Puteri Jaya     | Jalan Kuala Ketil                                 | 6,965          |
|                 | Lotus's Pulau Hartamas         | Medan Pulau Hartamas,<br>Jalan Sultan Nazrin Shah | 4,970          |
|                 | Econsave Chemor                | Jalan Jelapang-Chemor                             | 5,368          |
| Perak           | Bazar @ Botani Village         | Medan Botani                                      | 5,099          |
|                 | Mydin Hyper Tunjong            | Jalan Kuala Krai                                  | 22,195         |
| <b>Total</b>    | <b>10 complexes</b>            |   | <b>263,479</b> |

## Sewa

Sewaan ruang niaga secara amnya stabil di Lembah Klang dengan pergerakan bercampur-campur di kompleks terpilih. Suria KLCC memperoleh julat sewa yang lebih tinggi setiap bulan daripada RM376 s.m.p. hingga setinggi RM2,231 s.m.p. di aras concourse; beberapa unit mencatatkan penurunan antara 2.3% hingga 10.2%. Sewa di Semua House mencatatkan peningkatan sebanyak 3.0% hingga 7.7% dengan julat sewa antara RM133 s.m.p. hingga RM341 s.m.p. Di Selangor, The Curve Mutiara Damansara menikmati pertumbuhan sederhana sebanyak 3.1% dengan sewa antara RM23.70 s.m.p. hingga RM425.00 s.m.p. Begitu juga, Starling Mall mencatatkan pertumbuhan positif sebanyak 2.4% hingga 3.6% dengan sewa antara RM53 s.m.p. hingga RM200 s.m.p.

## Rental

Rentals of retail space were generally stable in Klang Valley with mixed movements in selected complexes. Suria KLCC fetched a higher rental per month ranging from RM376 p.s.m. to as high as RM2,231 p.s.m. at concourse level; several units recorded decreases of 2.3% to 10.2%. Rental at Semua House recorded increases of 3.0% to 7.7% with rental ranging from RM133 p.s.m. to RM341 p.s.m. In Selangor, The Curve Mutiara Damansara enjoyed a moderate growth of 3.1% with rental ranging from RM23.70 p.s.m. to RM425.00 s.m.p. Likewise, Starling Mall recorded positive growths of 2.4% to 3.6% with rental ranging from RM53 p.s.m. to RM200 p.s.m.

## 2.2.4 Pejabat Binaan Khas

### Transaksi

Dua puluh transaksi bangunan pejabat dengan nilai terkumpul RM1.36 bilion dicatatkan pada tahun 2022. Ringkasan transaksi adalah seperti yang disenaraikan di bawah:

## 2.2.4 Purpose-Built Office

### Transaction

Twenty office building transactions with an accumulated worth RM1.36 billion were recorded in 2022. The summary of transaction is as listed below:

| No | State           | Name of Property      | Location  | Transaction Year                | Consideration (RM) |
|----|-----------------|-----------------------|---|---------------------------------|--------------------|
| 1  | WP Kuala Lumpur | Bangunan AHP          | Jalan Tun Mohd Fuad 2                               | 2022                            | 86,000,000         |
| 2  |                 | Bangunan KWSP         | Off Jalan Raja Chulan                               | 2022                            | 62,000,000         |
| 3  |                 | Menara Naza           | Jalan Raja Muda Abdul Aziz                          | 2022                            | 51,000,000         |
| 4  |                 | Menara TM             | Persiaran Semarak Api, Cyberjaya                    | 2022                            | 35,288,000         |
| 5  |                 | Menara Ambank         | Jalan Pudu  | 2022                            | 22,000,000         |
| 6  |                 | CIMB                  | Jalan Sri Semantan                                  | 2021                            | 32,000,000         |
| 7  |                 | Menara Goucoland      | Jalan Damanlela                                     | 2020                            | 242,100,000        |
| 8  | WP Putrajaya    | Menara Tulus          | Persiaran Perdana                                   | 2020                            | 105,300,000        |
| 9  | Selangor        | Quill 9               | No.112, Jalan Professor Khoo Kay Kim, Petaling Jaya | 2022                            | 200,000,000        |
| 10 |                 | Menara Amfirst        | Jalan 19/3, Petaling Jaya                           | 2022                            | 62,000,000         |
| 11 |                 | Bangunan TM           | Persiaran Semarak Api, Sepang                       | 2022                            | 44,750,000         |
| 12 |                 | Bank Negara           | Jalan Persiaran Tasik, Shah Alam                    | 2022                            | 33,400,000         |
| 13 |                 | Wisma Chung De        | Off Persiaran Raja Muda Musa                        | 2022                            | 9,600,000          |
| 15 |                 | Quill 9 Annex         | No.110, Jalan Professor Khoo Kay Kim, Petaling Jaya | 2021                            | 123,880,000        |
| 16 |                 | VSQ Tower             | Jalan Utara, Petaling Jaya                          | 2021                            | 147,000,000        |
| 17 |                 | SEGI Damansara Campus | Jalan Teknologi                                     | 2021                            | 49,000,000         |
| 18 |                 | Pulau Pinang          | Kompleks Dato' Shaari Jihin                         | Jalan Forshore, Pelabuhan Klang | 2021               |
| 19 | Sarawak         | Wisma Segoo           | Jalan Sultan Tengah, Kuching                        | 2021                            | 13,000,000         |
| 20 | Pahang          | Bangunan UMNO         | Jalan Dato Awang Ngah, Temerloh                     | 2020                            | 1,500,000          |

### Penghunian

Prestasi keseluruhan segmen pejabat terus menurun dalam tempoh kajian apabila kadar penghunian keseluruhan menurun lagi kepada 78.5%, turun daripada 78.9% pada 2021. Bangunan pejabat swasta merekodkan kadar penghunian purata pada 71.7%, turun daripada 72.3% pada 2021. Pulau Pinang memperoleh kadar penghunian yang lebih tinggi pada 80.9% manakala Kuala Lumpur, Selangor dan Johor masing-masing mencatatkan lebih rendah daripada paras nasional iaitu pada 72.1%, 67.3% dan 59.1%. Bangunan pejabat swasta di Putrajaya mencatatkan kadar penghunian terendah dalam negara iaitu 49.4%.

### Occupancy

The overall performance of office segment continued to soften in the review period as the overall occupancy rate declined further to 78.5%, down from 78.9% in 2021. The private office buildings recorded average occupancy rate at 71.7%, down from 72.3% in 2021. Pulau Pinang secured a higher occupancy rate at 80.9% while Kuala Lumpur, Selangor and Johor recorded lower than the national level at 72.1%, 67.3% and 59.1% respectively. Private office buildings in Putrajaya recorded the lowest occupancy rate in the country at 49.4%.

Chart 22

Supply and Occupancy of Purpose-Built Office (Private & Government) 2018 – 2022

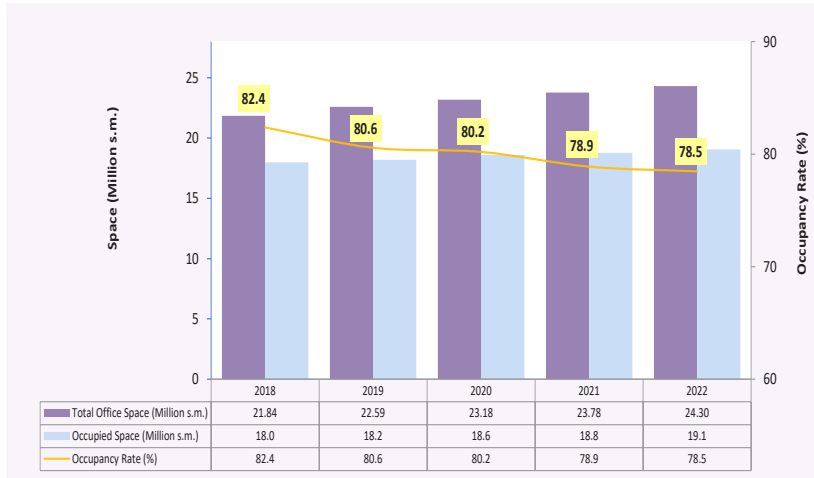


Chart 23

Supply & Occupancy of Purpose-Built Office (Private & Government) by State 2022

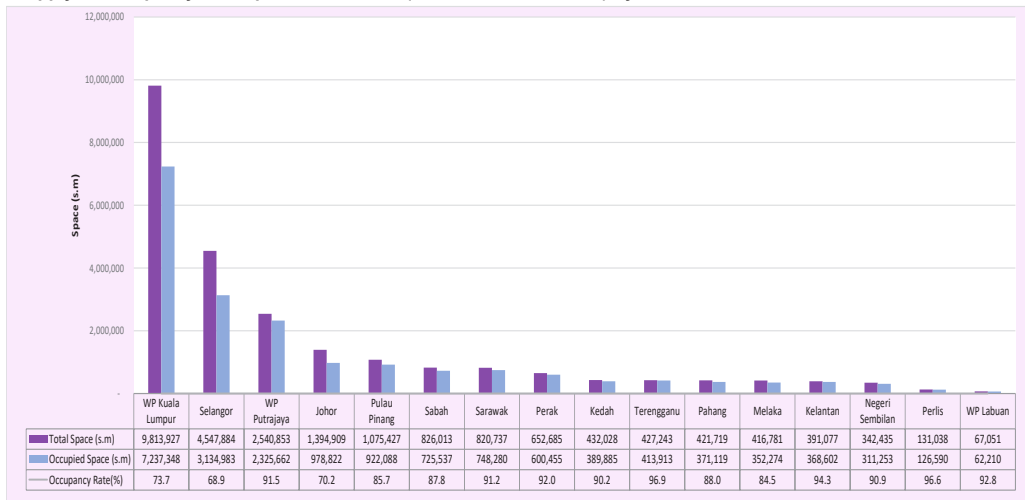
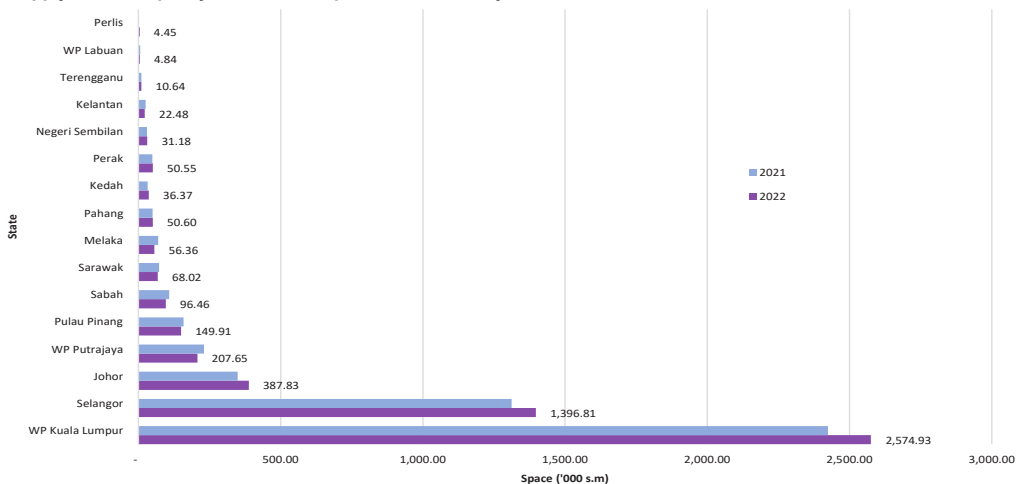


Chart 24

Supply and Occupancy of Private Purpose-Built Office by State 2022



## Aktiviti Pembinaan

Terdapat 10 bangunan pejabat baharu siap dibina yang menawarkan jumlah ruang pejabat 0.42 juta m.p., lebih rendah berbanding 2021 (13 siap dibina; 0.49 juta m.p.). Terdapat sejumlah 24.30 juta m.p. ruang pejabat sedia ada daripada 2,585 bangunan, manakala 1.53 juta m.p. (48 bangunan) dalam penawaran akan datang dan hampir 0.99 juta m.p. (31 bangunan) dalam penawaran dirancang pada akhir tahun 2022. WP Kuala Lumpur mendominasi ketiga-tiga kategori penawaran, menyumbang 40.4% daripada jumlah ruang pejabat sedia ada dan 64.0% daripada keseluruhan ruang dalam penawaran akan datang.

Bangunan pejabat berikut telah siap pada tahun 2022:

| State           | Name of Building                                       | Location                                  | Category         | NLA (s.m.)     |
|-----------------|--|---|------------------|----------------|
| WP Kuala Lumpur | Menara Affin@TRX                                       | Jalan Tun Razak                           | Private          | 76,497         |
|                 | The Stride@BBCC  | Jalan Pudu                                | Private          | 35,481         |
|                 | Angkasapuri Kota Media                                 | Jalan Pantai Bahru                        | Government       | 45,495         |
|                 | Kampus Ibu Pejabat TNB                                 | Jalan Bangsar                             | Private          | 88,188         |
|                 | Pavillion Embassy (Menara A)                           | Jalan Low Yat                             | Private          | 24,859         |
|                 | Pavillion Embassy (Menara B)                           | Jalan Ampang                              | Private          | 23,294         |
| Selangor        | Empire City (Blok J) (HCK Tower)                       | Seksyen 13, PJ                            | Private          | 29,154         |
| Johor           | Mid Valley Southkey Office Tower (Tower 2)             | Jalan Bakar Batu                          | Private          | 32,500         |
| Perak           | Bonanza Venture Holdings                               | Jalan Lasam, Off Jalan Sultan Abdul Jalil | Private Building | 2,738          |
| Terengganu      | Kompleks Pentadbiran Majlis Bandaraya Kuala Terengganu | Jalan Sultan Zainal Abidin                | Government       | 63,767         |
| <b>Total</b>    | <b>10 buildings</b>                                    |   |                  | <b>421,973</b> |

## Harga dan Sewa

Harga pejabat berstrata pada umumnya stabil di seluruh negeri dengan beberapa pengecualian. Di WP Kuala Lumpur, harga untuk ruang pejabat di Heritage House dan Wisma Perintis masing-masing turun 4.2% dan 4.1% pada julat harga RM5,160 s.m.p. dan RM9,000 s.m.p. Harga lebih tinggi dicatatkan di Menara Bangkok Bank yang lebih strategik pada RM15,930 s.m.p. Di Selangor, harga lot pejabat berstrata di 8Trium, Sri Damansara dan Bandar Baru Sri Damansara masing-masing meningkat 10.9% dan 8.6%.

Pasaran sewa pejabat menggambarkan prestasi bercampur-campur pada tahun 2022. Di Kuala Lumpur, beberapa bangunan pejabat menyaksikan pertumbuhan dua angka iaitu Menara Perak (16.9%) dan Wisma Boustead (15.7%). Sewa yang lebih tinggi dilihat di Wisma Genting, Jalan Sultan Ismail antara RM118.41 s.m.p. hingga 131.32 s.m.p. Di Selangor, sewa pejabat secara amnya stabil dengan julat sewa bulanan RM40 – RM50 s.m.p. kecuali bagi ruang pejabat di tingkat bawah, Damansara Uptown 1 & 2, sewanya antara

## Construction Activity

There were 10 new completions offering a total office space of 0.42 million s.m., lower compared to 2021 (13 new completion; 0.49 million s.m.). There was a total of 24.30 million s.m. existing office space from 2,585 buildings, while another 1.53 million s.m. (48 buildings) in the incoming supply and nearly 0.99 million s.m. (31 buildings) in the planned supply as at end-2022. WP Kuala Lumpur dominated all three categories of supplies, contributing 40.4% of the total existing office spaces and 64.0% of the total incoming supply spaces.

The following office buildings were completed in 2022:

## Price and Rental

Prices of stratified office lot were generally stable across the states with several exceptions. In WP Kuala Lumpur, prices for office space in Heritage House and Wisma Perintis down by 4.2% and 4.1% at a price range of RM5,160 p.s.m. and RM9,000 p.s.m. respectively. A higher price was recorded at a more strategically located Menara Bangkok Bank at RM15,930 p.s.m. In Selangor, prices of stratified office lot in 8Trium, Sri Damansara and Bandar Baru Sri Damansara increased by 10.9% and 8.6% respectively.

The office rental market portrayed mixed performance in 2022. In Kuala Lumpur, several office buildings witnessed double digit growth namely Menara Perak (16.9%) and Wisma Boustead (15.7%). A higher rental was seen at Wisma Genting, Jalan Sultan Ismail ranging between RM118.41 p.s.m. to 131.32 p.s.m. In Selangor, the office rentals were generally stable with monthly rental range of RM40 – RM50 p.s.m. except for office spaces on the ground floor/level 1 in Damansara Uptown 1 & 2, ranging from RM107.85



RM107.85 s.m.p. hingga RM155.00 s.m.p. manakala ruang pejabat di tingkat mezanin, Sunway Pinnacle disewa pada julat sewa bulanan antara RM59.20 s.m.p. hingga RM102.26 s.m.p., meningkat sebanyak 8.8%.

*p.s.m. to RM155.00 p.s.m. whilst office space at mezzanine floor, Sunway Pinnacle were tenanted at monthly rental range of RM59.20 p.s.m. to RM102.26 p.s.m., up by 8.8%.*

## 2.2.5 Riadah

### Transaksi

Tujuh transaksi hotel dan satu resort direkodkan dalam tempoh kajian dengan nilai terkumpul hampir RM555 juta. Ringkasan transaksi adalah seperti yang yang disenaraikan di bawah:

| No | State           | Name of Property                           | Location  | Transaction Year | Consideration (RM) |
|----|-----------------|--|---|------------------|--------------------|
| 1  | WP Kuala Lumpur | Hotel Sheraton Imperial                    | Jalan Sultan Ismail                             | 2022             | 235,000,000        |
| 2  |                 | Hotel Bintang Warisan                      | Jalan Bukit Bintang                             | 2022             | 31,800,000         |
| 3  |                 | Citizen M Hotel (Previously Skypark Hotel) | Jalan Pudu                                      | 2022             | 80,000,000         |
| 4  | Sabah           | Hotel Sixty3                               | Jalan Gaya, Kota Kinabalu                       | 2022             | 50,000,000         |
| 5  | Sarawak         | Li Hua Hotel                               | Jalan Wawasan, Sibu                             | 2022             | 8,500,000          |
| 6  | Selangor        | Hotel Lisa De Inn                          | Jalan Harapan & Jalan Universiti, Petaling Jaya | 2021             | 17,500,000         |
| 7  | Kedah           | Tanjung Rhu Resort                         | Jalan Tanjung Rhu, Langkawi                     | 2020             | 123,000,000        |
| 8  |                 | Hotel Swiss Inn                            | Jalan Wira, Kuala Muda                          | 2020             | 8,900,000          |

### Aktiviti Pembinaan

Aktiviti pembinaan berada pada nada pemulihan apabila siap dibina dan mula dibina meningkat. Terdapat 10 hotel baharu siap dibina pada 2022 menawarkan 1,341 bilik (2021: 3 hotel; 337 bilik). Mula dibina menunjukkan peningkatan (1,501 bilik) manakala penawaran baharu dirancang berkurang (219 bilik) berbanding 2021. Kebanyakan hotel mula dibina terletak di Sabah (tiga hotel: 807 bilik), diikuti oleh Johor (dua hotel: 353 bilik). Terdapat 3,517 hotel/resort di seluruh negara yang menawarkan 271,322 bilik, 85 lagi hotel/resort (17,919 bilik) dalam penawaran akan datang dan 91 hotel/resort (18,113 bilik) dalam peringkat penawaran dirancang pada akhir 2022; semuanya didahului oleh WP Kuala Lumpur.

## 2.2.5 Leisure

### Transaction

*Seven hotels and one resort transactions were recorded in the review period with an accumulated worth of nearly RM555 million. The summary of transactions is as listed below:*

### Construction Activity

*Construction activities was on a recovery tone as completion and starts increased. There were 10 new hotels completed in 2022 offering 1,341 rooms (2021: 3 hotels; 337 rooms). Starts showed an increase (1,501 rooms) whilst new planned supply reduced (219 rooms) compared to 2021. Most starts were in Sabah (three hotels: 807 rooms), followed by Johor (two hotels: 353 rooms). There were 3,517 hotels/resorts across the country offering 271,322 rooms, another 85 hotels/resorts (17,919 rooms) were in the incoming supply and 91 hotels/resorts (18,113 rooms) at the planned supply stage as at end-2022; all led by WP Kuala Lumpur.*

Hotel/resort yang baharu siap dibina pada tahun 2022 adalah seperti berikut:

The newly completed hotels/resorts in 2022 as follows:

| State           | Name of Hotels/Resorts             | Number of Rooms |
|-----------------|------------------------------------|-----------------|
| Pulau Pinang    | Amari Spice Penang                 | 453             |
|                 | Ascott Gurney Hotel                | 261             |
|                 | Victoria Garden Hotel              | 80              |
|                 | Citi Villa Hotel                   | 54              |
|                 | The Granite Luxury Hotel           | 52              |
|                 | Hotel Iconic Point                 | 48              |
| WP Kuala Lumpur | Llyod's Inn Kuala Lumpur           | 108             |
|                 | East Riverine                      | 49              |
| Sabah           | Hyatt Centric Hotel, Kota Kinabalu | 222             |
|                 | Padi View Resthouse                | 14              |
| <b>TOTAL</b>    | <b>10 Hotels/Resorts</b>           | <b>1,341</b>    |

### Penghunian

Setelah negara beralih ke fasa endemik dan pembukaan semula sempadan antarabangsa sejak 1 April 2022, industri pelancongan Malaysia kini menuju ke arah pemulihan. Menurut Tourism Malaysia, dari Januari hingga September 2022, purata kadar penghunian meningkat kepada 46.6%, melonjak sebanyak 24.8% berbanding 2021 (21.8%). Purata kadar penghunian (AOR) Malaysia sebelum bermulanya pandemik COVID-19 pada tahun 2020 adalah sekitar 60%.

### Occupancy

As the country moved towards endemicity and the reopening of international borders since 1 April 2022, Malaysia's tourism industry is on track to recovery. According to Tourism Malaysia, from January to September 2022, the average occupancy rate increased to 46.6%, an expansion of 24.8% compared to 2021 (21.8%). The Malaysia average occupancy rates (AOR) before COVID-19 pandemic in 2020 was around 60%.

Table 5 – Malaysia Average Occupancy Rates January – September 2021/2022

| Locality        | 2021        | 2022        | Difference  |
|-----------------|-------------|-------------|-------------|
| Kuala Lumpur    | 16.9        | 44.3        | 27.4        |
| Putrajaya       | 21.4        | 48.0        | 26.6        |
| Selangor        | 26.8        | 44.7        | 17.9        |
| Penang          | 11.9        | 43.7        | 31.8        |
| Perak           | 15.0        | 45.5        | 30.5        |
| Kedah           | 11.6        | 41.0        | 29.4        |
| Perlis          | 13.0        | 36.7        | 23.7        |
| Negeri Sembilan | 14.6        | 34.2        | 19.6        |
| Melaka          | 14.8        | 37.9        | 23.1        |
| Johor           | 16.9        | 45.0        | 28.1        |
| Pahang          | 13.5        | 60.0        | 46.5        |
| Terengganu      | 35.5        | 55.9        | 20.4        |
| Kelantan        | 27.4        | 47.1        | 19.7        |
| Sabah           | 10.8        | 41.5        | 30.7        |
| Labuan          | 28.4        | 36.3        | 7.9         |
| Sarawak         | 49.6        | 46.6        | -3.0        |
| <b>Malaysia</b> | <b>21.8</b> | <b>46.6</b> | <b>24.8</b> |

Source: Tourism Malaysia (Based on Hotel Survey)



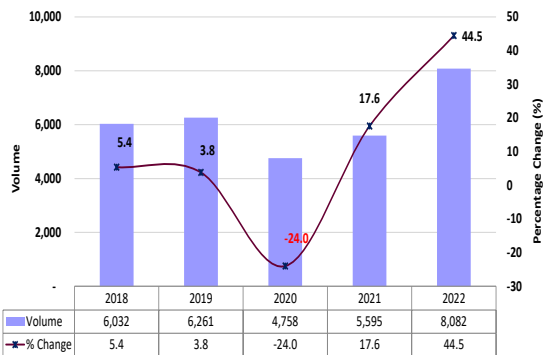
### 2.3 Harta Tanah Industri

#### Transaksi

Subsektor industri mencatat 8,082 transaksi bernilai RM21.16 bilion pada tahun 2022. Berbanding tahun 2021, aktiviti pasaran meningkat sebanyak 44.5% dalam bilangan dan 24.8% dalam nilai. Selangor terus menguasai pasaran, dengan 33.8% daripada jumlah bilangan dalam negara, diikuti oleh Johor dan Perak, masing-masing dengan syer pasaran 14.0% dan 8.1%.

Chart 25

Industrial Transactions Volume 2018 – 2022



#### Status Pasaran

Unit industri siap dibina tidak terjual kekal terkawal. Jumlah tidak terjual berkurangan kepada 880 unit bernilai hampir RM1.15 bilion, turun sebanyak 22.1% dalam bilangan dan 27.6% dalam nilai berbanding 2021. Pada masa yang sama, unit dalam pembinaan belum terjual berkurangan menurun kepada 450 unit, turun sebanyak 31.2%. Prestasi belum dibina belum terjual mencatatkan 51 unit, lebih daripada 22 unit yang direkodkan pada 2021.

Sarawak memegang sebahagian besar bilangan siap dibina tidak terjual, dengan 33.8% syer, diikuti oleh Johor (23.3%) dan Pulau Pinang (9.7%). Mengikut jenis, unit teres dan berkembar membentuk sebahagian besar daripada siap dibina tidak terjual, masing-masing dengan 59.2% dan 29.8% syer. Kebanyakan unit siap tidak terjual melebihi RM1 juta, membentuk 45.2% daripada jumlah keseluruhan negara.

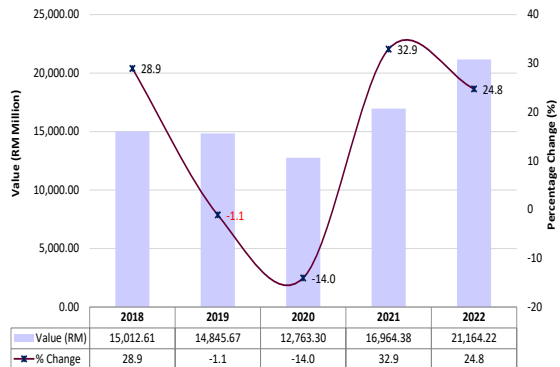
### 2.3 Industrial Property

#### Transaction

The industrial sub-sector recorded 8,082 transactions worth RM21.16 billion in 2022. Compared to 2021, the market activity increased by 44.5% in volume and 24.8% in value. Selangor continued to dominate the market, with 33.8% of the nation's volume, followed by Johor and Perak, each with 14.0% and 8.1% market share.

Chart 26

Industrial Transaction Value Trend 2018 – 2022



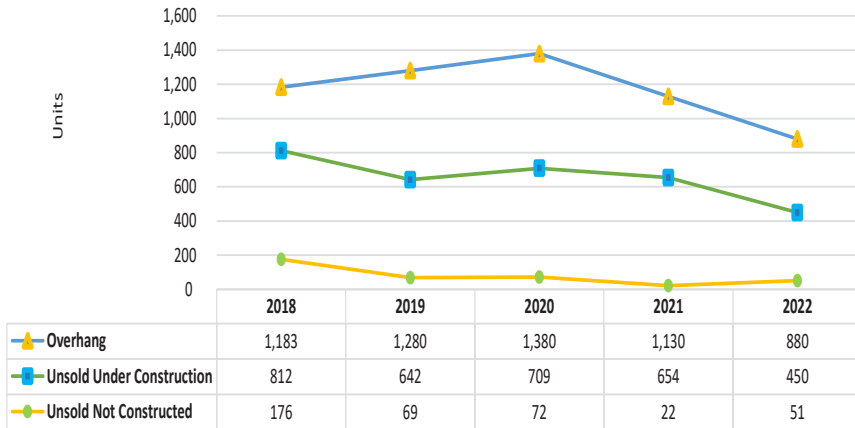
#### Market Status

The industrial overhang remained manageable. The overhang volume decreased to 880 units worth nearly RM1.15 bilion, down by 22.1% volume and 27.6% in value against 2021. On similar note, the unsold under construction decreased to 450 units, down by 31.2%. The unsold not constructed recorded 51 units, more than 22 units recorded in 2021.

Sarawak held most of the overhang, with 33.8% share, followed by Johor (23.3%) and Pulau Pinang (9.7%). By type, terraced and semi-detach units formed the bulk of the overhang, each with 59.2% and 29.8% share. Most of the overhang were above RM1 million, forming 45.2% of the national total.

**Chart 27**

**Industrial Market Status 2018 - 2022**



**Aktiviti Pembinaan**

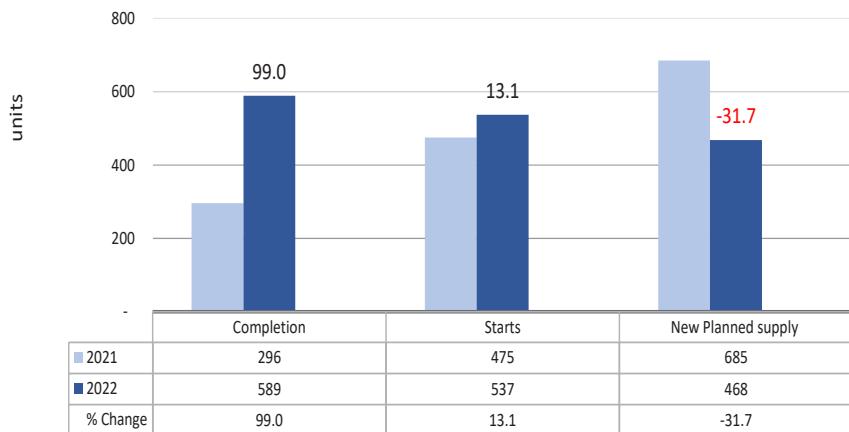
Dari segi pembinaan, subsektor industri menyaksikan pergerakan yang bercampur-campur. Siap dibina meningkat hampir satu kali ganda kepada 589 unit manakala mula dibina meningkat sebanyak 13.1% kepada 537 unit. Sebaliknya, penawaran baharu dirancang menurun sebanyak 31.7% kepada 468 unit. Selangor menyumbang bilangan siap dibina tertinggi iaitu 34.1% daripada jumlah keseluruhan negara, diikuti Sarawak (23.8%) dan Pulau Pinang (20.7%). Terdapat lebih daripada 120,000 unit industri sedia ada, lebih daripada 4,000 unit dalam penawaran akan datang dan hampir 7,000 unit dalam penawaran dirancang pada akhir tahun 2022.

**Construction Activity**

*On the construction front, the industrial sub-sector saw a mixed movement. Completions increased by nearly one-fold to 589 units whilst starts increased by 13.1% to 537 units. On the contrary, the new planned supply was down by 31.7% to 468 unit. Selangor contributed the highest number of completions, accounting for 34.1% of the national total, followed by Sarawak (23.8%) and Pulau Pinang (20.7%). There were slightly more than 120,000 existing industrial units, slightly more than 4,000 units in the incoming supply and nearly 7,000 units in the planned supply as at end-2022.*

**Chart 28**

**Industrial Industrial Construction Activity**



**Harga**

Harga harta tanah industri menunjukkan trend lebih stabil di seluruh negeri dengan trend menaik disaksikan untuk kilang teres. Di WP Kuala Lumpur, kilang teres satu setengah tingkat di Taman Perindustrian Ringan

**Price**

*Prices of industrial property showed a more stable trend across the states with upward trend witnessed for terraced factory. In WP Kuala Lumpur, one and a-half-storey terraced factory at Sri Edaran Light Industrial Park*

Sri Edaran dan Desa Tun Razak 2 masing-masing meningkat 15.7% dan 10.8% kepada RM1,680,000 hingga RM1,850,000 dan RM1,900,000. Di Selangor, kilang teres yang serupa di Bandar Bukit Puchong dan Subang International Light Industri Park 1 masing-masing meningkat 13.6% dan 7.3% kepada RM1,550,000 dan RM1,000,000. Plot industri kosong di Worldwide Izone di Klang dan Kawasan Perusahaan Ringan PKNS Batu 17 di Gombak masing-masing dipindahmilik dengan harga RM1,449 s.m.p dan RM958 s.m.p., meningkat sebanyak 9.4% dan 8.5%. Peningkatan itu disebabkan oleh meningkatnya permintaan terhadap gudang akibat daripada pengembangan e-dagang.

and Desa Tun Razak 2 increased by 15.7% and 10.8% to RM1,680,000 to RM1,850,000 and RM1,900,000 respectively. In Selangor, similar terraced factory in Bandar Bukit Puchong and Subang International Light Industri Park 1 increased by 13.6% and 7.3% to RM1,550,000 and RM1,000,000 respectively. Vacant industrial plots in Worldwide Izone in Klang and Kawasan Perusahaan Ringan PKNS Batu 17 in Gombak were transacted at RM1,449 p.s.m and RM958 p.s.m., increased by 9.4% and 8.5% respectively. The increase could be attributed to growing demand for warehouse due to expansion of e-commerce.

## 2.4 Harta Pertanian

### Transaksi

Subsektor pertanian mencatatkan 82,040 transaksi bernilai RM17.86 bilion, meningkat 44.6% di dalam bilangan dan 50.5% di dalam nilai berbanding tahun 2021 (56,730 transaksi bernilai RM11.86 bilion). Subsektor itu menduduki tempat kedua dari segi sumbangan kepada jumlah keseluruhan pasaran dengan syer 21.1% namun hanya menyumbang 10.0% syer dalam nilai transaksi.

## 2.4 Agriculture Property

### Transaction

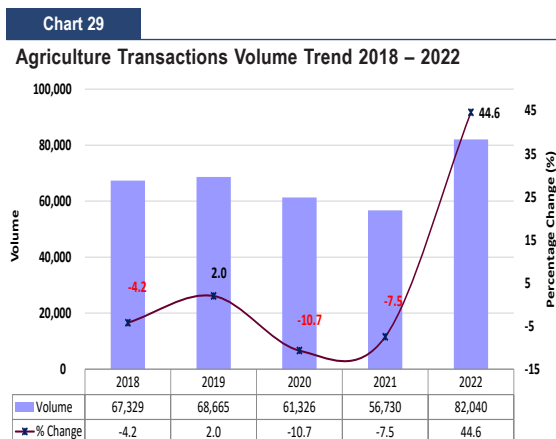
Agriculture sub-sector recorded 82,040 transactions worth RM17.86 billion, up by 44.6% in volume and 50.5% in value against 2021 (56,730 transactions worth RM11.86 billion). The sub-sector ranked second in terms of contribution to the overall market volume with 21.1% share whilst contributed only 10.0% share in transaction value.

Kedah dan Perak menyumbang jumlah pasaran yang lebih tinggi kepada jumlah nasional, masing-masing dengan 17.2% (14,071 transaksi) dan 16.9% (13,873 transaksi). Dari segi nilai, Johor mendahului pasaran dengan 18.9%, diikuti oleh Perak (14.1%).

Kedah and Perak contributed higher market share to the national total, each with 17.2% (14,071 transactions) and 16.9% (13,873 transactions) share. In terms of value, Johor led the market with 18.9%, followed by Perak (14.1%).

Terdapat 59 transaksi tanah ladang bernilai hampir RM2 bilion yang dicatatkan pada tahun 2022. 36 di Sabah, 11 di Pahang, lima di Perak, tiga di Sarawak dan masing-masing satu di Johor, Negeri Sembilan, Kelantan dan Terengganu. Daripada 59 transaksi, 20 tanah ladang dijual pada 2021 tetapi disempurnakan pada tahun 2022.

There were 59 estate land transactions worth nearly RM2 billion recorded in 2022. 36 in Sabah, 11 in Pahang, five in Perak, three in Sarawak and one each in Johor, Negeri Sembilan, Kelantan and Terengganu. Out of 59 transactions, 20 estate lands were sold in 2021 but concluded in 2022.



## Harga

Harga tanah pertanian pada amnya stabil. Di Kedah, tanah sawah tanaman padi dua kali setahun menghadap jalan di Kubang Pasu dipindahmilik dalam lingkungan RM204,000 dan RM284,000 sehektar, manakala tanah pedalaman tanaman padi dipindahmilik dalam lingkungan RM172,000 dan RM227,000 sehektar. Di Daerah Kota Bahru, transaksi tanah yang sama adalah antara RM170,000 dan RM541,000 sehektar. Di Johor, tanah durian di lapisan pedalaman memperoleh harga yang lebih tinggi antara RM275,000 sehektar hingga setinggi RM868,000 sehektar manakala tanah serupa di Perak adalah antara RM38,000 sehektar hingga RM744,000 sehektar.

### 3.0 PROSPEK 2023

Menurut Kementerian Kewangan Malaysia (MoF), ekonomi Malaysia dijangka berkembang sederhana antara empat hingga lima peratus pada tahun 2023, disokong oleh asas ekonomi yang kukuh dan struktur ekonomi yang pelbagai, ditambah dengan sokongan dasar berterusan untuk mengurangkan kesan kenaikan kos sara hidup dan mengurangkan risiko penurunan yang berpunca daripada ketidakpastian geopolitik yang berpanjangan dan keadaan kewangan global yang semakin ketat. Bank Negara Malaysia (BNM) juga menjangka permintaan domestik akan terus memacu pertumbuhan, disokong oleh pasaran buruh yang terus pulih dan realisasi projek pelaburan berbilang tahun.

Pasaran hartanah dijangka meneruskan momentumnya dengan pelbagai inisiatif yang digariskan oleh kerajaan di bawah bajet 2023, antara lain:

1. Pengecualian penuh duti setem ke atas surat cara pindah milik dan perjanjian pinjaman untuk pembelian rumah kediaman pertama berharga sehingga RM500,000 oleh warganegara Malaysia kekal sehingga 31 Disember 2025.
2. Kenaikan pelepasan duti setem daripada 50% kepada 75% untuk pembelian hartanah kediaman pertama berharga antara RM500,000 hingga RM 1 juta oleh warganegara Malaysia dan hanya terpakai untuk perjanjian jual beli yang disempurnakan sehingga 31 Disember 2023.
3. Pengecualian penuh duti setem sehingga RM1 juta dan 50% pelepasan duti setem bagi amaun selebihnya bagi pindah milik harta secara kasih sayang antara ahli keluarga (bapa kepada anak dan datuk kepada cucu).
4. Peruntukan RM460.2 juta untuk pembinaan rumah baharu dan ubah suai rumah di kawasan luar bandar.
5. Peruntukan RM389.5 juta akan disalurkan kepada Program Perumahan Rakyat.

## Price

*Prices of agriculture land were generally stable. In Kedah, road frontage double cropping paddy lands in Kubang Pasu were transacted between RM204,000 and RM284,000 per hectare, whilst interior paddy lands were transacted at RM172,000 and RM227,000 per hectare. In Kota Bahru District, similar land was transacted between RM170,000 and RM541,000 per hectare. In Johor, interior durian lands fetched higher prices ranging from RM275,000 per hectare to as high as RM868,000 per hectare whilst similar land in Perak ranged from RM38,000 per hectare to RM744,000 per hectare.*

### 3.0 2023 OUTLOOK

*According to the Ministry of Finance (MoF), Malaysia's economy is expected to grow moderately between four to five percent in 2023, backed by strong fundamentals and diversified economic structure, coupled with ongoing policy support to cushion the impact of the rising cost of living and mitigate the downside risk stemming from the prolonged geopolitical uncertainties and tightening global financial conditions. Bank Negara Malaysia (BNM) also anticipated domestic demand will continue to drive growth, supported by the continued recovery in the labour market and the realisation of multi-year investment projects.*

*The property market is expected to continue its momentum with various initiatives outlined by the government under the revised Budget 2023. Among others:*

1. *Full stamp duty exemption on instrument of transfer and loan agreement for the purchase of the first residential home priced up to RM500,000 by Malaysia citizens remained until 31 December 2025.*
2. *Increase of stamp duty remission from 50% to 75% for the purchase of the first residential properties priced between RM500,000 to RM 1 million by Malaysian citizens and applicable for sale and purchase agreements executed until 31 December 2023.*
3. *Full stamp duty exemption up to RM1 million and 50% stamp duty remission for the remaining balance on transfers of property by way of love and affection between family members (father to child and grandfather to grandson).*
4. *Allocation of RM460.2 million for the building of new homes and home renovations in rural areas.*
5. *Allocation of RM389.5 million will be channelled to the People's Housing Programme.*

6. Peruntukan RM358 juta untuk pembinaan rumah mampu milik di bawah program Rumah Mesra Rakyat oleh Syarikat Perumahan Negara Berhad.
7. Peruntukan RM462 juta untuk pembinaan 23,000 rumah di bawah Projek Perumahan Awam Malaysia.
8. Meningkatkan jaminan sehingga RM5 bilion melalui Syarikat Jaminan Kredit Perumahan (SJKP) dalam membantu pekerja gig seperti pekerja e-hailing dalam mendapatkan pembiayaan rumah sehingga RM500,000.

Dari segi pembangunan infrastruktur, kerajaan telah mencadangkan peruntukan bagi beberapa projek yang sedang dijalankan dan baharu di bawah Bajet 2023 yang dijangka dapat memacu aktiviti ekonomi, antara lain:

- Lebuhraya Pan Borneo dan Jalan Hubungan Sarawak-Sabah
- Mass Rapid Transit 3 (MRT 3) – Kerajaan akan mengkaji semula kos projek
- Untuk melegakan kesesakan jalan raya di kawasan tumpuan pelancong:
  - Jalan baharu dari Habu ke Tanah Rata, Cameron Highlands, Pahang dengan harga RM480 juta;
  - Jalan Tun Hamzah sehingga persimpangan Semabok Lebu AMJ Daerah Melaka Tengah akan dinaik taraf dengan kos RM300 juta;
  - Sebuah jalan dan jambatan di atas Sungai Sepang akan dibina untuk menghubungkan Bukit Pelandok, Port Dickson dan Sungai Pelek, Sepang dengan harga RM160 juta; dan
  - Lorong memotong di Lebuhraya Senai Desaru akan dibina, dan Lebuhraya Utara Selatan dari Yong Peng Utara ke Senai Utara – Fasa 1, Johor akan dinaik taraf daripada empat kepada enam lorong, secara berperingkat dengan kos RM525 juta.
- Perluasan dan penambahbaikan kapasiti lapangan terbang di Pulau Pinang dan Subang
- RM1.5 bilion untuk membangunkan jalan luar bandar dan jalan perhubungan kampung yang baharu.

Memandangkan pertumbuhan KDNK negara diunjurkan sederhana rendah berbanding tahun sebelumnya dan sejajar dengan negara lain di rantau ini, prestasi pasaran harta tanah dijangka optimistik yang berhati-hati di bawah persekitaran luaran yang tidak menentu. Dasar akomodatif, sokongan berterusan kerajaan, pelaksanaan semua langkah yang dirancang dengan baik yang digariskan dalam Bajet 2023 dan pelaksanaan strategi dan inisiatif yang betul di bawah RMK-12 dijangka terus menyokong sektor harta tanah.

6. Allocation of RM358 million for the construction of affordable homes under Rumah Mesra Rakyat programme by Syarikat Perumahan Negara Berhad.
7. Allocation of RM462 million for the construction of 23,000 houses under Projek Perumahan Awam Malaysia.
8. Increase the guarantees of up to RM5 billion via Syarikat Jaminan Kredit Perumahan (SJKP) in assisting gig workers such as e-hailing workers in obtaining home financing up to RM500,000.

*On the infrastructure development front, the government has proposed allocations on several ongoing and new projects under the revised Budget 2023 which are expected to spur the economic activities, among others:*

- *Pan Borneo Highway and Sarawak-Sabah Link Road*
- *Mass Rapid Transit 3 (MRT 3) – Government to review project cost*
- *To relieve road congestion at tourist hotspots:*
  - *A new road from Habu to Tanah Rata, Cameron Highlands, Pahang for RM480 million;*
  - *Jalan Tun Hamzah up to the intersection of Semabok Lebu AMJ Daerah Melaka Tengah to be upgraded at a cost of RM300 million;*
  - *A road and bridge over Sungai Sepang to be built to connect Bukit Pelandok, Port Dickson and Sungai Pelek, Sepang for RM160 million; and*
  - *An overtaking lane on Senai Desaru Expressway to be built, and Lebuhraya Utara Selatan from Yong Peng Utara to Senai Utara – Phase 1, Johor to be upgraded from four to six lanes, in phases at the cost of RM525 million.*
- *Expansion and improvement of airport capacity in Penang and Subang*
- *RM1.5 billion to develop new rural roads and village link roads.*

*As the country's GDP growth is projected to be moderately lower than the previous year and in line with other countries in the region, the property market performance is expected to be cautiously optimistic given the unpredictable external environment. The accommodative policies, continuous government support, well execution of measures outlined in the revised Budget 2023 and the proper implementation of strategies and initiatives under RMK-12 are expected to remain supportive of the property sector.*



# **JADUAL GAMBARAN KESELURUHAN**

## ***OVERVIEW TABLE***





| Pendapatan Negara dan<br>Pengeluaran Dalam Negeri                | 2020                      |                            | 2021 <sup>a</sup> |       | 2022 <sup>p</sup> |       | National Income and<br>Domestic Product                        |
|--|---------------------------|----------------------------|-------------------|-------|-------------------|-------|--|
|  | RM<br>Juta/<br>RM Billion | %<br>Pertumbuhan<br>Growth |                   |       |                   |       |  |
| Jumlah Penduduk ('000)   | 32.53                     | 0.3                        | 32.59             | 0.2   | 33.0              | 1.3   | <b>Total Population ('000)</b>                                 |
| Keluaran Dalam Negara Kasar (KDNK)<br>(pada harga malar 2015)    | 1,345.1                   | (5.5)                      | 1,386.7           | 3.1   | 1,507.3           | 8.7   | <b>Gross Domestic Product (GDP)<br/>(2015 constant prices)</b> |
| <b>Sektor Utama yang menyumbang kepada KDNK</b>                  |                           |                            |                   |       |                   |       | <b>Key Sectors Contributing to GDP</b>                         |
| • Pertanian  | 99,106                    | -2.4                       | 98,898            | -0.2  | 98,949            | 0.1   | • Agricultural   |
| • Perlombongan dan kuari   | 92,879                    | -9.7                       | 93,150            | 0.3   | 96,350            | 3.4   | • Mining and quarrying   |
| • Pembuatan  | 307,847                   | -2.7                       | 337,219           | 9.5   | 364,522           | 8.1   | • Manufacturing  |
| • Pembinaan  | 53,616                    | -19.3                      | 50,802            | -5.2  | 53,327            | 5.0   | • Construction   |
| • Perkhidmatan   | 776,361                   | -5.4                       | 791,068           | 1.9   | 877,426           | 10.9  | • Services   |
| - Utiliti (Elektrik, gas)  | 29,560                    | -3.5                       | 30,029            | 1.6   | 31,296            | 4.2   | - Utilities  |
| - Pengangkutan dan penyimpanan                                   | 42,139                    | -21.9                      | 42,671            | 1.3   | 55,834            | 30.8  | - Transport and storage  |
| - Maklumat dan komunikasi  | 89,252                    | 6.0                        | 94,874            | 6.3   | 99,829            | 5.2   | - Wholesale, and retail trade                                  |
| - Perdagangan borong dan runcit                                  | 205,673                   | -5.7                       | 212,255           | 3.2   | 235,731           | 11.1  | - Wholesale, and retail trade                                  |
| - Penginapan   | 4,854                     | -50.3                      | 3,674             | -24.3 | 8,270             | 125.1 | - Accommodation  |
| - Kewangan dan insurans  | 96,105                    | 3.0                        | 212,255           | 120.9 | 235,731           | 11.1  | - Finance and insurance  |
| - Harta tanah dan perkhidmatan perniagaan                        | 17,512                    | -16.1                      | 15,216            | -13.1 | 19,556            | 28.5  | - Real estate and business services                            |
| - Perkhidmatan kerajaan  | 58,399                    | 4.5                        | 51,972            | -11.0 | 63,821            | 22.8  | - Government services  |
| - Perkhidmatan-perkhidmatan lain                                 | 43,158                    | -12.0                      | 40,783            | -5.5  | 44,868            | 10.0  | - Other services   |
| <b>Pendapatan Negara Kasar (KNK)<br/>(pada harga semasa)</b>     | 1,389.5                   | -5.7                       | 1,503.8           | 8.2   | 1,724.6           | 14.7  | <b>Gross National Income (GNI)<br/>(at current prices)</b>     |
| <b>Pendapatan Negara Kasar (KNK)<br/>(pada harga tetap 2015)</b> | 1,331.4                   | -5.0                       | 1,367.7           | 2.7   | 1,472.9           | 7.7   | <b>Gross National Income (GNI)<br/>(2015 constant prices)</b>  |
| <b>Guna Tenaga dan Buruh</b>                                     | 15.67                     | 2.6                        | 15.80             | 0.8   | 16.73             | 5.9   | <b>Employment and Labour</b>                                   |
| Tenaga buruh (ribu)  |                           |                            |                   |       |                   |       | <i>Labour force (thousand)</i>                                 |
| Penduduk bekerja (ribu)  | 14.96                     | 0.9                        | 15.06             | 0.7   | 16.13             | 7.1   | <i>Employment (thousand)</i>                                   |
| Kadar pengangguran (%)   | 4.5                       |                            | 4.6               |       | 3.8               |       |  |
| <b>Indeks Harga Pengguna</b>                                     | 120.1                     |                            | 123.1             |       | 127.2             |       | <b>Consumer Price Index</b>                                    |
| <b>Kadar Inflasi (% perubahan)</b>                               | -1.1                      |                            | 2.5               |       | 3.4               |       | <b>Inflation Rates (% Change)</b>                              |

<sup>a</sup> Data Awalan (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 II/ 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         |                |
|---------------------------|---------------|---------------|--------------|--------------|--------------|--------------|---------------|---------------|------------------|--------------|----------|----------|---------------|----------------|
|                           | 2021          | 2022          | 2021         | 2022         | 2021         | 2022         | 2021          | 2022          | 2021             | 2022         | 2021     | 2022     | 2021          | 2022           |
| <b>Jan - Mar</b>          |               |               |              |              |              |              |               |               |                  |              |          |          |               |                |
| 100,000 & Below           | 8,633         | 10,412        | 610          | 828          | 118          | 129          | 9,523         | 13,383        | 2,399            | 2,948        | 0        | 1        | 21,283        | 27,701         |
| 100,001 - 200,000         | 10,975        | 11,421        | 675          | 792          | 84           | 186          | 2,978         | 3,868         | 901              | 1,020        | 0        | 0        | 15,613        | 17,287         |
| 200,001 - 300,000         | 10,154        | 10,779        | 763          | 854          | 102          | 137          | 1,185         | 1,586         | 371              | 493          | 0        | 1        | 12,575        | 13,850         |
| 300,001 - 400,000         | 7,593         | 8,071         | 725          | 845          | 104          | 111          | 672           | 857           | 268              | 268          | 0        | 0        | 9,362         | 10,152         |
| 400,001 - 500,000         | 5,123         | 5,443         | 630          | 811          | 90           | 101          | 462           | 576           | 151              | 177          | 0        | 0        | 6,456         | 7,108          |
| 500,001 - 600,000         | 2,731         | 3,214         | 425          | 572          | 66           | 79           | 262           | 335           | 86               | 141          | 0        | 0        | 3,570         | 4,341          |
| 600,001 - 700,000         | 2,015         | 2,223         | 424          | 577          | 83           | 64           | 204           | 234           | 82               | 113          | 0        | 0        | 2,808         | 3,211          |
| 700,001 - 800,000         | 1,274         | 1,540         | 320          | 345          | 73           | 72           | 138           | 174           | 77               | 99           | 0        | 0        | 1,882         | 2,230          |
| 800,001 - 900,000         | 808           | 1,034         | 286          | 300          | 41           | 61           | 103           | 129           | 77               | 69           | 0        | 1        | 1,315         | 1,594          |
| 900,001 - 1,000,000       | 542           | 682           | 238          | 245          | 40           | 87           | 65            | 91            | 56               | 63           | 0        | 0        | 941           | 1,168          |
| 1,000,001 & Above         | 2,427         | 2,931         | 1,005        | 1,259        | 658          | 798          | 298           | 394           | 486              | 507          | 0        | 5        | 4,874         | 5,894          |
| <b>Total</b>              | <b>52,275</b> | <b>57,750</b> | <b>6,101</b> | <b>7,428</b> | <b>1,459</b> | <b>1,825</b> | <b>15,890</b> | <b>21,627</b> | <b>4,954</b>     | <b>5,898</b> | <b>0</b> | <b>8</b> | <b>80,679</b> | <b>94,536</b>  |
| <b>Apr - Jun</b>          |               |               |              |              |              |              |               |               |                  |              |          |          |               |                |
| 0 - 100,000               | 6,434         | 9,453         | 275          | 604          | 107          | 163          | 6,150         | 11,213        | 1,585            | 2,365        | 0        | 0        | 14,551        | 23,798         |
| 100,001 - 200,000         | 8,540         | 12,012        | 550          | 882          | 52           | 136          | 1,983         | 3,816         | 595              | 1,013        | 0        | 0        | 11,720        | 17,859         |
| 200,001 - 300,000         | 7,754         | 11,173        | 531          | 863          | 70           | 159          | 870           | 1,715         | 313              | 497          | 0        | 0        | 9,538         | 14,407         |
| 300,001 - 400,000         | 5,728         | 8,098         | 490          | 870          | 81           | 117          | 454           | 992           | 156              | 270          | 0        | 0        | 6,909         | 10,347         |
| 400,001 - 500,000         | 3,874         | 5,868         | 493          | 824          | 81           | 112          | 321           | 634           | 127              | 205          | 0        | 0        | 4,896         | 7,643          |
| 500,001 - 600,000         | 2,111         | 3,340         | 366          | 621          | 44           | 106          | 159           | 350           | 72               | 120          | 0        | 0        | 2,752         | 4,537          |
| 600,001 - 700,000         | 1,456         | 2,294         | 294          | 660          | 53           | 106          | 138           | 260           | 52               | 82           | 0        | 1        | 1,993         | 3,403          |
| 700,001 - 800,000         | 1,010         | 1,590         | 216          | 457          | 46           | 69           | 113           | 247           | 64               | 100          | 0        | 0        | 1,449         | 2,463          |
| 800,001 - 900,000         | 617           | 1,130         | 215          | 294          | 33           | 51           | 58            | 147           | 52               | 73           | 0        | 0        | 975           | 1,695          |
| 900,001 - 1,000,000       | 455           | 694           | 167          | 245          | 51           | 60           | 61            | 112           | 35               | 70           | 0        | 0        | 769           | 1,181          |
| 1,000,001 & Above         | 1,761         | 2,776         | 735          | 1,420        | 485          | 926          | 234           | 482           | 305              | 528          | 1        | 1        | 3,521         | 6,133          |
| <b>Total</b>              | <b>39,740</b> | <b>58,428</b> | <b>4,332</b> | <b>7,740</b> | <b>1,103</b> | <b>2,005</b> | <b>10,541</b> | <b>19,968</b> | <b>3,356</b>     | <b>5,323</b> | <b>1</b> | <b>2</b> | <b>59,073</b> | <b>93,466</b>  |
| <b>Jul - Sept</b>         |               |               |              |              |              |              |               |               |                  |              |          |          |               |                |
| 0 - 100,000               | 6,116         | 10,447        | 321          | 590          | 74           | 195          | 4,884         | 13,036        | 1,193            | 3,273        | 1        | 0        | 12,589        | 27,541         |
| 100,001 - 200,000         | 7,932         | 12,923        | 461          | 892          | 72           | 181          | 1,778         | 4,158         | 546              | 1,008        | 0        | 1        | 10,789        | 19,163         |
| 200,001 - 300,000         | 8,383         | 12,492        | 565          | 960          | 73           | 136          | 873           | 1,775         | 258              | 468          | 0        | 1        | 10,152        | 15,832         |
| 300,001 - 400,000         | 6,543         | 9,328         | 553          | 1,003        | 65           | 145          | 520           | 1,698         | 164              | 310          | 0        | 0        | 7,845         | 12,484         |
| 400,001 - 500,000         | 4,463         | 6,645         | 621          | 879          | 100          | 173          | 297           | 626           | 126              | 200          | 0        | 2        | 5,607         | 8,525          |
| 500,001 - 600,000         | 2,498         | 3,759         | 518          | 878          | 61           | 133          | 220           | 393           | 85               | 112          | 0        | 1        | 3,382         | 5,276          |
| 600,001 - 700,000         | 1,815         | 2,754         | 316          | 712          | 50           | 91           | 181           | 303           | 58               | 114          | 0        | 0        | 2,420         | 3,974          |
| 700,001 - 800,000         | 1,108         | 1,696         | 270          | 472          | 46           | 88           | 112           | 201           | 56               | 91           | 0        | 0        | 1,592         | 2,548          |
| 800,001 - 900,000         | 830           | 1,082         | 213          | 339          | 47           | 74           | 79            | 156           | 59               | 82           | 0        | 0        | 1,228         | 1,733          |
| 900,001 - 1,000,000       | 567           | 802           | 159          | 301          | 38           | 64           | 88            | 92            | 52               | 75           | 0        | 0        | 904           | 1,334          |
| 1,000,001 & Above         | 2,354         | 2,985         | 960          | 1,535        | 649          | 934          | 342           | 557           | 469              | 690          | 1        | 2        | 4,775         | 6,703          |
| <b>Total</b>              | <b>42,609</b> | <b>64,913</b> | <b>4,957</b> | <b>8,561</b> | <b>1,275</b> | <b>2,214</b> | <b>9,374</b>  | <b>22,995</b> | <b>3,066</b>     | <b>6,423</b> | <b>2</b> | <b>7</b> | <b>61,283</b> | <b>105,113</b> |
| <b>Oct - Dec</b>          |               |               |              |              |              |              |               |               |                  |              |          |          |               |                |
| 0 - 100,000               | 10,970        | 10,623        | 516          | 657          | 140          | 169          | 12,837        | 10,037        | 2,723            | 2,526        | 1        | 1        | 27,187        | 24,013         |
| 100,001 - 200,000         | 12,740        | 12,167        | 692          | 845          | 96           | 184          | 3,899         | 3,366         | 939              | 840          | 1        | 0        | 18,367        | 17,402         |
| 200,001 - 300,000         | 12,470        | 11,714        | 791          | 1,048        | 97           | 92           | 1,490         | 1,343         | 445              | 449          | 0        | 0        | 15,293        | 14,646         |
| 300,001 - 400,000         | 9,281         | 8,693         | 872          | 1,071        | 105          | 106          | 872           | 805           | 275              | 258          | 1        | 0        | 11,406        | 10,933         |
| 400,001 - 500,000         | 6,292         | 6,718         | 778          | 1,059        | 110          | 148          | 508           | 515           | 202              | 156          | 0        | 0        | 7,890         | 8,596          |
| 500,001 - 600,000         | 3,409         | 3,699         | 606          | 839          | 69           | 100          | 305           | 294           | 122              | 158          | 1        | 0        | 4,512         | 5,090          |
| 600,001 - 700,000         | 2,450         | 2,492         | 501          | 717          | 68           | 74           | 240           | 215           | 104              | 120          | 0        | 0        | 3,363         | 3,618          |
| 700,001 - 800,000         | 1,737         | 1,615         | 385          | 488          | 93           | 70           | 173           | 166           | 96               | 81           | 0        | 0        | 2,484         | 2,420          |
| 800,001 - 900,000         | 1,148         | 1,038         | 296          | 433          | 60           | 66           | 112           | 128           | 62               | 74           | 1        | 0        | 1,679         | 1,739          |
| 900,001 - 1,000,000       | 778           | 680           | 228          | 312          | 60           | 63           | 95            | 121           | 60               | 56           | 0        | 0        | 1,221         | 1,232          |
| 1,000,001 & Above         | 2,913         | 2,660         | 1,373        | 1,611        | 860          | 966          | 394           | 460           | 517              | 602          | 3        | 4        | 6,060         | 6,303          |
| <b>Total</b>              | <b>64,188</b> | <b>62,099</b> | <b>7,038</b> | <b>9,080</b> | <b>1,758</b> | <b>2,038</b> | <b>20,925</b> | <b>17,450</b> | <b>5,545</b>     | <b>5,320</b> | <b>8</b> | <b>5</b> | <b>99,462</b> | <b>95,992</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          |                |
|---------------------------|----------------|----------------|---------------|---------------|--------------|--------------|---------------|---------------|------------------|---------------|-----------|-----------|----------------|----------------|
|                           | 2021           | 2022           | 2021          | 2022          | 2021         | 2022         | 2021          | 2022          | 2021             | 2022          | 2021      | 2022      | 2021           | 2022           |
| <b>Jan - Jun</b>          |                |                |               |               |              |              |               |               |                  |               |           |           |                |                |
| 100,000 & Below           | 15,067         | 19,865         | 885           | 1,432         | 225          | 292          | 15,673        | 24,596        | 3,984            | 5,313         | 0         | 1         | 35,834         | 51,499         |
| 100,001 - 200,000         | 19,515         | 23,433         | 1,225         | 1,674         | 136          | 322          | 4,961         | 7,684         | 1,496            | 2,033         | 0         | 0         | 27,333         | 35,146         |
| 200,001 - 300,000         | 17,908         | 21,952         | 1,294         | 1,717         | 172          | 296          | 2,055         | 3,301         | 684              | 990           | 0         | 1         | 22,113         | 28,257         |
| 300,001 - 400,000         | 13,321         | 16,169         | 1,215         | 1,715         | 185          | 228          | 1,126         | 1,849         | 424              | 538           | 0         | 0         | 16,271         | 20,499         |
| 400,001 - 500,000         | 8,997          | 11,311         | 1,123         | 1,635         | 171          | 213          | 783           | 1,210         | 278              | 382           | 0         | 0         | 11,352         | 14,751         |
| 500,001 - 600,000         | 4,842          | 6,554          | 791           | 1,193         | 110          | 185          | 421           | 685           | 158              | 261           | 0         | 0         | 6,322          | 8,878          |
| 600,001 - 700,000         | 3,471          | 4,517          | 718           | 1,237         | 136          | 170          | 342           | 494           | 134              | 195           | 0         | 1         | 4,801          | 6,614          |
| 700,001 - 800,000         | 2,284          | 3,130          | 536           | 802           | 119          | 141          | 251           | 421           | 141              | 199           | 0         | 0         | 3,331          | 4,693          |
| 800,001 - 900,000         | 1,425          | 2,164          | 501           | 594           | 74           | 112          | 161           | 276           | 129              | 142           | 0         | 1         | 2,290          | 3,289          |
| 900,001 - 1,000,000       | 997            | 1,376          | 405           | 490           | 91           | 147          | 126           | 203           | 91               | 133           | 0         | 0         | 1,710          | 2,349          |
| 1,000,001 & Above         | 4,188          | 5,707          | 1,740         | 2,679         | 1,143        | 1,724        | 532           | 876           | 791              | 1,035         | 1         | 6         | 8,395          | 12,027         |
| <b>Total</b>              | <b>92,015</b>  | <b>116,178</b> | <b>10,433</b> | <b>15,168</b> | <b>2,562</b> | <b>3,830</b> | <b>26,431</b> | <b>41,595</b> | <b>8,310</b>     | <b>11,221</b> | <b>1</b>  | <b>10</b> | <b>139,752</b> | <b>188,002</b> |
| <b>Jan - Sept</b>         |                |                |               |               |              |              |               |               |                  |               |           |           |                |                |
| 100,000 & Below           | 21,183         | 30,312         | 1,206         | 2,022         | 299          | 487          | 20,557        | 37,632        | 5,177            | 8,586         | 1         | 1         | 48,423         | 79,040         |
| 100,001 - 200,000         | 27,447         | 36,356         | 1,686         | 2,566         | 208          | 503          | 6,739         | 11,842        | 2,042            | 3,041         | 0         | 1         | 38,122         | 54,309         |
| 200,001 - 300,000         | 26,291         | 34,444         | 1,859         | 2,677         | 245          | 432          | 2,928         | 5,076         | 942              | 1,458         | 0         | 2         | 32,265         | 44,089         |
| 300,001 - 400,000         | 19,864         | 25,497         | 1,768         | 2,718         | 250          | 373          | 1,646         | 3,547         | 588              | 848           | 0         | 0         | 24,116         | 32,983         |
| 400,001 - 500,000         | 13,460         | 17,956         | 1,744         | 2,514         | 271          | 386          | 1,080         | 1,836         | 404              | 582           | 0         | 2         | 16,959         | 23,276         |
| 500,001 - 600,000         | 7,340          | 10,313         | 1,309         | 2,071         | 171          | 318          | 641           | 1,078         | 243              | 373           | 0         | 1         | 9,704          | 14,154         |
| 600,001 - 700,000         | 5,286          | 7,271          | 1,034         | 1,949         | 186          | 261          | 523           | 797           | 192              | 309           | 0         | 1         | 7,221          | 10,588         |
| 700,001 - 800,000         | 3,392          | 4,826          | 806           | 1,274         | 165          | 229          | 363           | 622           | 197              | 290           | 0         | 0         | 4,923          | 7,241          |
| 800,001 - 900,000         | 2,255          | 3,246          | 714           | 933           | 121          | 186          | 240           | 432           | 188              | 224           | 0         | 1         | 3,518          | 5,022          |
| 900,001 - 1,000,000       | 1,564          | 2,178          | 564           | 791           | 129          | 211          | 214           | 295           | 143              | 208           | 0         | 0         | 2,614          | 3,683          |
| 1,000,001 & Above         | 6,542          | 8,692          | 2,700         | 4,214         | 1,792        | 2,658        | 874           | 1,433         | 1,260            | 1,725         | 2         | 8         | 13,170         | 18,730         |
| <b>Total</b>              | <b>134,624</b> | <b>181,091</b> | <b>15,390</b> | <b>23,729</b> | <b>3,837</b> | <b>6,044</b> | <b>35,805</b> | <b>64,590</b> | <b>11,376</b>    | <b>17,644</b> | <b>3</b>  | <b>17</b> | <b>201,035</b> | <b>293,115</b> |
| <b>Jan - Dec</b>          |                |                |               |               |              |              |               |               |                  |               |           |           |                |                |
| 100,000 & Below           | 32,153         | 40,935         | 1,722         | 2,679         | 439          | 656          | 33,394        | 47,669        | 7,900            | 11,112        | 2         | 2         | 75,610         | 103,053        |
| 100,001 - 200,000         | 40,187         | 48,523         | 2,378         | 3,411         | 304          | 687          | 10,638        | 15,208        | 2,981            | 3,881         | 1         | 1         | 56,489         | 71,711         |
| 200,001 - 300,000         | 38,761         | 46,158         | 2,650         | 3,725         | 342          | 524          | 4,418         | 6,419         | 1,387            | 1,907         | 0         | 2         | 47,558         | 58,735         |
| 300,001 - 400,000         | 29,145         | 34,190         | 2,640         | 3,789         | 355          | 479          | 2,518         | 4,352         | 863              | 1,106         | 1         | 0         | 35,522         | 43,916         |
| 400,001 - 500,000         | 19,752         | 24,674         | 2,522         | 3,573         | 381          | 534          | 1,588         | 2,351         | 606              | 738           | 0         | 2         | 24,849         | 31,872         |
| 500,001 - 600,000         | 10,749         | 14,012         | 1,915         | 2,910         | 240          | 418          | 946           | 1,372         | 365              | 531           | 1         | 1         | 14,216         | 19,244         |
| 600,001 - 700,000         | 7,736          | 9,763          | 1,535         | 2,666         | 254          | 335          | 763           | 1,012         | 296              | 429           | 0         | 1         | 10,584         | 14,206         |
| 700,001 - 800,000         | 5,129          | 6,441          | 1,191         | 1,762         | 258          | 299          | 536           | 788           | 293              | 371           | 0         | 0         | 7,407          | 9,661          |
| 800,001 - 900,000         | 3,403          | 4,284          | 1,010         | 1,366         | 181          | 252          | 352           | 560           | 250              | 298           | 1         | 1         | 5,197          | 6,761          |
| 900,001 - 1,000,000       | 2,342          | 2,858          | 792           | 1,103         | 189          | 274          | 309           | 416           | 203              | 264           | 0         | 0         | 3,835          | 4,915          |
| 1,000,001 & Above         | 9,455          | 11,352         | 4,073         | 5,825         | 2,652        | 3,624        | 1,268         | 1,893         | 1,777            | 2,327         | 5         | 12        | 19,230         | 25,033         |
| <b>Total</b>              | <b>198,812</b> | <b>243,190</b> | <b>22,428</b> | <b>32,809</b> | <b>5,595</b> | <b>8,082</b> | <b>56,730</b> | <b>82,040</b> | <b>16,921</b>    | <b>22,964</b> | <b>11</b> | <b>22</b> | <b>300,497</b> | <b>389,107</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            |                  |
|---------------------------|------------------|------------------|-----------------|------------------|-----------------|-----------------|-----------------|-----------------|------------------|-----------------|--------------|--------------|------------------|------------------|
|                           | 2021             | 2022             | 2021            | 2022             | 2021            | 2022            | 2021            | 2022            | 2021             | 2022            | 2021         | 2022         | 2021             | 2022             |
| <b>Jan - Mar</b>          |                  |                  |                 |                  |                 |                 |                 |                 |                  |                 |              |              |                  |                  |
| 100,000 & Below           | 538.82           | 638.41           | 39.69           | 53.44            | 7.51            | 6.58            | 409.08          | 562.83          | 114.56           | 133.36          | 0.00         | 0.03         | 1,109.67         | 1,394.66         |
| 100,001 - 200,000         | 1,720.58         | 1,777.57         | 108.10          | 123.64           | 12.64           | 27.52           | 438.27          | 561.66          | 132.71           | 148.22          | 0.00         | 0.00         | 2,412.29         | 2,638.61         |
| 200,001 - 300,000         | 2,599.25         | 2,755.03         | 196.15          | 219.09           | 27.06           | 34.65           | 297.18          | 395.80          | 90.30            | 124.11          | 0.00         | 0.21         | 3,209.95         | 3,528.90         |
| 300,001 - 400,000         | 2,682.02         | 2,858.57         | 259.27          | 302.89           | 38.29           | 39.98           | 236.40          | 300.55          | 94.01            | 95.42           | 0.00         | 0.00         | 3,309.99         | 3,597.40         |
| 400,001 - 500,000         | 2,341.67         | 2,481.64         | 288.47          | 371.94           | 41.19           | 46.17           | 209.94          | 263.39          | 69.22            | 80.56           | 0.00         | 0.00         | 2,950.50         | 3,243.70         |
| 500,001 - 600,000         | 1,516.74         | 1,782.48         | 237.57          | 319.62           | 36.44           | 44.39           | 145.04          | 186.10          | 47.79            | 77.63           | 0.00         | 0.00         | 1,983.58         | 2,410.21         |
| 600,001 - 700,000         | 1,313.29         | 1,455.56         | 278.96          | 377.56           | 54.16           | 42.67           | 132.28          | 152.61          | 53.66            | 73.86           | 0.00         | 0.00         | 1,832.36         | 2,102.26         |
| 700,001 - 800,000         | 960.56           | 1,163.56         | 243.14          | 260.03           | 56.32           | 55.18           | 103.86          | 131.07          | 58.42            | 74.54           | 0.00         | 0.00         | 1,422.30         | 1,684.38         |
| 800,001 - 900,000         | 690.96           | 883.28           | 244.78          | 257.53           | 35.28           | 52.14           | 88.00           | 109.88          | 65.91            | 59.46           | 0.00         | 0.86         | 1,124.92         | 1,363.14         |
| 900,001 - 1,000,000       | 520.74           | 653.18           | 230.55          | 235.50           | 38.30           | 83.79           | 62.86           | 87.70           | 53.80            | 60.74           | 0.00         | 0.00         | 906.25           | 1,120.92         |
| 1,000,001 & Above         | 4,750.49         | 6,503.51         | 4,528.12        | 4,717.79         | 3,402.50        | 4,691.86        | 1,187.67        | 1,371.17        | 1,956.54         | 1,575.69        | 0.00         | 16.15        | 15,825.32        | 18,876.17        |
| <b>Total</b>              | <b>19,635.13</b> | <b>22,952.80</b> | <b>6,654.79</b> | <b>7,239.03</b>  | <b>3,749.69</b> | <b>5,124.93</b> | <b>3,310.58</b> | <b>4,122.76</b> | <b>2,736.93</b>  | <b>2,503.59</b> | <b>0.00</b>  | <b>17.24</b> | <b>36,087.12</b> | <b>41,960.35</b> |
| <b>Apr - Jun</b>          |                  |                  |                 |                  |                 |                 |                 |                 |                  |                 |              |              |                  |                  |
| 100,000 & Below           | 397.76           | 590.46           | 17.06           | 39.31            | 5.56            | 11.32           | 271.84          | 478.01          | 74.04            | 111.41          | 0.00         | 0.00         | 766.26           | 1,230.50         |
| 100,001 - 200,000         | 1,335.31         | 1,879.63         | 84.06           | 138.67           | 7.97            | 22.97           | 290.34          | 560.68          | 85.74            | 148.04          | 0.00         | 0.00         | 1,803.42         | 2,749.99         |
| 200,001 - 300,000         | 1,980.48         | 2,852.97         | 135.60          | 220.75           | 18.11           | 40.65           | 217.33          | 428.91          | 79.26            | 123.98          | 0.00         | 0.00         | 2,430.78         | 3,667.25         |
| 300,001 - 400,000         | 2,025.75         | 2,872.94         | 175.09          | 311.36           | 28.96           | 41.72           | 158.22          | 347.01          | 54.54            | 94.71           | 0.00         | 0.00         | 2,442.56         | 3,667.75         |
| 400,001 - 500,000         | 1,767.44         | 2,674.59         | 227.65          | 377.75           | 36.84           | 51.46           | 145.35          | 285.99          | 57.67            | 92.95           | 0.00         | 0.00         | 2,234.95         | 3,482.73         |
| 500,001 - 600,000         | 1,173.09         | 1,850.97         | 204.66          | 346.16           | 24.60           | 59.95           | 88.42           | 193.49          | 39.77            | 66.61           | 0.00         | 0.00         | 1,530.54         | 2,517.18         |
| 600,001 - 700,000         | 949.38           | 1,500.95         | 193.15          | 433.37           | 35.13           | 69.46           | 90.02           | 170.11          | 34.33            | 53.88           | 0.00         | 0.62         | 1,302.00         | 2,228.38         |
| 700,001 - 800,000         | 762.66           | 1,202.46         | 164.33          | 345.80           | 34.88           | 52.25           | 85.21           | 186.90          | 48.05            | 74.29           | 0.00         | 0.00         | 1,095.13         | 1,861.70         |
| 800,001 - 900,000         | 527.35           | 966.46           | 185.04          | 251.42           | 28.67           | 43.82           | 50.07           | 125.01          | 44.46            | 62.39           | 0.00         | 0.00         | 835.58           | 1,449.09         |
| 900,001 - 1,000,000       | 437.59           | 664.53           | 160.95          | 236.37           | 49.49           | 58.16           | 58.17           | 107.74          | 33.91            | 67.72           | 0.00         | 0.00         | 740.11           | 1,134.51         |
| 1,000,001 & Above         | 3,517.04         | 5,612.29         | 2,726.66        | 4,078.65         | 2,456.60        | 5,173.05        | 727.93          | 1,572.54        | 1,314.28         | 2,011.54        | 1.62         | 3.33         | 10,744.13        | 18,451.39        |
| <b>Total</b>              | <b>14,873.84</b> | <b>22,668.22</b> | <b>4,274.26</b> | <b>6,779.61</b>  | <b>2,726.80</b> | <b>5,624.80</b> | <b>2,182.91</b> | <b>4,456.38</b> | <b>1,866.04</b>  | <b>2,907.53</b> | <b>1.62</b>  | <b>3.94</b>  | <b>25,925.47</b> | <b>42,440.48</b> |
| <b>Jul - Sept</b>         |                  |                  |                 |                  |                 |                 |                 |                 |                  |                 |              |              |                  |                  |
| 100,000 & Below           | 355.43           | 641.70           | 21.80           | 39.27            | 4.70            | 10.09           | 233.30          | 551.71          | 57.10            | 134.86          | 0.00         | 0.00         | 672.34           | 1,377.63         |
| 100,001 - 200,000         | 1,248.23         | 2,023.28         | 71.45           | 139.82           | 11.73           | 27.65           | 261.73          | 609.52          | 80.08            | 146.43          | 0.00         | 0.14         | 1,673.22         | 2,946.84         |
| 200,001 - 300,000         | 2,144.74         | 3,195.30         | 147.65          | 244.84           | 18.59           | 35.41           | 220.19          | 442.44          | 64.25            | 115.84          | 0.00         | 0.30         | 2,595.43         | 4,034.13         |
| 300,001 - 400,000         | 2,317.59         | 3,316.95         | 197.33          | 360.01           | 23.31           | 52.01           | 183.14          | 612.44          | 58.32            | 108.49          | 0.00         | 0.00         | 2,779.68         | 4,449.91         |
| 400,001 - 500,000         | 2,036.22         | 3,025.03         | 284.72          | 403.12           | 46.11           | 79.93           | 135.74          | 282.48          | 57.53            | 91.16           | 0.00         | 0.91         | 2,560.31         | 3,882.63         |
| 500,001 - 600,000         | 1,389.63         | 2,091.31         | 289.77          | 491.10           | 33.94           | 75.28           | 122.20          | 217.65          | 47.45            | 62.26           | 0.00         | 0.59         | 1,882.99         | 2,938.19         |
| 600,001 - 700,000         | 1,188.92         | 1,800.26         | 207.43          | 467.03           | 33.10           | 59.59           | 118.25          | 196.75          | 37.74            | 74.75           | 0.00         | 0.00         | 1,585.45         | 2,598.38         |
| 700,001 - 800,000         | 837.76           | 1,279.49         | 203.74          | 356.98           | 35.19           | 67.14           | 84.76           | 150.29          | 42.01            | 67.83           | 0.00         | 0.00         | 1,203.46         | 1,921.73         |
| 800,001 - 900,000         | 708.66           | 925.49           | 182.97          | 290.38           | 40.63           | 63.76           | 67.63           | 133.13          | 49.96            | 70.14           | 0.00         | 0.00         | 1,049.85         | 1,482.91         |
| 900,001 - 1,000,000       | 543.72           | 768.51           | 153.31          | 290.03           | 36.76           | 61.89           | 84.45           | 88.37           | 50.35            | 72.16           | 0.00         | 0.00         | 868.58           | 1,280.96         |
| 1,000,001 & Above         | 5,051.82         | 5,950.91         | 6,203.82        | 4,758.54         | 4,536.76        | 3,965.73        | 1,032.26        | 1,762.76        | 2,301.08         | 3,173.49        | 4.12         | 70.00        | 19,129.87        | 19,681.43        |
| <b>Total</b>              | <b>17,822.73</b> | <b>25,018.24</b> | <b>7,963.99</b> | <b>7,841.10</b>  | <b>4,820.82</b> | <b>4,498.48</b> | <b>2,543.64</b> | <b>5,047.56</b> | <b>2,845.87</b>  | <b>4,117.42</b> | <b>4.12</b>  | <b>71.94</b> | <b>36,001.18</b> | <b>46,594.74</b> |
| <b>Oct - Dec</b>          |                  |                  |                 |                  |                 |                 |                 |                 |                  |                 |              |              |                  |                  |
| 100,000 & Below           | 651.16           | 645.29           | 31.80           | 42.39            | 7.72            | 10.35           | 557.38          | 431.07          | 127.47           | 114.23          | 0.03         | 0.07         | 1,375.56         | 1,243.39         |
| 100,001 - 200,000         | 1,996.00         | 1,912.73         | 108.65          | 130.80           | 15.34           | 26.70           | 566.04          | 492.99          | 136.16           | 122.56          | 0.14         | 0.00         | 2,822.32         | 2,685.79         |
| 200,001 - 300,000         | 3,190.53         | 2,981.46         | 203.32          | 269.89           | 24.64           | 23.83           | 373.13          | 335.17          | 110.80           | 110.61          | 0.00         | 0.00         | 3,902.42         | 3,720.96         |
| 300,001 - 400,000         | 3,280.03         | 3,084.75         | 311.72          | 384.61           | 38.11           | 37.62           | 307.32          | 282.59          | 95.99            | 89.85           | 0.38         | 0.00         | 4,033.55         | 3,879.42         |
| 400,001 - 500,000         | 2,870.26         | 3,069.39         | 365.26          | 484.65           | 50.35           | 67.98           | 232.08          | 233.20          | 91.43            | 70.46           | 0.00         | 0.00         | 3,609.37         | 3,925.69         |
| 500,001 - 600,000         | 1,892.53         | 2,052.69         | 338.84          | 468.72           | 38.61           | 56.17           | 169.85          | 162.17          | 67.63            | 87.32           | 0.52         | 0.00         | 2,507.98         | 2,827.07         |
| 600,001 - 700,000         | 1,604.67         | 1,634.46         | 328.75          | 470.50           | 45.63           | 48.90           | 155.12          | 139.48          | 68.19            | 78.03           | 0.00         | 0.00         | 2,202.36         | 2,371.38         |
| 700,001 - 800,000         | 1,309.76         | 1,219.04         | 292.12          | 369.22           | 70.35           | 52.88           | 130.37          | 124.72          | 72.07            | 60.80           | 0.00         | 0.00         | 1,874.66         | 1,826.66         |
| 800,001 - 900,000         | 980.98           | 888.46           | 253.51          | 371.03           | 51.40           | 56.72           | 95.15           | 109.35          | 52.97            | 63.82           | 0.87         | 0.00         | 1,434.88         | 1,489.39         |
| 900,001 - 1,000,000       | 744.25           | 654.00           | 219.58          | 300.59           | 57.69           | 60.66           | 91.39           | 115.63          | 57.65            | 54.01           | 0.00         | 0.00         | 1,170.55         | 1,184.89         |
| 1,000,001 & Above         | 6,050.01         | 5,494.65         | 6,594.12        | 7,461.31         | 5,267.24        | 5,474.19        | 1,147.84        | 1,803.93        | 2,850.78         | 2,658.19        | 10.55        | 31.72        | 21,920.54        | 22,923.99        |
| <b>Total</b>              | <b>24,570.16</b> | <b>23,636.92</b> | <b>9,047.67</b> | <b>10,753.70</b> | <b>5,667.07</b> | <b>5,916.01</b> | <b>3,825.64</b> | <b>4,230.31</b> | <b>3,731.14</b>  | <b>3,509.88</b> | <b>12.50</b> | <b>31.79</b> | <b>46,854.18</b> | <b>48,078.62</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             |                   |
|---------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|--------------|---------------|-------------------|-------------------|
|                           | 2021             | 2022             | 2021             | 2022             | 2021             | 2022             | 2021             | 2022             | 2021             | 2022             | 2021         | 2022          | 2021              | 2022              |
| <b>Jan - Jun</b>          |                  |                  |                  |                  |                  |                  |                  |                  |                  |                  |              |               |                   |                   |
| 100,000 & Below           | 936.58           | 1,228.87         | 56.76            | 92.75            | 13.07            | 17.90            | 680.92           | 1,040.84         | 188.60           | 244.77           | 0.00         | 0.03          | 1,875.93          | 2,625.16          |
| 100,001 - 200,000         | 3,055.89         | 3,657.20         | 192.16           | 262.31           | 20.61            | 50.49            | 728.61           | 1,122.34         | 218.45           | 296.26           | 0.00         | 0.00          | 4,215.72          | 5,388.60          |
| 200,001 - 300,000         | 4,579.73         | 5,608.00         | 331.76           | 439.84           | 45.17            | 75.30            | 514.51           | 824.71           | 169.56           | 248.09           | 0.00         | 0.21          | 5,640.73          | 7,196.15          |
| 300,001 - 400,000         | 4,707.77         | 5,731.50         | 434.36           | 614.25           | 67.25            | 81.70            | 394.62           | 647.56           | 148.55           | 190.13           | 0.00         | 0.00          | 5,752.55          | 7,265.14          |
| 400,001 - 500,000         | 4,109.11         | 5,156.23         | 516.11           | 749.68           | 78.03            | 97.63            | 355.29           | 549.37           | 126.89           | 173.51           | 0.00         | 0.00          | 5,185.44          | 6,726.43          |
| 500,001 - 600,000         | 2,689.83         | 3,633.45         | 442.23           | 665.77           | 61.04            | 104.33           | 233.46           | 379.60           | 87.56            | 144.24           | 0.00         | 0.00          | 3,514.12          | 4,927.39          |
| 600,001 - 700,000         | 2,262.67         | 2,956.51         | 472.11           | 810.93           | 89.29            | 112.13           | 222.30           | 322.72           | 87.99            | 127.74           | 0.00         | 0.62          | 3,134.36          | 4,330.64          |
| 700,001 - 800,000         | 1,723.23         | 2,366.02         | 407.47           | 605.82           | 91.19            | 107.43           | 189.07           | 317.98           | 106.47           | 148.83           | 0.00         | 0.00          | 2,517.43          | 3,546.08          |
| 800,001 - 900,000         | 1,218.31         | 1,849.74         | 429.81           | 508.95           | 63.94            | 95.95            | 138.07           | 234.88           | 110.37           | 121.85           | 0.00         | 0.86          | 1,960.50          | 2,812.23          |
| 900,001 - 1,000,000       | 958.32           | 1,317.71         | 391.50           | 471.88           | 87.80            | 141.95           | 121.03           | 195.44           | 87.70            | 128.46           | 0.00         | 0.00          | 1,646.36          | 2,255.43          |
| 1,000,001 & Above         | 8,267.52         | 12,115.80        | 7,254.78         | 8,796.45         | 5,859.10         | 9,864.91         | 1,915.61         | 2,943.71         | 3,270.83         | 3,587.23         | 1.62         | 19.47         | 26,569.45         | 37,327.56         |
| <b>Total</b>              | <b>34,508.97</b> | <b>45,621.02</b> | <b>10,929.05</b> | <b>14,018.64</b> | <b>6,476.49</b>  | <b>10,749.72</b> | <b>5,493.48</b>  | <b>8,579.14</b>  | <b>4,602.97</b>  | <b>5,411.11</b>  | <b>1.62</b>  | <b>21.19</b>  | <b>62,012.58</b>  | <b>84,400.83</b>  |
| <b>Jan - Sept</b>         |                  |                  |                  |                  |                  |                  |                  |                  |                  |                  |              |               |                   |                   |
| 100,000 & Below           | 1,292.01         | 1,870.57         | 78.55            | 132.01           | 17.78            | 27.99            | 914.22           | 1,592.55         | 245.71           | 379.64           | 0.00         | 0.03          | 2,548.27          | 4,002.79          |
| 100,001 - 200,000         | 4,304.13         | 5,680.47         | 263.61           | 402.13           | 32.34            | 78.15            | 990.34           | 1,731.86         | 298.53           | 442.70           | 0.00         | 0.14          | 5,888.94          | 8,335.44          |
| 200,001 - 300,000         | 6,724.47         | 8,803.30         | 479.41           | 684.68           | 63.76            | 110.71           | 734.70           | 1,267.15         | 233.81           | 363.93           | 0.00         | 0.51          | 8,236.16          | 11,230.28         |
| 300,001 - 400,000         | 7,025.36         | 9,048.46         | 631.69           | 974.26           | 90.56            | 133.71           | 577.75           | 1,260.00         | 206.87           | 298.62           | 0.00         | 0.00          | 8,532.23          | 11,715.05         |
| 400,001 - 500,000         | 6,145.33         | 8,181.26         | 800.83           | 1,152.80         | 124.14           | 177.56           | 491.03           | 831.86           | 184.42           | 264.67           | 0.00         | 0.91          | 7,745.75          | 10,609.05         |
| 500,001 - 600,000         | 4,079.46         | 5,724.76         | 732.00           | 1,156.87         | 94.98            | 179.61           | 355.66           | 597.24           | 135.01           | 206.51           | 0.00         | 0.59          | 5,397.11          | 7,865.58          |
| 600,001 - 700,000         | 3,451.59         | 4,756.77         | 679.54           | 1,277.96         | 122.39           | 171.72           | 340.55           | 519.47           | 125.73           | 202.49           | 0.00         | 0.62          | 4,719.81          | 6,929.02          |
| 700,001 - 800,000         | 2,560.99         | 3,645.51         | 611.21           | 962.80           | 126.38           | 174.57           | 273.83           | 468.27           | 148.48           | 216.66           | 0.00         | 0.00          | 3,720.89          | 5,467.81          |
| 800,001 - 900,000         | 1,926.97         | 2,775.23         | 612.78           | 799.33           | 104.57           | 159.72           | 205.70           | 368.02           | 160.32           | 191.99           | 0.00         | 0.86          | 3,010.35          | 4,295.14          |
| 900,001 - 1,000,000       | 1,502.04         | 2,086.22         | 544.82           | 761.90           | 124.55           | 203.84           | 205.48           | 283.81           | 138.05           | 200.61           | 0.00         | 0.00          | 2,514.94          | 3,536.39          |
| 1,000,001 & Above         | 13,319.35        | 18,066.71        | 13,458.60        | 13,554.98        | 10,395.86        | 13,830.64        | 2,947.86         | 4,706.47         | 5,571.91         | 6,760.72         | 5.74         | 89.47         | 45,699.31         | 57,009.00         |
| <b>Total</b>              | <b>52,331.70</b> | <b>70,639.26</b> | <b>18,893.04</b> | <b>21,859.74</b> | <b>11,297.31</b> | <b>15,248.21</b> | <b>8,037.13</b>  | <b>13,626.70</b> | <b>7,448.84</b>  | <b>9,528.54</b>  | <b>5.74</b>  | <b>93.12</b>  | <b>98,013.76</b>  | <b>130,995.56</b> |
| <b>Jan - Dec</b>          |                  |                  |                  |                  |                  |                  |                  |                  |                  |                  |              |               |                   |                   |
| 100,000 & Below           | 1,943.17         | 2,515.86         | 110.35           | 174.40           | 25.49            | 38.34            | 1,471.60         | 2,023.62         | 373.18           | 493.86           | 0.03         | 0.10          | 3,923.83          | 5,246.18          |
| 100,001 - 200,000         | 6,300.12         | 7,593.21         | 372.26           | 532.93           | 47.68            | 104.85           | 1,556.37         | 2,224.84         | 434.68           | 565.26           | 0.14         | 0.14          | 8,711.26          | 11,021.23         |
| 200,001 - 300,000         | 9,915.00         | 11,784.76        | 682.73           | 954.57           | 88.40            | 134.54           | 1,107.83         | 1,602.32         | 344.62           | 474.54           | 0.00         | 0.51          | 12,138.57         | 14,951.24         |
| 300,001 - 400,000         | 10,305.39        | 12,133.20        | 943.41           | 1,358.87         | 128.67           | 171.33           | 885.07           | 1,542.60         | 302.86           | 388.47           | 0.38         | 0.00          | 12,565.77         | 15,594.47         |
| 400,001 - 500,000         | 9,015.58         | 11,250.65        | 1,166.09         | 1,637.45         | 174.49           | 245.54           | 723.10           | 1,065.06         | 275.85           | 335.13           | 0.00         | 0.91          | 11,355.12         | 14,534.74         |
| 500,001 - 600,000         | 5,971.99         | 7,777.45         | 1,070.84         | 1,625.59         | 133.59           | 235.78           | 525.51           | 759.41           | 202.64           | 293.82           | 0.52         | 0.59          | 7,905.09          | 10,692.65         |
| 600,001 - 700,000         | 5,056.26         | 6,391.23         | 1,008.29         | 1,748.46         | 168.02           | 220.62           | 495.67           | 658.95           | 193.93           | 280.52           | 0.00         | 0.62          | 6,922.17          | 9,300.40          |
| 700,001 - 800,000         | 3,870.74         | 4,864.55         | 903.33           | 1,332.02         | 196.72           | 227.45           | 404.21           | 592.99           | 220.55           | 277.47           | 0.00         | 0.00          | 5,595.55          | 7,294.47          |
| 800,001 - 900,000         | 2,907.95         | 3,663.69         | 866.30           | 1,170.36         | 155.97           | 216.44           | 300.85           | 477.37           | 213.30           | 255.80           | 0.87         | 0.86          | 4,445.22          | 5,784.53          |
| 900,001 - 1,000,000       | 2,246.29         | 2,740.22         | 764.40           | 1,062.49         | 182.24           | 264.50           | 296.86           | 399.44           | 195.70           | 254.63           | 0.00         | 0.00          | 3,685.49          | 4,721.28          |
| 1,000,001 & Above         | 19,369.36        | 23,561.36        | 20,052.72        | 21,016.29        | 15,663.10        | 19,304.83        | 4,095.70         | 6,510.40         | 8,422.69         | 9,418.91         | 16.29        | 121.20        | 67,619.86         | 79,932.99         |
| <b>Total</b>              | <b>76,901.86</b> | <b>94,276.18</b> | <b>27,940.71</b> | <b>32,613.44</b> | <b>16,964.38</b> | <b>21,164.22</b> | <b>11,862.77</b> | <b>17,857.02</b> | <b>11,179.98</b> | <b>13,038.42</b> | <b>18.24</b> | <b>124.91</b> | <b>144,867.94</b> | <b>179,074.19</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  |        |
|--------------------------|-------------|--------|------------|-------|------------|-------|-------------|--------|------------------|-------|--------|------|--------|--------|
|                          | 2021        | 2022   | 2021       | 2022  | 2021       | 2022  | 2021        | 2022   | 2021             | 2022  | 2021   | 2022 | 2021   | 2022   |
| <b>W.P. Kuala Lumpur</b> |             |        |            |       |            |       |             |        |                  |       |        |      |        |        |
| Jan - Mar                | 3,061       | 3,127  | 835        | 1,054 | 23         | 34    | 0           | 0      | 41               | 51    | 0      | 1    | 3,960  | 4,267  |
| Apr - June               | 1,850       | 3,180  | 524        | 1,144 | 14         | 45    | 0           | 0      | 32               | 35    | 0      | 0    | 2,420  | 4,404  |
| Jul - Sept               | 3,070       | 3,514  | 877        | 1,303 | 33         | 31    | 0           | 0      | 43               | 65    | 0      | 0    | 4,023  | 4,913  |
| Oct - Dec                | 3,148       | 3,361  | 1,015      | 1,276 | 27         | 39    | 0           | 0      | 59               | 52    | 0      | 0    | 4,249  | 4,728  |
| Jan - June               | 4,911       | 6,307  | 1,359      | 2,198 | 37         | 79    | 0           | 0      | 73               | 86    | 0      | 1    | 6,380  | 8,671  |
| Jan - Sept               | 7,981       | 9,821  | 2,236      | 3,501 | 70         | 110   | 0           | 0      | 116              | 151   | 0      | 1    | 10,403 | 13,584 |
| Jan - Dec                | 11,129      | 13,182 | 3,251      | 4,777 | 97         | 149   | 0           | 0      | 175              | 203   | 0      | 1    | 14,652 | 18,312 |
| <b>W.P. Putrajaya</b>    |             |        |            |       |            |       |             |        |                  |       |        |      |        |        |
| Jan - Mar                | 53          | 62     | 3          | 8     | 2          | 0     | 0           | 0      | 0                | 0     | 0      | 0    | 58     | 70     |
| Apr - June               | 35          | 115    | 6          | 6     | 0          | 1     | 0           | 0      | 0                | 0     | 0      | 0    | 41     | 122    |
| Jul - Sept               | 84          | 66     | 3          | 5     | 0          | 0     | 0           | 0      | 0                | 0     | 0      | 0    | 87     | 71     |
| Oct - Dec                | 84          | 96     | 11         | 12    | 11         | 0     | 0           | 0      | 4                | 0     | 0      | 0    | 110    | 108    |
| Jan - June               | 88          | 177    | 9          | 14    | 2          | 1     | 0           | 0      | 0                | 0     | 0      | 0    | 99     | 192    |
| Jan - Sept               | 172         | 243    | 12         | 19    | 2          | 1     | 0           | 0      | 0                | 0     | 0      | 0    | 186    | 263    |
| Jan - Dec                | 256         | 339    | 23         | 31    | 13         | 1     | 0           | 0      | 4                | 0     | 0      | 0    | 296    | 371    |
| <b>W.P. Labuan</b>       |             |        |            |       |            |       |             |        |                  |       |        |      |        |        |
| Jan - Mar                | 59          | 87     | 27         | 6     | 6          | 1     | 22          | 31     | 49               | 55    | 0      | 0    | 163    | 180    |
| Apr - June               | 46          | 70     | 1          | 4     | 4          | 4     | 10          | 16     | 32               | 40    | 0      | 0    | 93     | 134    |
| Jul - Sept               | 69          | 72     | 8          | 9     | 3          | 5     | 15          | 19     | 38               | 40    | 0      | 0    | 133    | 145    |
| Oct - Dec                | 120         | 44     | 3          | 12    | 7          | 9     | 17          | 28     | 28               | 47    | 0      | 0    | 175    | 140    |
| Jan - June               | 105         | 157    | 28         | 10    | 10         | 5     | 32          | 47     | 81               | 95    | 0      | 0    | 256    | 314    |
| Jan - Sept               | 174         | 229    | 36         | 19    | 13         | 10    | 47          | 66     | 119              | 135   | 0      | 0    | 389    | 459    |
| Jan - Dec                | 294         | 273    | 39         | 31    | 20         | 19    | 64          | 94     | 147              | 182   | 0      | 0    | 564    | 599    |
| <b>Selangor</b>          |             |        |            |       |            |       |             |        |                  |       |        |      |        |        |
| Jan - Mar                | 13,077      | 13,758 | 1,554      | 1,970 | 495        | 564   | 693         | 1,027  | 489              | 653   | 0      | 3    | 16,308 | 17,975 |
| Apr - June               | 10,633      | 13,743 | 1,187      | 2,055 | 420        | 655   | 615         | 1,003  | 445              | 595   | 1      | 0    | 13,301 | 18,051 |
| Jul - Sept               | 9,671       | 15,515 | 1,201      | 2,285 | 410        | 801   | 444         | 1,158  | 344              | 1,142 | 0      | 0    | 12,070 | 20,901 |
| Oct - Dec                | 15,374      | 13,498 | 2,079      | 2,344 | 627        | 711   | 1,139       | 1,008  | 608              | 646   | 1      | 1    | 19,828 | 18,208 |
| Jan - June               | 23,710      | 27,501 | 2,741      | 4,025 | 915        | 1,219 | 1,308       | 2,030  | 934              | 1,248 | 1      | 3    | 29,609 | 36,026 |
| Jan - Sept               | 33,381      | 43,016 | 3,942      | 6,310 | 1,325      | 2,020 | 1,752       | 3,188  | 1,278            | 2,390 | 1      | 3    | 41,679 | 56,927 |
| Jan - Dec                | 48,755      | 56,514 | 6,021      | 8,654 | 1,952      | 2,731 | 2,891       | 4,196  | 1,886            | 3,036 | 2      | 4    | 61,507 | 75,135 |
| <b>Johor</b>             |             |        |            |       |            |       |             |        |                  |       |        |      |        |        |
| Jan - Mar                | 5,973       | 6,054  | 753        | 1,150 | 203        | 303   | 2,083       | 2,611  | 683              | 541   | 0      | 0    | 9,695  | 10,659 |
| Apr - June               | 4,708       | 6,782  | 657        | 1,133 | 134        | 226   | 1,414       | 2,747  | 344              | 601   | 0      | 0    | 7,257  | 11,489 |
| Jul - Sept               | 4,937       | 7,551  | 656        | 1,122 | 242        | 290   | 1,506       | 2,752  | 364              | 603   | 0      | 2    | 7,705  | 12,320 |
| Oct - Dec                | 6,973       | 7,700  | 980        | 1,382 | 231        | 311   | 2,686       | 2,356  | 617              | 568   | 1      | 0    | 11,488 | 12,317 |
| Jan - June               | 10,681      | 12,836 | 1,410      | 2,283 | 337        | 529   | 3,497       | 5,358  | 1,027            | 1,142 | 0      | 0    | 16,952 | 22,148 |
| Jan - Sept               | 15,618      | 20,387 | 2,066      | 3,405 | 579        | 819   | 5,003       | 8,110  | 1,391            | 1,745 | 0      | 2    | 24,657 | 34,468 |
| Jan - Dec                | 22,591      | 28,087 | 3,046      | 4,787 | 810        | 1,130 | 7,689       | 10,466 | 2,008            | 2,313 | 1      | 2    | 36,145 | 46,785 |
| <b>Pulau Pinang</b>      |             |        |            |       |            |       |             |        |                  |       |        |      |        |        |
| Jan - Mar                | 3,657       | 4,035  | 355        | 318   | 138        | 110   | 413         | 449    | 276              | 316   | 0      | 0    | 4,839  | 5,228  |
| Apr - June               | 2,407       | 4,323  | 236        | 498   | 109        | 163   | 208         | 375    | 160              | 311   | 0      | 0    | 3,120  | 5,670  |
| Jul - Sept               | 3,127       | 4,876  | 307        | 481   | 105        | 126   | 207         | 560    | 275              | 351   | 0      | 1    | 4,021  | 6,395  |
| Oct - Dec                | 4,457       | 4,658  | 371        | 676   | 112        | 123   | 311         | 395    | 294              | 335   | 1      | 1    | 5,546  | 6,188  |
| Jan - June               | 6,064       | 8,358  | 591        | 816   | 247        | 273   | 621         | 824    | 436              | 627   | 0      | 0    | 7,959  | 10,898 |
| Jan - Sept               | 9,191       | 13,234 | 898        | 1,297 | 352        | 399   | 828         | 1,384  | 711              | 978   | 0      | 1    | 11,980 | 17,293 |
| Jan - Dec                | 13,648      | 17,892 | 1,269      | 1,973 | 464        | 522   | 1,139       | 1,779  | 1,005            | 1,313 | 1      | 2    | 17,526 | 23,481 |



**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  |        |
|------------------------|-------------|--------|------------|-------|------------|------|-------------|--------|------------------|-------|--------|------|--------|--------|
|                        | 2021        | 2022   | 2021       | 2022  | 2021       | 2022 | 2021        | 2022   | 2021             | 2022  | 2021   | 2022 | 2021   | 2022   |
| <b>Perak</b>           |             |        |            |       |            |      |             |        |                  |       |        |      |        |        |
| Jan - Mar              | 5,681       | 6,949  | 534        | 639   | 114        | 140  | 2,319       | 3,480  | 121              | 181   | 0      | 0    | 8,769  | 11,389 |
| Apr - June             | 4,991       | 7,550  | 401        | 610   | 75         | 206  | 1,608       | 3,322  | 63               | 97    | 0      | 0    | 7,138  | 11,785 |
| Jul - Sept             | 5,703       | 8,129  | 406        | 739   | 98         | 157  | 1,200       | 4,029  | 68               | 153   | 0      | 0    | 7,475  | 13,207 |
| Oct - Dec              | 8,935       | 7,458  | 547        | 745   | 218        | 151  | 3,694       | 3,042  | 116              | 88    | 1      | 2    | 13,511 | 11,486 |
| Jan - June             | 10,672      | 14,499 | 935        | 1,249 | 189        | 346  | 3,927       | 6,802  | 184              | 278   | 0      | 0    | 15,907 | 23,174 |
| Jan - Sept             | 16,375      | 22,628 | 1,341      | 1,988 | 287        | 503  | 5,127       | 10,831 | 252              | 431   | 0      | 0    | 23,382 | 36,381 |
| Jan - Dec              | 25,310      | 30,086 | 1,888      | 2,733 | 505        | 654  | 8,821       | 13,873 | 368              | 519   | 1      | 2    | 36,893 | 47,867 |
| <b>Negeri Sembilan</b> |             |        |            |       |            |      |             |        |                  |       |        |      |        |        |
| Jan - Mar              | 2,970       | 3,634  | 195        | 332   | 88         | 179  | 814         | 1,091  | 114              | 122   | 0      | 1    | 4,181  | 5,359  |
| Apr - June             | 2,169       | 3,671  | 148        | 328   | 86         | 123  | 646         | 1,018  | 66               | 145   | 0      | 1    | 3,115  | 5,286  |
| Jul - Sept             | 2,293       | 3,800  | 157        | 298   | 54         | 113  | 539         | 1,269  | 54               | 184   | 1      | 1    | 3,098  | 5,665  |
| Oct - Dec              | 4,798       | 5,681  | 227        | 311   | 89         | 114  | 1,270       | 988    | 103              | 127   | 1      | 0    | 6,488  | 7,221  |
| Jan - June             | 5,139       | 7,305  | 343        | 660   | 174        | 302  | 1,460       | 2,109  | 180              | 267   | 0      | 2    | 7,296  | 10,645 |
| Jan - Sept             | 7,432       | 11,105 | 500        | 958   | 228        | 415  | 1,999       | 3,378  | 234              | 451   | 1      | 3    | 10,394 | 16,310 |
| Jan - Dec              | 12,230      | 16,786 | 727        | 1,269 | 317        | 529  | 3,269       | 4,366  | 337              | 578   | 2      | 3    | 16,882 | 23,531 |
| <b>Melaka</b>          |             |        |            |       |            |      |             |        |                  |       |        |      |        |        |
| Jan - Mar              | 2,461       | 2,136  | 252        | 265   | 98         | 100  | 620         | 502    | 411              | 700   | 0      | 0    | 3,842  | 3,703  |
| Apr - June             | 1,662       | 2,450  | 111        | 276   | 72         | 97   | 291         | 538    | 291              | 643   | 0      | 0    | 2,427  | 4,004  |
| Jul - Sept             | 2,015       | 3,106  | 151        | 382   | 48         | 165  | 394         | 582    | 241              | 721   | 0      | 0    | 2,849  | 4,956  |
| Oct - Dec              | 2,171       | 3,226  | 205        | 315   | 80         | 117  | 694         | 389    | 591              | 677   | 0      | 0    | 3,741  | 4,724  |
| Jan - June             | 4,123       | 4,586  | 363        | 541   | 170        | 197  | 911         | 1,040  | 702              | 1,343 | 0      | 0    | 6,269  | 7,707  |
| Jan - Sept             | 6,138       | 7,692  | 514        | 923   | 218        | 362  | 1,305       | 1,622  | 943              | 2,064 | 0      | 0    | 9,118  | 12,663 |
| Jan - Dec              | 8,309       | 10,918 | 719        | 1,238 | 298        | 479  | 1,999       | 2,011  | 1,534            | 2,741 | 0      | 0    | 12,859 | 17,387 |
| <b>Kedah</b>           |             |        |            |       |            |      |             |        |                  |       |        |      |        |        |
| Jan - Mar              | 3,154       | 3,003  | 251        | 359   | 55         | 114  | 3,382       | 4,281  | 679              | 757   | 0      | 2    | 7,521  | 8,516  |
| Apr - June             | 2,490       | 3,200  | 153        | 295   | 31         | 207  | 1,894       | 3,272  | 402              | 731   | 0      | 1    | 4,970  | 7,706  |
| Jul - Sept             | 2,044       | 3,779  | 145        | 275   | 37         | 174  | 1,224       | 3,751  | 263              | 709   | 0      | 0    | 3,713  | 8,688  |
| Oct - Dec              | 3,842       | 3,430  | 244        | 383   | 69         | 115  | 3,971       | 2,767  | 747              | 509   | 0      | 0    | 8,873  | 7,204  |
| Jan - June             | 5,644       | 6,203  | 404        | 654   | 86         | 321  | 5,276       | 7,553  | 1,081            | 1,488 | 0      | 3    | 12,491 | 16,222 |
| Jan - Sept             | 7,688       | 9,982  | 549        | 929   | 123        | 495  | 6,500       | 11,304 | 1,344            | 2,197 | 0      | 3    | 16,204 | 24,910 |
| Jan - Dec              | 11,530      | 13,412 | 793        | 1,312 | 192        | 610  | 10,471      | 14,071 | 2,091            | 2,706 | 0      | 3    | 25,077 | 32,114 |
| <b>Pahang</b>          |             |        |            |       |            |      |             |        |                  |       |        |      |        |        |
| Jan - Mar              | 2,630       | 3,475  | 195        | 266   | 51         | 41   | 1,116       | 1,502  | 142              | 260   | 0      | 0    | 4,134  | 5,544  |
| Apr - June             | 2,450       | 3,072  | 192        | 252   | 21         | 46   | 770         | 1,514  | 131              | 229   | 0      | 0    | 3,564  | 5,113  |
| Jul - Sept             | 1,820       | 3,408  | 120        | 344   | 34         | 73   | 586         | 1,695  | 87               | 266   | 0      | 0    | 2,647  | 5,786  |
| Oct - Dec              | 3,597       | 3,007  | 220        | 298   | 50         | 60   | 1,486       | 1,294  | 289              | 259   | 1      | 0    | 5,643  | 4,918  |
| Jan - June             | 5,080       | 6,547  | 387        | 518   | 72         | 87   | 1,886       | 3,016  | 273              | 489   | 0      | 0    | 7,698  | 10,657 |
| Jan - Sept             | 6,900       | 9,955  | 507        | 862   | 106        | 160  | 2,472       | 4,711  | 360              | 755   | 0      | 0    | 10,345 | 16,443 |
| Jan - Dec              | 10,497      | 12,962 | 727        | 1,160 | 156        | 220  | 3,958       | 6,005  | 649              | 1,014 | 1      | 0    | 15,988 | 21,361 |
| <b>Terengganu</b>      |             |        |            |       |            |      |             |        |                  |       |        |      |        |        |
| Jan - Mar              | 3,573       | 4,649  | 72         | 147   | 7          | 10   | 677         | 968    | 809              | 1,072 | 0      | 0    | 5,138  | 6,846  |
| Apr - June             | 2,105       | 3,639  | 73         | 92    | 1          | 7    | 442         | 782    | 581              | 697   | 0      | 0    | 3,202  | 5,217  |
| Jul - Sept             | 2,412       | 4,424  | 70         | 95    | 7          | 5    | 435         | 908    | 432              | 1,004 | 0      | 0    | 3,356  | 6,436  |
| Oct - Dec              | 3,822       | 3,525  | 104        | 141   | 10         | 4    | 709         | 709    | 982              | 788   | 0      | 0    | 5,627  | 5,167  |
| Jan - June             | 5,678       | 8,288  | 145        | 239   | 8          | 17   | 1,119       | 1,750  | 1,390            | 1,769 | 0      | 0    | 8,340  | 12,063 |
| Jan - Sept             | 8,090       | 12,712 | 215        | 334   | 15         | 22   | 1,554       | 2,658  | 1,822            | 2,773 | 0      | 0    | 11,696 | 18,499 |
| Jan - Dec              | 11,912      | 16,237 | 319        | 475   | 25         | 26   | 2,263       | 3,367  | 2,804            | 3,561 | 0      | 0    | 17,323 | 23,666 |

**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   |         |
|-----------------|-------------|---------|------------|--------|------------|-------|-------------|--------|------------------|--------|--------|------|---------|---------|
|                 | 2021        | 2022    | 2021       | 2022   | 2021       | 2022  | 2021        | 2022   | 2021             | 2022   | 2021   | 2022 | 2021    | 2022    |
| <b>Kelantan</b> |             |         |            |        |            |       |             |        |                  |        |        |      |         |         |
| Jan - Mar       | 1,706       | 1,908   | 215        | 85     | 1          | 10    | 1,277       | 1,837  | 342              | 310    | 0      | 0    | 3,541   | 4,150   |
| Apr - June      | 908         | 1,703   | 60         | 93     | 6          | 8     | 612         | 1,374  | 141              | 218    | 0      | 0    | 1,727   | 3,396   |
| Jul - Sept      | 1,370       | 1,692   | 102        | 102    | 3          | 4     | 636         | 1,472  | 115              | 284    | 0      | 0    | 2,226   | 3,554   |
| Oct - Dec       | 1,855       | 1,388   | 129        | 89     | 2          | 4     | 1,495       | 1,015  | 239              | 211    | 0      | 0    | 3,720   | 2,707   |
| Jan - June      | 2,614       | 3,611   | 275        | 178    | 7          | 18    | 1,889       | 3,211  | 483              | 528    | 0      | 0    | 5,268   | 7,546   |
| Jan - Sept      | 3,984       | 5,303   | 377        | 280    | 10         | 22    | 2,525       | 4,683  | 598              | 812    | 0      | 0    | 7,494   | 11,100  |
| Jan - Dec       | 5,839       | 6,691   | 506        | 369    | 12         | 26    | 4,020       | 5,698  | 837              | 1,023  | 0      | 0    | 11,214  | 13,807  |
| <b>Perlis</b>   |             |         |            |        |            |       |             |        |                  |        |        |      |         |         |
| Jan - Mar       | 244         | 292     | 25         | 33     | 2          | 1     | 417         | 645    | 35               | 93     | 0      | 0    | 723     | 1,064   |
| Apr - June      | 193         | 263     | 35         | 30     | 1          | 8     | 366         | 501    | 95               | 73     | 0      | 0    | 690     | 875     |
| Jul - Sept      | 104         | 297     | 20         | 32     | 0          | 6     | 170         | 563    | 11               | 95     | 0      | 1    | 305     | 994     |
| Oct - Dec       | 329         | 503     | 37         | 100    | 3          | 8     | 614         | 402    | 57               | 88     | 0      | 0    | 1,040   | 1,101   |
| Jan - June      | 437         | 555     | 60         | 63     | 3          | 9     | 783         | 1,146  | 130              | 166    | 0      | 0    | 1,413   | 1,939   |
| Jan - Sept      | 541         | 852     | 80         | 95     | 3          | 15    | 953         | 1,709  | 141              | 261    | 0      | 1    | 1,718   | 2,933   |
| Jan - Dec       | 870         | 1,355   | 117        | 195    | 6          | 23    | 1,567       | 2,111  | 198              | 349    | 0      | 1    | 2,758   | 4,034   |
| <b>Sabah</b>    |             |         |            |        |            |       |             |        |                  |        |        |      |         |         |
| Jan - Mar       | 1,198       | 1,448   | 262        | 276    | 56         | 95    | 268         | 547    | 100              | 177    | 0      | 0    | 1,884   | 2,543   |
| Apr - June      | 1,028       | 1,431   | 194        | 292    | 36         | 78    | 282         | 521    | 133              | 148    | 0      | 0    | 1,673   | 2,470   |
| Jul - Sept      | 1,218       | 1,593   | 272        | 351    | 66         | 101   | 375         | 1,351  | 119              | 245    | 0      | 0    | 2,050   | 3,641   |
| Oct - Dec       | 1,361       | 1,320   | 252        | 345    | 69         | 94    | 485         | 476    | 210              | 248    | 1      | 0    | 2,378   | 2,483   |
| Jan - June      | 2,226       | 2,879   | 456        | 568    | 92         | 173   | 550         | 1,068  | 233              | 325    | 0      | 0    | 3,557   | 5,013   |
| Jan - Sept      | 3,444       | 4,472   | 728        | 919    | 158        | 274   | 925         | 2,419  | 352              | 570    | 0      | 0    | 5,607   | 8,654   |
| Jan - Dec       | 4,805       | 5,792   | 980        | 1,264  | 227        | 368   | 1,410       | 2,895  | 562              | 818    | 1      | 0    | 7,985   | 11,137  |
| <b>Sarawak</b>  |             |         |            |        |            |       |             |        |                  |        |        |      |         |         |
| Jan - Mar       | 2,778       | 3,133   | 573        | 520    | 120        | 123   | 1,789       | 2,656  | 663              | 610    | 0      | 1    | 5,923   | 7,043   |
| Apr - June      | 2,065       | 3,236   | 354        | 632    | 93         | 131   | 1,383       | 2,985  | 440              | 760    | 0      | 0    | 4,335   | 7,744   |
| Jul - Sept      | 2,672       | 3,091   | 462        | 738    | 135        | 163   | 1,643       | 2,886  | 612              | 561    | 1      | 2    | 5,525   | 7,441   |
| Oct - Dec       | 3,322       | 3,204   | 614        | 651    | 153        | 178   | 2,354       | 2,581  | 601              | 677    | 1      | 1    | 7,045   | 7,292   |
| Jan - June      | 4,843       | 6,369   | 927        | 1,152  | 213        | 254   | 3,172       | 5,641  | 1,103            | 1,370  | 0      | 1    | 10,258  | 14,787  |
| Jan - Sept      | 7,515       | 9,460   | 1,389      | 1,890  | 348        | 417   | 4,815       | 8,527  | 1,715            | 1,931  | 1      | 3    | 15,783  | 22,228  |
| Jan - Dec       | 10,837      | 12,664  | 2,003      | 2,541  | 501        | 595   | 7,169       | 11,108 | 2,316            | 2,608  | 2      | 4    | 22,828  | 29,520  |
| <b>MALAYSIA</b> |             |         |            |        |            |       |             |        |                  |        |        |      |         |         |
| Jan - Mar       | 52,275      | 57,750  | 6,101      | 7,428  | 1,459      | 1,825 | 15,890      | 21,627 | 4,954            | 5,898  | 0      | 8    | 80,679  | 94,536  |
| Apr - June      | 39,740      | 58,428  | 4,332      | 7,740  | 1,103      | 2,005 | 10,541      | 19,968 | 3,356            | 5,323  | 1      | 2    | 59,073  | 93,466  |
| Jul - Sept      | 42,609      | 64,913  | 4,957      | 8,561  | 1,275      | 2,214 | 9,374       | 22,995 | 3,066            | 6,423  | 2      | 7    | 61,283  | 105,113 |
| Oct - Dec       | 64,188      | 62,099  | 7,038      | 9,080  | 1,758      | 2,038 | 20,925      | 17,450 | 5,545            | 5,320  | 8      | 5    | 99,462  | 95,992  |
| Jan - June      | 92,015      | 116,178 | 10,433     | 15,168 | 2,562      | 3,830 | 26,431      | 41,595 | 8,310            | 11,221 | 1      | 10   | 139,752 | 188,002 |
| Jan - Sept      | 134,624     | 181,091 | 15,390     | 23,729 | 3,837      | 6,044 | 35,805      | 64,590 | 11,376           | 17,644 | 3      | 17   | 201,035 | 293,115 |
| Jan - Dec       | 198,812     | 243,190 | 22,428     | 32,809 | 5,595      | 8,082 | 56,730      | 82,040 | 16,921           | 22,964 | 11     | 22   | 300,497 | 389,107 |

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     |           |
|--------------------------|-------------|-----------|------------|-----------|------------|-----------|-------------|----------|------------------|----------|--------|-------|-----------|-----------|
|                          | 2021        | 2022      | 2021       | 2022      | 2021       | 2022      | 2021        | 2022     | 2021             | 2022     | 2021   | 2022  | 2021      | 2022      |
| <b>W.P. Kuala Lumpur</b> |             |           |            |           |            |           |             |          |                  |          |        |       |           |           |
| Jan - Mar                | 2,395.35    | 3,352.26  | 1,900.10   | 1,643.63  | 43.56      | 125.02    | 0.00        | 0.00     | 353.89           | 131.21   | 0.00   | 2.82  | 4,692.90  | 5,254.95  |
| Apr - Jun                | 1,512.94    | 2,825.76  | 1,184.99   | 1,655.94  | 46.33      | 241.85    | 0.00        | 0.00     | 260.67           | 272.92   | 0.00   | 0.00  | 3,004.93  | 4,996.46  |
| Jul - Sept               | 2,954.48    | 2,754.41  | 3,059.59   | 1,960.76  | 92.12      | 109.48    | 0.00        | 0.00     | 706.40           | 562.98   | 0.00   | 0.00  | 6,812.60  | 5,387.63  |
| Oct - Dec                | 2,828.95    | 2,853.66  | 2,800.37   | 3,227.46  | 53.14      | 116.34    | 0.00        | 0.00     | 212.07           | 167.20   | 0.00   | 0.00  | 5,894.54  | 6,364.67  |
| Jan - Jun                | 3,908.29    | 6,178.02  | 3,085.09   | 3,299.57  | 89.89      | 366.87    | 0.00        | 0.00     | 614.57           | 404.13   | 0.00   | 2.82  | 7,697.83  | 10,251.42 |
| Jan - Sept               | 6,862.77    | 8,932.43  | 6,144.68   | 5,260.33  | 182.01     | 476.35    | 0.00        | 0.00     | 1,320.97         | 967.11   | 0.00   | 2.82  | 14,510.43 | 15,639.04 |
| Jan - Dec                | 9,691.72    | 11,786.10 | 8,945.06   | 8,487.79  | 235.16     | 592.70    | 0.00        | 0.00     | 1,533.04         | 1,134.30 | 0.00   | 2.82  | 20,404.97 | 22,003.71 |
| <b>W.P. Putrajaya</b>    |             |           |            |           |            |           |             |          |                  |          |        |       |           |           |
| Jan - Mar                | 39.58       | 161.65    | 3.16       | 260.49    | 14.70      | 0.00      | 0.00        | 0.00     | 0.00             | 0.00     | 0.00   | 0.00  | 57.43     | 422.14    |
| Apr - Jun                | 30.88       | 129.65    | 11.38      | 16.40     | 0.00       | 1.30      | 0.00        | 0.00     | 0.00             | 0.00     | 0.00   | 0.00  | 42.26     | 147.36    |
| Jul - Sept               | 57.13       | 59.62     | 9.41       | 11.13     | 0.00       | 0.00      | 0.00        | 0.00     | 0.00             | 0.00     | 0.00   | 0.00  | 66.54     | 70.75     |
| Oct - Dec                | 77.54       | 101.35    | 56.30      | 31.78     | 7.80       | 0.00      | 0.00        | 0.00     | 269.12           | 0.00     | 0.00   | 0.00  | 410.76    | 133.13    |
| Jan - Jun                | 70.46       | 291.30    | 14.53      | 276.89    | 14.70      | 1.30      | 0.00        | 0.00     | 0.00             | 0.00     | 0.00   | 0.00  | 99.69     | 569.49    |
| Jan - Sept               | 127.59      | 350.92    | 23.94      | 288.03    | 14.70      | 1.30      | 0.00        | 0.00     | 0.00             | 0.00     | 0.00   | 0.00  | 166.23    | 640.24    |
| Jan - Dec                | 205.13      | 452.27    | 80.25      | 319.80    | 22.50      | 1.30      | 0.00        | 0.00     | 269.12           | 0.00     | 0.00   | 0.00  | 576.99    | 773.37    |
| <b>W.P. Labuan</b>       |             |           |            |           |            |           |             |          |                  |          |        |       |           |           |
| Jan - Mar                | 22.78       | 39.96     | 18.93      | 6.06      | 10.42      | 0.50      | 3.58        | 7.03     | 9.75             | 10.75    | 0.00   | 0.00  | 65.45     | 64.30     |
| Apr - Jun                | 18.29       | 24.09     | 0.38       | 4.24      | 3.60       | 15.13     | 1.97        | 2.44     | 9.49             | 8.38     | 0.00   | 0.00  | 33.72     | 54.28     |
| Jul - Sept               | 27.49       | 27.95     | 6.00       | 8.23      | 205.25     | 5.11      | 2.21        | 3.59     | 12.65            | 9.75     | 0.00   | 0.00  | 253.60    | 54.63     |
| Oct - Dec                | 40.29       | 15.52     | 13.45      | 10.99     | 4.53       | 9.21      | 2.81        | 5.87     | 5.32             | 11.16    | 0.00   | 0.00  | 66.39     | 52.75     |
| Jan - Jun                | 41.06       | 64.05     | 19.31      | 10.30     | 14.02      | 15.63     | 5.55        | 9.47     | 19.23            | 19.14    | 0.00   | 0.00  | 99.17     | 118.58    |
| Jan - Sept               | 68.55       | 92.01     | 25.31      | 18.52     | 219.27     | 20.74     | 7.76        | 13.05    | 31.88            | 28.89    | 0.00   | 0.00  | 352.77    | 173.21    |
| Jan - Dec                | 108.84      | 107.53    | 38.76      | 29.52     | 223.80     | 29.95     | 10.57       | 18.92    | 37.20            | 40.05    | 0.00   | 0.00  | 419.16    | 225.97    |
| <b>Selangor</b>          |             |           |            |           |            |           |             |          |                  |          |        |       |           |           |
| Jan - Mar                | 6,792.51    | 7,497.34  | 1,884.94   | 2,483.78  | 1,906.35   | 2,482.13  | 415.88      | 327.49   | 458.56           | 618.52   | 0.00   | 5.87  | 11,458.24 | 13,415.13 |
| Apr - Jun                | 5,621.28    | 7,597.41  | 1,481.60   | 2,219.05  | 1,558.41   | 2,658.24  | 231.14      | 355.72   | 408.84           | 811.20   | 1.62   | 0.00  | 9,302.89  | 13,641.62 |
| Jul - Sept               | 5,608.56    | 8,340.88  | 1,372.28   | 2,441.94  | 2,437.91   | 2,408.05  | 261.63      | 685.63   | 528.60           | 1,227.69 | 0.00   | 0.00  | 10,208.98 | 15,104.19 |
| Oct - Dec                | 8,468.36    | 7,142.37  | 2,316.78   | 3,204.37  | 3,014.57   | 2,504.40  | 340.81      | 401.24   | 709.01           | 667.21   | 0.87   | 12.80 | 14,850.41 | 13,932.40 |
| Jan - Jun                | 12,413.79   | 15,094.76 | 3,366.54   | 4,702.83  | 3,464.76   | 5,140.37  | 647.02      | 683.21   | 867.40           | 1,429.72 | 1.62   | 5.87  | 20,761.13 | 27,056.75 |
| Jan - Sept               | 18,022.35   | 23,435.64 | 4,738.82   | 7,144.76  | 5,902.67   | 7,548.42  | 908.65      | 1,368.85 | 1,396.01         | 2,657.41 | 1.62   | 5.87  | 30,970.11 | 42,160.94 |
| Jan - Dec                | 26,490.71   | 30,578.01 | 7,055.61   | 10,349.13 | 8,917.24   | 10,052.82 | 1,249.46    | 1,770.09 | 2,105.02         | 3,324.62 | 2.49   | 18.67 | 45,820.53 | 56,093.34 |
| <b>Johor</b>             |             |           |            |           |            |           |             |          |                  |          |        |       |           |           |
| Jan - Mar                | 2,193.46    | 2,370.23  | 797.11     | 1,044.79  | 581.49     | 1,140.32  | 825.83      | 808.21   | 418.89           | 310.97   | 0.00   | 0.00  | 4,816.77  | 5,674.51  |
| Apr - Jun                | 1,706.38    | 2,531.68  | 475.35     | 830.50    | 277.70     | 885.56    | 445.88      | 911.73   | 383.37           | 349.30   | 0.00   | 0.00  | 3,288.68  | 5,508.78  |
| Jul - Sept               | 1,924.31    | 2,946.59  | 639.23     | 1,041.24  | 722.69     | 700.65    | 573.65      | 883.47   | 360.25           | 499.66   | 0.00   | 70.00 | 4,220.13  | 6,141.61  |
| Oct - Dec                | 2,658.59    | 3,062.86  | 1,836.11   | 1,657.07  | 1,007.24   | 1,402.90  | 901.36      | 764.61   | 490.33           | 931.37   | 1.72   | 0.00  | 6,895.35  | 7,818.82  |
| Jan - Jun                | 3,899.85    | 4,901.90  | 1,272.46   | 1,875.29  | 859.18     | 2,025.88  | 1,271.71    | 1,719.95 | 802.26           | 660.27   | 0.00   | 0.00  | 8,105.45  | 11,183.29 |
| Jan - Sept               | 5,824.16    | 7,848.50  | 1,911.69   | 2,916.53  | 1,581.87   | 2,726.53  | 1,845.36    | 2,603.42 | 1,162.51         | 1,159.93 | 0.00   | 70.00 | 12,325.58 | 17,324.91 |
| Jan - Dec                | 8,482.75    | 10,911.36 | 3,747.80   | 4,573.60  | 2,589.11   | 4,129.43  | 2,746.72    | 3,368.03 | 1,652.83         | 2,091.31 | 1.72   | 70.00 | 19,220.93 | 25,143.72 |
| <b>Pulau Pinang</b>      |             |           |            |           |            |           |             |          |                  |          |        |       |           |           |
| Jan - Mar                | 1,624.28    | 1,809.69  | 332.02     | 234.18    | 367.99     | 375.04    | 155.09      | 140.19   | 179.20           | 258.10   | 0.00   | 0.00  | 2,658.58  | 2,817.20  |
| Apr - Jun                | 984.19      | 1,907.73  | 160.61     | 368.40    | 407.62     | 614.78    | 53.78       | 203.31   | 110.73           | 237.76   | 0.00   | 0.00  | 1,716.94  | 3,332.00  |
| Jul - Sept               | 1,468.69    | 2,207.48  | 515.04     | 334.01    | 412.71     | 237.74    | 119.87      | 249.03   | 335.09           | 331.98   | 0.00   | 0.30  | 2,851.40  | 3,360.52  |
| Oct - Dec                | 1,889.04    | 2,033.69  | 309.76     | 583.75    | 424.31     | 395.85    | 88.80       | 346.56   | 509.33           | 505.71   | 0.03   | 1.02  | 3,221.28  | 3,866.59  |
| Jan - Jun                | 2,608.47    | 3,717.43  | 492.63     | 602.58    | 775.61     | 989.83    | 208.87      | 343.50   | 289.93           | 495.86   | 0.00   | 0.00  | 4,375.51  | 6,149.19  |
| Jan - Sept               | 4,077.16    | 5,924.91  | 1,007.67   | 936.59    | 1,188.32   | 1,227.56  | 328.74      | 592.53   | 625.03           | 827.84   | 0.00   | 0.30  | 7,226.91  | 9,509.72  |
| Jan - Dec                | 5,966.21    | 7,958.60  | 1,317.42   | 1,520.34  | 1,612.64   | 1,623.42  | 417.54      | 939.09   | 1,134.36         | 1,333.54 | 0.03   | 1.32  | 10,448.19 | 13,376.31 |

**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    |           |
|------------------------|-------------|----------|------------|----------|------------|----------|-------------|----------|------------------|--------|--------|------|----------|-----------|
|                        | 2021        | 2022     | 2021       | 2022     | 2021       | 2022     | 2021        | 2022     | 2021             | 2022   | 2021   | 2022 | 2021     | 2022      |
| <b>Perak</b>           |             |          |            |          |            |          |             |          |                  |        |        |      |          |           |
| Jan - Mar              | 1,324.20    | 1,612.94 | 227.99     | 324.04   | 178.01     | 138.18   | 360.19      | 482.91   | 34.00            | 121.38 | 0.00   | 0.00 | 2,124.39 | 2,679.44  |
| Apr - June             | 1,020.18    | 1,609.79 | 153.68     | 273.99   | 79.74      | 181.78   | 235.20      | 612.42   | 31.26            | 36.24  | 0.00   | 0.00 | 1,520.07 | 2,714.22  |
| Jul - Sept             | 1,334.91    | 1,855.56 | 252.76     | 339.17   | 162.63     | 150.99   | 302.62      | 811.78   | 84.07            | 117.77 | 0.00   | 0.00 | 2,136.99 | 3,275.27  |
| Oct - Dec              | 1,813.24    | 1,633.17 | 275.00     | 352.76   | 340.14     | 162.51   | 449.41      | 617.19   | 40.79            | 40.90  | 0.14   | 9.37 | 2,918.72 | 2,815.91  |
| Jan - June             | 2,344.38    | 3,222.72 | 381.67     | 598.03   | 257.76     | 319.96   | 595.39      | 1,095.34 | 65.26            | 157.62 | 0.00   | 0.00 | 3,644.46 | 5,393.66  |
| Jan - Sept             | 3,679.29    | 5,078.29 | 634.43     | 937.20   | 420.38     | 470.95   | 898.02      | 1,907.12 | 149.33           | 275.38 | 0.00   | 0.00 | 5,781.45 | 8,668.93  |
| Jan - Dec              | 5,492.53    | 6,711.45 | 909.43     | 1,289.96 | 760.53     | 633.46   | 1,347.43    | 2,524.31 | 190.12           | 316.29 | 0.14   | 9.37 | 8,700.17 | 11,484.84 |
| <b>Negeri Sembilan</b> |             |          |            |          |            |          |             |          |                  |        |        |      |          |           |
| Jan - Mar              | 966.02      | 1,276.85 | 256.92     | 151.47   | 168.00     | 178.71   | 225.44      | 246.69   | 68.17            | 80.87  | 0.00   | 5.70 | 1,684.54 | 1,940.30  |
| Apr - June             | 671.98      | 1,265.22 | 82.31      | 189.58   | 105.60     | 266.46   | 156.80      | 236.33   | 47.09            | 122.91 | 0.00   | 3.33 | 1,063.77 | 2,083.83  |
| Jul - Sept             | 802.25      | 1,305.63 | 95.13      | 217.96   | 181.69     | 119.25   | 168.77      | 302.58   | 70.52            | 118.41 | 4.12   | 0.14 | 1,322.48 | 2,063.98  |
| Oct - Dec              | 1,725.80    | 1,741.96 | 173.37     | 179.58   | 247.90     | 261.67   | 414.56      | 371.86   | 52.48            | 130.94 | 0.52   | 0.00 | 2,614.62 | 2,686.01  |
| Jan - June             | 1,638.00    | 2,542.08 | 339.23     | 341.05   | 273.59     | 445.17   | 382.24      | 483.02   | 115.25           | 203.78 | 0.00   | 9.03 | 2,748.31 | 4,024.13  |
| Jan - Sept             | 2,440.24    | 3,847.71 | 434.36     | 559.01   | 455.29     | 564.43   | 551.01      | 785.60   | 185.78           | 322.19 | 4.12   | 9.17 | 4,070.79 | 6,088.11  |
| Jan - Dec              | 4,166.04    | 5,589.67 | 607.73     | 738.59   | 703.18     | 826.10   | 965.57      | 1,157.46 | 238.25           | 453.13 | 4.64   | 9.17 | 6,685.42 | 8,774.12  |
| <b>Melaka</b>          |             |          |            |          |            |          |             |          |                  |        |        |      |          |           |
| Jan - Mar              | 664.71      | 698.19   | 238.09     | 190.19   | 88.44      | 152.28   | 85.34       | 109.04   | 425.52           | 150.72 | 0.00   | 0.00 | 1,502.10 | 1,300.42  |
| Apr - June             | 472.69      | 742.25   | 71.50      | 228.55   | 67.77      | 135.63   | 51.22       | 96.94    | 59.75            | 103.73 | 0.00   | 0.00 | 722.93   | 1,307.11  |
| Jul - Sept             | 584.35      | 1,038.19 | 110.29     | 275.59   | 36.88      | 149.75   | 84.79       | 83.63    | 72.52            | 211.52 | 0.00   | 0.00 | 888.84   | 1,758.69  |
| Oct - Dec              | 605.19      | 920.81   | 294.93     | 359.20   | 96.10      | 230.18   | 97.38       | 71.18    | 252.46           | 155.86 | 0.00   | 0.00 | 1,346.06 | 1,737.23  |
| Jan - June             | 1,137.40    | 1,440.44 | 309.59     | 418.74   | 156.20     | 287.91   | 136.57      | 205.99   | 485.27           | 254.45 | 0.00   | 0.00 | 2,225.03 | 2,607.52  |
| Jan - Sept             | 1,721.76    | 2,478.63 | 419.88     | 694.33   | 193.09     | 437.66   | 221.36      | 289.61   | 557.79           | 465.97 | 0.00   | 0.00 | 3,113.87 | 4,366.21  |
| Jan - Dec              | 2,326.95    | 3,399.44 | 714.81     | 1,053.53 | 289.18     | 667.84   | 318.74      | 360.80   | 810.25           | 621.83 | 0.00   | 0.00 | 4,459.93 | 6,103.44  |
| <b>Kedah</b>           |             |          |            |          |            |          |             |          |                  |        |        |      |          |           |
| Jan - Mar              | 816.82      | 775.68   | 100.84     | 198.85   | 45.88      | 168.93   | 297.39      | 360.72   | 123.56           | 107.33 | 0.00   | 2.65 | 1,384.48 | 1,614.15  |
| Apr - June             | 654.44      | 807.21   | 85.08      | 180.02   | 35.27      | 343.43   | 174.29      | 268.06   | 75.46            | 152.07 | 0.00   | 0.62 | 1,024.53 | 1,751.41  |
| Jul - Sept             | 583.28      | 906.65   | 815.14     | 262.18   | 58.36      | 305.45   | 160.33      | 322.85   | 91.98            | 242.24 | 0.00   | 0.00 | 1,709.10 | 2,039.36  |
| Oct - Dec              | 952.66      | 912.80   | 116.09     | 164.96   | 116.38     | 455.77   | 347.73      | 289.22   | 321.25           | 158.28 | 0.00   | 0.00 | 1,854.12 | 1,981.03  |
| Jan - June             | 1,471.25    | 1,582.89 | 185.92     | 378.87   | 81.14      | 512.36   | 471.68      | 628.78   | 199.01           | 259.41 | 0.00   | 3.26 | 2,409.01 | 3,365.56  |
| Jan - Sept             | 2,054.54    | 2,489.54 | 1,001.07   | 641.05   | 139.50     | 817.80   | 632.01      | 951.63   | 291.00           | 501.64 | 0.00   | 3.26 | 4,118.11 | 5,404.93  |
| Jan - Dec              | 3,007.20    | 3,402.34 | 1,117.16   | 806.01   | 255.87     | 1,273.57 | 979.74      | 1,240.86 | 612.25           | 659.92 | 0.00   | 3.26 | 5,972.23 | 7,385.96  |
| <b>Pahang</b>          |             |          |            |          |            |          |             |          |                  |        |        |      |          |           |
| Jan - Mar              | 620.18      | 776.80   | 140.45     | 156.45   | 39.26      | 45.50    | 321.30      | 460.16   | 73.67            | 123.74 | 0.00   | 0.00 | 1,194.86 | 1,562.64  |
| Apr - June             | 572.08      | 789.38   | 145.30     | 257.08   | 9.50       | 34.10    | 244.39      | 867.54   | 72.29            | 101.41 | 0.00   | 0.00 | 1,043.55 | 2,049.51  |
| Jul - Sept             | 479.92      | 905.10   | 608.51     | 215.69   | 34.24      | 39.64    | 263.76      | 405.62   | 54.93            | 111.21 | 0.00   | 0.00 | 1,441.35 | 1,677.26  |
| Oct - Dec              | 964.15      | 788.17   | 155.16     | 207.37   | 39.61      | 63.80    | 385.99      | 533.09   | 292.97           | 195.94 | 7.00   | 0.00 | 1,844.88 | 1,788.37  |
| Jan - June             | 1,192.25    | 1,566.18 | 285.75     | 413.53   | 48.76      | 79.61    | 565.69      | 1,327.69 | 145.96           | 225.15 | 0.00   | 0.00 | 2,238.41 | 3,612.16  |
| Jan - Sept             | 1,672.17    | 2,471.28 | 894.25     | 629.22   | 82.99      | 119.25   | 829.45      | 1,733.31 | 200.88           | 336.36 | 0.00   | 0.00 | 3,679.75 | 5,289.42  |
| Jan - Dec              | 2,636.33    | 3,259.44 | 1,049.41   | 836.59   | 122.60     | 183.05   | 1,215.44    | 2,266.40 | 493.85           | 532.30 | 7.00   | 0.00 | 5,524.63 | 7,077.79  |
| <b>Terengganu</b>      |             |          |            |          |            |          |             |          |                  |        |        |      |          |           |
| Jan - Mar              | 489.11      | 626.77   | 47.61      | 67.34    | 6.19       | 22.86    | 54.43       | 82.24    | 79.55            | 91.40  | 0.00   | 0.00 | 676.88   | 890.61    |
| Apr - June             | 297.00      | 493.92   | 25.13      | 48.42    | 2.20       | 12.25    | 34.51       | 81.72    | 51.24            | 64.66  | 0.00   | 0.00 | 410.07   | 700.98    |
| Jul - Sept             | 386.99      | 631.32   | 29.18      | 46.84    | 234.59     | 8.86     | 41.74       | 77.88    | 39.47            | 79.69  | 0.00   | 0.00 | 731.96   | 844.59    |
| Oct - Dec              | 529.80      | 499.80   | 47.84      | 62.52    | 25.91      | 13.40    | 60.16       | 50.96    | 82.11            | 63.15  | 0.00   | 0.00 | 745.82   | 689.83    |
| Jan - June             | 786.11      | 1,120.69 | 72.73      | 115.76   | 8.39       | 35.12    | 88.94       | 163.96   | 130.79           | 156.07 | 0.00   | 0.00 | 1,086.95 | 1,591.59  |
| Jan - Sept             | 1,173.09    | 1,752.00 | 101.91     | 162.59   | 242.97     | 43.98    | 130.68      | 241.84   | 170.26           | 235.76 | 0.00   | 0.00 | 1,818.91 | 2,436.17  |
| Jan - Dec              | 1,702.89    | 2,251.81 | 149.75     | 225.11   | 268.88     | 57.37    | 190.84      | 292.80   | 252.37           | 298.91 | 0.00   | 0.00 | 2,564.73 | 3,126.00  |

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      |            |
|-----------------|-------------|-----------|------------|-----------|------------|-----------|-------------|-----------|------------------|-----------|--------|--------|------------|------------|
|                 | 2021        | 2022      | 2021       | 2022      | 2021       | 2022      | 2021        | 2022      | 2021             | 2022      | 2021   | 2022   | 2021       | 2022       |
| <b>Kelantan</b> |             |           |            |           |            |           |             |           |                  |           |        |        |            |            |
| Jan - Mar       | 252.46      | 308.52    | 90.15      | 38.98     | 1.33       | 28.24     | 166.41      | 118.60    | 36.91            | 52.62     | 0.00   | 0.00   | 547.26     | 546.95     |
| Apr - June      | 176.20      | 279.70    | 26.62      | 38.60     | 6.78       | 5.12      | 37.89       | 116.06    | 17.24            | 21.94     | 0.00   | 0.00   | 264.73     | 461.42     |
| Jul - Sept      | 229.80      | 298.20    | 43.26      | 44.84     | 9.35       | 3.95      | 190.12      | 98.51     | 12.10            | 29.27     | 0.00   | 0.00   | 484.63     | 474.77     |
| Oct - Dec       | 311.77      | 249.54    | 51.16      | 37.56     | 5.30       | 5.66      | 102.11      | 67.54     | 20.61            | 22.06     | 0.00   | 0.00   | 490.95     | 382.36     |
| Jan - June      | 428.66      | 588.22    | 116.77     | 77.58     | 8.11       | 33.36     | 204.30      | 234.65    | 54.15            | 74.56     | 0.00   | 0.00   | 811.98     | 1,008.38   |
| Jan - Sept      | 658.46      | 886.42    | 160.03     | 122.43    | 17.46      | 37.31     | 394.42      | 333.17    | 66.25            | 103.83    | 0.00   | 0.00   | 1,296.62   | 1,483.15   |
| Jan - Dec       | 970.23      | 1,135.96  | 211.19     | 159.99    | 22.76      | 42.96     | 496.53      | 400.71    | 86.86            | 125.89    | 0.00   | 0.00   | 1,787.57   | 1,865.51   |
| <b>Perlis</b>   |             |           |            |           |            |           |             |           |                  |           |        |        |            |            |
| Jan - Mar       | 49.25       | 69.46     | 12.60      | 16.15     | 0.85       | 0.78      | 36.40       | 50.82     | 3.55             | 7.81      | 0.00   | 0.00   | 102.65     | 145.03     |
| Apr - June      | 51.25       | 62.65     | 13.21      | 16.68     | 0.24       | 4.00      | 24.80       | 43.48     | 6.29             | 15.18     | 0.00   | 0.00   | 95.78      | 141.99     |
| Jul - Sept      | 27.00       | 61.97     | 10.82      | 17.98     | 0.00       | 3.39      | 15.09       | 46.77     | 1.20             | 20.76     | 0.00   | 0.59   | 54.11      | 151.45     |
| Oct - Dec       | 78.88       | 74.96     | 23.90      | 40.41     | 1.61       | 8.07      | 45.27       | 31.77     | 3.76             | 11.85     | 0.00   | 0.00   | 153.42     | 167.06     |
| Jan - June      | 100.49      | 132.11    | 25.81      | 32.83     | 1.08       | 4.78      | 61.20       | 94.31     | 9.84             | 23.00     | 0.00   | 0.00   | 198.43     | 287.02     |
| Jan - Sept      | 127.50      | 194.08    | 36.63      | 50.81     | 1.08       | 8.17      | 76.29       | 141.07    | 11.04            | 43.76     | 0.00   | 0.59   | 252.54     | 438.48     |
| Jan - Dec       | 206.37      | 269.03    | 60.53      | 91.22     | 2.70       | 16.24     | 121.57      | 172.84    | 14.80            | 55.61     | 0.00   | 0.59   | 405.96     | 605.54     |
| <b>Sabah</b>    |             |           |            |           |            |           |             |           |                  |           |        |        |            |            |
| Jan - Mar       | 501.73      | 572.85    | 139.61     | 149.66    | 156.63     | 187.17    | 131.42      | 393.79    | 98.33            | 99.03     | 0.00   | 0.00   | 1,027.72   | 1,402.50   |
| Apr - June      | 404.25      | 554.66    | 140.22     | 168.62    | 60.41      | 98.30     | 197.68      | 259.55    | 108.75           | 243.65    | 0.00   | 0.00   | 911.30     | 1,324.78   |
| Jul - Sept      | 474.16      | 637.31    | 162.87     | 217.34    | 112.60     | 141.76    | 134.85      | 654.05    | 88.54            | 188.84    | 0.00   | 0.00   | 973.02     | 1,839.30   |
| Oct - Dec       | 561.64      | 512.95    | 228.79     | 268.20    | 157.70     | 138.90    | 227.93      | 213.76    | 131.85           | 104.52    | 1.84   | 0.00   | 1,309.76   | 1,238.33   |
| Jan - June      | 905.98      | 1,127.51  | 279.83     | 318.28    | 217.05     | 285.47    | 329.09      | 653.34    | 207.07           | 342.68    | 0.00   | 0.00   | 1,939.03   | 2,727.28   |
| Jan - Sept      | 1,380.15    | 1,764.82  | 442.70     | 535.62    | 329.64     | 427.23    | 463.94      | 1,307.39  | 295.61           | 531.52    | 0.00   | 0.00   | 2,912.05   | 4,566.58   |
| Jan - Dec       | 1,941.79    | 2,277.77  | 671.50     | 803.82    | 487.35     | 566.13    | 691.87      | 1,521.14  | 427.47           | 636.04    | 1.84   | 0.00   | 4,221.80   | 5,804.90   |
| <b>Sarawak</b>  |             |           |            |           |            |           |             |           |                  |           |        |        |            |            |
| Jan - Mar       | 882.70      | 1,003.62  | 464.29     | 272.98    | 140.61     | 79.26     | 231.89      | 534.88    | 373.38           | 339.13    | 0.00   | 0.21   | 2,092.86   | 2,230.08   |
| Apr - June      | 679.81      | 1,047.11  | 216.91     | 283.53    | 65.64      | 126.86    | 293.36      | 401.07    | 223.59           | 366.17    | 0.00   | 0.00   | 1,479.32   | 2,224.73   |
| Jul - Sept      | 879.40      | 1,041.37  | 234.47     | 406.20    | 119.81     | 114.41    | 224.21      | 422.17    | 387.54           | 365.65    | 0.00   | 0.91   | 1,845.44   | 2,350.72   |
| Oct - Dec       | 1,064.26    | 1,093.30  | 348.65     | 365.72    | 124.83     | 147.34    | 361.30      | 465.46    | 337.69           | 343.72    | 0.38   | 8.60   | 2,237.11   | 2,424.14   |
| Jan - June      | 1,562.52    | 2,050.72  | 681.20     | 556.51    | 206.25     | 206.12    | 525.25      | 935.95    | 596.97           | 705.30    | 0.00   | 0.21   | 3,572.18   | 4,454.81   |
| Jan - Sept      | 2,441.92    | 3,092.10  | 915.67     | 962.72    | 326.06     | 320.53    | 749.46      | 1,358.12  | 984.51           | 1,070.95  | 0.00   | 1.12   | 5,417.61   | 6,805.53   |
| Jan - Dec       | 3,506.17    | 4,185.40  | 1,264.32   | 1,328.44  | 450.89     | 467.87    | 1,110.76    | 1,823.58  | 1,322.20         | 1,414.66  | 0.39   | 9.72   | 7,654.72   | 9,229.67   |
| <b>MALAYSIA</b> |             |           |            |           |            |           |             |           |                  |           |        |        |            |            |
| Jan - Mar       | 11,635.13   | 22,952.80 | 6,654.79   | 7,239.03  | 3,749.69   | 5,124.93  | 3,310.58    | 4,122.76  | 2,736.93         | 2,503.59  | 0.00   | 17.24  | 36,087.12  | 41,960.35  |
| Apr - June      | 11,873.84   | 22,668.22 | 4,274.26   | 6,779.61  | 2,726.80   | 5,624.80  | 2,182.91    | 4,456.38  | 1,866.04         | 2,907.53  | 1.62   | 3.94   | 25,925.47  | 42,440.48  |
| Jul - Sept      | 11,822.73   | 25,018.24 | 7,963.99   | 7,841.10  | 4,820.82   | 4,498.48  | 2,543.64    | 5,047.56  | 2,845.87         | 4,117.42  | 4.12   | 71.94  | 36,001.18  | 46,594.74  |
| Oct - Dec       | 21,570.16   | 23,636.92 | 9,047.67   | 10,753.70 | 5,667.07   | 5,916.01  | 3,825.64    | 4,230.31  | 3,731.14         | 3,509.88  | 12.50  | 31.79  | 46,854.18  | 48,078.62  |
| Jan - June      | 31,508.97   | 45,621.02 | 10,929.05  | 14,018.64 | 6,476.49   | 10,749.72 | 5,493.48    | 8,579.14  | 4,602.97         | 5,411.11  | 1.62   | 21.19  | 62,012.58  | 84,400.83  |
| Jan - Sept      | 51,331.70   | 70,639.26 | 18,893.04  | 21,859.74 | 11,297.31  | 15,248.21 | 8,037.13    | 13,626.70 | 7,448.84         | 9,528.54  | 5.74   | 93.12  | 98,013.76  | 130,995.56 |
| Jan - Dec       | 71,901.86   | 94,276.18 | 27,940.71  | 32,613.44 | 16,964.38  | 21,164.22 | 11,862.77   | 17,857.02 | 11,179.98        | 13,038.42 | 18.24  | 124.91 | 144,867.94 | 179,074.19 |

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

Jadual VII/ Table VI

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

| Pemberi & Penerima Pindah Milik    | W.P. Kuala Lumpur |        | W.P. Putrajaya |       | W.P. Labuan |      | Selangor |        | Johor  |        | Pulau Pinang |        | Perak  |        | Negeri Sembilan |        | Melaka |        |  |
|------------------------------------|-------------------|--------|----------------|-------|-------------|------|----------|--------|--------|--------|--------------|--------|--------|--------|-----------------|--------|--------|--------|--|
|                                    | 2021              | 2022   | 2021           | 2022  | 2021        | 2022 | 2021     | 2022   | 2021   | 2022   | 2021         | 2022   | 2021   | 2022   | 2021            | 2022   | 2021   | 2022   |  |
| <b>KEDIAMAN</b>                    |                   |        |                |       |             |      |          |        |        |        |              |        |        |        |                 |        |        |        |  |
| Perseorangan & Perseorangan % Syer | 8,215             | 9,696  | 168            | 168   | 228         | 220  | 35,368   | 42,516 | 17,030 | 22,327 | 9,467        | 12,889 | 11,263 | 15,271 | 6,155           | 7,767  | 4,543  | 5,865  |  |
| Pemaju & Perseorangan              | 73.8              | 73.6   | 65.6           | 49.6  | 77.6        | 80.6 | 72.5     | 75.2   | 75.4   | 79.5   | 69.4         | 72.0   | 44.5   | 50.8   | 50.3            | 46.3   | 54.7   | 53.7   |  |
| Syarikat & Perseorangan            | 1,190             | 1,216  | 62             | 140   | 51          | 35   | 7,400    | 8,050  | 4,184  | 3,983  | 2,956        | 3,109  | 7,983  | 9,171  | 5,028           | 6,796  | 3,084  | 4,499  |  |
| Syarikat & Syarikat                | 10.7              | 9.2    | 24.2           | 41.3  | 17.3        | 12.8 | 15.2     | 14.2   | 18.5   | 14.2   | 21.7         | 17.4   | 31.5   | 30.5   | 41.1            | 40.5   | 37.1   | 41.2   |  |
| Lain-lain                          | 1,317             | 1,731  | 16             | 19    | 4           | 8    | 4,890    | 5,078  | 946    | 1,147  | 859          | 1,305  | 1,487  | 1,849  | 832             | 813    | 510    | 418    |  |
| Jumlah                             | 11,129            | 13,162 | 256            | 339   | 294         | 273  | 48,755   | 56,514 | 22,591 | 28,087 | 13,648       | 17,892 | 25,310 | 30,086 | 12,230          | 16,786 | 8,309  | 10,918 |  |
| <b>KOMERSIAL</b>                   |                   |        |                |       |             |      |          |        |        |        |              |        |        |        |                 |        |        |        |  |
| Perseorangan & Perseorangan % Syer | 1,432             | 1,833  | 7              | 9     | 6           | 20   | 2,931    | 4,069  | 1,462  | 2,344  | 525          | 839    | 884    | 1,493  | 402             | 695    | 352    | 540    |  |
| Pemaju & Perseorangan              | 44.0              | 38.4   | 30.4           | 29.0  | 15.4        | 64.5 | 48.7     | 47.0   | 48.0   | 49.0   | 41.4         | 42.5   | 46.8   | 54.6   | 55.3            | 54.8   | 49.0   | 43.6   |  |
| Syarikat & Perseorangan            | 389               | 986    | 1              | 0     | 21          | 0    | 364      | 730    | 387    | 482    | 157          | 217    | 115    | 209    | 81              | 154    | 94     | 234    |  |
| Syarikat & Syarikat                | 12.0              | 20.6   | 4.3            | 0.0   | 53.8        | 0.0  | 6.0      | 8.4    | 12.7   | 10.1   | 12.4         | 11.0   | 6.1    | 7.6    | 11.1            | 12.1   | 13.1   | 18.9   |  |
| Lain-lain                          | 888               | 1,237  | 5              | 4     | 6           | 6    | 1,542    | 2,456  | 637    | 978    | 301          | 552    | 485    | 561    | 141             | 231    | 138    | 221    |  |
| Jumlah                             | 3,251             | 4,777  | 23             | 31    | 39          | 31   | 6,021    | 8,654  | 3,046  | 4,787  | 1,269        | 1,973  | 1,888  | 2,733  | 727             | 1,269  | 719    | 1,238  |  |
| <b>IO.00USTRI</b>                  |                   |        |                |       |             |      |          |        |        |        |              |        |        |        |                 |        |        |        |  |
| Perseorangan & Perseorangan % Syer | 34                | 31     | 0              | 1     | 4           | 8    | 399      | 619    | 192    | 260    | 82           | 108    | 146    | 208    | 64              | 121    | 60     | 91     |  |
| Pemaju & Perseorangan              | 35.1              | 20.8   | 0.0            | 100.0 | 20.0        | 42.1 | 20.4     | 22.7   | 23.7   | 23.0   | 17.7         | 20.7   | 28.9   | 31.8   | 20.2            | 22.9   | 20.1   | 19.0   |  |
| Syarikat & Perseorangan            | 1                 | 0      | 0              | 0     | 5           | 2    | 19       | 32     | 18     | 35     | 13           | 8      | 3      | 3      | 25              | 52     | 23     | 17     |  |
| Syarikat & Syarikat                | 27                | 58     | 1              | 0     | 2           | 8    | 516      | 794    | 219    | 309    | 112          | 115    | 120    | 178    | 54              | 85     | 59     | 97     |  |
| Lain-lain                          | 1.0               | 0.7    | 0.0            | 0.0   | 25.0        | 10.5 | 1.0      | 1.2    | 2.2    | 3.1    | 2.8          | 1.5    | 0.6    | 0.5    | 7.9             | 9.8    | 7.7    | 3.5    |  |
| Jumlah                             | 97                | 149    | 13             | 1     | 20          | 19   | 1,952    | 2,731  | 810    | 1,130  | 464          | 522    | 505    | 654    | 317             | 529    | 298    | 479    |  |
| <b>PERTANIAN</b>                   |                   |        |                |       |             |      |          |        |        |        |              |        |        |        |                 |        |        |        |  |
| Perseorangan & Perseorangan % Syer | 0                 | 0      | 0              | 0     | 63          | 92   | 2,459    | 3,619  | 6,882  | 9,475  | 979          | 1,484  | 8,129  | 12,474 | 2,887           | 3,953  | 1,877  | 1,845  |  |
| Pemaju & Perseorangan              | 0.0               | 0.0    | 0.0            | 0.0   | 98.4        | 97.9 | 85.1     | 86.2   | 89.5   | 90.5   | 86.0         | 83.4   | 92.2   | 89.9   | 88.3            | 90.5   | 93.9   | 91.7   |  |
| Syarikat & Perseorangan            | 0                 | 0      | 0              | 0     | 0           | 0    | 6        | 7      | 3      | 8      | 1            | 2      | 8      | 4      | 24              | 44     | 0      | 2      |  |
| Syarikat & Syarikat                | 0.0               | 0.0    | 0.0            | 0.0   | 0.0         | 0.2  | 0.2      | 0.0    | 0.1    | 0.1    | 0.1          | 0.1    | 0.1    | 0.0    | 0.7             | 1.0    | 0.0    | 0.1    |  |
| Lain-lain                          | 0                 | 0      | 0              | 0     | 1           | 1    | 336      | 468    | 635    | 817    | 109          | 219    | 484    | 1,110  | 288             | 312    | 93     | 114    |  |
| Jumlah                             | 0                 | 0      | 0              | 0     | 64          | 94   | 2,891    | 4,196  | 7,689  | 10,466 | 1,139        | 1,779  | 8,821  | 13,873 | 3,269           | 4,366  | 1,999  | 2,011  |  |
| <b>TANAH PEMBANGUNAN</b>           |                   |        |                |       |             |      |          |        |        |        |              |        |        |        |                 |        |        |        |  |
| Perseorangan & Perseorangan % Syer | 101               | 115    | 0              | 0     | 137         | 169  | 1,469    | 2,486  | 1,413  | 1,866  | 672          | 870    | 263    | 451    | 253             | 448    | 1,342  | 2,548  |  |
| Pemaju & Perseorangan              | 57.7              | 56.7   | 0.0            | 0.0   | 93.2        | 92.9 | 77.9     | 81.9   | 70.4   | 80.7   | 66.9         | 66.3   | 71.5   | 86.9   | 75.1            | 77.5   | 87.5   | 93.0   |  |
| Syarikat & Perseorangan            | 0                 | 0      | 0              | 0     | 0           | 0    | 3        | 4      | 5      | 11     | 8            | 8      | 1      | 0      | 9               | 7      | 0      | 0      |  |
| Syarikat & Syarikat                | 31                | 28     | 0              | 0     | 9           | 10   | 291      | 381    | 261    | 330    | 183          | 294    | 70     | 38     | 53              | 82     | 129    | 138    |  |
| Lain-lain                          | 17.7              | 13.8   | 0.0            | 0.0   | 6.1         | 5.5  | 15.4     | 12.5   | 13.0   | 14.3   | 18.2         | 22.4   | 19.0   | 7.3    | 15.7            | 14.2   | 8.4    | 5.0    |  |
| Jumlah                             | 175               | 203    | 4              | 0     | 147         | 182  | 1,886    | 3,036  | 2,008  | 2,313  | 1,005        | 1,313  | 368    | 519    | 337             | 578    | 1,534  | 2,741  |  |
| <b>LAIN-LAIN</b>                   |                   |        |                |       |             |      |          |        |        |        |              |        |        |        |                 |        |        |        |  |
| Perseorangan & Perseorangan % Syer | 0                 | 0      | 0              | 0     | 0           | 0    | 0        | 0      | 0      | 0      | 0            | 0      | 0      | 0      | 1               | 2      | 0      | 0      |  |
| Pemaju & Perseorangan              | 0.0               | 0.0    | 0.0            | 0.0   | 0.0         | 0.0  | 0.0      | 0.0    | 0.0    | 0.0    | 0.0          | 0.0    | 0.0    | 0.0    | 50.0            | 66.7   | 0.0    | 0.0    |  |
| Syarikat & Perseorangan            | 0                 | 0      | 0              | 0     | 0           | 0    | 0        | 0      | 0      | 0      | 0            | 0      | 0      | 0      | 0               | 0      | 0      | 0      |  |
| Syarikat & Syarikat                | 0                 | 0      | 0              | 0     | 0           | 0    | 0        | 0      | 0      | 0      | 0            | 0      | 0      | 0      | 0               | 0      | 0      | 0      |  |
| Lain-lain                          | 0                 | 1      | 0              | 0     | 0           | 0    | 0        | 0      | 0      | 0      | 0            | 0      | 0      | 0      | 0               | 0      | 0      | 0      |  |
| Jumlah                             | 0                 | 1      | 0              | 0     | 0           | 0    | 0        | 0      | 0      | 0      | 0            | 0      | 0      | 0      | 2               | 2      | 0      | 0      |  |
| <b>JUMLAH</b>                      |                   |        |                |       |             |      |          |        |        |        |              |        |        |        |                 |        |        |        |  |
| Perseorangan & Perseorangan % Syer | 9,782             | 11,675 | 175            | 178   | 438         | 509  | 42,626   | 53,310 | 26,979 | 36,272 | 11,725       | 16,190 | 20,685 | 29,897 | 9,762           | 12,986 | 8,174  | 10,889 |  |
| Pemaju & Perseorangan              | 66.8              | 63.8   | 59.1           | 48.0  | 77.7        | 85.0 | 69.3     | 71.0   | 74.6   | 77.5   | 66.9         | 68.9   | 56.1   | 62.5   | 57.8            | 55.2   | 63.6   | 62.6   |  |
| Syarikat & Perseorangan            | 1,580             | 2,203  | 63             | 140   | 77          | 37   | 7,792    | 8,823  | 4,597  | 4,519  | 3,135        | 3,344  | 8,110  | 9,387  | 5,167           | 7,053  | 3,201  | 4,752  |  |
| Syarikat & Syarikat                | 2,263             | 3,054  | 22             | 23    | 22          | 33   | 7,575    | 9,178  | 2,698  | 3,581  | 1,564        | 2,485  | 2,646  | 3,736  | 1,369           | 1,523  | 929    | 988    |  |
| Lain-lain                          | 15.4              | 16.7   | 7.4            | 6.2   | 3.9         | 5.5  | 12.3     | 12.2   | 7.5    | 7.7    | 8.9          | 10.6   | 7.2    | 7.8    | 8.1             | 6.5    | 7.2    | 5.7    |  |
| Jumlah                             | 14,652            | 18,312 | 296            | 371   | 564         | 599  | 61,507   | 75,135 | 36,145 | 46,785 | 17,526       | 23,481 | 36,893 | 47,867 | 16,882          | 23,531 | 12,859 | 17,387 |  |

**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       |                | Transferor and Transferee       |
|-------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|--------------|--------------|--------------|---------------|---------------|---------------|----------------|----------------|---------------------------------|
| 2021                    | 2022          | 2021          | 2022          | 2021          | 2022          | 2021          | 2022          | 2021         | 2022         | 2021         | 2022          | 2021          | 2022          | 2021           | 2022           |                                 |
| <b>RESIDENTIAL</b>      |               |               |               |               |               |               |               |              |              |              |               |               |               |                |                |                                 |
| 6,880                   | 8,492         | 4,826         | 7,050         | 10,936        | 14,192        | 4,564         | 5,469         | 611          | 721          | 4,343        | 5,118         | 9,099         | 10,850        | 133,696        | 168,611        | Individual & Individual % Share |
| 59.7                    | 63.3          | 46.0          | 54.4          | 91.8          | 87.4          | 78.2          | 81.7          | 70.2         | 53.2         | 90.4         | 88.4          | 84.0          | 85.7          | 67.2           | 69.3           | Developer & Individual          |
| 3,768                   | 3,503         | 4,520         | 4,231         | 425           | 902           | 717           | 1,013         | 132          | 327          | 6            | 53            | 568           | 488           | 42,074         | 47,516         | Company & Individual            |
| 32.7                    | 26.1          | 43.1          | 32.6          | 3.6           | 5.6           | 12.3          | 15.1          | 15.2         | 24.1         | 0.1          | 0.9           | 5.2           | 3.9           | 21.2           | 19.5           | Company & Company               |
| 407                     | 520           | 658           | 925           | 208           | 427           | 99            | 137           | 70           | 110          | 376          | 501           | 1,042         | 1,167         | 13,721         | 16,155         | Others                          |
| 3.5                     | 3.9           | 6.3           | 7.1           | 1.7           | 2.6           | 1.7           | 2.0           | 8.0          | 8.1          | 7.8          | 8.6           | 9.6           | 9.2           | 6.9            | 6.6            | Total                           |
| 165                     | 114           | 312           | 560           | 27            | 41            | 344           | 2             | 18           | 159          | 23           | 70            | 85            | 77            | 6,813          | 7,284          |                                 |
| 1.4                     | 0.8           | 3.0           | 4.3           | 0.2           | 0.3           | 5.9           | 0.0           | 2.1          | 11.7         | 0.5          | 1.2           | 0.8           | 0.6           | 3.4            | 3.0            |                                 |
| 310                     | 783           | 181           | 196           | 316           | 675           | 115           | 70            | 39           | 38           | 57           | 50            | 43            | 82            | 2,508          | 3,624          |                                 |
| 2.7                     | 5.8           | 1.7           | 1.5           | 2.7           | 4.2           | 2.0           | 1.0           | 4.5          | 2.8          | 1.2          | 0.9           | 0.4           | 0.6           | 1.3            | 1.5            |                                 |
| <b>11,530</b>           | <b>13,412</b> | <b>10,497</b> | <b>12,962</b> | <b>11,912</b> | <b>16,237</b> | <b>5,839</b>  | <b>6,691</b>  | <b>870</b>   | <b>1,355</b> | <b>4,805</b> | <b>5,792</b>  | <b>10,837</b> | <b>12,664</b> | <b>198,812</b> | <b>243,190</b> |                                 |
| <b>COMMERCIAL</b>       |               |               |               |               |               |               |               |              |              |              |               |               |               |                |                |                                 |
| 398                     | 702           | 328           | 551           | 192           | 314           | 217           | 261           | 57           | 53           | 569          | 735           | 1,279         | 1,739         | 11,041         | 16,197         | Individual & Individual % Share |
| 50.2                    | 53.5          | 45.1          | 47.5          | 60.2          | 66.1          | 42.9          | 70.7          | 48.7         | 27.2         | 58.1         | 58.1          | 63.9          | 68.4          | 49.2           | 49.4           | Developer & Individual          |
| 107                     | 131           | 46            | 120           | 10            | 8             | 74            | 56            | 5            | 12           | 2            | 14            | 55            | 46            | 1,908          | 3,399          | Company & Individual            |
| 13.5                    | 10.0          | 6.3           | 10.3          | 3.1           | 1.7           | 14.6          | 15.2          | 4.3          | 6.2          | 0.2          | 1.1           | 2.7           | 1.8           | 8.5            | 10.4           | Company & Company               |
| 152                     | 218           | 187           | 254           | 54            | 62            | 23            | 37            | 15           | 44           | 276          | 370           | 438           | 557           | 5,288          | 7,788          | Others                          |
| 19.2                    | 16.6          | 25.7          | 21.9          | 16.9          | 13.1          | 4.5           | 10.0          | 12.8         | 22.6         | 28.2         | 29.3          | 21.9          | 21.9          | 23.6           | 23.7           |                                 |
| 100                     | 186           | 113           | 179           | 24            | 37            | 178           | 10            | 34           | 77           | 114          | 123           | 193           | 158           | 3,646          | 4,845          |                                 |
| 12.6                    | 14.2          | 15.5          | 15.4          | 7.5           | 7.8           | 35.2          | 2.7           | 29.1         | 39.5         | 11.6         | 9.7           | 9.6           | 6.2           | 16.3           | 14.8           |                                 |
| 36                      | 75            | 53            | 56            | 39            | 54            | 14            | 5             | 6            | 9            | 19           | 19            | 38            | 41            | 545            | 580            |                                 |
| 4.5                     | 6.7           | 7.3           | 4.8           | 12.2          | 11.4          | 2.8           | 1.4           | 5.1          | 4.6          | 1.9          | 1.7           | 1.9           | 1.6           | 2.4            | 1.8            |                                 |
| <b>793</b>              | <b>1,312</b>  | <b>727</b>    | <b>1,160</b>  | <b>319</b>    | <b>475</b>    | <b>506</b>    | <b>369</b>    | <b>117</b>   | <b>195</b>   | <b>980</b>   | <b>1,264</b>  | <b>2,003</b>  | <b>2,541</b>  | <b>22,428</b>  | <b>32,809</b>  |                                 |
| <b>INDUSTRIAL</b>       |               |               |               |               |               |               |               |              |              |              |               |               |               |                |                |                                 |
| 39                      | 57            | 42            | 79            | 10            | 7             | 4             | 11            | 1            | 7            | 84           | 140           | 229           | 314           | 1,390          | 2,062          | Individual & Individual % Share |
| 20.3                    | 9.3           | 26.9          | 35.9          | 40.0          | 26.9          | 33.3          | 42.3          | 16.7         | 30.4         | 37.0         | 38.0          | 45.7          | 52.8          | 24.8           | 25.5           | Developer & Individual          |
| 4                       | 15            | 2             | 4             | 0             | 0             | 0             | 0             | 0            | 0            | 0            | 1             | 15            | 7             | 128            | 177            | Company & Individual            |
| 2.1                     | 2.5           | 1.3           | 1.8           | 0.0           | 0.0           | 0.0           | 0.0           | 0.0          | 0.0          | 0.0          | 0.3           | 3.0           | 1.2           | 2.3            | 2.2            | Company & Company               |
| 63                      | 100           | 54            | 54            | 2             | 0             | 2             | 5             | 1            | 8            | 73           | 132           | 167           | 181           | 1,472          | 2,124          | Others                          |
| 32.8                    | 16.4          | 34.6          | 24.5          | 8.0           | 0.0           | 16.7          | 19.2          | 16.7         | 34.8         | 32.2         | 35.9          | 33.3          | 30.4          | 26.3           | 26.3           |                                 |
| 64                      | 330           | 31            | 66            | 11            | 16            | 5             | 10            | 0            | 4            | 69           | 94            | 88            | 92            | 2,419          | 3,463          |                                 |
| 33.3                    | 54.1          | 19.9          | 30.0          | 44.0          | 61.5          | 41.7          | 38.5          | 0.0          | 17.4         | 30.4         | 25.5          | 17.6          | 15.5          | 43.2           | 42.8           |                                 |
| 22                      | 108           | 27            | 17            | 2             | 13            | 1             | 0             | 4            | 4            | 1            | 1             | 2             | 1             | 186            | 256            |                                 |
| 11.5                    | 17.7          | 17.3          | 7.7           | 8.0           | 11.5          | 8.3           | 0.0           | 66.7         | 17.4         | 0.4          | 0.3           | 0.4           | 0.2           | 3.3            | 3.2            |                                 |
| <b>192</b>              | <b>610</b>    | <b>156</b>    | <b>220</b>    | <b>25</b>     | <b>26</b>     | <b>12</b>     | <b>26</b>     | <b>6</b>     | <b>23</b>    | <b>227</b>   | <b>368</b>    | <b>501</b>    | <b>595</b>    | <b>5,595</b>   | <b>8,082</b>   |                                 |
| <b>AGRICULTURE</b>      |               |               |               |               |               |               |               |              |              |              |               |               |               |                |                |                                 |
| 10,245                  | 13,770        | 3,236         | 5,211         | 2,212         | 3,297         | 3,999         | 5,639         | 1,544        | 2,079        | 1,162        | 1,709         | 6,513         | 10,320        | 52,187         | 74,967         | Individual & Individual % Share |
| 97.8                    | 97.9          | 81.8          | 86.8          | 97.7          | 97.9          | 99.5          | 99.0          | 98.5         | 98.5         | 82.4         | 59.0          | 90.8          | 92.9          | 92.0           | 91.4           | Developer & Individual          |
| 13                      | 1             | 58            | 26            | 0             | 2             | 0             | 5             | 0            | 0            | 0            | 1             | 0             | 0             | 113            | 102            | Company & Individual            |
| 0.1                     | 0.0           | 1.5           | 0.4           | 0.0           | 0.1           | 0.0           | 0.1           | 0.0          | 0.0          | 0.0          | 0.0           | 0.0           | 0.0           | 0.2            | 0.1            | Company & Company               |
| 158                     | 171           | 538           | 524           | 39            | 43            | 4             | 33            | 10           | 9            | 162          | 364           | 527           | 695           | 3,384          | 4,880          | Others                          |
| 1.5                     | 1.2           | 13.6          | 8.7           | 1.7           | 1.3           | 0.1           | 0.6           | 0.6          | 0.4          | 11.5         | 12.6          | 7.4           | 6.3           | 6.0            | 5.9            |                                 |
| 26                      | 27            | 102           | 88            | 2             | 13            | 6             | 1             | 3            | 1            | 82           | 100           | 106           | 76            | 727            | 889            |                                 |
| 0.2                     | 0.2           | 2.6           | 1.5           | 0.1           | 0.4           | 0.1           | 0.0           | 0.2          | 0.0          | 5.8          | 3.5           | 1.5           | 0.7           | 1.3            | 1.1            |                                 |
| 29                      | 102           | 24            | 156           | 10            | 12            | 11            | 20            | 10           | 22           | 4            | 721           | 23            | 17            | 319            | 1,202          |                                 |
| 0.3                     | 0.7           | 0.6           | 2.6           | 0.4           | 0.4           | 0.3           | 0.4           | 0.6          | 1.0          | 0.3          | 24.9          | 0.3           | 0.2           | 0.6            | 1.5            |                                 |
| <b>10,471</b>           | <b>14,071</b> | <b>3,958</b>  | <b>6,005</b>  | <b>2,263</b>  | <b>3,367</b>  | <b>4,020</b>  | <b>5,698</b>  | <b>1,567</b> | <b>2,111</b> | <b>1,410</b> | <b>2,895</b>  | <b>7,169</b>  | <b>11,108</b> | <b>56,730</b>  | <b>82,040</b>  |                                 |
| <b>DEVELOPMENT LAND</b> |               |               |               |               |               |               |               |              |              |              |               |               |               |                |                |                                 |
| 1,954                   | 2,517         | 518           | 836           | 2,751         | 3,505         | 832           | 1,018         | 193          | 330          | 466          | 705           | 1,740         | 2,013         | 14,104         | 19,877         | Individual & Individual % Share |
| 93.4                    | 93.0          | 79.8          | 82.4          | 98.1          | 98.4          | 99.4          | 99.5          | 97.5         | 94.6         | 82.9         | 86.2          | 75.1          | 77.2          | 83.4           | 86.6           | Developer & Individual          |
| 1                       | 2             | 9             | 12            | 0             | 0             | 0             | 0             | 0            | 0            | 0            | 0             | 2             | 0             | 38             | 44             | Company & Individual            |
| 0.0                     | 0.1           | 1.4           | 1.2           | 0.0           | 0.0           | 0.0           | 0.0           | 0.0          | 0.0          | 0.0          | 0.0           | 0.1           | 0.0           | 0.2            | 0.2            | Company & Company               |
| 97                      | 111           | 97            | 119           | 34            | 36            | 3             | 2             | 2            | 9            | 65           | 93            | 485           | 523           | 1,810          | 2,194          | Others                          |
| 4.6                     | 4.1           | 14.9          | 11.7          | 1.2           | 1.0           | 0.4           | 0.2           | 1.0          | 2.6          | 11.6         | 11.4          | 20.9          | 20.1          | 10.7           | 9.6            |                                 |
| 27                      | 33            | 21            | 40            | 4             | 7             | 0             | 1             | 0            | 5            | 28           | 18            | 78            | 64            | 840            | 656            |                                 |
| 1.3                     | 1.2           | 3.2           | 3.9           | 0.1           | 0.2           | 0.0           | 0.1           | 0.0          | 1.4          | 5.0          | 2.2           | 3.4           | 2.5           | 5.0            | 2.9            |                                 |
| 12                      | 43            | 4             | 7             | 15            | 13            | 2             | 2             | 3            | 5            | 3            | 2             | 11            | 8             | 129            | 193            |                                 |
| 0.6                     | 1.6           | 0.6           | 0.7           | 0.5           | 0.4           | 0.2           | 0.2           | 1.5          | 1.4          | 0.5          | 0.2           | 0.5           | 0.3           | 0.8            | 0.8            |                                 |
| <b>2,091</b>            | <b>2,706</b>  | <b>649</b>    | <b>1,014</b>  | <b>2,804</b>  | <b>3,561</b>  | <b>837</b>    | <b>1,023</b>  | <b>198</b>   | <b>349</b>   | <b>562</b>   | <b>818</b>    | <b>2,316</b>  | <b>2,608</b>  | <b>16,921</b>  | <b>22,964</b>  |                                 |
| <b>OTHERS</b>           |               |               |               |               |               |               |               |              |              |              |               |               |               |                |                |                                 |
| 0                       | 2             | 0             | 0             | 0             | 0             | 0             | 0             | 0            | 0            | 0            | 0             | 1             | 0             | 2              | 5              | Individual & Individual % Share |
| 0.0                     | 66.7          | 0.0           | 0.0           | 0.0           | 0.0           | 0.0           | 0.0           | 0.0          | 0.0          | 0.0          | 0.0           | 50.0          | 0.0           | 18.2           | 22.7           | Developer & Individual          |
| 0                       | 0             | 0             | 0             | 0             | 0             | 0             | 0             | 0            | 0            | 0            | 0             | 0             | 0             | 0              | 0              | Company & Individual            |
| 0.0                     | 0.0           | 0.0           | 0.0           | 0.0           | 0.0           | 0.0           | 0.0           | 0.0          | 0.0          | 0.0          | 0.0           | 0.0           | 0.0           | 0.0            | 0.0            | Company & Company               |
| 0                       | 0             | 0             | 0             | 0             | 0             | 0             | 0             | 0            | 0            | 0            | 0             | 0             | 0             | 1              | 1              | Others                          |
| 0.0                     | 0.0           | 0.0           | 0.0           | 0.0           | 0.0           | 0.0           | 0.0           | 0.0          | 0.0          | 0.0          | 0.0           | 0.0           | 0.0           | 9.1            | 4.5            |                                 |
| 0                       | 0             | 1             | 0             | 0             | 0             | 0             | 0             | 0            | 0            | 0            | 0             | 0             | 3             | 3              | 7              |                                 |
| 0.0                     | 0.0           | 100.0         | 0.0           | 0.0           | 0.0           | 0.0           | 0.0           | 0.0          | 0.0          | 0.0          | 0.0           | 0.0           | 75.0          | 27.3           | 31.8           |                                 |
| 0                       | 1             | 0             | 0             | 0             | 0             | 0             | 0             | 0            | 1            | 1            | 0             | 1             | 1             | 5              | 9              |                                 |
| 0.0                     | 33.3          | 0.0           | 0.0           | 0.0           | 0.0           | 0.0           | 0.0           | 0.0          | 100.0        | 100.0        | 0.0           | 50.0          | 25.0          | 45.5           | 40.9           |                                 |
| <b>0</b>                | <b>3</b>      | <b>1</b>      | <b>0</b>      | <b>0</b>      | <b>0</b>      | <b>0</b>      | <b>0</b>      | <b>0</b>     | <b>1</b>     | <b>1</b>     | <b>0</b>      | <b>2</b>      | <b>4</b>      | <b>11</b>      | <b>22</b>      |                                 |
| <b>TOTAL</b>            |               |               |               |               |               |               |               |              |              |              |               |               |               |                |                |                                 |
| 19,516                  | 25,540        | 8,950         | 13,727        | 16,101        | 21,315        | 9,616         | 12,398        | 2,406        | 3,190        | 6,624        | 8,407         | 18,861        | 25,236        | 212,420        | 281,719        | Individual & Individual % Share |
| 77.8                    | 79.5          | 56.0          | 64.3          | 92.9          | 90.1          | 85.7          | 89.8          | 87.2         | 79.1         | 83.0         | 75.5          | 82.6          | 85.5          | 70.7           | 72.4           | Developer & Individual          |
| 3,893                   | 3,652         | 4,635         | 4,393         | 435           | 912           | 791           | 1,074         | 137          | 339          | 8            | 69            | 640           | 541           | 44,261         | 51,238         | Company & Individual            |
| 15.5                    | 11.4          | 29.0          | 20.6          | 2.5           | 3.9           | 7.1           | 7.8           | 5.0          | 8.4          | 0.1          | 0.6           | 2.8           | 1.8           | 14.7           | 13.2           | Company & Company               |
| 877                     | 1,120         | 1,534         | 1,876         | 337           | 568           | 131           | 214           | 98           | 180          | 952          | 1,460         | 2,659         | 3,123         | 25,676         | 33,142         | Others                          |
| 3.5                     | 3.5           | 9.6           | 8.8           | 1.9           | 2.4           | 1.2           | 1.5           | 3.6          | 4.5          | 11.9         | 13.1          | 11.6          | 10.6          | 8.5            | 8.5            |                                 |
| 382                     | 690           | 580           | 933           | 68            | 114           | 533           | 24            | 55           | 246          | 316          | 405           | 550           | 470           | 14,448         | 17,144         |                                 |
| 1.5                     | 2.1           | 3.6           | 4.4           | 0.4           | 0.5           | 4.8           | 0.2           | 2.0          | 6.1          | 4.0          | 3.6           | 2.4           | 1.6           | 4.8            | 4.4            |                                 |
| 409                     | 1,112         | 289           | 432           | 382           | 757           | 143           | 97            | 62           | 79           | 85           | 796           | 118           | 150           | 3,692          | 5,864          |                                 |
| 1.6                     | 3.5           | 1.8           | 2.0           | 2.2           | 3.2           | 1.3           | 0.7           | 2.2          | 2.0          | 1.1          | 7.1           | 0.5           | 0.5           | 1.2            | 1.5            |                                 |
| <b>25,077</b>           | <b>32,114</b> | <b>15,988</b> | <b>21,361</b> | <b>17,323</b> | <b>23,666</b> | <b>11,214</b> | <b>13,807</b> | <b>2,758</b> | <b>4,034</b> | <b>7,985</b> | <b>11,137</b> | <b>22,828</b> | <b>29,520</b> | <b>300,497</b> | <b>389,107</b> |                                 |



**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)*

| Pemberi & Penerima Pindah Milik    | W.P. Kuala Lumpur |                  | W.P. Putrajaya |               | W.P. Labuan   |               | Selangor         |                  | Johor            |                  | Pulau Pinang     |                  | Perak           |                  | Negeri Sembilan |                 | Melaka          |                 |
|------------------------------------|-------------------|------------------|----------------|---------------|---------------|---------------|------------------|------------------|------------------|------------------|------------------|------------------|-----------------|------------------|-----------------|-----------------|-----------------|-----------------|
|                                    | 2021              | 2022             | 2021           | 2022          | 2021          | 2022          | 2021             | 2022             | 2021             | 2022             | 2021             | 2022             | 2021            | 2022             | 2021            | 2022            | 2021            | 2022            |
| <b>KEDIAMAN</b>                    |                   |                  |                |               |               |               |                  |                  |                  |                  |                  |                  |                 |                  |                 |                 |                 |                 |
| Perseorangan & Perseorangan % Syer | 6,033.84          | 6,740.74         | 116.04         | 122.40        | 79.60         | 76.44         | 17,071.68        | 20,796.05        | 5,791.01         | 8,079.90         | 3,799.27         | 5,273.65         | 2,379.63        | 3,213.96         | 1,540.29        | 1,980.89        | 1,084.27        | 1,454.47        |
| Pemaju & Perseorangan              | 1,011.06          | 1,235.12         | 64.62          | 196.11        | 21.87         | 14.17         | 4,920.59         | 5,441.56         | 1,970.22         | 1,900.89         | 1,519.40         | 1,605.32         | 2,270.91        | 2,546.72         | 2,236.41        | 3,139.37        | 1,004.57        | 1,471.83        |
| Syarikat & Perseorangan            | 1,770.93          | 2,178.41         | 14.64          | 20.91         | 0.44          | 5.77          | 3,383.91         | 3,337.66         | 491.43           | 631.56           | 433.34           | 785.41           | 452.60          | 549.39           | 53.18           | 283.90          | 177.89          | 163.71          |
| Syarikat & Syarikat                | 765.97            | 1,459.59         | 4.69           | 34.28         | 6.73          | 10.88         | 852.39           | 872.98           | 146.46           | 276.78           | 124.06           | 157.14           | 318.97          | 257.87           | 36.22           | 150.36          | 38.12           | 288.74          |
| Lain-lain                          | 109.93            | 172.23           | 5.12           | 78.56         | 0.22          | 0.27          | 262.14           | 129.76           | 83.63            | 22.22            | 90.13            | 137.08           | 70.42           | 143.52           | 13.95           | 35.14           | 22.10           | 20.70           |
| <b>Jumlah</b>                      | <b>9,691.72</b>   | <b>11,786.10</b> | <b>205.13</b>  | <b>452.27</b> | <b>108.84</b> | <b>107.53</b> | <b>26,490.71</b> | <b>30,578.01</b> | <b>8,482.75</b>  | <b>10,911.36</b> | <b>5,966.21</b>  | <b>7,958.60</b>  | <b>5,492.53</b> | <b>6,711.45</b>  | <b>4,166.04</b> | <b>5,589.67</b> | <b>2,326.95</b> | <b>3,399.44</b> |
| <b>KOMERSIAL</b>                   |                   |                  |                |               |               |               |                  |                  |                  |                  |                  |                  |                 |                  |                 |                 |                 |                 |
| Perseorangan & Perseorangan % Syer | 1,156.18          | 1,374.12         | 11.41          | 13.67         | 4.96          | 16.67         | 1,716.02         | 2,375.01         | 687.99           | 1,194.74         | 273.61           | 447.57           | 316.95          | 494.73           | 162.31          | 256.17          | 123.44          | 213.48          |
| Pemaju & Perseorangan              | 388.10            | 948.04           | 2.94           | 0.00          | 12.86         | 0.00          | 251.78           | 550.81           | 288.64           | 371.75           | 122.36           | 137.66           | 56.86           | 119.82           | 59.62           | 95.78           | 48.13           | 117.10          |
| Syarikat & Perseorangan            | 994.82            | 1,428.15         | 8.01           | 10.45         | 15.91         | 7.64          | 1,580.91         | 2,422.41         | 531.10           | 833.90           | 273.93           | 436.86           | 233.97          | 303.93           | 96.67           | 153.54          | 87.79           | 114.10          |
| Syarikat & Syarikat                | 6,094.09          | 4,080.75         | 17.50          | 283.82        | 5.03          | 4.61          | 3,218.02         | 4,535.51         | 1,951.04         | 1,964.37         | 627.87           | 477.36           | 194.43          | 310.24           | 23.60           | 198.96          | 448.92          | 596.71          |
| Lain-lain                          | 311.87            | 656.73           | 40.39          | 11.87         | 0.00          | 0.60          | 288.88           | 465.39           | 289.02           | 208.84           | 19.66            | 20.89            | 107.22          | 61.24            | 8.68            | 34.15           | 6.58            | 12.14           |
| <b>Jumlah</b>                      | <b>8,945.06</b>   | <b>8,487.79</b>  | <b>80.25</b>   | <b>319.80</b> | <b>38.76</b>  | <b>29.52</b>  | <b>7,055.61</b>  | <b>10,349.13</b> | <b>3,747.80</b>  | <b>4,573.60</b>  | <b>1,317.42</b>  | <b>1,520.34</b>  | <b>909.43</b>   | <b>1,289.96</b>  | <b>607.73</b>   | <b>738.59</b>   | <b>714.81</b>   | <b>1,053.53</b> |
| <b>INDUSTRI</b>                    |                   |                  |                |               |               |               |                  |                  |                  |                  |                  |                  |                 |                  |                 |                 |                 |                 |
| Perseorangan & Perseorangan % Syer | 40.25             | 39.10            | 0              | 1.30          | 1.61          | 7.84          | 442.63           | 606.29           | 142.00           | 192.73           | 50.09            | 62.47            | 53.59           | 74.61            | 30.29           | 56.22           | 34.44           | 39.51           |
| Pemaju & Perseorangan              | 17.1              | 6.6              | 0.0            | 100.0         | 0.7           | 2.62          | 5.0              | 6.0              | 5.5              | 4.7              | 3.1              | 3.8              | 7.0             | 11.8             | 4.3             | 6.8             | 11.9            | 5.9             |
| Syarikat & Perseorangan            | 49.34             | 133.91           | 1.70           | 0             | 3.15          | 10.05         | 1,218.34         | 1,829.40         | 369.39           | 473.74           | 203.42           | 142.76           | 88.12           | 101.77           | 63.41           | 123.61          | 40.32           | 77.90           |
| Syarikat & Syarikat                | 140.30            | 418.70           | 19.51          | 0             | 216.68        | 9.90          | 7,051.43         | 7,389.90         | 1,953.79         | 3,384.58         | 1,242.21         | 1,331.10         | 602.63          | 440.91           | 57.46           | 539.48          | 182.90          | 535.06          |
| Lain-lain                          | 59.7              | 70.6             | 86.7           | 0.0           | 96.8          | 33.1          | 79.1             | 73.5             | 75.5             | 82.0             | 77.0             | 82.0             | 79.2            | 69.6             | 82.1            | 65.3            | 63.2            | 80.1            |
| <b>Jumlah</b>                      | <b>235.16</b>     | <b>592.70</b>    | <b>22.50</b>   | <b>1.30</b>   | <b>223.80</b> | <b>29.95</b>  | <b>8,917.24</b>  | <b>10,052.82</b> | <b>2,589.11</b>  | <b>4,129.43</b>  | <b>1,612.64</b>  | <b>1,623.42</b>  | <b>760.53</b>   | <b>633.46</b>    | <b>703.18</b>   | <b>826.10</b>   | <b>289.18</b>   | <b>667.84</b>   |
| <b>PERTANIAN</b>                   |                   |                  |                |               |               |               |                  |                  |                  |                  |                  |                  |                 |                  |                 |                 |                 |                 |
| Perseorangan & Perseorangan % Syer | 0                 | 0                | 0              | 0             | 10.06         | 17.62         | 624.87           | 936.52           | 1,844.10         | 2,590.32         | 232.14           | 361.18           | 986.28          | 1,581.06         | 523.82          | 750.27          | 247.11          | 255.42          |
| Pemaju & Perseorangan              | 0.0               | 0.0              | 0.0            | 0.0           | 95.25         | 93.13         | 50.01            | 52.91            | 67.14            | 76.91            | 55.60            | 38.46            | 73.20           | 62.63            | 54.25           | 64.82           | 77.53           | 70.79           |
| Syarikat & Perseorangan            | 0.0               | 0.0              | 0.0            | 0.0           | 0             | 0             | 3.17             | 2.38             | 4.49             | 10.79            | 0.09             | 7.88             | 1.40            | 0.56             | 18.75           | 28.42           | 0               | 0.24            |
| Syarikat & Syarikat                | 0.0               | 0.0              | 0.0            | 0.0           | 0.50          | 1.20          | 298.40           | 503.90           | 418.85           | 573.94           | 118.24           | 295.99           | 216.27          | 430.09           | 169.39          | 216.64          | 54.57           | 63.60           |
| Lain-lain                          | 0.0               | 0.0              | 0.0            | 0.0           | 4.75          | 6.30          | 23.88            | 28.47            | 15.25            | 17.04            | 28.32            | 31.52            | 16.05           | 17.04            | 17.54           | 18.72           | 17.12           | 17.63           |
| <b>Jumlah</b>                      | <b>0.0</b>        | <b>0.0</b>       | <b>0.0</b>     | <b>0.0</b>    | <b>10.57</b>  | <b>18.92</b>  | <b>1,249.46</b>  | <b>1,770.09</b>  | <b>2,746.72</b>  | <b>3,368.03</b>  | <b>417.54</b>    | <b>939.09</b>    | <b>1,347.43</b> | <b>2,524.31</b>  | <b>965.57</b>   | <b>1,157.46</b> | <b>318.74</b>   | <b>360.80</b>   |
| <b>TANAH PEMBANGUNAN</b>           |                   |                  |                |               |               |               |                  |                  |                  |                  |                  |                  |                 |                  |                 |                 |                 |                 |
| Perseorangan & Perseorangan % Syer | 184.54            | 221.86           | 0              | 0             | 24.86         | 29.29         | 688.33           | 935.01           | 581.12           | 730.66           | 159.11           | 265.43           | 42.67           | 89.95            | 88.77           | 184.21          | 196.65          | 347.11          |
| Pemaju & Perseorangan              | 12.0              | 19.6             | 0.0            | 0.0           | 66.8          | 73.1          | 32.7             | 28.1             | 35.2             | 34.9             | 14.0             | 19.9             | 22.4            | 28.4             | 37.3            | 40.7            | 24.3            | 55.8            |
| Syarikat & Perseorangan            | 310.39            | 147.08           | 0              | 0             | 11.67         | 7.48          | 741.44           | 1,069.42         | 462.91           | 493.93           | 170.43           | 493.26           | 40.27           | 72.86            | 73.59           | 144.42          | 99.25           | 137.92          |
| Syarikat & Syarikat                | 981.84            | 711.73           | 0              | 0             | 3.00          | 662.18        | 1,284.13         | 586.86           | 840.12           | 778.74           | 543.19           | 107.13           | 131.00          | 62.90            | 114.50          | 512.61          | 132.80          |                 |
| Lain-lain                          | 56.27             | 53.63            | 269.12         | 0             | 0.67          | 0.29          | 7.95             | 26.31            | 15.44            | 15.31            | 14.27            | 26.08            | 0.03            | 22.48            | 7.61            | 3.99            | 1.75            | 4.00            |
| <b>Jumlah</b>                      | <b>1,533.04</b>   | <b>1,134.30</b>  | <b>269.12</b>  | <b>0</b>      | <b>37.20</b>  | <b>40.05</b>  | <b>2,105.02</b>  | <b>3,324.62</b>  | <b>1,652.83</b>  | <b>2,091.31</b>  | <b>1,134.36</b>  | <b>1,333.54</b>  | <b>190.12</b>   | <b>316.29</b>    | <b>238.25</b>   | <b>453.13</b>   | <b>810.25</b>   | <b>621.83</b>   |
| <b>LAIN-LAIN</b>                   |                   |                  |                |               |               |               |                  |                  |                  |                  |                  |                  |                 |                  |                 |                 |                 |                 |
| Perseorangan & Perseorangan % Syer | 0                 | 0                | 0              | 0             | 0             | 0             | 0                | 12.80            | 0                | 0                | 0                | 0                | 0               | 0                | 4.12            | 3.47            | 0               | 0               |
| Pemaju & Perseorangan              | 0.0               | 0.0              | 0.0            | 0.0           | 0.0           | 0.0           | 0.0              | 68.6             | 0.0              | 0.0              | 0.0              | 0.0              | 0.0             | 0.0              | 88.8            | 37.8            | 0.0             | 0.0             |
| Syarikat & Perseorangan            | 0.0               | 0.0              | 0.0            | 0.0           | 0.0           | 0.0           | 0.0              | 0.0              | 0.0              | 0.0              | 0.0              | 0.0              | 0.0             | 0.0              | 0.0             | 0.0             | 0.0             | 0.0             |
| Syarikat & Syarikat                | 0.0               | 0.0              | 0.0            | 0.0           | 0.0           | 0.0           | 0.0              | 0.1              | 0.0              | 0.0              | 0.0              | 0.0              | 0.0             | 0.0              | 11.2            | 0.0             | 0.0             | 0.0             |
| Lain-lain                          | 0                 | 2.82             | 0              | 0             | 0             | 0             | 2.49             | 1.03             | 0                | 0.03             | 0                | 0.03             | 1.32            | 0                | 0.07            | 0               | 5.70            | 0               |
| <b>Jumlah</b>                      | <b>0.0</b>        | <b>2.82</b>      | <b>0</b>       | <b>0</b>      | <b>0</b>      | <b>0</b>      | <b>2.49</b>      | <b>18.67</b>     | <b>1.72</b>      | <b>70.00</b>     | <b>0.03</b>      | <b>1.32</b>      | <b>0.14</b>     | <b>9.37</b>      | <b>4.64</b>     | <b>9.17</b>     | <b>0</b>        | <b>0</b>        |
| <b>JUMLAH</b>                      |                   |                  |                |               |               |               |                  |                  |                  |                  |                  |                  |                 |                  |                 |                 |                 |                 |
| Perseorangan & Perseorangan % Syer | 7,414.80          | 8,375.83         | 127.46         | 137.37        | 121.09        | 147.87        | 20,543.53        | 25,661.68        | 9,046.21         | 12,788.35        | 4,514.22         | 6,410.31         | 3,779.12        | 5,454.30         | 2,349.60        | 3,231.23        | 1,685.91        | 2,310.00        |
| Pemaju & Perseorangan              | 1,403.55          | 2,184.15         | 67.56          | 196.11        | 37.09         | 16.33         | 5,228.90         | 6,072.59         | 2,303.41         | 2,349.58         | 1,680.02         | 1,769.10         | 2,330.59        | 2,669.28         | 2,347.86        | 3,327.63        | 1,071.36        | 1,600.98        |
| Syarikat & Perseorangan            | 3,125.49          | 3,887.55         | 24.35          | 31.36         | 31.66         | 32.12         | 7,222.99         | 9,162.81         | 2,273.69         | 3,007.07         | 1,199.36         | 2,154.28         | 1,031.24        | 1,458.04         | 742.76          | 922.11          | 459.81          | 557.22          |
| Syarikat & Syarikat                | 7,982.19          | 6,670.78         | 41.70          | 318.09        | 228.43        | 28.49         | 12,103.78        | 14,410.66        | 5,094.72         | 6,725.54         | 2,834.30         | 2,774.30         | 1,325.45        | 1,653.96         | 1,185.82        | 1,162.78        | 1,198.17        | 1,592.70        |
| Lain-lain                          | 478.94            | 885.41           | 315.92         | 90.43         | 0.89          | 1.16          | 721.33           | 785.61           | 502.90           | 273.18           | 220.29           | 268.32           | 233.79          | 249.26           | 59.38           | 130.37          | 44.68           | 42.55           |
| <b>Jumlah</b>                      | <b>20,404.97</b>  | <b>22,003.71</b> | <b>576.99</b>  | <b>773.37</b> | <b>419.16</b> | <b>225.97</b> | <b>45,820.53</b> | <b>56,093.34</b> | <b>19,220.93</b> | <b>25,143.72</b> | <b>10,448.19</b> | <b>13,376.31</b> | <b>8,700.17</b> | <b>11,484.84</b> | <b>6,885.42</b> | <b>8,774.12</b> | <b>4,459.93</b> | <b>6,103.44</b> |



**Jadual VIII Table VIII**  
**Penawaran Unit Kediaman di Malaysia**  
**Supply of Residential Units in Malaysia**

JABATAN PENILAIAN &  
 PERKHIDMATAN HARTA

| State             | Existing Stock   |                  | Completion |               | Incoming Supply |             | Starts         |                | Planned Supply |               | New Planned Supply |             |                |                |             |               |               |             |
|-------------------|------------------|------------------|------------|---------------|-----------------|-------------|----------------|----------------|----------------|---------------|--------------------|-------------|----------------|----------------|-------------|---------------|---------------|-------------|
|                   | 2021             | 2022             | % Change   | 2021          | 2022            | % Change    | 2021           | 2022           | % Change       | 2021          | 2022               | % Change    |                |                |             |               |               |             |
| W.P. Kuala Lumpur | 515,083          | 535,937          | 4.0        | 12,719        | 12,374          | -2.7        | 43,119         | 41,647         | -3.4           | 64,117        | 57,674             | -10.0       | 17,068         | 26,769         | 56.8        |               |               |             |
| W.P. Putrajaya    | 16,881           | 17,765           | 5.2        | 2,450         | 428             | -82.5       | 4,788          | 3,055          | -36.2          | 36            | 3,252              | 8933.3      | 0              | 0              | ND          |               |               |             |
| W.P. Labuan       | 12,803           | 13,174           | 2.9        | 10            | 239             | 2,290.0     | 1,291          | 1,135          | -12.1          | 0             | 75                 | 5           | 0              | 0              | ND          |               |               |             |
| Selangor          | 1,625,686        | 1,657,709        | 2.0        | 13,853        | 19,741          | 42.5        | 106,173        | 99,875         | -5.9           | 19,283        | 18,253             | -5.3        | 79,995         | 80,623         | 0.8         |               |               |             |
| Johor             | 875,166          | 894,510          | 2.2        | 8,307         | 9,479           | 14.1        | 47,429         | 43,531         | -8.2           | 9,692         | 12,313             | 27.0        | 67,818         | 60,988         | -10.1       | 8,341         | 5,276         | -36.7       |
| Pulau Pinang      | 537,596          | 547,272          | 1.8        | 9,306         | 3,675           | -60.5       | 29,631         | 31,139         | 5.1            | 6,229         | 10,585             | 69.9        | 25,346         | 15,542         | -38.7       | 6,895         | 6,629         | -3.9        |
| Perak             | 505,146          | 514,929          | 1.9        | 3,312         | 5,118           | 54.5        | 42,096         | 44,746         | 6.3            | 8,680         | 9,203              | 6.0         | 48,682         | 35,565         | -26.9       | 7,859         | 9,001         | 14.5        |
| Negeri Sembilan   | 293,673          | 297,754          | 1.4        | 3,752         | 3,562           | -5.1        | 18,018         | 21,203         | 17.7           | 5,094         | 7,550              | 48.2        | 31,178         | 25,825         | -17.2       | 3,485         | 1,762         | -49.4       |
| Melaka            | 208,871          | 212,841          | 1.9        | 4,945         | 2,222           | -55.1       | 21,672         | 22,341         | 3.1            | 5,556         | 4,876              | -12.2       | 13,555         | 14,968         | 10.4        | 4,998         | 7,516         | 50.4        |
| Kedah             | 343,461          | 346,127          | 0.8        | 2,293         | 1,259           | -45.1       | 17,394         | 19,589         | 12.6           | 4,374         | 3,899              | -10.9       | 13,387         | 10,883         | -18.7       | 3,608         | 1,259         | -65.1       |
| Pahang            | 292,375          | 299,156          | 2.3        | 3,310         | 4,294           | 29.7        | 17,704         | 15,884         | -10.3          | 5,101         | 4,593              | -10.0       | 34,333         | 33,035         | -3.8        | 3,224         | 2,128         | -34.0       |
| Terengganu        | 106,479          | 107,717          | 1.2        | 1,417         | 615             | -56.6       | 17,679         | 17,915         | 1.3            | 1,405         | 1,541              | 9.7         | 11,024         | 9,620          | -12.7       | 1,037         | 865           | -16.6       |
| Kelantan          | 86,927           | 88,914           | 2.3        | 2,028         | 1,138           | -43.9       | 11,191         | 11,215         | 0.2            | 2,360         | 1,987              | -15.8       | 3,935          | 4,006          | 1.8         | 961           | 2,110         | 119.6       |
| Perlis            | 26,628           | 27,198           | 2.1        | 266           | 339             | 27.4        | 1,575          | 1,275          | -19.0          | 322           | 258                | -19.9       | 2,275          | 1,594          | -29.9       | 729           | 657           | -9.9        |
| Sabah             | 231,424          | 235,195          | 1.6        | 3,129         | 3,758           | 20.1        | 22,168         | 20,311         | -8.3           | 1,677         | 4,323              | 157.8       | 21,788         | 26,871         | 23.3        | 312           | 593           | 90.1        |
| Sarawak           | 278,917          | 284,085          | 1.9        | 5,296         | 3,740           | -29.4       | 16,583         | 17,050         | 2.8            | 4,590         | 4,084              | -11.0       | 5,752          | 7,524          | 30.8        | 4,260         | 5,924         | 39.1        |
| <b>MALAYSIA</b>   | <b>5,957,116</b> | <b>6,080,283</b> | <b>2.1</b> | <b>76,393</b> | <b>71,981</b>   | <b>-5.8</b> | <b>418,501</b> | <b>411,911</b> | <b>-1.6</b>    | <b>86,258</b> | <b>97,804</b>      | <b>13.4</b> | <b>423,296</b> | <b>387,955</b> | <b>-8.3</b> | <b>77,585</b> | <b>89,111</b> | <b>14.9</b> |

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

Inventori harta tanah bagi unit siap dibina, mula dibina dan penawaran baru dirancang adalah jumlah terkumpul bagi tempoh kajian.  
 Property inventory for completion, starts dan new planned supply are accumulated over the survey period.

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

| State             | Existing Stock |                | Completion |              | Incoming Supply |             | Starts        |               | Planned Supply |              | New Planned Supply |            |               |               |             |              |              |             |
|-------------------|----------------|----------------|------------|--------------|-----------------|-------------|---------------|---------------|----------------|--------------|--------------------|------------|---------------|---------------|-------------|--------------|--------------|-------------|
|                   | 2021           | 2022           | % Change   | 2021         | 2022            | % Change    | 2021          | 2022          | % Change       | 2021         | 2022               | % Change   |               |               |             |              |              |             |
| W.P. Kuala Lumpur | 32,105         | 32,162         | 0.2        | 0            | 57              | ND          | 1,623         | 1,072         | -33.9          | 68           | 41                 | -39.7      | 1,439         | 1,534         | 6.6         | 29           | 254          | 775.9       |
| W.P. Putrajaya    | 538            | 538            | -          | 0            | 0               | ND          | 0             | 0             | ND             | 0            | 0                  | ND         | 64            | 0             | -100.0      | 0            | 0            | ND          |
| W.P. Labuan       | 1,003          | 1,019          | 1.6        | 0            | 30              | ND          | 64            | 34            | -46.9          | 0            | 0                  | ND         | 0             | 20            | ND          | 0            | 20           | ND          |
| Selangor          | 109,986        | 110,574        | 0.5        | 487          | 588             | 20.7        | 5,953         | 5,467         | -8.2           | 330          | 333                | 0.9        | 3,335         | 3,571         | 7.1         | 425          | 490          | 15.3        |
| Johor             | 92,388         | 93,575         | 1.3        | 1,101        | 1,187           | 7.8         | 7,580         | 5,664         | -25.3          | 755          | 631                | -16.4      | 7,617         | 6,267         | -17.7       | 139          | 926          | 566.2       |
| Pulau Pinang      | 38,945         | 39,164         | 0.6        | 400          | 219             | -45.3       | 1,029         | 978           | -5.0           | 259          | 349                | 34.7       | 2,134         | 1,961         | -8.1        | 349          | 285          | -18.3       |
| Perak             | 62,997         | 63,142         | 0.2        | 77           | 145             | 88.3        | 2,907         | 2,320         | -20.2          | 76           | 168                | 121.1      | 3,706         | 3,316         | -10.5       | 153          | 277          | 81.0        |
| Negeri sembilan   | 27,173         | 27,211         | 0.1        | 12           | 38              | 216.7       | 893           | 868           | -2.8           | 21           | 75                 | 257.1      | 2,672         | 2,342         | -12.4       | 70           | 2            | -97.1       |
| Melaka            | 23,180         | 23,211         | 0.1        | 143          | 31              | -78.3       | 1,273         | 1,235         | -3.0           | 126          | 110                | -12.7      | 1,135         | 1,258         | 10.8        | 48           | 135          | 181.3       |
| Kedah             | 32,302         | 32,338         | 0.1        | 114          | 36              | -68.4       | 1,072         | 1,096         | 2.2            | 368          | 114                | -69.0      | 857           | 809           | -5.6        | 128          | 94           | -26.6       |
| Pahang            | 25,757         | 25,865         | 0.4        | 204          | 108             | -47.1       | 1,233         | 1,221         | -1.0           | 41           | 227                | 453.7      | 3,386         | 3,447         | 1.8         | 80           | 158          | 97.5        |
| Terengganu        | 8,501          | 8,640          | 1.6        | 113          | 139             | 23.0        | 1,080         | 956           | -11.5          | 97           | 33                 | -66.0      | 740           | 706           | -4.6        | 36           | 36           | 0.0         |
| Kelantan          | 14,109         | 14,380         | 1.9        | 59           | 271             | 359.3       | 1,360         | 1,016         | -25.3          | 115          | 38                 | -67.0      | 734           | 742           | 1.1         | 28           | 59           | 110.7       |
| Perlis            | 5,718          | 5,798          | 1.4        | 62           | 80              | 29.0        | 335           | 293           | -12.5          | 24           | 10                 | -58.3      | 810           | 779           | -3.8        | 9            | 7            | -22.2       |
| Sabah             | 32,187         | 32,866         | 2.1        | 52           | 679             | 1205.8      | 2,429         | 1,996         | -17.8          | 49           | 336                | 585.7      | 2,282         | 2,366         | 3.7         | 0            | 44           | ND          |
| Sarawak           | 36,979         | 37,371         | 1.1        | 345          | 392             | 13.6        | 1,622         | 1,222         | -24.7          | 211          | 281                | 33.2       | 1,275         | 1,408         | 10.4        | 530          | 498          | -6.0        |
| <b>MALAYSIA</b>   | <b>543,868</b> | <b>547,854</b> | <b>0.7</b> | <b>3,169</b> | <b>4,000</b>    | <b>26.2</b> | <b>30,453</b> | <b>25,438</b> | <b>-16.5</b>   | <b>2,540</b> | <b>2,746</b>       | <b>8.1</b> | <b>32,186</b> | <b>30,526</b> | <b>-5.2</b> | <b>2,024</b> | <b>3,285</b> | <b>62.3</b> |

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

Inventori harta tanah bagi unit siap dibina, mula dibina dan penawaran baru dirancang adalah jumlah terkumpul bagi tempoh kajian.  
Property inventory for completion, starts and new planned supply are accumulated over the survey period.

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

**Jadual X / Table X**  
**Penawaran dan Penghunian 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.) |                  | Starts (s.m.) |                | Planned Supply (s.m.) |                | New Planned Supply (s.m.) |               |
|-------------------|--------------------|-------------------|-------------------|----------------|-------------------|-------------------|--------------------|-------------|----------------------------------|--------------|------------------------|------------------|---------------|----------------|-----------------------|----------------|---------------------------|---------------|
|                   | 2021               | 2022              | 2021              | 2022           | 2021              | 2022              | 2021               | 2022        | 2021                             | 2022         | 2021                   | 2022             | 2021          | 2022           | 2021                  | 2022           | 2021                      | 2022          |
| W.P. Kuala Lumpur | 3,397,193          | 3,250,139         | 278,702           | 9,290          | 2,709,996         | 2,686,727         | 79.8               | 82.7        | 143,377                          | -23,269      | 393,540                | 481,797          | 0             | 60,386         | 187,117               | 196,691        | 0                         | 69,960        |
| W.P. Putrajaya    | 86,017             | 86,017            | 0                 | 0              | 75,684            | 70,884            | 88.0               | 82.4        | 5,996                            | -4,800       | 0                      | 29,277           | 0             | 0              | 0                     | 0              | 0                         | 0             |
| W.P. Labuan       | 28,614             | 28,614            | 0                 | 0              | 27,392            | 27,555            | 95.7               | 96.3        | -496                             | 163          | 0                      | 0                | 0             | 0              | 0                     | 0              | 0                         | 0             |
| Selangor          | 3,729,665          | 3,959,058         | 47,375            | 177,092        | 3,008,199         | 3,069,598         | 80.7               | 77.5        | 43,443                           | 61,399       | 513,937                | 331,202          | 0             | 0              | 0                     | 0              | 0                         | 0             |
| Johor             | 2,442,257          | 2,456,467         | 7,432             | 0              | 1,781,800         | 1,691,273         | 73.0               | 68.8        | -68,180                          | -90,527      | 43,479                 | 3,716            | 0             | 0              | 0                     | 0              | 0                         | 0             |
| Pulau Pinang      | 1,863,714          | 1,844,184         | 0                 | 32,500         | 1,321,907         | 1,338,480         | 70.9               | 72.6        | -11,298                          | 16,573       | 223,052                | 190,552          | 27,352        | 0              | 96,421                | 96,421         | 0                         | 0             |
| Perak             | 991,062            | 1,095,112         | 38,701            | 15,437         | 823,890           | 834,312           | 83.1               | 76.2        | 14,201                           | 10,422       | 120,437                | 24,373           | 0             | 7,654          | 0                     | 0              | 0                         | 0             |
| Negeri Sembilan   | 605,456            | 605,456           | 8,106             | 0              | 404,587           | 403,475           | 66.8               | 66.6        | 6,825                            | -1,112       | 5,534                  | 8,155            | 5,534         | 2,621          | 0                     | 0              | 0                         | 0             |
| Melaka            | 635,388            | 635,388           | 0                 | 0              | 405,243           | 388,601           | 63.8               | 61.2        | 3,058                            | -16,642      | 128,465                | 57,245           | 0             | 0              | 0                     | 0              | 0                         | 0             |
| Kedah             | 582,356            | 596,952           | 0                 | 6,965          | 438,049           | 423,549           | 75.2               | 71.0        | 3,332                            | -14,500      | 0                      | 0                | 0             | 0              | 15,045                | 15,045         | 0                         | 0             |
| Pahang            | 448,799            | 450,826           | 21,101            | 0              | 311,302           | 324,113           | 69.4               | 71.9        | -5,610                           | 12,811       | 0                      | 9,894            | 0             | 9,894          | 25,267                | 15,373         | 0                         | 0             |
| Terengganu        | 203,379            | 204,564           | 0                 | 0              | 157,599           | 162,129           | 77.5               | 79.3        | 11,450                           | 4,530        | 126,520                | 126,520          | 0             | 0              | 0                     | 0              | 0                         | 0             |
| Kelantan          | 381,280            | 403,475           | 0                 | 22,195         | 301,668           | 330,379           | 79.1               | 81.9        | -8,867                           | 28,711       | 69,168                 | 0                | 0             | 0              | 0                     | 0              | 0                         | 0             |
| Perlis            | 56,421             | 56,421            | 0                 | 0              | 51,905            | 47,046            | 92.0               | 83.4        | -3,967                           | -4,859       | 12,145                 | 38,527           | 0             | 26,382         | 22,544                | 0              | 0                         | 0             |
| Sabah             | 745,796            | 751,388           | 0                 | 0              | 550,639           | 568,714           | 73.8               | 75.7        | -52,929                          | 18,075       | 35,743                 | 35,743           | 0             | 0              | 23,509                | 23,509         | 0                         | 0             |
| Sarawak           | 1,084,338          | 1,084,338         | 36,860            | 0              | 823,598           | 834,349           | 76.0               | 76.9        | 56,677                           | 10,751       | 41,676                 | 41,676           | 0             | 0              | 0                     | 0              | 0                         | 0             |
| <b>MALAYSIA</b>   | <b>17,281,735</b>  | <b>17,508,399</b> | <b>438,277</b>    | <b>263,479</b> | <b>13,193,458</b> | <b>13,201,184</b> | <b>76.3</b>        | <b>75.4</b> | <b>137,012</b>                   | <b>7,726</b> | <b>1,713,696</b>       | <b>1,378,677</b> | <b>32,886</b> | <b>106,937</b> | <b>369,903</b>        | <b>347,039</b> | <b>0</b>                  | <b>69,960</b> |

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

Inventori harta tanah bagi unit siap dibina, mula dibina dan penawaran baru dirancang adalah jumlah terkumpul bagi tempoh kajian.  
Property inventory for completion, starts dan new planned supply are accumulated over the survey period.

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

| State             | Total Space (s.m.) |                   | Completion (s.m.) |                | Occupancy (s.m.)  |                   | Occupancy Rate (%) |             | Annual Take-Up Difference (s.m.) |                | Incoming Supply (s.m.) |                  | Starts (s.m.) |                | Planned Supply (s.m.) |                | New Planned Supply (s.m.) |                |
|-------------------|--------------------|-------------------|-------------------|----------------|-------------------|-------------------|--------------------|-------------|----------------------------------|----------------|------------------------|------------------|---------------|----------------|-----------------------|----------------|---------------------------|----------------|
|                   | 2021               | 2022              | 2021              | 2022           | 2021              | 2022              | 2021               | 2022        | 2021                             | 2022           | 2021                   | 2022             | 2021          | 2022           | 2021                  | 2022           | 2021                      | 2022           |
| W.P. Kuala Lumpur | 9,624,524          | 9,813,927         | 387,861           | 293,814        | 7,199,049         | 7,237,348         | 74.8               | 73.7        | 5,603                            | 38,299         | 985,662                | 978,869          | 0             | 283,250        | 136,268               | 790,806        | 0                         | 412,422        |
| W.P. Putrajaya    | 2,540,853          | 2,540,853         | 15,600            | 0              | 2,301,282         | 2,325,682         | 90.6               | 91.5        | 26,168                           | 24,380         | 59,940                 | 59,940           | 0             | 0              | 31,545                | 31,545         | 0                         | 0              |
| W.P. Labuan       | 67,051             | 67,051            | 0                 | 0              | 60,680            | 62,210            | 90.5               | 92.8        | 1,199                            | 1,530          | 0                      | 0                | 0             | 0              | 0                     | 0              | 0                         | 0              |
| Selangor          | 4,282,121          | 4,547,884         | 46,078            | 29,164         | 2,945,335         | 3,134,983         | 68.8               | 68.9        | 55,018                           | 189,648        | 91,369                 | 60,243           | 0             | 0              | 10,276                | 10,276         | 0                         | 0              |
| Johor             | 1,374,661          | 1,394,909         | 30,149            | 32,500         | 997,303           | 978,822           | 72.5               | 70.2        | 28,430                           | -18,481        | 229,933                | 197,433          | 0             | 0              | 33,817                | 33,817         | 0                         | 0              |
| Pulau Pinang      | 1,110,561          | 1,075,427         | 0                 | 0              | 948,202           | 922,088           | 85.4               | 85.7        | 12,259                           | -26,114        | 56,466                 | 56,466           | 0             | 0              | 0                     | 44,408         | 0                         | 0              |
| Perak             | 646,045            | 652,685           | 10,268            | 2,738          | 594,295           | 600,455           | 92.0               | 92.0        | -782                             | 6,160          | 25,912                 | 23,174           | 0             | 0              | 0                     | 0              | 0                         | 0              |
| Negeri Sembilan   | 342,435            | 342,435           | 2,786             | 0              | 312,042           | 311,253           | 91.1               | 90.9        | 1,181                            | -789           | 8,831                  | 10,437           | 0             | 1,606          | 0                     | 0              | 0                         | 0              |
| Melaka            | 411,050            | 416,781           | 0                 | 0              | 341,303           | 352,274           | 83.0               | 84.5        | 0                                | 10,971         | 0                      | 0                | 0             | 0              | 0                     | 0              | 0                         | 0              |
| Kedah             | 432,312            | 432,028           | 0                 | 0              | 395,206           | 389,885           | 91.4               | 90.2        | 4,036                            | -5,321         | 0                      | 0                | 0             | 0              | 0                     | 0              | 0                         | 0              |
| Pahang            | 421,719            | 421,719           | 0                 | 0              | 371,824           | 371,119           | 88.2               | 88.0        | -3,948                           | -705           | 36,375                 | 36,375           | 0             | 0              | 4,911                 | 4,911          | 0                         | 0              |
| Terengganu        | 360,738            | 427,243           | 0                 | 63,767         | 347,818           | 413,913           | 96.4               | 96.9        | 3,056                            | 66,095         | 63,767                 | 9,704            | 0             | 9,704          | 31,760                | 31,760         | 0                         | 0              |
| Kelantan          | 391,077            | 391,077           | 0                 | 0              | 365,534           | 368,602           | 93.5               | 94.3        | -5,112                           | 3,068          | 0                      | 0                | 0             | 0              | 0                     | 0              | 0                         | 0              |
| Pelis             | 131,038            | 131,038           | 0                 | 0              | 129,688           | 126,590           | 99.0               | 96.6        | -1,350                           | -3,098         | 25,085                 | 25,085           | 0             | 0              | 0                     | 0              | 0                         | 0              |
| Sabah             | 822,600            | 826,013           | 0                 | 0              | 711,309           | 725,537           | 86.5               | 87.8        | -10,904                          | 14,228         | 6,963                  | 14,744           | 0             | 0              | 37,498                | 37,498         | 0                         | 0              |
| Sarawak           | 818,073            | 820,737           | 0                 | 0              | 741,150           | 748,280           | 90.6               | 91.2        | 57,016                           | 7,130          | 56,952                 | 56,952           | 0             | 0              | 0                     | 0              | 0                         | 0              |
| <b>MALAYSIA</b>   | <b>23,776,668</b>  | <b>24,301,807</b> | <b>492,742</b>    | <b>421,973</b> | <b>18,762,020</b> | <b>19,069,021</b> | <b>78.9</b>        | <b>78.5</b> | <b>171,870</b>                   | <b>307,001</b> | <b>1,647,275</b>       | <b>1,529,442</b> | <b>0</b>      | <b>294,560</b> | <b>286,075</b>        | <b>985,021</b> | <b>0</b>                  | <b>412,422</b> |

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

Inventori harta tanah bagi unit siap dibina, mula dibina dan penawaran baru dirancang adalah jumlah terkumpul bagi tempoh kajian.  
Property inventory for completion, starts dan new planned supply are accumulated over the survey period.

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

Jadual XII / Table XII  
Penawaran unit SOHO di Malaysia  
Supply of SOHO units in Malaysia

| State             | Existing Stock |               | % Change    | Completion   |              | % Change     | Incoming Supply |               | % Change     | Starts       |          | % Change      | Planned Supply |               | % Change    | New Planned Supply |              | % Change     |
|-------------------|----------------|---------------|-------------|--------------|--------------|--------------|-----------------|---------------|--------------|--------------|----------|---------------|----------------|---------------|-------------|--------------------|--------------|--------------|
|                   | 2021           | 2022          |             | 2021         | 2022         |              | 2021            | 2022          |              | 2021         | 2022     |               | 2021           | 2022          |             | 2021               | 2022         |              |
| W.P. Kuala Lumpur | 6,390          | 7,418         | 16.1        | 723          | 1,028        | 42.2         | 7,532           | 5,726         | -24.0        | 0            | 0        | ND            | 4,375          | 4,266         | -2.5        | 661                | 1,367        | 106.8        |
| 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          | 36,141         | 40,122        | 11.0        | 502          | 3,981        | 693.0        | 18,046          | 16,040        | -11.1        | 1,690        | 0        | -100.0        | 7,943          | 7,463         | -6.0        | 0                  | 0            | ND           |
| Johor             | 2,843          | 2,843         | 0.0         | 0            | 0            | ND           | 966             | 966           | 0.0          | 0            | 0        | ND            | 3,316          | 3,316         | 0.0         | 0                  | 0            | ND           |
| Pulau Pinang      | 2,614          | 3,627         | 38.8        | 227          | 1,013        | 346.3        | 3,647           | 2,459         | -32.6        | 0            | 0        | ND            | 626            | 626           | 0.0         | 0                  | 577          | ND           |
| Perak             | 577            | 577           | 0.0         | 0            | 0            | ND           | 654             | 654           | 0.0          | 0            | 0        | ND            | 3,628          | 2,737         | -24.6       | 0                  | 0            | ND           |
| 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           | 352             | 352           | 0.0          | 0            | 0        | ND            | 0              | 0             | ND          | 0                  | 0            | ND           |
| Kedah             | 64             | 64            | 0.0         | 0            | 0            | ND           | 0               | 0             | ND           | 0            | 0        | ND            | 0              | 0             | ND          | 0                  | 0            | ND           |
| Pahang            | 0              | 0             | ND          | 0            | 0            | ND           | 0               | 0             | ND           | 0            | 0        | ND            | 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             | 467            | 467           | 0.0         | 127          | 0            | -100.0       | 0               | 0             | ND           | 0            | 0        | ND            | 0              | 0             | ND          | 0                  | 0            | ND           |
| Sarawak           | 405            | 405           | 0.0         | 148          | 0            | -100.0       | 72              | 72            | 0.0          | 0            | 0        | ND            | 0              | 0             | ND          | 0                  | 0            | ND           |
| <b>MALAYSIA</b>   | <b>49,605</b>  | <b>55,627</b> | <b>12.1</b> | <b>1,727</b> | <b>6,022</b> | <b>248.7</b> | <b>31,269</b>   | <b>26,269</b> | <b>-16.0</b> | <b>1,690</b> | <b>0</b> | <b>-100.0</b> | <b>19,941</b>  | <b>18,461</b> | <b>-7.4</b> | <b>661</b>         | <b>1,944</b> | <b>194.1</b> |

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

Inventori harta tanah bagi unit siap dibina, mula dibina dan penawaran baru dirancang adalah jumlah terkumpul bagi tempoh kajian.  
Property inventory for completion, starts and new planned supply are accumulated over the survey period.

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



| State           | Existing Stock    |                |            | Completion    |               |             | Incoming Supply |                |             | Starts        |               |              | Planned Supply |                |             | New Planned Supply |               |             |
|-----------------|-------------------|----------------|------------|---------------|---------------|-------------|-----------------|----------------|-------------|---------------|---------------|--------------|----------------|----------------|-------------|--------------------|---------------|-------------|
|                 | 2021              | 2022           | % Change   | 2021          | 2022          | % Change    | 2021            | 2022           | % Change    | 2021          | 2022          | % Change     | 2021           | 2022           | % Change    | 2021               | 2022          | % Change    |
|                 | W.P. Kuala Lumpur | 86,960         | 100,249    | 15.3          | 5,665         | 13,289      | 134.6           | 66,722         | 63,478      | -4.9          | 25,808        | 6,641        | -74.3          | 61,582         | 48,215      | -21.7              | 6,778         | 6,020       |
| W.P. Putrajaya  | 746               | 746            | 0.0        | 0             | 0             | ND          | 781             | 781            | 0.0         | 0             | 0             | ND           | 186            | 0              | -100.0      | 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        | 85,553            | 94,333         | 10.3       | 4,328         | 8,780         | 102.9       | 54,596          | 54,743         | 0.3         | 6,477         | 7,590         | 17.2         | 21,079         | 21,377         | 1.4         | 3,281              | 4,348         | 32.5        |
| Johor           | 86,025            | 86,257         | 0.3        | 1,120         | 232           | -79.3       | 21,666          | 18,913         | -12.7       | 1,953         | 1,568         | -19.7        | 54,760         | 53,717         | -1.9        | 1,472              | 0             | -100.0      |
| Pulau Pinang    | 6,614             | 7,372          | 11.5       | 246           | 758           | 208.1       | 3,100           | 5,114          | 65.0        | 1,004         | 2,994         | 198.2        | 8,698          | 6,438          | -26.0       | 418                | 2,397         | 473.4       |
| Perak           | 1,314             | 1,314          | 0.0        | 0             | 0             | ND          | 404             | 428            | 5.9         | 0             | 24            | ND           | 1,240          | 985            | -20.6       | 0                  | 310           | ND          |
| Negeri sembilan | 11,285            | 11,285         | 0.0        | 0             | 0             | ND          | 4,877           | 5,129          | 5.2         | 980           | 252           | -74.3        | 712            | 1,006          | 41.3        | 0                  | 0             | ND          |
| Melaka          | 6,363             | 6,363          | 0.0        | 722           | 0             | -100.0      | 5,926           | 5,805          | -2.0        | 130           | 240           | 84.6         | 3,643          | 4,126          | 13.3        | 442                | 0             | -100.0      |
| Kedah           | 637               | 637            | 0.0        | 0             | 0             | ND          | 0               | 0              | ND          | 0             | 0             | ND           | 0              | 0              | ND          | 0                  | 0             | ND          |
| Pahang          | 6,398             | 6,398          | 0.0        | 0             | 0             | ND          | 0               | 212            | ND          | 0             | 212           | ND           | 4,746          | 6,152          | 29.6        | 243                | 648           | 166.7       |
| Terengganu      | 132               | 132            | 0.0        | 132           | 0             | -100.0      | 0               | 0              | ND          | 0             | 0             | ND           | 132            | 132            | 0.0         | 0                  | 0             | ND          |
| Kelantan        | 858               | 858            | 0.0        | 0             | 0             | ND          | 480             | 0              | -100.0      | 0             | 0             | ND           | 418            | 1,358          | 224.9       | 0                  | 668           | ND          |
| Perlis          | 0                 | 0              | ND         | 0             | 0             | ND          | 0               | 0              | ND          | 0             | 0             | ND           | 0              | 0              | ND          | 0                  | 0             | ND          |
| Sabah           | 1,215             | 1,913          | 57.4       | 0             | 698           | ND          | 2,725           | 2,917          | 7.0         | 0             | 981           | ND           | 1,201          | 2,378          | 98.0        | 0                  | 0             | ND          |
| Sarawak         | 1,105             | 1,295          | 17.2       | 0             | 190           | ND          | 729             | 966            | 32.5        | 627           | 237           | -62.2        | 119            | 119            | 0.0         | 186                | 0             | -100.0      |
| <b>MALAYSIA</b> | <b>295,205</b>    | <b>319,152</b> | <b>8.1</b> | <b>12,213</b> | <b>23,947</b> | <b>96.1</b> | <b>162,006</b>  | <b>158,486</b> | <b>-2.2</b> | <b>36,979</b> | <b>20,739</b> | <b>-43.9</b> | <b>158,516</b> | <b>146,003</b> | <b>-7.9</b> | <b>12,820</b>      | <b>14,391</b> | <b>12.3</b> |

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

Inventori harta tanah bagi unit siap dibina, mula dibina dan penawaran baru dirancang adalah jumlah terkumpul bagi tempoh kajian.  
Property inventory for completion, starts dan new planned supply are accumulated over the survey period.

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

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

JABATAN PENILAIAN &  
PERKHIDMATAN HARTA

| State           | Existing Stock    |                |            | Completion |            |             | Incoming Supply |              |             | Starts     |            |             | Planned Supply |              |            | New Planned Supply |            |            |              |
|-----------------|-------------------|----------------|------------|------------|------------|-------------|-----------------|--------------|-------------|------------|------------|-------------|----------------|--------------|------------|--------------------|------------|------------|--------------|
|                 | 2021              | 2022           | % Change   | 2021       | 2022       | % Change    | 2021            | 2022         | % Change    | 2021       | 2022       | % Change    | 2021           | 2022         | % Change   | 2021               | 2022       | % Change   |              |
|                 | W.P. Kuala Lumpur | 5,138          | 5,138      | 0.0        | 0          | 0           | ND              | 0            | 0           | 0          | 0          | 0           | ND             | 37           | 37         | 0.0                | 0          | 0          | 0            |
| W.P. Putrajaya  | 48                | 48             | 0.0        | 0          | 0          | ND          | 0               | 0            | 0           | 0          | 0          | ND          | 0              | 0            | ND         | 0                  | 0          | 0          | ND           |
| W.P. Labuan     | 641               | 641            | 0.0        | 0          | 0          | ND          | 8               | 8            | 0.0         | 0          | 0          | ND          | 0              | 0            | ND         | 0                  | 0          | 0          | ND           |
| Selangor        | 41,339            | 41,642         | 0.7        | 205        | 201        | -2.0        | 1,286           | 1,578        | 22.7        | 141        | 263        | 86.5        | 1,683          | 1,768        | 5.1        | 259                | 342        | 32.0       | 32.0         |
| Johor           | 18,525            | 18,718         | 1.0        | 10         | 58         | 480.0       | 927             | 728          | -21.5       | 131        | 56         | -57.3       | 817            | 818          | 0.1        | 190                | 16         | 16         | -91.6        |
| Pulau Pinang    | 9,606             | 9,714          | 1.1        | 11         | 122        | 1,009.1     | 193             | 99           | -48.7       | 42         | 10         | -76.2       | 148            | 138          | -6.8       | 22                 | 0          | 0          | -100.0       |
| Perak           | 8,471             | 8,482          | 0.1        | 0          | 11         | ND          | 118             | 107          | -9.3        | 3          | 0          | -100.0      | 315            | 338          | 7.3        | 4                  | 23         | 475.0      | 475.0        |
| Negeri Sembilan | 5,556             | 5,574          | 0.3        | 28         | 16         | -42.9       | 77              | 170          | 120.8       | 2          | 109        | 5,350.0     | 707            | 596          | -15.7      | 0                  | 0          | 0          | ND           |
| Melaka          | 7,158             | 7,184          | 0.4        | 0          | 0          | ND          | 829             | 803          | -3.1        | 30         | 0          | -100.0      | 1,783          | 1,783        | 0.0        | 0                  | 0          | 0          | ND           |
| Kedah           | 3,869             | 3,869          | 0.0        | 11         | 0          | -100.0      | 69              | 69           | 0.0         | 43         | 0          | -100.0      | 307            | 347          | 13.0       | 43                 | 40         | 40         | -7.0         |
| Pahang          | 3,584             | 3,647          | 1.8        | 6          | 12         | 100.0       | 102             | 49           | -52.0       | 0          | 0          | ND          | 229            | 224          | -2.2       | 5                  | 5          | 5          | 0.0          |
| Terengganu      | 866               | 866            | 0.0        | 0          | 0          | ND          | 83              | 83           | 0.0         | 7          | 0          | -100.0      | 66             | 66           | 0.0        | 0                  | 0          | 0          | ND           |
| Kelantan        | 617               | 630            | 2.1        | 0          | 13         | ND          | 18              | 5            | -72.2       | 1          | 0          | -100.0      | 31             | 44           | 41.9       | 1                  | 13         | 13         | 1,200.0      |
| Perlis          | 296               | 296            | 0.0        | 0          | 0          | ND          | 30              | 30           | 0.0         | 1          | 0          | -100.0      | 140            | 140          | 0.0        | 0                  | 0          | 0          | ND           |
| Sabah           | 6,237             | 6,317          | 1.3        | 25         | 16         | -36.0       | 276             | 224          | -18.8       | 0          | 20         | ND          | 277            | 265          | -4.3       | 0                  | 8          | 8          | ND           |
| Sarawak         | 7,337             | 7,467          | 1.8        | 0          | 140        | ND          | 300             | 252          | -16.0       | 74         | 79         | 6.8         | 161            | 136          | -15.5      | 161                | 21         | 21         | -87.0        |
| <b>MALAYSIA</b> | <b>119,288</b>    | <b>120,233</b> | <b>0.8</b> | <b>296</b> | <b>589</b> | <b>99.0</b> | <b>4,316</b>    | <b>4,205</b> | <b>-2.6</b> | <b>475</b> | <b>537</b> | <b>13.1</b> | <b>6,701</b>   | <b>6,700</b> | <b>0.0</b> | <b>685</b>         | <b>468</b> | <b>468</b> | <b>-31.7</b> |

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

Inventori harta tanah bagi unit siap dibina, mula dibina dan penawaran baru dirancang adalah jumlah terkumpul bagi tempoh kajian.  
Property inventory for completion, starts and new planned supply are accumulated over the survey period.

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

JABATAN PENILAIAN & PERKHIDMATAN HARTA

Jadual XV / Table XV  
Bilangan Bilik Hotel  
Number of Hotel Rooms

| State           | Existing Stock    |                |            | Completion |              |              | Incoming Supply |               |              | Starts     |              |             | Planned Supply |               |             | New Planned Supply |            |              |
|-----------------|-------------------|----------------|------------|------------|--------------|--------------|-----------------|---------------|--------------|------------|--------------|-------------|----------------|---------------|-------------|--------------------|------------|--------------|
|                 | 2021              | 2022           | % Change   | 2021       | 2022         | % Change     | 2021            | 2022          | % Change     | 2021       | 2022         | % Change    | 2021           | 2022          | % Change    | 2021               | 2022       | % Change     |
|                 | W.P. Kuala Lumpur | 40,897         | 45,576     | 11.4       | 0            | 157          | ND              | 8,396         | 3,112        | -62.9      | 0            | 250         | ND             | 4,417         | 4,308       | -2.5               | 0          | 190          |
| W.P. Putrajaya  | 1,769             | 1,769          | 0.0        | 0          | 0            | ND           | 0               | 0             | ND           | 0          | 0            | ND          | 0              | 0             | ND          | 0                  | 0          | ND           |
| W.P. Labuan     | 1,697             | 1,697          | 0.0        | 0          | 0            | ND           | 264             | 80            | -69.7        | 0          | 0            | ND          | 0              | 0             | ND          | 0                  | 0          | ND           |
| Selangor        | 23,002            | 24,201         | 5.2        | 0          | 0            | ND           | 2,254           | 878           | -61.0        | 111        | 0            | -100.0      | 564            | 200           | -64.5       | 0                  | 0          | ND           |
| Johor           | 31,066            | 31,791         | 2.3        | 0          | 0            | ND           | 2,822           | 2,450         | -13.2        | 0          | 353          | ND          | 3,754          | 3,401         | -9.4        | 0                  | 0          | ND           |
| Pulau Pinang    | 22,406            | 23,185         | 3.5        | 0          | 948          | ND           | 6,005           | 4,106         | -31.6        | 874        | 37           | -95.8       | 2,432          | 2,617         | 7.6         | 400                | 29         | -92.8        |
| Perak           | 16,338            | 16,451         | 0.7        | 25         | 0            | -100.0       | 865             | 685           | -20.8        | 0          | 54           | ND          | 909            | 835           | -8.1        | 0                  | 0          | ND           |
| Negeri Sembilan | 9,396             | 9,542          | 1.6        | 0          | 0            | ND           | 1,588           | 1,546         | -2.6         | 0          | 0            | ND          | 358            | 358           | 0.0         | 0                  | 0          | ND           |
| Melaka          | 17,031            | 18,055         | 6.0        | 0          | 0            | ND           | 1,456           | 432           | -70.3        | 0          | 0            | ND          | 1,558          | 1,558         | 0.0         | 0                  | 0          | ND           |
| Kedah           | 13,154            | 13,251         | 0.7        | 0          | 0            | ND           | 756             | 539           | -28.7        | 0          | 0            | ND          | 252            | 252           | 0.0         | 0                  | 0          | ND           |
| Pahang          | 25,527            | 25,601         | 0.3        | 152        | 0            | -100.0       | 70              | 0             | -100.0       | 0          | 0            | ND          | 696            | 696           | 0.0         | 0                  | 0          | ND           |
| Terengganu      | 10,718            | 10,809         | 0.8        | 0          | 0            | ND           | 767             | 640           | -16.6        | 0          | 0            | ND          | 752            | 752           | 0.0         | 0                  | 0          | ND           |
| Kelantan        | 4,360             | 4,360          | 0.0        | 0          | 0            | ND           | 144             | 144           | 0.0          | 0          | 0            | ND          | 0              | 0             | ND          | 0                  | 0          | ND           |
| Perlis          | 1,245             | 1,245          | 0.0        | 0          | 0            | ND           | 120             | 120           | 0.0          | 0          | 0            | ND          | 120            | 120           | 0.0         | 0                  | 0          | ND           |
| Sabah           | 22,799            | 23,402         | 2.6        | 0          | 236          | ND           | 1,975           | 2,669         | 45.3         | 0          | 807          | ND          | 3,692          | 3,016         | -18.3       | 0                  | 0          | ND           |
| Sarawak         | 20,114            | 20,387         | 1.4        | 160        | 0            | -100.0       | 318             | 318           | 0.0          | 0          | 0            | ND          | 0              | 0             | ND          | 0                  | 0          | ND           |
| <b>MALAYSIA</b> | <b>261,519</b>    | <b>271,322</b> | <b>3.7</b> | <b>337</b> | <b>1,341</b> | <b>297.9</b> | <b>27,800</b>   | <b>17,919</b> | <b>-35.5</b> | <b>985</b> | <b>1,501</b> | <b>52.4</b> | <b>19,504</b>  | <b>18,113</b> | <b>-7.1</b> | <b>400</b>         | <b>219</b> | <b>-45.3</b> |

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

Inventori harta tanah bagi unit siap dibina, mula dibina dan penawaran baru dirancang adalah jumlah terkumpul bagi tempoh kajian.  
Property inventory for completion, starts dan new planned supply are accumulated over the survey period.

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

**Jadual XVI / Table XVI**  
**Bilangan & Prestasi Jualan Pelancaran Baru dan Bilangan & Nilai Unit Kediaman yang Tidak Terjual di Malaysia**  
*Number and Sales Performance of New Launches and Number and Value of Unsold Residential Units in Malaysia*

| State                    | Newly Launched |        | Completed                |           | Under Construction |        | Not Constructed |        |        |
|--------------------------|----------------|--------|--------------------------|-----------|--------------------|--------|-----------------|--------|--------|
|                          | 2021           | 2022   | 2021                     | 2022      | 2021               | 2022   | 2021            | 2022   |        |
| <b>Malaysia</b>          |                |        |                          |           |                    |        |                 |        |        |
| Units Launched           | 43,860         | 54,118 | Unsold Units             | 36,863    | 27,746             | 70,231 | 57,649          | 21,960 | 11,053 |
| Units Sold               | 17,237         | 19,497 | Value (RM Million)       | 22,789.74 | 18,414.33          | NA     | NA              | NA     | NA     |
| Sales Performance        | 39.3           | 36.0   |                          |           |                    |        |                 |        |        |
| <b>W.P. Kuala Lumpur</b> |                |        | <b>W.P. Kuala Lumpur</b> |           |                    |        |                 |        |        |
| Units Launched           | 5,029          | 10,324 | Unsold Units             | 3,908     | 3,429              | 7,737  | 10,120          | 7,906  | 3,700  |
| Units Sold               | 725            | 4,870  | Value (RM Million)       | 3,166.05  | 3,149.19           | NA     | NA              | NA     | NA     |
| Sales Performance        | 14.4           | 47.2   |                          |           |                    |        |                 |        |        |
| <b>W.P. Putrajaya</b>    |                |        | <b>W.P. Putrajaya</b>    |           |                    |        |                 |        |        |
| Units Launched           | 0              | 547    | Unsold Units             | 230       | 231                | 826    | 0               | 0      | 25     |
| Units Sold               | 0              | 3      | Value (RM Million)       | 439.03    | 165.04             | NA     | NA              | NA     | NA     |
| Sales Performance        | 0.00           | 0.5    |                          |           |                    |        |                 |        |        |
| <b>W.P. Labuan</b>       |                |        | <b>W.P. Labuan</b>       |           |                    |        |                 |        |        |
| Units Launched           | 0              | 0      | Unsold Units             | 65        | 47                 | 37     | 37              | 0      | 0      |
| Units Sold               | 0              | 0      | Value (RM Million)       | 21.25     | 15.37              | NA     | NA              | NA     | NA     |
| Sales Performance        | 0.00           | 0.00   |                          |           |                    |        |                 |        |        |
| <b>Selangor</b>          |                |        | <b>Selangor</b>          |           |                    |        |                 |        |        |
| Units Launched           | 9,827          | 11,176 | Unsold Units             | 6,095     | 3,698              | 13,935 | 7,160           | 2,885  | 1,598  |
| Units Sold               | 5,302          | 3,006  | Value (RM Million)       | 5,281.23  | 3,358.94           | NA     | NA              | NA     | NA     |
| Sales Performance        | 54.0           | 26.9   |                          |           |                    |        |                 |        |        |
| <b>Johor</b>             |                |        | <b>Johor</b>             |           |                    |        |                 |        |        |
| Units Launched           | 5,513          | 7,718  | Unsold Units             | 6,089     | 5,258              | 9,523  | 5,071           | 1,105  | 724    |
| Units Sold               | 2,714          | 3,287  | Value (RM Million)       | 4,715.35  | 4,326.72           | NA     | NA              | NA     | NA     |
| Sales Performance        | 49.2           | 42.6   |                          |           |                    |        |                 |        |        |
| <b>Pulau Pinang</b>      |                |        | <b>Pulau Pinang</b>      |           |                    |        |                 |        |        |
| Units Launched           | 2,338          | 4,442  | Unsold Units             | 5,493     | 3,593              | 5,170  | 4,969           | 877    | 113    |
| Units Sold               | 1,523          | 1,437  | Value (RM Million)       | 3,555.04  | 2,742.12           | NA     | NA              | NA     | NA     |
| Sales Performance        | 65.1           | 32.4   |                          |           |                    |        |                 |        |        |
| <b>Perak</b>             |                |        | <b>Perak</b>             |           |                    |        |                 |        |        |
| Units Launched           | 5,239          | 6,052  | Unsold Units             | 2,748     | 2,312              | 9,766  | 9,338           | 2,238  | 1,151  |
| Units Sold               | 1,352          | 2,121  | Value (RM Million)       | 920.29    | 775.95             | NA     | NA              | NA     | NA     |
| Sales Performance        | 25.8           | 35.0   |                          |           |                    |        |                 |        |        |
| <b>Negeri Sembilan</b>   |                |        | <b>Negeri Sembilan</b>   |           |                    |        |                 |        |        |
| Units Launched           | 4,273          | 2,451  | Unsold Units             | 1,401     | 886                | 3,492  | 3,339           | 914    | 272    |
| Units Sold               | 1,616          | 885    | Value (RM Million)       | 697.59    | 486.29             | NA     | NA              | NA     | NA     |
| Sales Performance        | 37.8           | 36.1   |                          |           |                    |        |                 |        |        |
| <b>Melaka</b>            |                |        | <b>Melaka</b>            |           |                    |        |                 |        |        |
| Units Launched           | 3,150          | 2,241  | Unsold Units             | 607       | 697                | 2,883  | 2,578           | 951    | 411    |
| Units Sold               | 1,315          | 786    | Value (RM Million)       | 233.65    | 246.43             | NA     | NA              | NA     | NA     |
| Sales Performance        | 41.7           | 35.1   |                          |           |                    |        |                 |        |        |
| <b>Kedah</b>             |                |        | <b>Kedah</b>             |           |                    |        |                 |        |        |
| Units Launched           | 448            | 612    | Unsold Units             | 2,569     | 1,174              | 2,250  | 2,104           | 256    | 6      |
| Units Sold               | 274            | 286    | Value (RM Million)       | 732.72    | 414.15             | NA     | NA              | NA     | NA     |
| Sales Performance        | 61.2           | 46.7   |                          |           |                    |        |                 |        |        |
| <b>Pahang</b>            |                |        | <b>Pahang</b>            |           |                    |        |                 |        |        |
| Units Launched           | 2,794          | 3,153  | Unsold Units             | 1,286     | 1,044              | 2,188  | 1,983           | 1,839  | 1,119  |
| Units Sold               | 1,110          | 1,226  | Value (RM Million)       | 558.17    | 430.32             | NA     | NA              | NA     | NA     |
| Sales Performance        | 39.7           | 38.9   |                          |           |                    |        |                 |        |        |
| <b>Terengganu</b>        |                |        | <b>Terengganu</b>        |           |                    |        |                 |        |        |
| Units Launched           | 373            | 399    | Unsold Units             | 587       | 442                | 535    | 682             | 7      | 23     |
| Units Sold               | 132            | 136    | Value (RM Million)       | 229.94    | 160.42             | NA     | NA              | NA     | NA     |
| Sales Performance        | 35.4           | 34.1   |                          |           |                    |        |                 |        |        |
| <b>Kelantan</b>          |                |        | <b>Kelantan</b>          |           |                    |        |                 |        |        |
| Units Launched           | 562            | 692    | Unsold Units             | 613       | 389                | 3,068  | 2,606           | 950    | 877    |
| Units Sold               | 85             | 214    | Value (RM Million)       | 223.55    | 164.59             | NA     | NA              | NA     | NA     |
| Sales Performance        | 15.1           | 30.9   |                          |           |                    |        |                 |        |        |
| <b>Perlis</b>            |                |        | <b>Perlis</b>            |           |                    |        |                 |        |        |
| Units Launched           | 443            | 155    | Unsold Units             | 67        | 29                 | 161    | 236             | 148    | 0      |
| Units Sold               | 143            | 73     | Value (RM Million)       | 13.30     | 3.01               | NA     | NA              | NA     | NA     |
| Sales Performance        | 32.3           | 47.1   |                          |           |                    |        |                 |        |        |
| <b>Sabah</b>             |                |        | <b>Sabah</b>             |           |                    |        |                 |        |        |
| Units Launched           | 1,622          | 2,784  | Unsold Units             | 2,933     | 2,718              | 4,984  | 4,234           | 1,382  | 474    |
| Units Sold               | 352            | 712    | Value (RM Million)       | 1,121.23  | 1,174.12           | NA     | NA              | NA     | NA     |
| Sales Performance        | 21.7           | 25.6   |                          |           |                    |        |                 |        |        |
| <b>Sarawak</b>           |                |        | <b>Sarawak</b>           |           |                    |        |                 |        |        |
| Units Launched           | 2,249          | 1,372  | Unsold Units             | 2,172     | 1,799              | 3,676  | 3,192           | 502    | 560    |
| Units Sold               | 594            | 455    | Value (RM Million)       | 881.36    | 801.69             | NA     | NA              | NA     | NA     |
| Sales Performance        | 26.4           | 33.2   |                          |           |                    |        |                 |        |        |

**Jadual XVII / Table XVII**  
**Bilangan Unit Kedai yang Tidak Terjual di Malaysia**  
*Number of Unsold Shop Units in Malaysia*

| State                     | Completed |          | Under Construction |       | Not Constructed |      |
|---------------------------|-----------|----------|--------------------|-------|-----------------|------|
|                           | 2021      | 2022     | 2021               | 2022  | 2021            | 2022 |
| <b>Malaysia</b>           |           |          |                    |       |                 |      |
| Unsold Units              | 6,612     | 6,720    | 3,899              | 2,777 | 401             | 365  |
| Value (RM Million)        | 5,778.24  | 5,841.83 | NA                 | NA    | NA              | NA   |
| <b>W. P. Kuala Lumpur</b> |           |          |                    |       |                 |      |
| Unsold Units              | 66        | 82       | 45                 | 51    | 0               | 0    |
| Value (RM Million)        | 41.62     | 50.02    | NA                 | NA    | NA              | NA   |
| <b>W. P. Putrajaya</b>    |           |          |                    |       |                 |      |
| Unsold Units              | 17        | 17       | 0                  | 0     | 0               | 0    |
| Value (RM Million)        | 60.65     | 60.65    | NA                 | NA    | NA              | NA   |
| <b>W. P. Labuan</b>       |           |          |                    |       |                 |      |
| Unsold Units              | 0         | 0        | 9                  | 9     | 0               | 0    |
| Value (RM Million)        | 0.00      | 0.00     | NA                 | NA    | NA              | NA   |
| <b>Selangor</b>           |           |          |                    |       |                 |      |
| Unsold Units              | 566       | 404      | 446                | 510   | 0               | 0    |
| Value (RM Million)        | 553.99    | 476.68   | NA                 | NA    | NA              | NA   |
| <b>Johor</b>              |           |          |                    |       |                 |      |
| Unsold Units              | 1,578     | 1,731    | 1,476              | 1,005 | 0               | 13   |
| Value (RM Million)        | 1,571.10  | 1,674.77 | NA                 | NA    | NA              | NA   |
| <b>Pulau Pinang</b>       |           |          |                    |       |                 |      |
| Unsold Units              | 278       | 143      | 7                  | 45    | 0               | 0    |
| Value (RM Million)        | 166.25    | 92       | NA                 | NA    | NA              | NA   |
| <b>Perak</b>              |           |          |                    |       |                 |      |
| Unsold Units              | 706       | 707      | 350                | 125   | 29              | 0    |
| Value (RM Million)        | 339.04    | 336.98   | NA                 | NA    | NA              | NA   |
| <b>Negeri Sembilan</b>    |           |          |                    |       |                 |      |
| Unsold Units              | 464       | 455      | 55                 | 7     | 30              | 35   |
| Value (RM Million)        | 289.39    | 293.57   | NA                 | NA    | NA              | NA   |
| <b>Melaka</b>             |           |          |                    |       |                 |      |
| Unsold Units              | 174       | 277      | 22                 | 50    | 0               | 0    |
| Value (RM Million)        | 127.84    | 214.72   | NA                 | NA    | NA              | NA   |
| <b>Kedah</b>              |           |          |                    |       |                 |      |
| Unsold Units              | 319       | 314      | 118                | 182   | 21              | 0    |
| Value (RM Million)        | 235.27    | 213.15   | NA                 | NA    | NA              | NA   |
| <b>Pahang</b>             |           |          |                    |       |                 |      |
| Unsold Units              | 619       | 552      | 157                | 40    | 267             | 287  |
| Value (RM Million)        | 523.77    | 397.46   | NA                 | NA    | NA              | NA   |
| <b>Terengganu</b>         |           |          |                    |       |                 |      |
| Unsold Units              | 195       | 180      | 34                 | 14    | 14              | 0    |
| Value (RM Million)        | 159.78    | 143      | NA                 | NA    | NA              | NA   |
| <b>Kelantan</b>           |           |          |                    |       |                 |      |
| Unsold Units              | 205       | 246      | 289                | 24    | 22              | 30   |
| Value (RM Million)        | 124.67    | 141.49   | NA                 | NA    | NA              | NA   |
| <b>Perlis</b>             |           |          |                    |       |                 |      |
| Unsold Units              | 78        | 64       | 64                 | 34    | 0               | 0    |
| Value (RM Million)        | 43.01     | 40.54    | NA                 | NA    | NA              | NA   |
| <b>Sabah</b>              |           |          |                    |       |                 |      |
| Unsold Units              | 602       | 661      | 565                | 379   | 0               | 0    |
| Value (RM Million)        | 434.47    | 512.94   | NA                 | NA    | NA              | NA   |
| <b>Sarawak</b>            |           |          |                    |       |                 |      |
| Unsold Units              | 745       | 887      | 262                | 302   | 18              | 0    |
| Value (RM Million)        | 1,107.38  | 1,193.87 | NA                 | NA    | NA              | NA   |

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

Jadual XVIII / Table XVIII  
Bilangan Unit SOHO yang Tidak Terjual di Malaysia  
Number of Unsold SOHO Units in Malaysia

| State                     | Completed |          | Under Construction |       | Not Constructed |       |
|---------------------------|-----------|----------|--------------------|-------|-----------------|-------|
|                           | 2021      | 2022     | 2021               | 2022  | 2021            | 2022  |
| <b>Malaysia</b>           |           |          |                    |       |                 |       |
| Unsold Units              | 2,274     | 2,239    | 8,161              | 6,970 | 920             | 1,088 |
| Value (RM Million)        | 1,292.94  | 1,448.50 | NA                 | NA    | NA              | NA    |
| <b>W. P. Kuala Lumpur</b> |           |          |                    |       |                 |       |
| Unsold Units              | 457       | 788      | 2,837              | 2184  | 0               | 0     |
| Value (RM Million)        | 492.14    | 781.06   | 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              | 1,187     | 944      | 3,480              | 3,311 | 280             | 712   |
| Value (RM Million)        | 493.34    | 414.43   | NA                 | NA    | NA              | NA    |
| <b>Johor</b>              |           |          |                    |       |                 |       |
| Unsold Units              | 426       | 331      | 94                 | 88    | 640             | 376   |
| Value (RM Million)        | 222.75    | 184.56   | NA                 | NA    | NA              | NA    |
| <b>Pulau Pinang</b>       |           |          |                    |       |                 |       |
| Unsold Units              | 60        | 38       | 1476               | 1,258 | 0               | 0     |
| Value (RM Million)        | 38.58     | 24.43    | NA                 | NA    | NA              | NA    |
| <b>Perak</b>              |           |          |                    |       |                 |       |
| Unsold Units              | 0         | 0        | 203                | 58    | 0               | 0     |
| Value (RM Million)        | 0.00      | 0.00     | NA                 | NA    | NA              | NA    |
| <b>Negeri Sembilan</b>    |           |          |                    |       |                 |       |
| Unsold Units              | 0         | 0        | 0                  | 0     | 0               | 0     |
| Value (RM Million)        | 0.00      | 0.00     | NA                 | NA    | NA              | NA    |
| <b>Melaka</b>             |           |          |                    |       |                 |       |
| Unsold Units              | 0         | 0        | 0                  | 0     | 0               | 0     |
| Value (RM Million)        | 0.00      | 0.00     | NA                 | NA    | NA              | NA    |
| <b>Kedah</b>              |           |          |                    |       |                 |       |
| Unsold Units              | 0         | 0        | 0                  | 0     | 0               | 0     |
| Value (RM Million)        | 0.00      | 0.00     | NA                 | NA    | NA              | NA    |
| <b>Pahang</b>             |           |          |                    |       |                 |       |
| Unsold Units              | 0         | 0        | 0                  | 0     | 0               | 0     |
| Value (RM Million)        | 0.00      | 0.00     | NA                 | NA    | NA              | NA    |
| <b>Terengganu</b>         |           |          |                    |       |                 |       |
| Unsold Units              | 0         | 0        | 0                  | 0     | 0               | 0     |
| Value (RM Million)        | 0.00      | 0.00     | 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        | 0                  | 0     | 0               | 0     |
| Value (RM Million)        | 0.00      | 0.00     | NA                 | NA    | NA              | NA    |
| <b>Sabah</b>              |           |          |                    |       |                 |       |
| Unsold Units              | 0         | 0        | 0                  | 0     | 0               | 0     |
| Value (RM Million)        | 0.00      | 0.00     | NA                 | NA    | NA              | NA    |
| <b>Sarawak</b>            |           |          |                    |       |                 |       |
| Unsold Units              | 144       | 138      | 71                 | 71    | 0               | 0     |
| Value (RM Million)        | 46.12     | 44.01    | 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

**Jadual XIX / Table XX**  
**Bilangan Pangsapuri Khidmat yang Tidak Terjual di Malaysia**  
*Number of Serviced Apartment Units in Malaysia*

| State                     | Completed |           | Under Construction |        | Not Constructed |        |
|---------------------------|-----------|-----------|--------------------|--------|-----------------|--------|
|                           | 2021      | 2022      | 2021               | 2022   | 2021            | 2022   |
| <b>Malaysia</b>           |           |           |                    |        |                 |        |
| Unsold Units              | 24,295    | 23,978    | 42,094             | 33,101 | 8,361           | 10,644 |
| Value (RM Million)        | 20,453.81 | 20,194.55 | NA                 | NA     | NA              | NA     |
| <b>W. P. Kuala Lumpur</b> |           |           |                    |        |                 |        |
| Unsold Units              | 4,695     | 6,012     | 17,356             | 14,401 | 6,522           | 7,164  |
| Value (RM Million)        | 4,327.55  | 5,495.97  | NA                 | NA     | NA              | NA     |
| <b>W. P. Putrajaya</b>    |           |           |                    |        |                 |        |
| Unsold Units              | 0         | 0         | 163                | 110    | 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              | 2,302     | 2,926     | 10,619             | 8,212  | 655             | 925    |
| Value (RM Million)        | 1,426.44  | 1,747.94  | NA                 | NA     | NA              | NA     |
| <b>Johor</b>              |           |           |                    |        |                 |        |
| Unsold Units              | 16,476    | 14,132    | 7,982              | 5,851  | 882             | 753    |
| Value (RM Million)        | 14,141.08 | 12,233.82 | NA                 | NA     | NA              | NA     |
| <b>Pulau Pinang</b>       |           |           |                    |        |                 |        |
| Unsold Units              | 285       | 419       | 1,431              | 642    | 200             | 120    |
| Value (RM Million)        | 373.82    | 545.17    | NA                 | NA     | NA              | NA     |
| <b>Perak</b>              |           |           |                    |        |                 |        |
| Unsold Units              | 54        | 0         | 355                | 276    | 0               | 0      |
| Value (RM Million)        | 11.13     | 0.00      | NA                 | NA     | NA              | NA     |
| <b>Negeri Sembilan</b>    |           |           |                    |        |                 |        |
| Unsold Units              | 0         | 0         | 2,454              | 2,075  | 0               | 0      |
| Value (RM Million)        | 0.00      | 0.00      | NA                 | NA     | NA              | NA     |
| <b>Melaka</b>             |           |           |                    |        |                 |        |
| Unsold Units              | 44        | 58        | 57                 | 92     | 0               | 213    |
| Value (RM Million)        | 21.35     | 26.66     | NA                 | NA     | NA              | NA     |
| <b>Kedah</b>              |           |           |                    |        |                 |        |
| Unsold Units              | 0         | 0         | 0                  | 0      | 0               | 0      |
| Value (RM Million)        | 0.00      | 0.00      | NA                 | NA     | NA              | NA     |
| <b>Pahang</b>             |           |           |                    |        |                 |        |
| Unsold Units              | 123       | 91        | 1,516              | 1,332  | 0               | 1,197  |
| Value (RM Million)        | 45.67     | 35.06     | NA                 | NA     | NA              | NA     |
| <b>Terengganu</b>         |           |           |                    |        |                 |        |
| Unsold Units              | 99        | 99        | 0                  | 0      | 0               | 0      |
| Value (RM Million)        | 42.79     | 42.79     | NA                 | NA     | NA              | NA     |
| <b>Kelantan</b>           |           |           |                    |        |                 |        |
| Unsold Units              | 217       | 241       | 0                  | 0      | 0               | 272    |
| Value (RM Million)        | 63.98     | 67.13     | NA                 | NA     | NA              | NA     |
| <b>Pertis</b>             |           |           |                    |        |                 |        |
| Unsold Units              | 0         | 0         | 0                  | 0      | 0               | 0      |
| Value (RM Million)        | 0.00      | 0.00      | NA                 | NA     | NA              | NA     |
| <b>Sabah</b>              |           |           |                    |        |                 |        |
| Unsold Units              | 0         | 0         | 0                  | 0      | 0               | 0      |
| Value (RM Million)        | 0.00      | 0.00      | NA                 | NA     | NA              | NA     |
| <b>Sarawak</b>            |           |           |                    |        |                 |        |
| Unsold Units              | 0         | 0         | 161                | 110    | 102             | 0      |
| Value (RM Million)        | 0.00      | 0.00      | 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

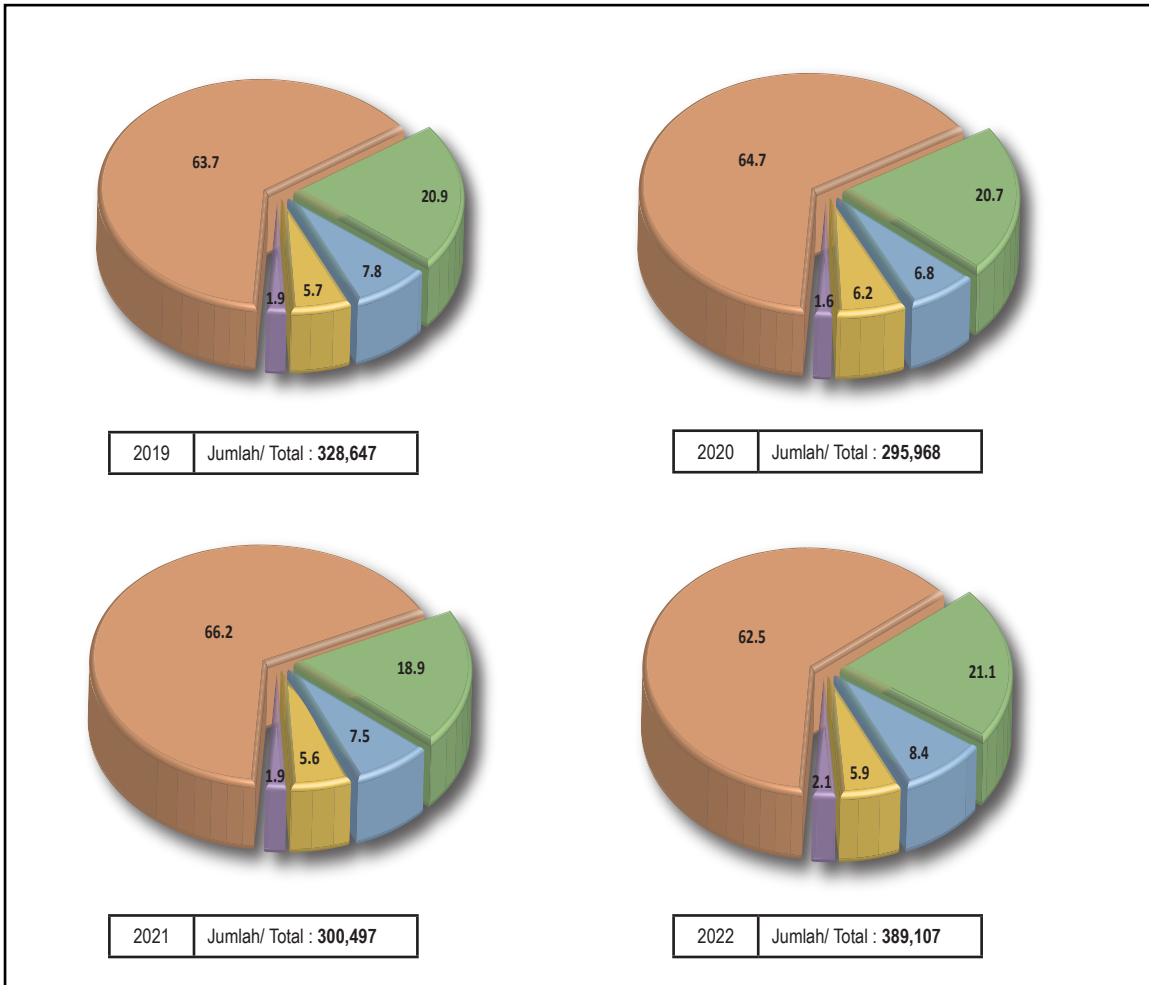


**Jadual XX / Table XIX**  
**Bilangan Unit Industri yang Tidak Terjual di Malaysia**  
*Number of Unsold Industrial Units in Malaysia*

| State                     | Completed |          | Under Construction |      | Not Constructed |      |
|---------------------------|-----------|----------|--------------------|------|-----------------|------|
|                           | 2021      | 2022     | 2021               | 2022 | 2021            | 2022 |
| <b>Malaysia</b>           |           |          |                    |      |                 |      |
| Unsold Units              | 1,130     | 880      | 654                | 450  | 22              | 51   |
| Value (RM Million)        | 1,584.44  | 1,146.49 | 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              | 50        | 45       | 56                 | 42   | 0               | 0    |
| Value (RM Million)        | 155.85    | 105.81   | NA                 | NA   | NA              | NA   |
| <b>Johor</b>              |           |          |                    |      |                 |      |
| Unsold Units              | 352       | 205      | 174                | 124  | 0               | 10   |
| Value (RM Million)        | 721.29    | 470.59   | NA                 | NA   | NA              | NA   |
| <b>Pulau Pinang</b>       |           |          |                    |      |                 |      |
| Unsold Units              | 101       | 85       | 0                  | 11   | 0               | 0    |
| Value (RM Million)        | 225.24    | 196.25   | NA                 | NA   | NA              | NA   |
| <b>Perak</b>              |           |          |                    |      |                 |      |
| Unsold Units              | 46        | 54       | 51                 | 36   | 0               | 0    |
| Value (RM Million)        | 37.61     | 43.12    | NA                 | NA   | NA              | NA   |
| <b>Negeri Sembilan</b>    |           |          |                    |      |                 |      |
| Unsold Units              | 66        | 54       | 51                 | 49   | 0               | 0    |
| Value (RM Million)        | 56.31     | 43.08    | NA                 | NA   | NA              | NA   |
| <b>Melaka</b>             |           |          |                    |      |                 |      |
| Unsold Units              | 19        | 17       | 0                  | 9    | 0               | 0    |
| Value (RM Million)        | 15.92     | 14.53    | NA                 | NA   | NA              | NA   |
| <b>Kedah</b>              |           |          |                    |      |                 |      |
| Unsold Units              | 0         | 0        | 41                 | 20   | 0               | 0    |
| Value (RM Million)        | 0.00      | 0.00     | NA                 | NA   | NA              | NA   |
| <b>Pahang</b>             |           |          |                    |      |                 |      |
| Unsold Units              | 73        | 78       | 38                 | 15   | 0               | 0    |
| Value (RM Million)        | 41.14     | 48.06    | NA                 | NA   | NA              | NA   |
| <b>Terengganu</b>         |           |          |                    |      |                 |      |
| Unsold Units              | 15        | 14       | 0                  | 0    | 0               | 0    |
| Value (RM Million)        | 5.38      | 4.95     | NA                 | NA   | NA              | NA   |
| <b>Kelantan</b>           |           |          |                    |      |                 |      |
| Unsold Units              | 0         | 0        | 26                 | 26   | 0               | 0    |
| Value (RM Million)        | 0.00      | 0.00     | NA                 | NA   | NA              | NA   |
| <b>Perlis</b>             |           |          |                    |      |                 |      |
| Unsold Units              | 31        | 10       | 0                  | 0    | 0               | 0    |
| Value (RM Million)        | 15.04     | 5.50     | NA                 | NA   | NA              | NA   |
| <b>Sabah</b>              |           |          |                    |      |                 |      |
| Unsold Units              | 57        | 21       | 44                 | 44   | 22              | 22   |
| Value (RM Million)        | 94.94     | 17.96    | NA                 | NA   | NA              | NA   |
| <b>Sarawak</b>            |           |          |                    |      |                 |      |
| Unsold Units              | 320       | 297      | 173                | 74   | 0               | 19   |
| Value (RM Million)        | 215.74    | 196.65   | 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

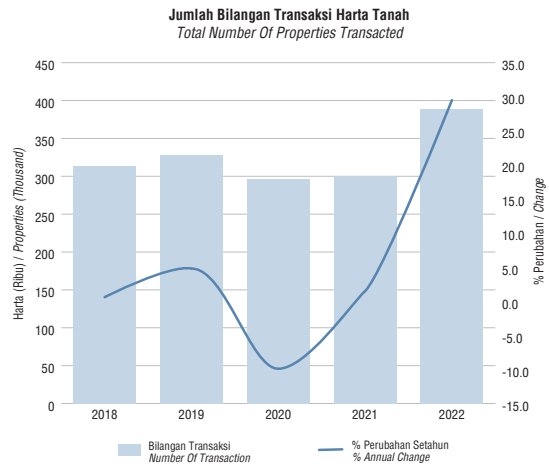
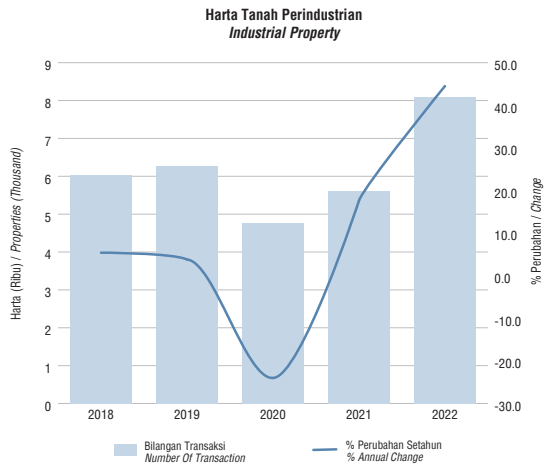
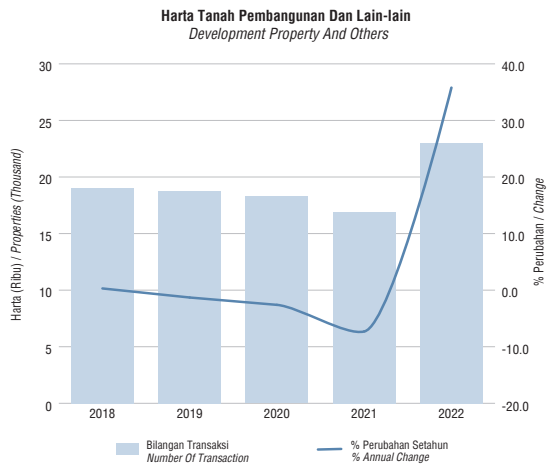
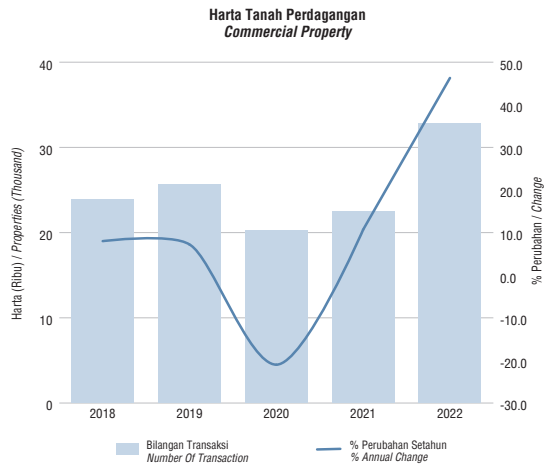
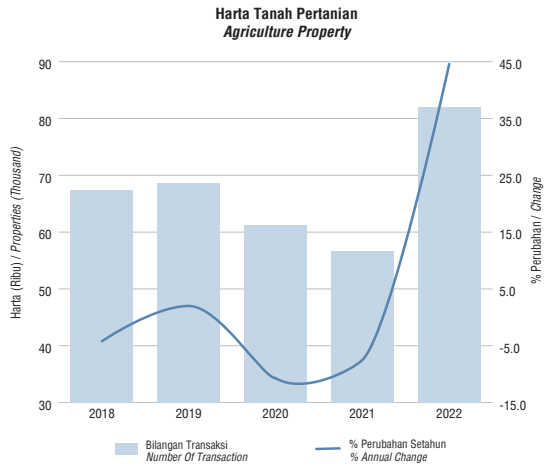
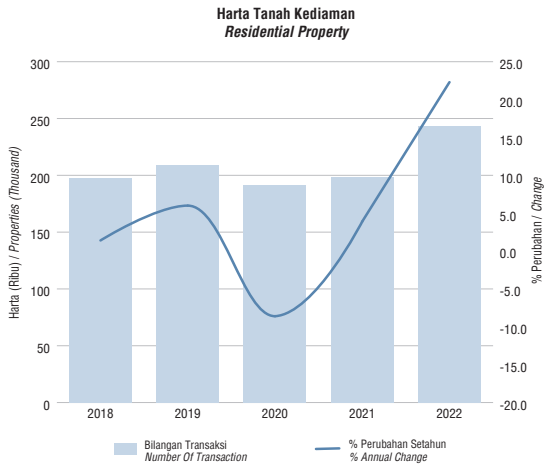
**Chart 1 / Chart 1**  
**Jumlah dan Peratus Pecahan Transaksi Harta Tanah Mengikut Subsektor**  
*Total and Percentage Share of Properties Transacted by SubSector*



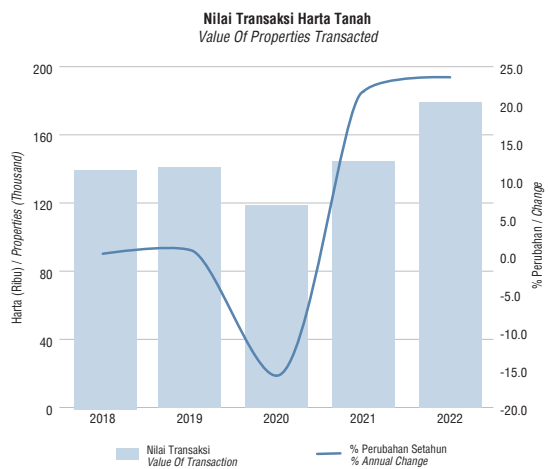
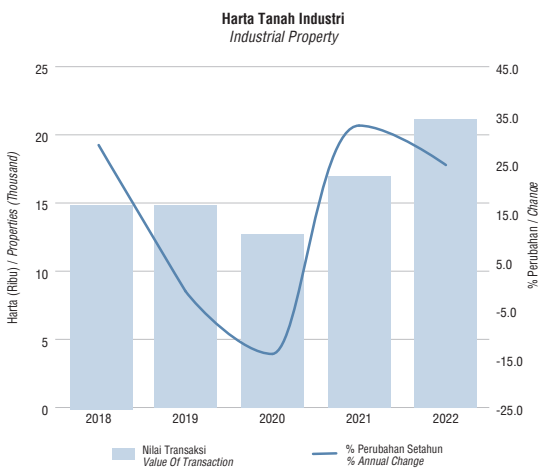
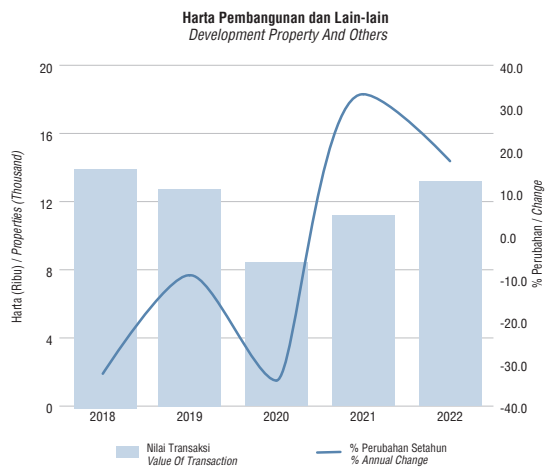
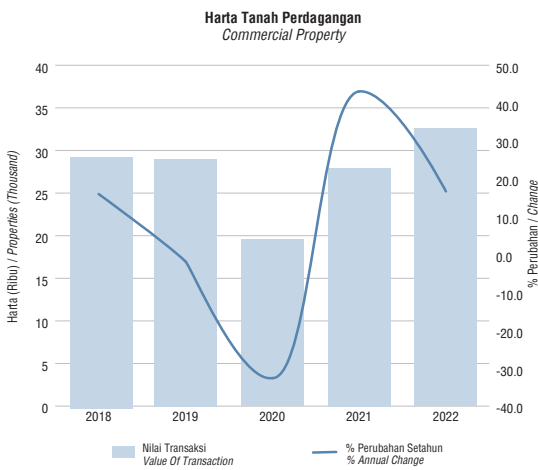
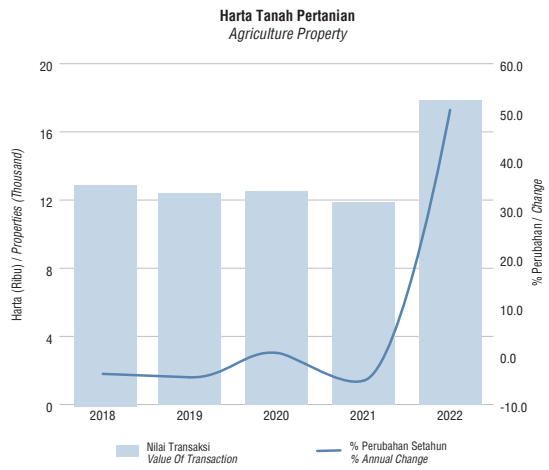
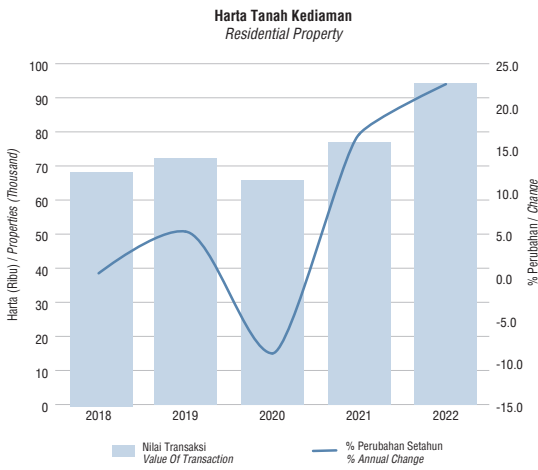
| Subsektor/<br>Sub-sector  | Bilangan Harta/<br>Number of Properties |                |                |                | % Pecahan/<br>Share |            |            |            |
|---|---|----------------|----------------|----------------|---------------------|------------|------------|------------|
|   | 2019                                    | 2020           | 2021           | 2022           | 2019                | 2020       | 2021       | 2022       |
| Kediaman/<br>Residential  | 209,295                                 | 191,354        | 198,812        | 243,190        | 63.7                | 64.7       | 66.2       | 62.5       |
| Pertanian/<br>Agriculture                                       | 68,665                                  | 61,326         | 56,730         | 82,040         | 20.9                | 20.7       | 18.9       | 21.1       |
| Komersial/<br>Commercial  | 25,654                                  | 20,255         | 22,428         | 32,809         | 7.8                 | 6.8        | 7.5        | 8.4        |
| Tanah Pembangunan Dan Lain-lain/<br>Development Land and Others | 18,772                                  | 18,275         | 16,932         | 22,986         | 5.7                 | 6.2        | 5.6        | 5.9        |
| Industri/<br>Industrial   | 6,261                                   | 4,758          | 5,595          | 8,082          | 1.9                 | 1.6        | 1.9        | 2.1        |
| <b>Jumlah/<br/>Total</b>  | <b>328,647</b>                          | <b>295,968</b> | <b>300,497</b> | <b>389,107</b> | <b>100</b>          | <b>100</b> | <b>100</b> | <b>100</b> |

**Carta II / Chart II**  
**Bilangan Transaksi dan Peratus Perubahan**  
*Number of Transaction and Percentage Change*

Overview 62



**Carta III / Chart III**  
**Nilai Transaksi dan Peratus Perubahan**  
*Value of Transaction and Percentage Change*

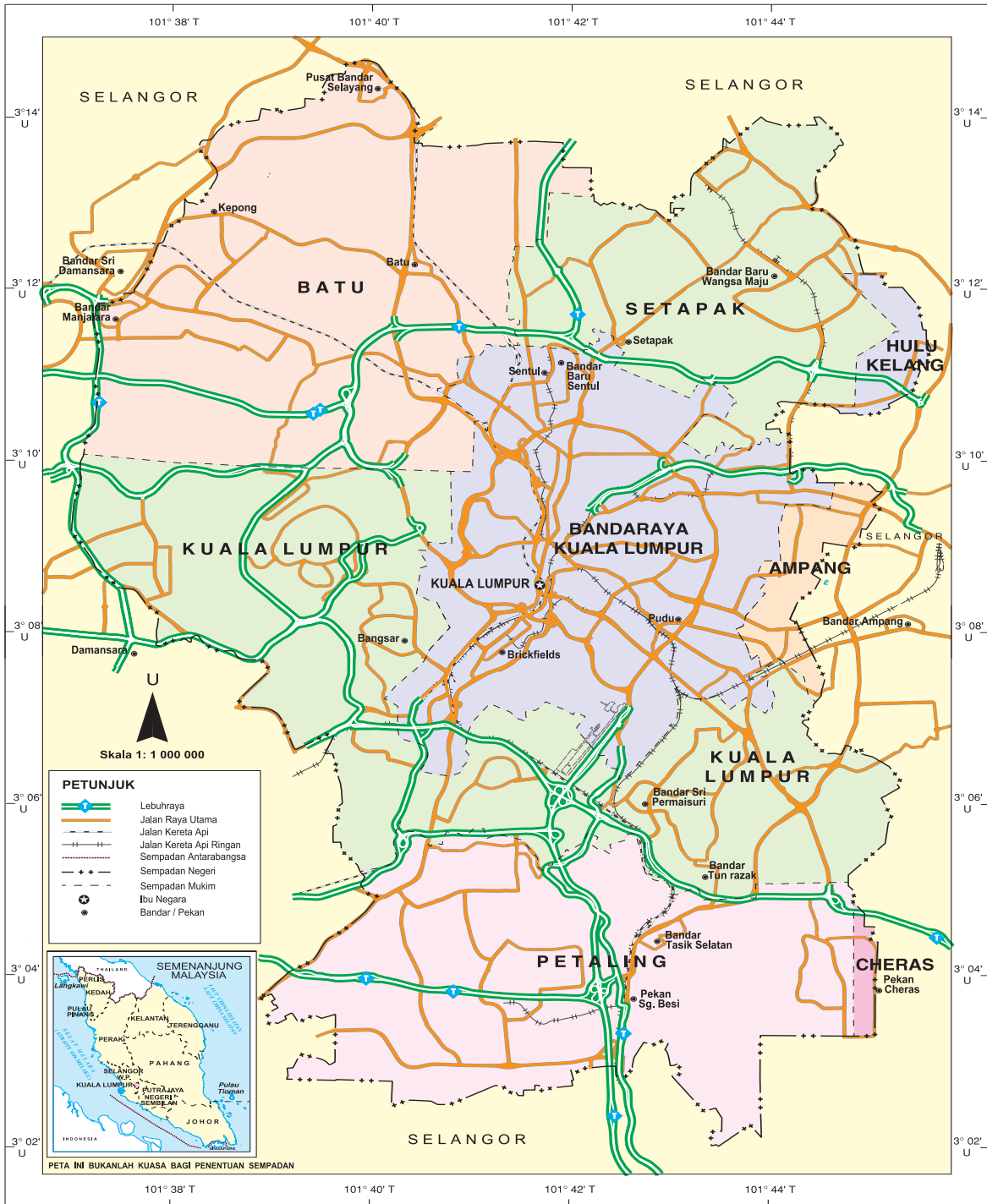




**TEKS NEGERI**  
***STATE TEXT***



# WILAYAH PERSEKUTUAN KUALA LUMPUR





# WILAYAH PERSEKUTUAN KUALA LUMPUR

## GAMBARAN KESELURUHAN

Pasaran harta tanah negeri ini terus mengukuh pada 2022 berdasarkan jumlah bilangan dan nilai transaksi yang lebih tinggi berbanding prestasi tahun lepas. Tempoh kajian mencatat 18,312 transaksi dengan jumlah nilai RM22.00 bilion masing-masing meningkat 25.0% dan 7.8% dalam bilangan dan nilai berbanding 2021 (14,652 transaksi bernilai RM20.40 bilion). Subsektor kediaman terus memacu pasaran keseluruhan, mencakupi 72.0% daripada bilangan transaksi diikuti oleh subsektor perdagangan (26.1%), tanah pembangunan (1.1%) dan industri (0.8%).

Aktiviti pasaran merentas semua subsektor berada pada aliran menaik. Subsektor kediaman, perdagangan, industri dan tanah pembangunan dan lain masing-masing meningkat 18.4%, 46.9%, 53.6% dan 16.0%. Dari segi nilai, subsektor kediaman dan industri menunjukkan peningkatan manakala subsektor perdagangan dan tanah pembangunan dan lain merekodkan sebaliknya.

## OVERVIEW

The state's property market continued to strengthen in 2022 indicated by the higher volume and value of transaction as compared to last year performance. The review period registered 18,312 transactions with a total value of RM22.00 billion, increased by 25.0% and 7.8% in volume and value respectively against 2021 (14,652 transactions worth RM20.40 billion). Residential sub-sector continued to propel the overall market, accounting for 72.0% of the state's property market volume transaction followed by the commercial (26.1%), development land (1.1%) and industrial (0.8%) sub-sectors.

Market activities across all sub-sectors witnessed uptrend movements. Residential, commercial, industrial and development land and others sub-sectors increased by 18.4%, 46.9%, 53.6% and 16.0% respectively. In term of value, residential and industrial sub-sectors showed uptrend whereas commercial and development land and others sub-sectors recorded otherwise.

2

Chart 1.1

Volume of Property Transactions 2018 – 2022

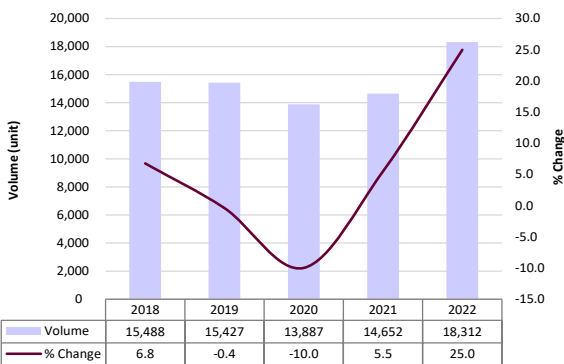


Chart 1.2

Value of Property Transactions 2018 – 2022

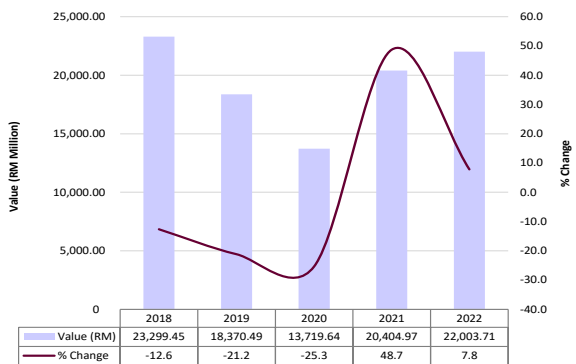


Chart 1.3

Contribution to Transaction Volume by Sub-sector 2022

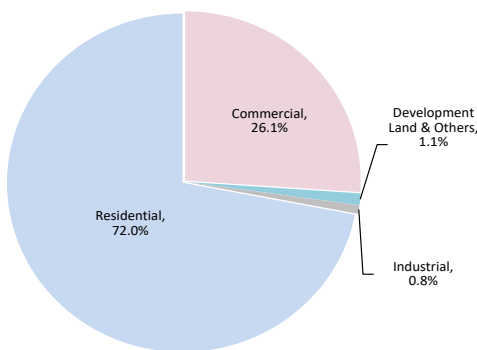
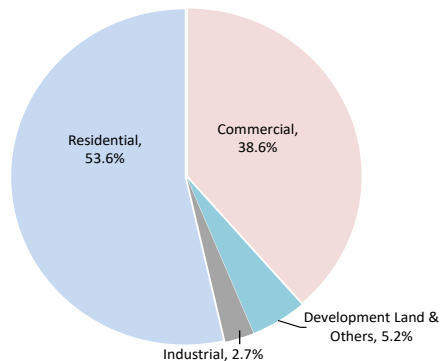


Chart 1.4

Contribution to Transaction Value by Sub-sector 2022



## PROMINENT SALES

Table 1.1

### Summary of Prominent Sales Recorded in 2022

| No.                               | Property                            | Location/Mukim                      | Transaction Year | Consideration Price (RM) |
|-----------------------------------|-------------------------------------|-------------------------------------|------------------|--------------------------|
| <b>SHOPPING COMPLEX (SC)</b>      |                                     |                                     |                  |                          |
| 1.                                | Boulevard Business Park             | Jalan Kuching                       | 2022             | 56,000,000.00            |
| <b>PURPOSE-BUILT OFFICE (PBO)</b> |                                     |                                     |                  |                          |
| 2.                                | Bangunan AHP                        | Jalan Tun Mohd Fuad 2, TTDI         | 2022             | 86,000,000.00            |
| 3.                                | Menara KWSP                         | Jalan Changkat                      | 2022             | 62,000,000.00            |
| 4.                                | Menara Naza                         | Jalan Raja Muda Abdul Azizi         | 2022             | 51,000,000.00            |
| 5.                                | Menara TM                           | Jalan Desa Utama, Taman Desa        | 2022             | 35,288,000.00            |
| 6.                                | Menara Ambank                       | Jalan Pudu                          | 2022             | 22,000,000.00            |
| 7.                                | Purpose-Built Office                | Jalan Sri Semantan 1                | 2021             | 32,000,000.00            |
| 8.                                | Menara Goucoland                    | Jalan Damanlela                     | 2020             | 242,100,000.00           |
| <b>HOTEL</b>                      |                                     |                                     |                  |                          |
| 9.                                | Hotel Sheraton Imperial             | Jalan Sultan Ismail                 | 2022             | 235,000,000.00           |
| 10.                               | Hotel Bintang Warisan               | Jalan Bukit Bitang                  | 2022             | 31,800,000.00            |
| 11.                               | Citizen M Hotel (fka Skypark Hotel) | Jalan Pudu                          | 2022             | 80,000,000.00            |
| <b>OTHER TYPE</b>                 |                                     |                                     |                  |                          |
| 12.                               | Private Hospital                    | Jalan Jalil Perkasa 19, Bukit Jalil | 2022             | 142,524,070.00           |
| 13.                               | 789 Star Residence Parking          | Jalan Yap Kwan Seng                 | 2022             | 51,300,000.00            |

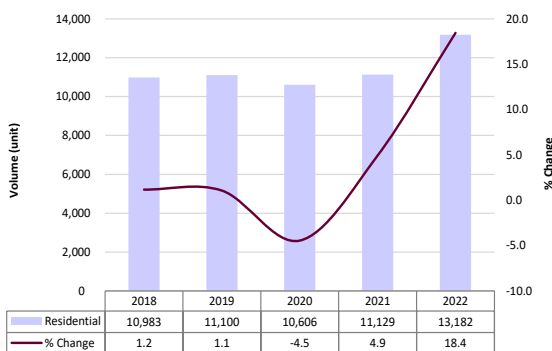
## HARTA TANAH KEDIAMAN

### Transaksi

Prestasi pasaran bagi subsektor kediaman meningkat dalam tempoh kajian dengan 13,182 transaksi bernilai RM11.79 bilion, masing-masing menunjukkan kenaikan 18.4% dan 21.6% dalam bilangan dan nilai berbanding 2021 (11,129 transaksi bernilai RM9.69 bilion). Unit kondominium dan pangsapuri terus memacu pasaran kediaman, menyumbang 50.0% (6,589 unit) daripada jumlah transaksi.

Chart 1.5

### Volume of Residential Property Transactions 2018 – 2022



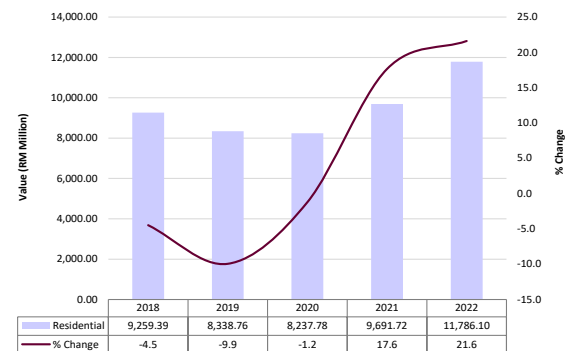
## RESIDENTIAL PROPERTY

### Transaction

The residential sub-sector's market performance improved in the review period with 13,182 transactions worth RM11.79 billion, increase 18.4% and 21.6% in volume and value respectively against 2021 (11,129 transactions worth RM9.69 billion). Condominium and apartment units continued to propel the residential market, contributed 50.0% (6,589 units) of the total transactions.

Chart 1.6

### Value of Residential Property Transactions 2018 – 2022

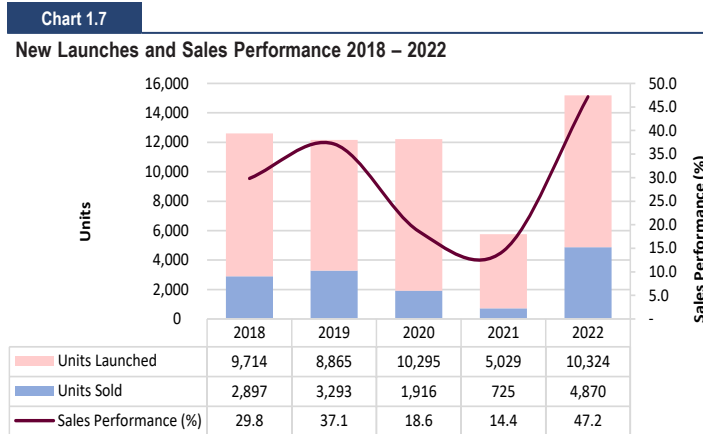


## Pelancaran Baharu

Pasaran utama menyaksikan lebih banyak pelancaran baharu dengan 10,324 unit, meningkat 105.3% berbanding 5,029 unit yang dilancarkan pada 2021. Prestasi penjualan untuk pelancaran baharu direkodkan lebih tinggi pada 47.2% berbanding 2021 (14.4%). Pangsapuri dan kondominium menyumbang kesemua pelancaran baharu.

## New Launches

The primary market saw more number of new launches with 10,324 units, increased by 105.3% compared to 5,029 units launched in 2021. Sales performance for new launches recorded higher at 47.2% compared to 2021 (14.4%). Apartments and condominiums contributed all of the total.

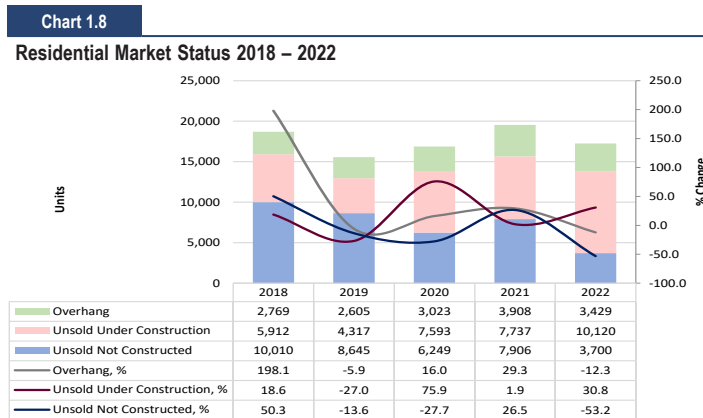


## 4 Status Pasaran

Unit kediaman siap dibina tidak terjual dan belum dibina belum terjual berkurang manakala dalam pembinaan belum terjual meningkat dalam tempoh kajian.

## Market Status

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



## Aktiviti Pembinaan

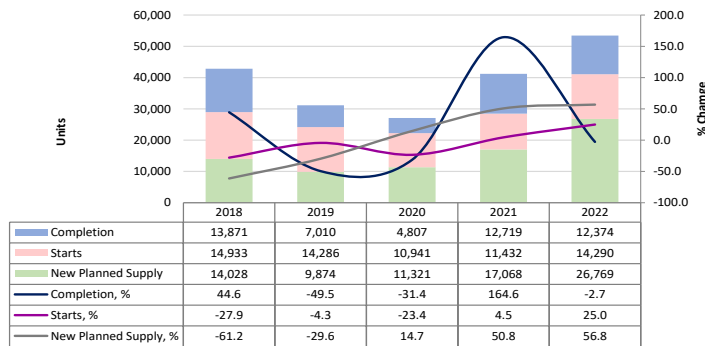
Aktiviti pembinaan berada dalam mod rendah. Sehingga akhir 2022, terdapat 535,937 unit kediaman sedia ada dengan 41,647 unit lagi dalam penawaran akan datang dan 57,674 unit dalam penawaran dirancang.

## Construction Activity

Construction activities was on a low mode. As at end-2022, there were 535,937 existing residential units with another 41,647 units in the incoming supply and 57,674 units in the planned supply.

Chart 1.9

Residential Construction Activity 2018 – 2022



## Harga dan sewa

Harga harta tanah kediaman secara keseluruhan merekodkan pergerakan bercampur-campur. Beberapa skim rumah teres setingkat di Mukim Kuala Lumpur menikmati kenaikan modal antara 2.9% hingga 13.8% sementara itu beberapa skim teres dua tingkat di Mukim Petaling juga mencatat pertumbuhan modal antara 2.6% hingga 10.5%.

Sementara itu, pangsapuri dan kondominium juga mencatat kenaikan modal yang minima secara keseluruhan. Beberapa skim menunjukkan pertumbuhan dua angka iaitu Bam Villas (10.9%), Sri Jinjang court (16.6%), Vista Harmoni (12.3%), Abadi Indah Apartment (16.2%), Faber Heights (11.3%), Jasmine Court (13.8%), Pantai Panorama Kondo (10.7%), Tiara Faber (10.1%), Bistari Condo (13.0%), Menara Belfield (15.8%), Sri Bukit Persekutuan (16.0%), The Orion (10.3%), Anjali North Kiara (13.3%), Ceriaan Kiara (12.7%), Hartamas Regency (13.3%), Hartamas Regency 2 (10.9%), The Westside Three (Desa Parkcity) 11.5%, Villa Lagenda Condo (10.7%), One Menerung (10.2%), Pantai Hillpark Apartment (11.1%), The Trellises (13.9%), Bukit OUG (13.7%), Gurney Height (10.4%), Madu Mas (10.1%) dan Seri Riana (12.8%).

Sehingga 2022<sup>P</sup>, Indeks Harga Semua Rumah bagi negeri ini berada pada 190.4 mata, menurun 0.2% daripada 190.9 mata pada 2021. Purata Harga Semua Rumah pada 2022<sup>P</sup> berada pada RM756,109, menurun daripada RM758,021 yang direkodkan pada 2021.

Pasaran sewa secara amnya stabil dengan pergerakan menaik direkodkan di lokasi yang baik. 11 Mont Kiara, Almaspuri dan Zeta Desky di Mukim Batu menunjukkan kenaikan sewa antara 4.2% dan 10.5%. Purata pulangan sewa kediaman berada dalam lingkungan antara 1.2% dan 9.5%.

## Price and Rental

Price of residential property recorded mixed movements across the board. Several single storey terraced houses schemes located in Mukim Kuala Lumpur enjoyed capital appreciation of 2.9% to 13.8% while several double storey terraced houses schemes in Mukim Petaling also registered capital gains 2.6% to 10.5%.

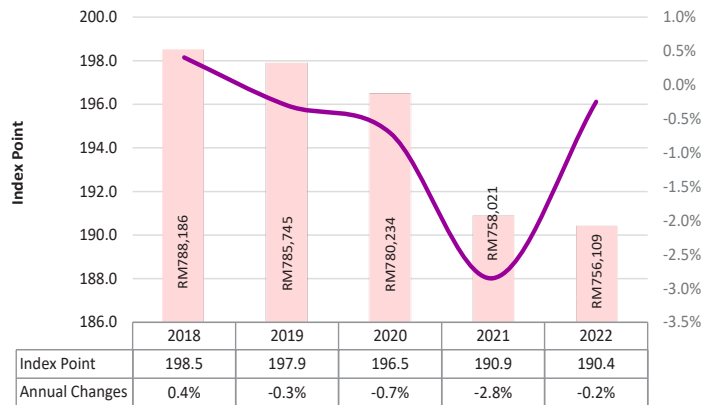
Meanwhile apartment and condominium units also recorded minimal capital gains across the board. Several schemes portrayed double-digit growth namely Bam Villas (10.9%), Sri Jinjang court (16.6%), Vista Harmoni (12.3%), Abadi Indah Apartment (16.2%), Faber Heights (11.3%), Jasmine Court (13.8%), Pantai Panorama Kondo (10.7%), Tiara Faber (10.1%), Bistari Condo (13.0%), Menara Belfield (15.8%), Sri Bukit Persekutuan (16.0%), The Orion (10.3%), Anjali North Kiara (13.3%), Ceriaan Kiara (12.7%), Hartamas Regency (13.3%), Hartamas Regency 2 (10.9%), The Westside Three (Desa Parkcity) 11.5%, Villa Lagenda Condo (10.7%), One Menerung (10.2%), Pantai Hillpark Apartment (11.1%), The Trellises (13.9%), Bukit OUG(13.7%), Gurney Height (10.4%), Madu Mas (10.1%) and Seri Riana (12.8%).

As at 2022<sup>P</sup>, the All House Price Index for the state stood at 190.4 points, down by 0.2% from 190.9 points in 2021. The average All House Price as at 2022<sup>P</sup> stood at RM756,109, decreased from RM758,021 recorded in 2021.

The rental market was generally stable with upward movements recorded in favourable locations. 11 Mont Kiara, Almaspuri and Zeta Desky in Mukim Batu experienced upward rental movements ranged between 4.2% and 10.5%. Average gross rental yield for residential obtained between 1.2% and 9.5%.

Chart 1.10

All House Price Index Annual Changes 2018 – 2022



## HARTA TANAH PERDAGANGAN

### Transaksi

Subsektor perdagangan mencatatkan 4,777 transaksi dengan jumlah nilai RM8.49 bilion pada 2022, menunjukkan kenaikan 46.9% dalam bilangan manakala nilai menurun 5.1% berbanding tahun 2021 (3,251 transaksi bernilai RM8.95 bilion).

6

## COMMERCIAL PROPERTY

### Transaction

The commercial sub-sector recorded 4,777 transactions with a total value of RM8.49 billion in 2022, indicating an increase of 46.9% in volume whereas value dropped by 5.1% as compared to 2021 (3,251 transactions worth RM8.95 billion).

Chart 1.11

Volume of Commercial Property Transactions 2018 – 2022

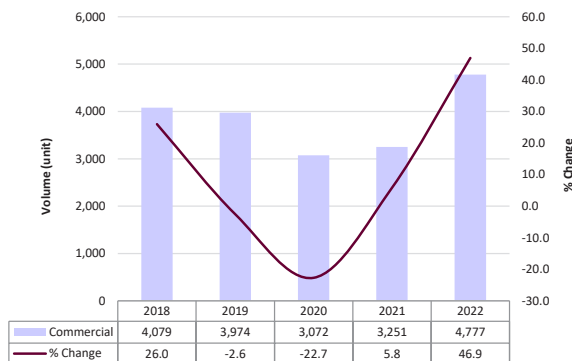
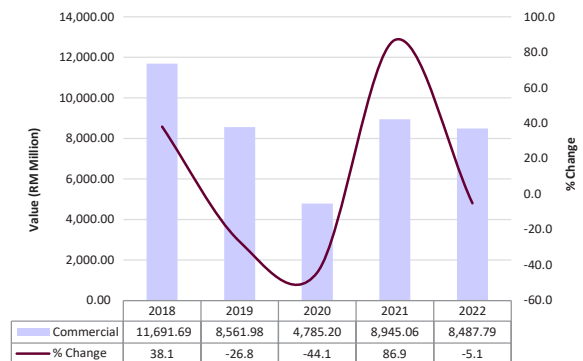


Chart 1.12

Value of Commercial Property Transactions 2018 – 2022



## Kedai

### Transaksi

Segmen kedai mencatat aktiviti pasaran yang kukuh pada 2022 dengan 680 transaksi bernilai RM1.64 bilion (2021: 496 transaksi bernilai RM1.14 bilion). Berbanding tahun 2021, bilangan dan nilai transaksi masing-masing meningkat 37.1% dan 43.8%. Transaksi kedai tiga hingga tiga setengah tingkat menguasai 34.3% (233 unit) daripada jumlah transaksi kedai.

## Shop

### Transaction

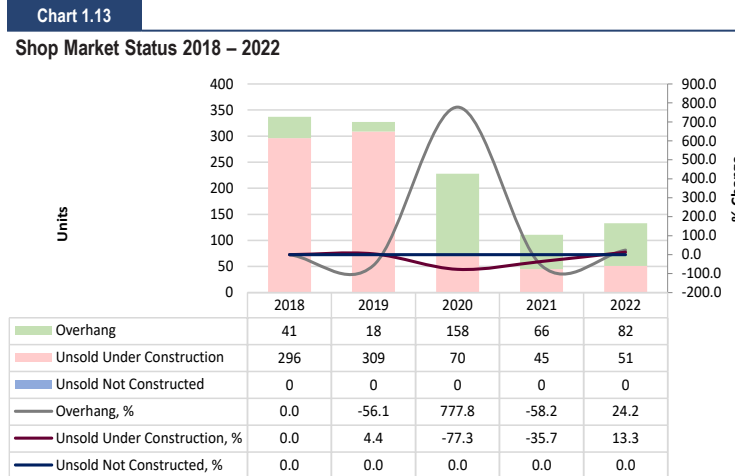
Shop segment recorded strengthen performance in 2022 with 680 transactions worth RM1.64 billion (2021: 496 transactions worth RM1.14 billion). In comparison to 2021, volume and value of transactions increased by 37.1% and 43.8% respectively. Three to three and a-half story shop transactions dominated 34.3% (233 units) of the total shop transactions.

## Status Pasaran

Situasi unit kedai siap dibina tidak terjual dan dalam pembinaan belum terjual kurang memberangsangkan di mana lebih banyak unit direkodkan dalam tempoh kajian. Negeri ini tidak dibebankan dengan mana-mana unit kedai belum dibina belum terjual pada 2022.

## Market Status

The shop overhang and unsold under construction situations was less encouraging as more units recorded in the review period. The state was unencumbered with any unsold not constructed shop units in 2022.

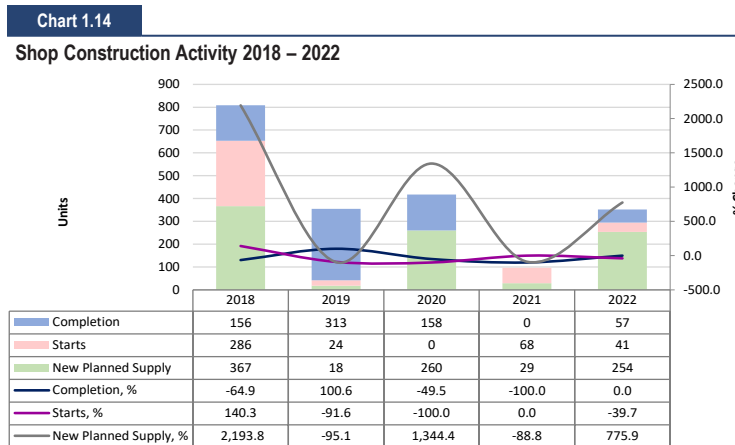


## Aktiviti Pembinaan

Segmen kedai menyaksikan pergerakan bercampur-campur dalam aktiviti pembinaan. Sehingga akhir 2022 segmen kedai mencatat 32,162 unit kedai sedia ada dengan 1,072 unit lagi dalam penawaran akan datang dan 1,534 unit dalam penawaran dirancang.

## Construction Activity

Shop segment mixed movements in construction activity. As at end 2022, shop segment recorded 32,162 units existing shop with another 1,072 units in the incoming supply and 1,534 units in the planned supply.



## Pangsapuri Khidmat

### Transaksi

Segmen ini terus mencatat aktiviti pasaran yang kukuh pada 2022 dengan 2,817 transaksi bernilai RM2.47 bilion. Berbanding tahun 2021, bilangan dan nilai transaksi masing-masing meningkat 56.1% dan 62.2% (2021: 1,805 transaksi bernilai RM1.52 bilion).

## Serviced Apartment

### Transaction

This segment recorded strengthen performance in 2022 with 2,817 transactions worth RM2.47 billion. In comparison to 2021, volume and value of transactions increased by 56.1% and 62.2% respectively (2021: 1,805 transactions worth RM1.52 billion).

## Status Pasaran

Unit pangsapuri khidmat siap dibina tidak terjual dan belum dibina belum terjual meningkat manakala dalam pembinaan belum terjual berkurang dalam tempoh kajian.

## Market Status

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

Chart 1.15

Serviced Apartment Market Status 2018 – 2022



## Aktiviti Pembinaan

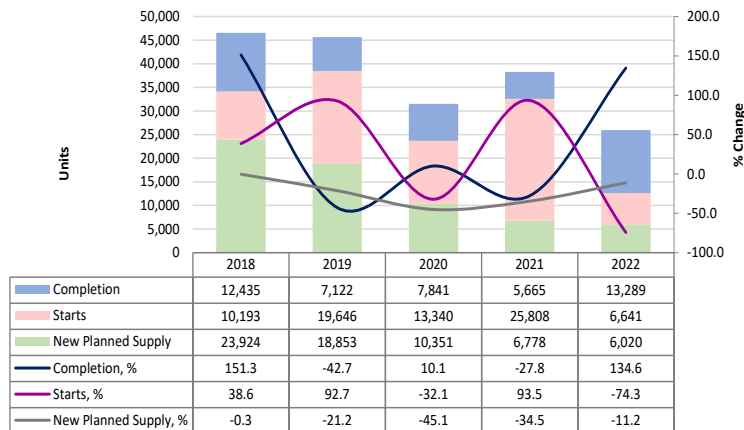
8 Aktiviti pembinaan segmen ini berada pada mod bercampur. Sehingga akhir 2022, terdapat 100,249 pangsapuri khidmat sedia ada dengan 63,478 unit lagi dalam penawaran akan datang dan 48,215 unit dalam penawaran dirancang.

## Construction Activity

The segment's construction activity was on a mix mode. As at end-2022, there were 100,249 existing serviced apartment units with another 63,478 units in the incoming supply and 48,215 units in the planned supply.

Chart 1.16

Serviced Apartment Construction Activity 2018 – 2022



## Harga dan Sewa

Secara umum, harga pangsapuri khidmat berada pada mod stabil dengan beberapa pergerakan bercampur di skim-skim terpilih. Residensi Opus dan The Elements mencatatkan keuntungan modal masing-masing pada 13.8% dan 14.0%. K Residence (Avenue K) 820 m.p. mencapai harga transaksi tertinggi pada RM12.97 juta.

## Price and Rental

Generally, prices of serviced apartment on a stable mode with some mixed movements noted in selected schemes. Residensi Opus and The Elements recorded capital gains at 13.8% and 14.0% respectively. K Residence (Avenue K) 820 s.m. fetching the highest transaction price at RM12.97 million.



Secara keseluruhannya, pasaran sewa adalah stabil untuk kebanyakan skim. Banyan Tree Signature (204 m.p.), Pavilion Residences dan Residensi Sentral memperoleh sewa tertinggi pada RM7,500 hingga RM9,000 sebulan disebabkan lokasi yang baik.

The rental market was generally stable for most of the schemes. Banyan Tree Signature (204 s.m.), Pavilion Residences and Residensi Sentral remained the highest rental at RM7,500 to RM9,000 per month due to its good location.

## Kompleks Perniagaan

## Shopping Complex

### Penghunian dan Ketersediaan Ruang

### Occupancy and Space Availability

Prestasi segmen ruang niaga meningkat apabila kadar purata penghunian bertambah kepada 82.7% berbanding dengan 79.8% yang dicatat pada 2021. Ambilan tahunan negatif pada 23,269 m.p. (2021: 143,377 m.p.). Pergerakan utama penyewa ditunjukkan di Jadual 1.2.

The performance of retail segment strengthened as the average occupancy rate increased to 82.7% as compared with 79.8% recorded in 2021. The annual take-up was negative at 23,269 s.m (2021: 143,377 s.m.). Pertinent movements of tenants as shown in Table 1.2.

Chart 1.17

Supply and Occupancy of Shopping Complex 2018 – 2022

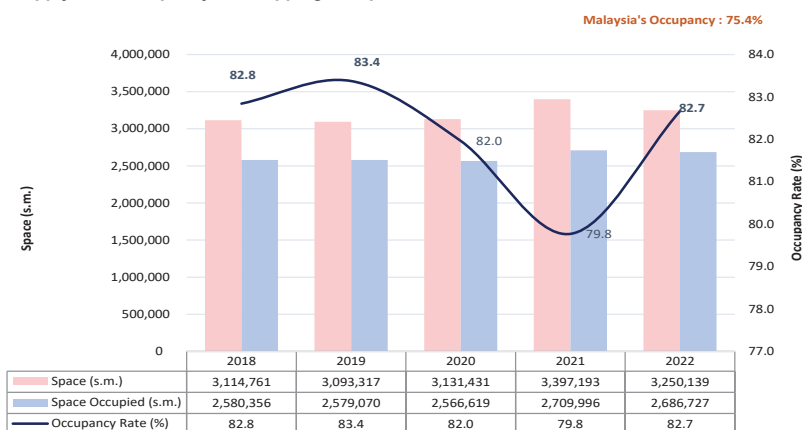


Table 1.2

Pertinent Movements in Shopping Complex

| No. | Shopping Complex    | Estimated Space (s.m) | Tenant Movement     |
|-----|---------------------|-----------------------|---------------------|
| 1.  | Cheras Leisure Mall | 2,149                 | Move in             |
| 2.  | KL East Mall        | 1,330                 | Move in             |
| 3.  | Life Centre         | 2,508<br>2,508        | Move out<br>Move in |
| 4.  | Setapak Central     | 1,082                 | Move out            |

## Aktiviti Pembinaan

## Construction Activity

Segmen ruang niaga menyaksikan satu kompleks baharu siap dibina dalam tempoh kajian iaitu Malaysia Grand Bazaar di Jalan Jalan Pudu dengan keluasan 9,290 m.p. Sehingga akhir 2022, terdapat 110 kompleks perniagaan sedia ada (3,250,139 m.p.) dengan sepuluh (10) lagi kompleks dalam penawaran akan datang (481,797 m.p.) dan tiga (3) lagi dalam penawaran dirancang (196,691 m.p.).

The retail segment saw one new complexes in the review period namely Malaysia Grand Bazaar in Jalan Pudu with space of 9,290 s.m. As at end-2022, there were 110 existing shopping complexes (3,250,139 s.m.) with another ten (10) complexes (481,797 s.m.) in the incoming supply and three (3) in the planned supply (196,691 s.m.).



## Sewa

Secara amnya, sewa ruang niaga adalah stabil dengan pergerakan bercampur-campur. Pergerakan sewa menaik direkodkan di Semua House, Plaza Low Yat dan Shaw Parade disebabkan oleh pembaharuan sewa. Suria KLCC mengekalkan keunggulannya, mencapai julat sewa tertinggi daripada RM393.31 s.m.p. hingga setinggi RM2,231.36 s.m.p.

Indeks Sewa Kompleks Beli Belah Kuala Lumpur berada pada 109.8 mata, meningkat 2.1% daripada 107.6 mata dalam 2021. Pada 2022, Sewa Kompleks Beli Belah bagi Kuala Lumpur berada pada RM85.53 s.m.p., meningkat daripada RM83.80 s.m.p., direkodkan pada 2021.

## Pejabat Binaan Khas

### Transaksi

Segmen pejabat binaan khas menunjukkan lapan transaksi utama dalam tempoh kajian dengan jumlah balasan melebihi RM635 juta.

## 10 Penghunian dan Ketersediaan Ruang

Purata kadar penghunian bagi pejabat binaan khas menurun kepada 73.7% pada tahun 2022 berbanding 74.8% pada tahun 2021. Ambilan tahunan pada 38,299 m.p. (2021: 5,603 m.p.). Pergerakan penyewa utama seperti ditunjukkan di Jadual 1.3.

## Rental

Generally, rental of retail space was stable with mixed movements. Upward rental movements were recorded at Semua House, Plaza Low Yat and Shaw Parade due to rental renewals. Suria KLCC sustained its prominence, fetching the highest rental range from RM393.31 p.s.m. to as high as RM2,231.36 p.s.m.

The Shopping Complex Rental Index for Kuala Lumpur stood at 109.8 points, increase by 2.1% from 107.6 points in 2021. The Shopping Complex Average Rental for Kuala Lumpur stood at RM85.53 p.s.m., increase from RM83.80 p.s.m., recorded in 2021.

## Purpose-Built Office

### Transaction

The purpose-built office segment saw eight prominent transactions in the review period with consideration of more than RM635 million.

## Occupancy and Space Availability

The average occupancy rate for purpose-built office decreased to 73.7% in 2022 as compared to 74.8% in 2021. The annual take-up was at 38,299 s.m (2021: 5,603 s.m.). Pertinent movements of tenants as shown in Table 1.3.

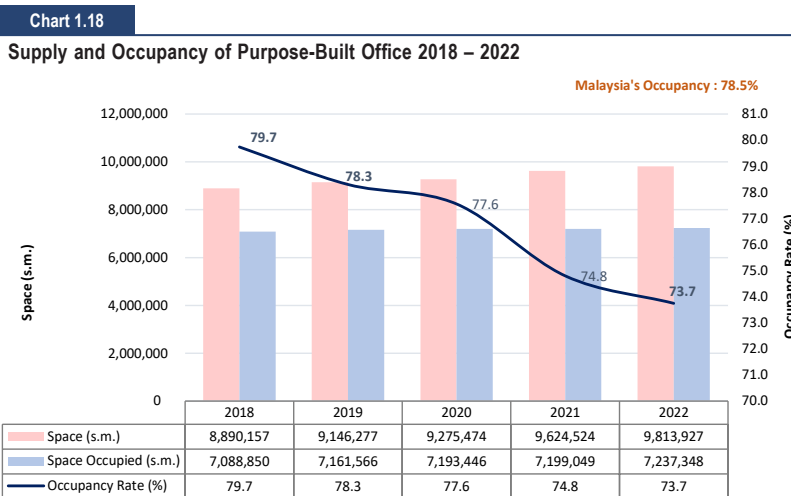


Table 1.3

## Pertinent Movements in Purpose-Built Office

| No. | Purpose-built Office Name                         | Tenant   | Space (s.m)    | Tenant Movement     |
|-----|---|--|----------------|---------------------|
| 1.  | Bangunan Malaysia RE                              | Takaful Ikhlas General Bhd   | 1,642          | Move in             |
| 2.  | Bangunan Public Bank                              | PBB-SDC  | 1,522          | Move in             |
| 3.  | Centrepoint South @ Mid Valley City               | Estee Lauder Malaysia Sdn Bhd  | 1,171          | Move in             |
| 4.  | Hampshire Place Office                            | Ciro Solution Sdn Bhd  | 1,644          | Move out            |
| 5.  | Menara 1 Sentrum                                  | TMF Regional Delivery Centre Sdn Bhd                                   | 1,508          | Move out            |
| 6.  | Menara Atlan                                      | Malaysian Bioeconomy Development Corporation Sdn Bhd                   | 1,892          | Move out            |
| 7.  | Menara Exchange 106                               | Telco  | 2,741          | Move In             |
| 8.  | Menara BRDB                                       | Club BSC By Fitness First  | 1,279          | Move out            |
| 9.  | Menara HLX  | Knowledgecomm Sdn Bhd<br>Beyond4                                       | 1,208<br>1,208 | Move out<br>Move in |
| 10. | Menara IGB & Annexe                               | Shopback Cashback Sdn Bhd  | 1,841          | Move in             |
| 11. | Menara Perak                                      | Goto Solution Sdn Bhd  | 1,044          | Move out            |
| 12. | Menara Shell                                      | Google Services Malaysia Sdn Bhd                                       | 3,277          | Move in             |
| 13. | Menara Southpoint                                 | BHP Shared Services Malaysia Sdn Bhd<br>Shopee Mobile Malaysia Sdn Bhd | 1,766<br>3,578 | Move out<br>Move in |
| 14. | Menara TH 1 Sentral                               | TDCX (My) Sdn Bhd  | 3,914          | Move in             |
| 15. | Menara TH Bangsar South (Blok 3) Tower 5 Avenue 5 | Touch N Go Sdn Bhd   | 2,313          | Move out            |
| 16. | Menara TH Selborn                                 | TH Plantations Berhad  | 1,877          | Move in             |
| 17. | Plaza Zurich                                      | APD Digital  | 1,012          | Move in             |
| 18. | The Garden North Tower @ Mid Valley City          | Amazon Web Services Malaysia Sdn Bhd<br>TOS energy Malaysia Sdn Bhd    | 1,526<br>1,050 | Move in<br>Move out |
| 19. | Wisma Genting & Annexe                            | Genting Cruise Lines Ship Management Sdn Bhd                           | 3,103          | Move out            |

## Aktiviti Pembinaan

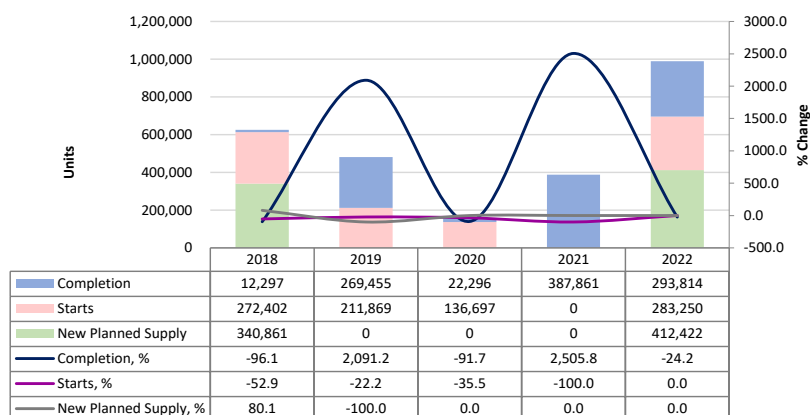
Terdapat enam bangunan pejabat binaan khas baharu siap dibina pada 2022 yang menyumbang 293,814 m.p. ruang tambahan ke pasaran. Sehingga akhir 2022, terdapat 458 pejabat binaan khas sedia ada (9,813,927 m.p.) dengan 16 lagi bangunan (978,869 m.p.) dalam penawaran akan datang dan 20 bangunan (790,806 m.p.) dalam penawaran dirancang.

## Construction Activity

There were six completions in the review period that contributed additional space of 293,814 s.m. to the market. As at end-2022, there were 458 existing purpose-built offices (9,813,927 s.m.) with another 16 buildings (978,869 s.m.) in the incoming supply and 20 buildings (790,806 s.m.) in the planned supply.

Chart 1.19

## Purpose-Built Office Construction Activity Trend 2018 – 2022



## **Harga dan Sewa**

Harga ruang pejabat merekodkan pergerakan bercampur-campur. Di kawasan utama pusat bandar, penurunan marginal antara 4.1% dan 4.2% dicatatkan di Wisma Perintis (tingkat 6) dan Heritage House (aras 12). Harga tertinggi direkodkan di Menara Bangkok Bank (aras 22) pada RM15,930 s.m.p.

Pasaran sewa pejabat menyaksikan prestasi bercampur-campur pada 2022. Sewa di beberapa bangunan pejabat menyaksikan pertumbuhan dua digit iaitu Menara Perak (aras 8 – 12) 13.5%, Wisma Boustead (15.7%), Wisma Bandar (15.7%), Bangunan Public Bank (19.3%), Menara Dato' Onn (PWTC) 13.8% dan Menara Shell (11.9%). Sewa aras bawah Wisma Genting di Jalan Sultan Ismail mengekalkan lingkungan sewa tertinggi subsektor pejabat dari RM118.41 s.m.p. hingga 131.32 s.m.p.

Sehingga 2022<sup>P</sup>, Indeks Sewa Pejabat Binaan Khas bagi negeri berada pada 138.7 mata, turun 0.1% daripada 138.9 mata pada 2021. Sewa Purata Pejabat Binaan Khas pada 2022<sup>P</sup> berada pada RM53.53 s.m.p., menurun dari RM53.61 s.m.p yang direkodkan pada 2021.

## **Price and Rental**

*Prices for office space recorded mixed movement. In the central town prime area, marginal decline between 4.1% and 4.2% was recorded in Wisma Perintis (level 6) and Heritage House (level 12). The highest price was recorded at Menara Bangkok Bank (level 22) at RM15,930 p.s.m.*

*The office rental market portrayed mixed performance in 2022. Several office buildings witnessed double digit growth namely Menara Perak (level 8–12) 13.5%, Wisma Boustead (15.7%), Wisma Bandar (15.7%), Bangunan Public Bank (19.3%), Menara Dato' Onn (PWTC) 13.8%, and Menara Shell (11.9%). Rental at ground level Wisma Genting at Jalan Sultan Ismail remained highest with ranging between RM118.41 p.s.m. to 131.32 p.s.m.*

*As at 2022<sup>P</sup>, the Purpose-Built Office Rental Index for the state stood at 138.7 points, down by 0.1% from 138.9 points in 2021. The Purpose-Built Office Average Rental as 2022<sup>P</sup> stood at RM53.53 p.s.m., decreased from RM53.61 p.s.m recorded in 2021.*

12

## **Riadah**

Subsektor riadah merekodkan dua hotel baharu siap dibina yang menawarkan 157 bilik ke dalam pasaran. Sehingga akhir 2022, terdapat 246 hotel (45,576 bilik) sedia ada dengan 11 hotel (3,112 bilik) dalam penawaran akan datang dan 22 hotel (4,308 bilik) dalam penawaran yang dirancang.

## **Leisure**

*The leisure subsector witnessed the completion of two new hotels offering 157 rooms into market. As at 2022, there were 246 hotels (45,576 rooms) in the existing supply with another 11 hotels (3,112 rooms) in the incoming supply and 22 hotels (4,308 rooms) in planned supply.*

## 2023 OUTLOOK

Walaupun 2022 merupakan tahun yang mencabar, pasaran harta tanah negeri ini dijangka meneruskan momentum pertumbuhannya pada 2023. Projek infrastruktur pengangkutan dalam Belanjawan 2023 dan Rancangan Malaysia ke-12 kekal sebagai pemangkin kepada pembangunan fizikal, pewujudan peluang pekerjaan dan peningkatan sosio-ekonomi rakyat.

*Although 2022 is the challenging year, the state's property market is expected to continue its growth momentum in 2023. Transportation infrastructure projects allocated in 2023 Budget and Twelfth Malaysia Plan remains as the catalyst contribute to the physical development, creating employment opportunities and socio-economic enhancement of the people.*

## Infrastructure Development

**Table 14.1: Infrastructure Projects**

| No. | Infrastructure Project                     | Description  | Current Development Status  |
|-----|--|--|---|
| 1.  | Klang Valley Mass Rapid Transit Project    | <p>One of the key initiative identified under the government's Economic Transformation Programme (ETP).</p> <p>1) Mass Rapid Transit 1 (MRT1) – SBK Line</p> <ul style="list-style-type: none"> <li>Connecting Sungai Buloh – Kajang</li> <li>Length: 51 kilometres of which 9.5 kilometres is underground.</li> <li>31 stations with 16 of them incorporating park-and-ride facilities.</li> </ul> <p>2) Mass Rapid Transit 2 (MRT2) – SSP Line</p> <ul style="list-style-type: none"> <li>Connecting Sungai Buloh - Serdang - Putrajaya</li> <li>Length: 52.2 kilometres of which 13.5 kilometres is underground.</li> <li>Total of 35 stations with 11 of them are underground.</li> <li>Project cost: RM30.53 billion</li> </ul> <p>3) Mass Rapid Transit 3 (MRT3) - Circle Line</p> <ul style="list-style-type: none"> <li>31 stations, comprises 40 kilometres elevated tracks and 11 kilometres underground tunnels that stretches into a circular alignment along the perimeter of Kuala Lumpur Connecting Bandar Malaysia, KL Ecocity, Bukit Kiara and Sentul.</li> <li>This the project would be separated into five main packages. The packages are two turnkey contractors for elevated works, one turnkey contractor for underground works, one package for integrated rail systems and one project management consultant to work alongside MRT Corp as the project developer Komuter lines.</li> <li>Estimation construction cost: RM31 billion</li> </ul> | <p>MRT 1 fully operational in 2017</p> <p>MRT 2 - Expected to be in operational in March 2023.</p> <p>Packages tendering has started in Q4 2022</p>   |
| 2.  | Sungai Besi - Ulu Kelang Expressway (Suke) | <ul style="list-style-type: none"> <li>Length: 24.4 kilometres (Two phases)</li> <li>Three-lane, dual-carriageway running from Sri Petaling to Ulu Kelang.</li> <li>It has 14 interchanges and reaches out to over 60 residential areas as well as connects to major highways such as Duta-Ulu Kelang Expressway (DUKE), Ampang-Kuala Lumpur Elevated Highway (Akleh) and Sungai Besi Expressway (Besraya).</li> <li>Traffic will be dispersed through SUKE 14 interchanges; Sri Petaling, Sungai Besi, Alam Damai, Cheras-Kajang, Cheras Hartamas, Bukit Teratai, Tasik Tambahan, Permai, Kosas, Pekan Ampang, Ampang Point, Ulu Kelang, Hillview and Bukit Antarabangsa.</li> <li>Project cost: RM4.6 billion</li> </ul>   | <p><u>Phase 1</u><br/>16.6 kilometres from Cheras-Kajang to Bukit Antarabangsa was opened to public in September 2022.</p> <p><u>Phase 2</u><br/>Expected to be completed in 2023</p>       |
| 3.  | Setiawangsa - Pantai Expressway (SPE)      | <ul style="list-style-type: none"> <li>Length: 32.1 kilometres (four sections)</li> <li>Previously known as Duta - Ulu Kelang Expressway Phase 3 "DUKE Phase 3".</li> <li>Seven interchanges and toll plazas.</li> <li>Dual-two carriageway with four lanes (two lanes on either direction).</li> <li>Start from MRR2 (where interchange with Jalan Genting Klang/ Jalan Kolam Air) and transverse across University Tunku Abdul Rahman, Wangsa Maju, Setiawangsa, Ampang, un Razak Exchange, Bandar Malaysia, Kerinchi and connected to SPRINT Highway.</li> </ul>  | <p><u>Section 1 to 3</u><br/>Under construction and expected to be completed in 2023</p> <p><u>Section 4</u><br/>Taman Melati to Setiawangsa was opened to the public in Disember 2021.</p> |

Kerajaan terus menyediakan rumah mampu milik kepada rakyat melalui Perumahan Penjawat Awam Malaysia (PPAM) skim rumah mampu milik untuk penjawat awam dan Residensi Wilayah, satu program perumahan mampu milik strata yang menyediakan kediaman kepada warga Wilayah Persekutuan dengan harga siling RM300,000 seunit. Antara projek rumah mampu milik adalah seperti di Jadual 1.5.

Government continue in providing affordable housing to the people through Perumahan Penjawat Awam Malaysia (PPAM) scheme for government servants and Residensi Wilayah, an affordable strata home program to Federal Territory citizens with ceiling price of RM300,000 per unit. Among the affordable housing projects is as shown in Table 1.5.

Table 1.5

**The Summary of Affordable House Projects**

| Scheme                                     | Stage              | Units |
|--|--------------------|-------|
| Residensi Akasia Jubilee                   | Under construction | 494   |
| Residensi Armani Bukit Lanjan              | Under construction | 74    |
| Residensi Armani Petaling                  | Under construction | 77    |
| Residensi Alamanda                         | Under construction | 678   |
| Residensi Desa Sentralmas                  | Under construction | 298   |
| Residensi Dutamas Dahlia                   | Under construction | 359   |
| Residensi Hijauan Pantai                   | Under construction | 629   |
| Residensi Inspirasi Setapak                | Under construction | 900   |
| Residensi J Satin                          | Under construction | 2,068 |
| Residensi Laman Sari                       | Under construction | 1,000 |
| Residensi Laman Seri Harmoni (LSH 33)      | Under construction | 300   |
| Residensi Laman Seri Hijau (LSH Segar)     | Under construction | 440   |
| Residensi Metro Kepong                     | Under construction | 1,520 |
| Residensi Max                              | Under construction | 818   |
| Residensi MH Platinum 2                    | Under construction | 556   |
| Residensi Minest                           | Under construction | 684   |
| Residensi Pitta                            | Under construction | 1,168 |
| Residensi Riamas                           | Under construction | 646   |
| Residensi Seruni                           | Under construction | 700   |
| Residensi SkyAwani 4                       | Under construction | 1,782 |
| Residensi SkyAwani 5                       | Under construction | 615   |
| Residensi Sutera                           | Under construction | 98    |
| Residensi Vista Saujana                    | Under construction | 203   |
| Pangsapuri Vista Danau Kota                | Under construction | 910   |
| Vierra Residence                           | Under construction | 1,604 |
| Vista Langkawi @ Residensi PV18            | Under construction | 398   |
| PPAM Brickfields                           | Under construction | 913   |
| PPAM Laman Seri Harmoni (LSH 33)- Jenis A2 | Under construction | 300   |
| PPAM Mercu Jalil                           | Under construction | 76    |
| PPAM Residensi Amansuri                    | Under construction | 617   |
| PPAM Residensi Pikel Permaisuri            | Under construction | 20    |
| PPAM Setapak Riviera                       | Under construction | 1,587 |
| PPAM Vista Dedanau                         | Under construction | 200   |

Table 1.6: Development Project

| No. | Development                      | Description  | Current Development Status  |
|-----|----------------------------------|--|---|
| 1.  | Tun Razak Exchange               | <ul style="list-style-type: none"> <li>- Location: Jalan Tun Razak, Kuala Lumpur</li> <li>- Land area: 28.3 hectares</li> <li>- The master plan includes a total of 30 buildings with a combined gross floor area of 24 million square feet spread across the office, retail, hotel, residences and cultural offerings.</li> <li>- The entire TRX development is anticipated to have a gross development value of more than RM40 billion.</li> <li>➤ <u>The Exchange TRX</u> <ul style="list-style-type: none"> <li>- Land area: 17 acres</li> <li>- The development consists a hotel, an office building, a two million square foot shopping mall (The Exchange TRX), and six residential towers with a combined 3,800 residential units (known as TRX Residences).</li> </ul> </li> <li>➤ <u>The Exchange 106</u> <ul style="list-style-type: none"> <li>- Height: 445.5 meter</li> <li>- The tallest building in TRX and one of the tallest in Malaysia;</li> <li>- It has 106 floors with massive column-free floor plates ranging from 28,000 to 34,000 square feet;</li> <li>- Phase 1 of The Exchange TRX is made up of the retail podium, which comprises two levels and roughly 70 retail shops.</li> <li>- Phase 1 will be focused on food and beverage (F&amp;B), and service-related offerings and combined with The Exchange TRX, will create over 1.5 million square feet of retail space within the TRX master plan.</li> </ul> </li> </ul> | <p>The Exchange TRX and The Exchange TRX Mall are expected to be completed in 2023.</p> <p>The Exchange 106 opened in December 2019.</p> <p>The entire TRX project is expected to be completed in phases over the next 15-20 years.</p> |
| 2.  | Merdeka 118                      | <ul style="list-style-type: none"> <li>- Location: Jalan Hang Jebat, Kuala Lumpur</li> <li>- Land area: 7.6 hectares</li> <li>- The development was divided into three phases.                             <ul style="list-style-type: none"> <li>• Phase 1 : Iconic Merdeka towers with 118 floors and the surrounding infrastructure;</li> <li>• Phase 2 : 118 Mall and Merdeka Boulevard @ 118 linear park;</li> <li>• Phase 3 : Three residential towers.</li> </ul> </li> <li>- Upon completion, the Merdeka 118 tower will be the region's tallest at 678.90 meter. The figure 118 represents the number of floors in the building.</li> <li>- Spanning over 3.1 million square feet of floor area, the Merdeka 118 tower includes 1.7 million square feet of net lettable area of premium Grade-A rentable office space.</li> </ul>   | <p>Phase 1 and Phase 2 are due for completion by mid-2023.</p>  |
| 3.  | Bukit Bintang City Centre (BBCC) | <ul style="list-style-type: none"> <li>- Location: Jalan Hang Tuah, Bukit Bintang, Pudu.</li> <li>- Land area: 19.4 acres</li> <li>- Gross development value: RM8.7 billion</li> <li>- The leasehold project features 1.4 million square feet retail mall, six luxury residential towers, strata offices, hotels and an 80-storey signature tower.</li> <li>- The development was divided into three phases.</li> </ul>  |   |

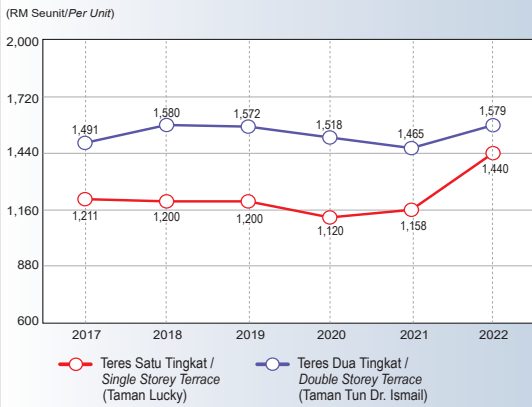
**Table 1.6: Development Project**

| No. | Development                | Description   | Current Development Status   |
|-----|----------------------------|---|--|
|     |                            | <p><u>Phase 1</u></p> <ul style="list-style-type: none"> <li>➤ Lifestyle mall;</li> <li>➤ 43-storey strata office tower;</li> <li>➤ An entertainment hub;</li> <li>➤ Hotel;</li> <li>➤ A live event hall that can accommodate about 2,500 people; and</li> <li>➤ Two towers of serviced apartments;</li> </ul> <p><u>Phase 2</u></p> <ul style="list-style-type: none"> <li>➤ One office tower; and</li> <li>➤ Three residential suite towers;</li> </ul> <p><u>Phase 3</u></p> <ul style="list-style-type: none"> <li>➤ BBCC signature tower.</li> </ul>   | <p>Phase 1<br/>Lifestyle mall, office tower and Two towers of serviced apartments completed.</p> <p>Phase 2 and 3<br/>Due for completion in 2025</p> |
| 4.  | Pavilion Damansara Heights | <ul style="list-style-type: none"> <li>- Location: Jalan Damanlela, Damansara Heights, Kuala Lumpur.</li> <li>- Land area: 16 acres</li> <li>- The integrated development project comprises of three blocks of luxurious residences, nine blocks of corporate towers and the 1.2 million square feet retail mall.</li> <li>- Phase 1 - 533,361 square feet net lettable area;</li> <li>- Phase 2 - 529,353 square feet net lettable area;</li> <li>- The mall will also offer 1,800 car park bays for its customers</li> </ul>  | <p>Phase 1 will be open to the public in May 2023.</p>   |
| 5.  | KL Metropolis              | <ul style="list-style-type: none"> <li>- Located by townships of Damansara Heights, Sri Hartamas, Mont Kiara and Bangsar.</li> <li>- Land area: 75.5 acres</li> <li>- KL Metropolis aims to integrate trade, commerce, living and transport in one bustling hub.</li> <li>- Built around a Meetings, Incentives, Conventions and Exhibitions (MICE) hub, KL Metropolis is poised to boost business tourism and spearhead a fresh effort to turn Malaysia into a preferred international convention destination.</li> <li>- KL Metropolis development phases are as below: <ul style="list-style-type: none"> <li>• MET 1: Two office towers, serviced residences and a retail mall;</li> <li>• MET 2: Office strata with a four-star hotel.</li> <li>• MET 3: Lifestyle mall with signature tower, luxury condominium, a five-star hotel and office towers;</li> <li>• <u>MET 5</u> <ul style="list-style-type: none"> <li>- 8.95 acres</li> <li>- KL Midtown comprises of podium retail, office tower, residential tower, hotel and serviced residential tower</li> <li>- Gross development value: RM20 billion</li> </ul> </li> <li>• MET 6: Office towers;</li> <li>• MET 7: Serviced residence;</li> <li>• MET 8: Two blocks of strata office towers;</li> <li>• MET 9: Six-star hotel;</li> <li>• Arte Mont Kiara: Serviced residences.</li> </ul> </li> </ul> |  |



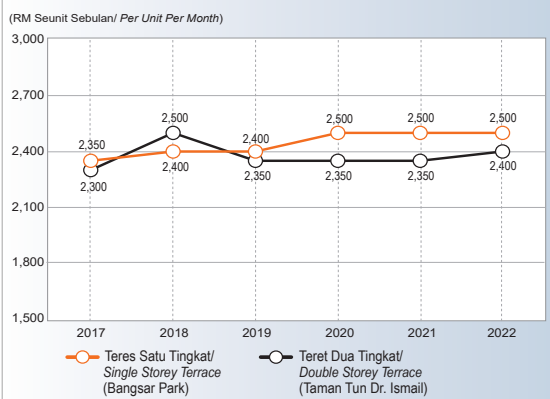
### KUALA LUMPUR 1.1

Pergerakan Harga Purata Rumah Teres di Kuala Lumpur  
Average Price Movements of Terraced Houses in Kuala Lumpur



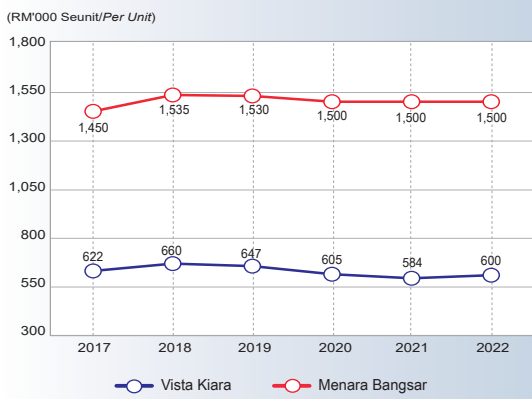
### KUALA LUMPUR 1.2

Pergerakan Sewaan Purata Rumah Teres di Kuala Lumpur  
Average Rental Movements of Terraced Houses in Kuala Lumpur



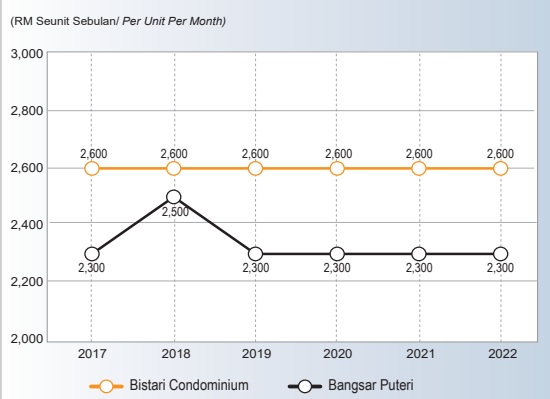
### KUALA LUMPUR 1.3

Pergerakan Harga Purata Kondominium di Kuala Lumpur  
Average Price Movements of Condominium in Kuala Lumpur



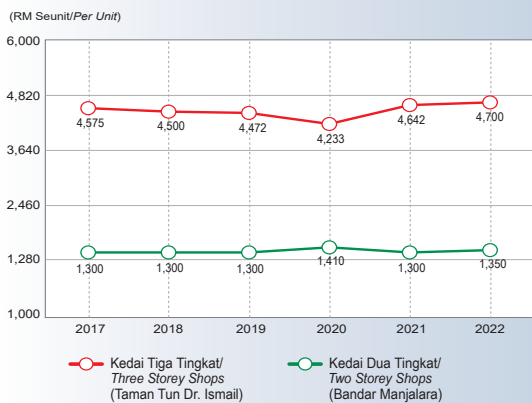
### KUALA LUMPUR 1.4

Pergerakan Sewaan Purata Kondominium di Kuala Lumpur  
Average Rental Movements Of Condominium In Kuala Lumpur



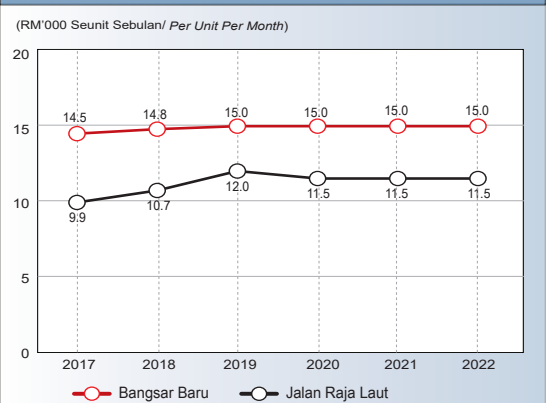
### KUALA LUMPUR 1.5

Pergerakan Harga Purata Kedai di Kuala Lumpur  
Average Price Movements of Shop in Kuala Lumpur



### KUALA LUMPUR 1.6

Pergerakan Sewaan Purata Tingkat Bawah Kedai Dua Tingkat di Kuala Lumpur  
Average Rental Movements Of Ground Floor Double Storey Shop in Kuala Lumpur

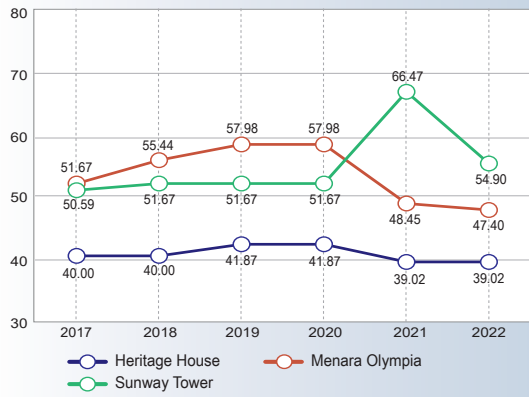




### KUALA LUMPUR 1.7

Pergerakan Sewaan Purata Pejabat Binaan Khas di Kawasan CBD, Kuala Lumpur  
 Average Rental Movements of Purpose-Built Office in CBD Area, Kuala Lumpur

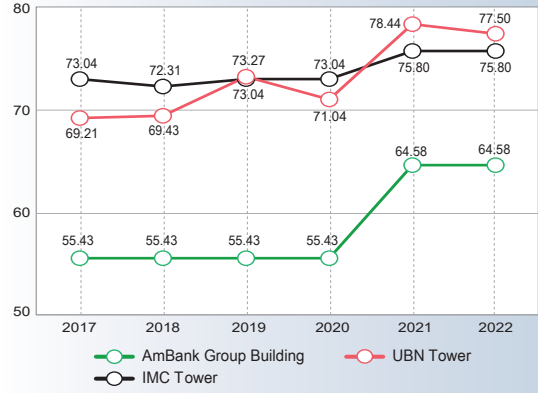
(RM Semeter Persegi/ Per Square Meter)



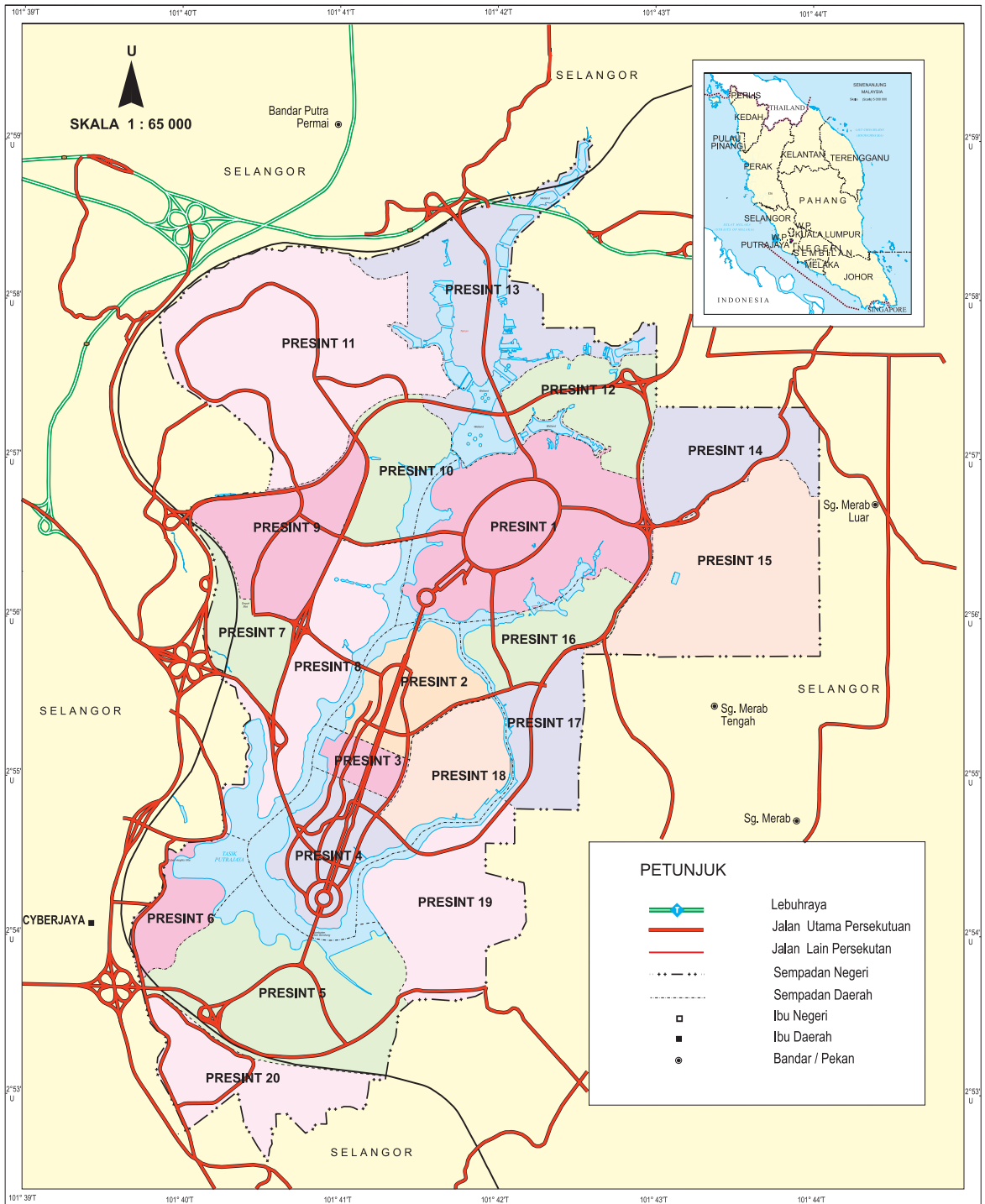
### KUALA LUMPUR 1.8

Pergerakan Sewaan Purata Pejabat Binaan Khas di Kawasan Segi Tiga Emas, Kuala Lumpur  
 Average Rental Movements of Purpose-Built in the Golden Triangle Area, Kuala Lumpur

(RM Semeter Persegi/ Per Square Meter)



# WILAYAH PERSEKUTUAN PUTRAJAYA



# WILAYAH PERSEKUTUAN PUTRAJAYA

## GAMBARAN KESELURUHAN

Pasaran harta tanah negeri bertambah baik dalam tempoh kajian. Terdapat 371 transaksi bernilai RM773.37 juta dicatatkan dengan peningkatan 25.3% dalam bilangan transaksi dan 34.0% dalam nilai (2021: 296 transaksi bernilai RM576.99 juta).

Subsektor kediaman terus memacu pasaran secara keseluruhan, menyumbang 91.4% daripada bilangan transaksi. Subsektor perdagangan di kedudukan kedua dengan syer pasaran 8.3% dan diikuti industri (0.3%).

Aktiviti pasaran harta tanah menunjukkan pergerakan bercampur-campur. Subsektor kediaman dan perdagangan masing-masing meningkat 32.4% dan 34.8%, manakala subsektor industri menurun 92.3% dalam bilangan. Sejajar dengan pergerakan aktiviti pasaran, nilai transaksi subsektor kediaman dan perdagangan juga menunjukkan peningkatan masing-masing pada 120.5% dan 298.5%, dan industri penurunan 94.2%.

## OVERVIEW

The state's property market performance improved in the review period. There were 371 transactions worth RM773.37 million recorded increase of 25.3% in volume but a significant increase of 34.0% in value (2021: 296 transactions worth RM576.99 million).

Residential sub-sector continued to propel the overall market, contributed 91.4% of total transactions. Commercial sub-sector ranked second with 8.3% of the market share and followed by industrial (0.3%) sub-sectors.

Property market activity witnessed mixed movement. Residential and commercial sub-sectors increase by 32.4% and 34.8% respectively, meanwhile subsector industry dropped 92.3% in volume. Correspondingly with the market activity movement, transaction value for residential and commercial sub-sectors increase by 120.5% and 298.5% respectively, and industry dropped by 94.2%.

20

Chart 2.1

Volume of Property Transactions 2018 – 2022

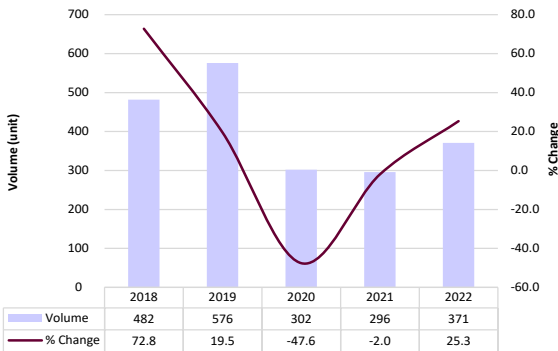


Chart 2.2

Value of Property Transactions 2018 – 2022

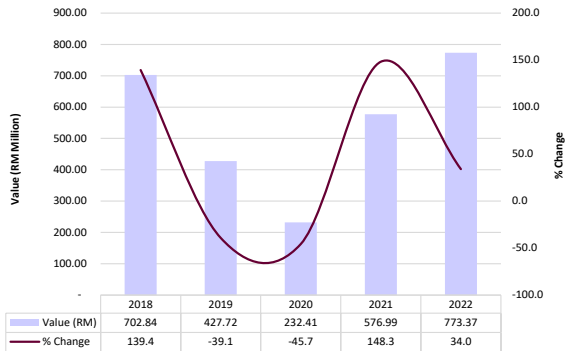


Chart 2.3

Contribution to Transaction Volume by Sub-sector 2022

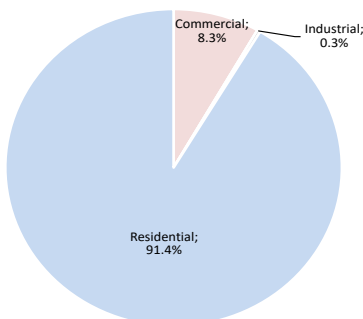
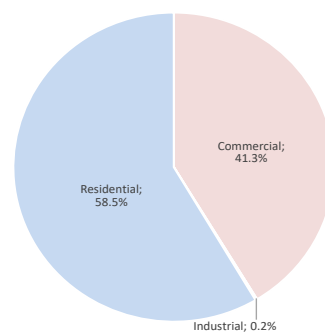


Chart 2.4

Contribution to Transaction Value by Sub-sector 2022



## PROMINENT SALES

Table 2.1

Summary of Prominent Sales Recorded in 2022

| No.                         | Property     | Location                     | Transaction Year | Consideration Price (RM) |
|-----------------------------|--------------|------------------------------|------------------|--------------------------|
| <b>Purpose Built Office</b> |              |                              |                  |                          |
| 1.                          | Menara Tulus | Persiaran Perdana, Putrajaya | 2020             | 105,300,000              |

## HARTA TANAH KEDIAMAN

### Transaksi

Terdapat 339 transaksi bernilai RM452.27 juta direkodkan dalam tempoh kajian, meningkat 32.4% dan 120.5% dalam nilai. Rumah teres dua hingga dua setengah tingkat menguasai pasaran tertinggi, menyumbang 44.8% (152 unit) daripada transaksi harta kediaman.

## RESIDENTIAL PROPERTY

### Transaction

There were 339 transactions worth RM452.27 million recorded in the review period, increased by 32.4% in volume and 120.5% in value. Two to two and a half storey terraced house dominated the highest market share, contributed 44.8% (152 units) of the residential property transactions.

Chart 2.5

Volume of Residential Property Transactions 2018 – 2022

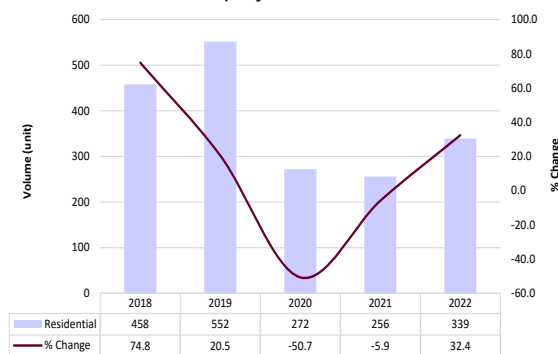
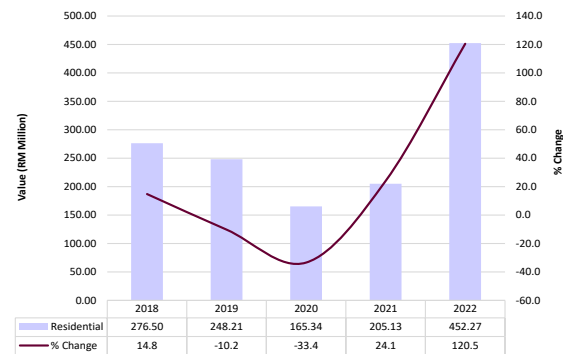


Chart 2.6

Value of Residential Property Transactions 2018 – 2022



## Pelancaran Baharu

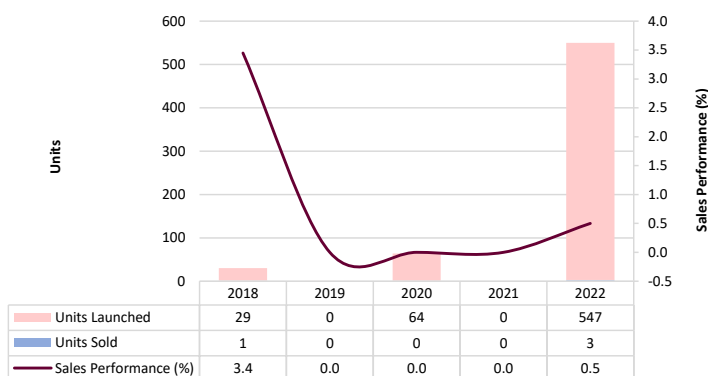
Prestasi pasaran utama kediaman adalah memberangsangkan. Tempoh kajian telah merekodkan 547 unit dilancar, rekod tertinggi dalam tempoh lima tahun terdekat. Walau bagaimanapun prestasi jualan tidak memberangsangkan.

## New Launches

The primary residential market's performance was promising. The review period recorded 547 units launched, the highest record in the recent five years. However, sales performance is not encouraging.

Chart 2.7

New Launches and Sales Performance 2018 - 2022

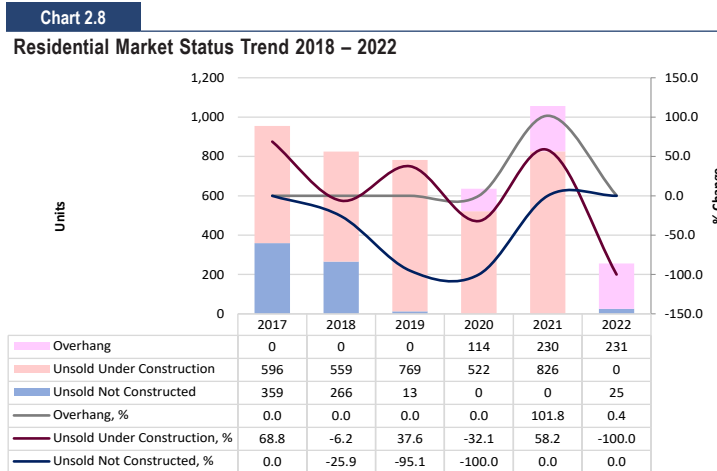


## Status Pasaran

Unit kediaman siap dibina tidak terjual menyaksikan peningkatan yang marginal. Bilangan siap dibina tidak terjual bertambah kepada 231 unit bernilai RM165.04 juta, iaitu kenaikan 0.4% berbanding 230 unit direkodkan pada 2021. Selain itu, negeri ini tidak dibebankan dengan mana-mana unit kediaman dalam pembinaan belum terjual pada 2022. Walau bagaimanapun unit belum dibina belum terjual telah meningkat kepada 25 unit dalam tempoh kajian (2021:0 units).

## Market Status

The overhang saw marginal increase. The number of overhang rose to 231 units worth RM165.04 million, up by 0.4% against 230 units recorded in 2021. Meanwhile the state was unencumbered with any unsold under construction residential units in 2022. However, unsold not constructed increase to 25 units in the review period (2021:0 units).



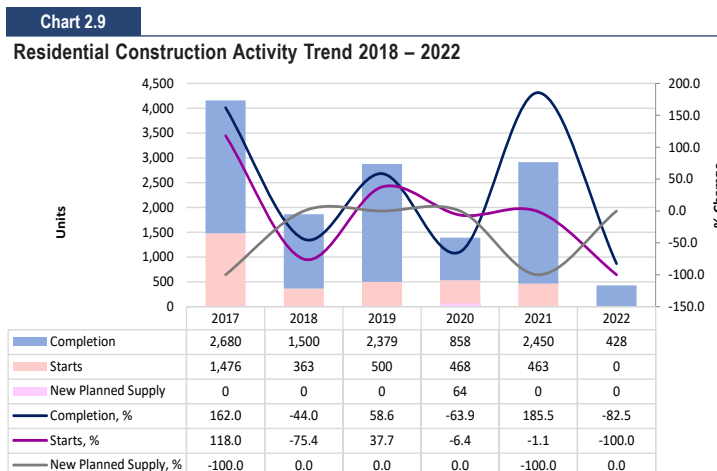
22

## Aktiviti Pembinaan

Aktiviti pembinaan adalah kurang aktif. Unit siap dibina mencatat penurunan ketara (428 unit) berbanding 2021 (2,450 unit). Manakala tiada unit kediaman dalam mula dibina dan penawaran baharu dirancang dalam tempoh kajian.

## Construction Activity

Construction activity was less active. Completions recorded a significant decrease (428 units) compared to 2021 (2,450 units). Whilst no residential unit recorded in start and new planned supply within review period.



## Harga dan Sewa

Trend harga kediaman adalah stabil secara keseluruhan dengan pergerakan bercampur. Kenaikan harga direkodkan bagi rumah teres 2 tingkat di Presint 11, rumah teres 3 tingkat Presint 16, rumah sesebuah dua tingkat di Presint 14 dan flat kos rendah di Presint 11. Manakala penurunan harga direkodkan di rumah teres 2 tingkat di Presint 11, flat kos rendah di Presint 9 dan Kondominium Tamara (Presint 8).

Dalam perkembangan sama, pasaran sewa kediaman menunjukkan perkembangan yang positif. Beberapa kenaikan sewa direkodkan terutama untuk harta tanah bertingkat tinggi. Purata pulangan sewa bagi kediaman bertanah adalah 2.1% hingga 4.3%, manakala bagi unit bertingkat tinggi di antara 3.3% hingga 6.7%.

## Price and Rental

The residential price trend was stable across the board with mixed movements. Price increases were recorded for 2-storey terrace houses in Precinct 11, 3-storey terrace houses in Precinct 16, two-storey detached houses in Precinct 14 and low-cost flats in Precinct 11. While price decreases were recorded in 2-storey terrace houses in precinct 11, low-cost flats in Precinct 9 and Tamara Condominium (Precinct 8).

On similar note, the residential market was showed positif performance. Residential Rental increases were recorded especially for high-rise property. The average rental return for landed property ranges from 2.1% to 4.3%, while for high-rise units between 3.3% to 6.7%.

## HARTA TANAH KOMERSIAL

### Transaksi

Subsektor komersil mencatatkan 31 transaksi bernilai RM319.80 juta (2021: 23 transaksi bernilai RM80.25 juta), peningkatan 34.8% dalam bilangan dan 298.5% dalam nilai berbanding tahun lepas.

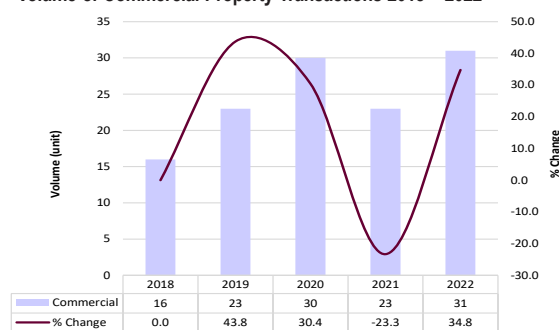
## COMMERCIAL PROPERTY

### Transaction

The commercial sub-sector recorded 31 transactions worth RM319.80 million (2021: 23 transactions worth RM80.25 million), showed a surge of 34.8% in volume and 298.5% in value as compared to last year.

Chart 2.10

Volume of Commercial Property Transactions 2018 – 2022



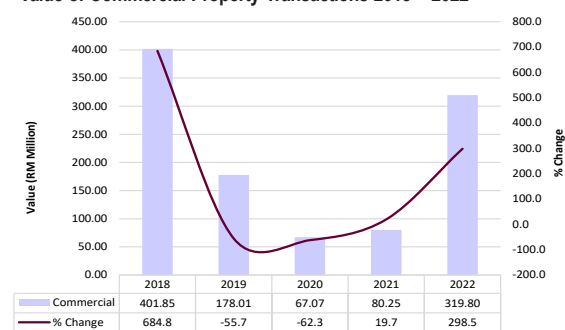
## Kompleks Perniagaan

### Penghunian dan Ketersediaan Ruang

Prestasi segmen niaga kurang mengalakkan. Kadar penghunian purata menyaksikan penurunan yang 82.4% berbanding 88.0% pada 2021. Ambilan tahunan juga berkurang ke 4,800 m.p. berbanding 5,996 m.p. yang direkodkan tahun sebelumnya.

Chart 2.11

Value of Commercial Property Transactions 2018 – 2022



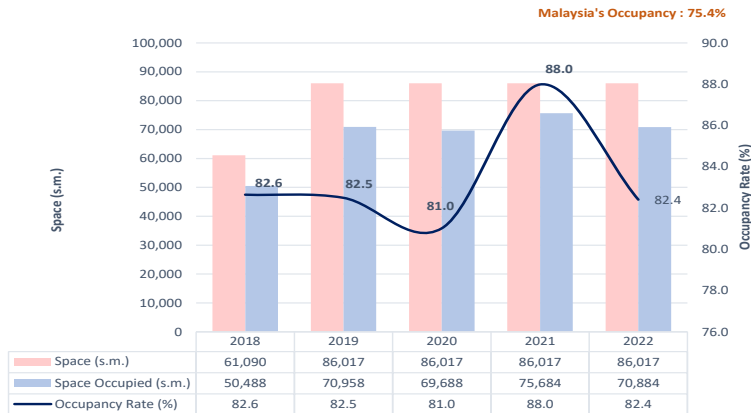
## Shopping Complex

### Occupancy and Space Availability

The retail segment performance was less promising. The average occupancy witnessed a decrease of 82.4% compared to 88.0% in 2021. The annual take-up reduces to 4,800 s.m. as compared 5,996 s.m. recorded previous year.

Chart 2.12

Supply and Occupancy of Shopping Complex 2018 - 2022



**Aktiviti Pembinaan**

Tiada kompleks perniagaan siap dibina dalam tempoh kajian. Pada akhir 2022, terdapat empat kompleks membeli-belah sedia ada (86,017 m.p.) dengan dua bangunan (29,277 m.p.) dalam penawaran akan datang dan tiada penawaran yang dirancang.

**Construction Activity**

There was no completion of Shopping Complex during the review period. As at end-2021, there were four existing shopping complexes (86,017 s.m.) with two buildings (29,277 s.m.) in the incoming supply and planned supply was nil.

24 **Sewa**

Sewa ruang niaga sebahagian besarnya stabil di seluruh wilayah. Walau bagaimanapun, didapati sewa telah meningkat 2.1% hingga 4.2% di Kompleks Perniagaan Alamanda.

**Rental**

Rentals of retail space were largely stable across the board. Nevertheless, rental increase of 2.1% to 4.2% observed at Kompleks Perniagaan Alamanda.

**Pejabat Binaan Khas**

**Purpose-Built Office**

**Penghunian dan Ketersediaan Ruang**

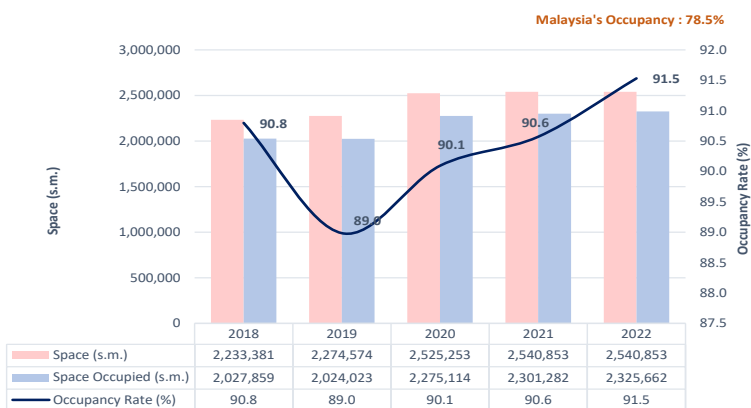
**Occupancy and Space Availability**

Prestasi segmen pejabat binaan khas kukuh dengan kadar purata penghunian meningkat sedikit ke 91.5% berbanding 90.6% pada tahun 2021. Sejajar dengan itu, ambilan tahunan adalah positif pada 24,380 m.p.

The performance of purpose-built office segment strengthened with an average occupancy rate marginally increase to 91.5% against 90.6% in 2021. Correspondingly, annual take-up was positive at 24,380 s.m.

Chart 2.13

Supply and Occupancy of Purpose-Built Office 2018 - 2022



## Aktiviti Pembinaan

Tiada pejabat binaan khas siap dibina dalam tempoh kajian. Pada akhir 2022, terdapat 47 pejabat binaan khas sedia ada (2,540,853 m.p.) dengan tiga bangunan (59,940 m.p.) dalam penawaran akan datang dan dua lagi (31,545 m.p.) dalam penawaran yang dirancang.

### Sewa

Segmen pejabat binaan khas mencatatkan trend sewa yang stabil secara keseluruhan. Walau bagaimanapun, didapati sewa telah meningkat 16.7% di Suasana PjH dan 2.4% di Galeria PjH.

## PROSPEK 2023

Trend pasaran harta tanah Putrajaya dijangka kekal positif pada 2023, dengan sektor kediaman menjadi penyumbang utama kepada jumlah transaksi harta tanah. Projek pembangunan yang dilaksanakan akan terus menyokong pasaran harta tanah. Antara pembangunan yang dijangka memberi kesan positif ke atas pasaran harta tanah adalah:

## Infrastructure Development

**Table 2.1: Infrastructure Projects**

| No. | Infrastructure     | Description  | Current Development Status |
|-----|--------------------|--|----------------------------|
| 1.  | MRT Putrajaya Line | <ul style="list-style-type: none"> <li>Previously known as Sungai Buloh - Serdang- Putrajaya Line.</li> <li>The alignment will have a length of 56.2 km, consisting of 42.7 km of elevated tracks and 13.5 km running through underground tunnels.</li> <li>Phase 2, expected to be open by Mac 2023.</li> </ul> | Under Construction         |

## Mega Project

**Table 2.2: Development Projects**

| No. | Development        | Description  | Current Development Status                          |
|-----|--------------------|--|---|
| 1.  | Terra @ Precinct 8 | <ul style="list-style-type: none"> <li>Location: Precinct 8, Putrajaya</li> <li>A lakeside mixed development with component of luxury apartment, services apartment, waterfront retail, retail mall including offices and event hall</li> <li>Expected completion at 2024</li> </ul>                                   | Under construction with 35% - 40% completion        |
| 2.  | Residensi Sakura   | <ul style="list-style-type: none"> <li>Located at Precinct 11, Putrajaya</li> <li>The project comprises 463 units of condominium with the size ranging from 828 sq. ft to 2,120 sq. ft.</li> </ul>   | Building approval & will be launch soon.            |
| 3.  | Teja (Fasa 1)      | <ul style="list-style-type: none"> <li>Located at Precinct 16, Putrajaya</li> <li>The project comprises 28 units of 2 ½ storey terrace house with freehold tenure.</li> <li>The units priced from RM1,386,000.00 with Built-up 2,944 sq. ft to 3,753 sq. ft and Land Area from 1,432 sq. ft - 3,563 sq. ft.</li> </ul> | Building Approval and launching date on 26 Mac 2022 |

## Construction Activity

*There was no completion of purpose-built office during the review period. As at end-2022, there were 47 existing purpose-built office (2,540,853 s.m.) with three building (59,940 s.m.) in the incoming supply and another two (31,545 s.m.) in the planned supply.*

### Rental

*The purpose-built office segment recorded stable rental trend across the board. Nevertheless, rental increase of 16.7% at Suasana PjH and 2.4% observed at Galeria PjH.*

## 2023 OUTLOOK

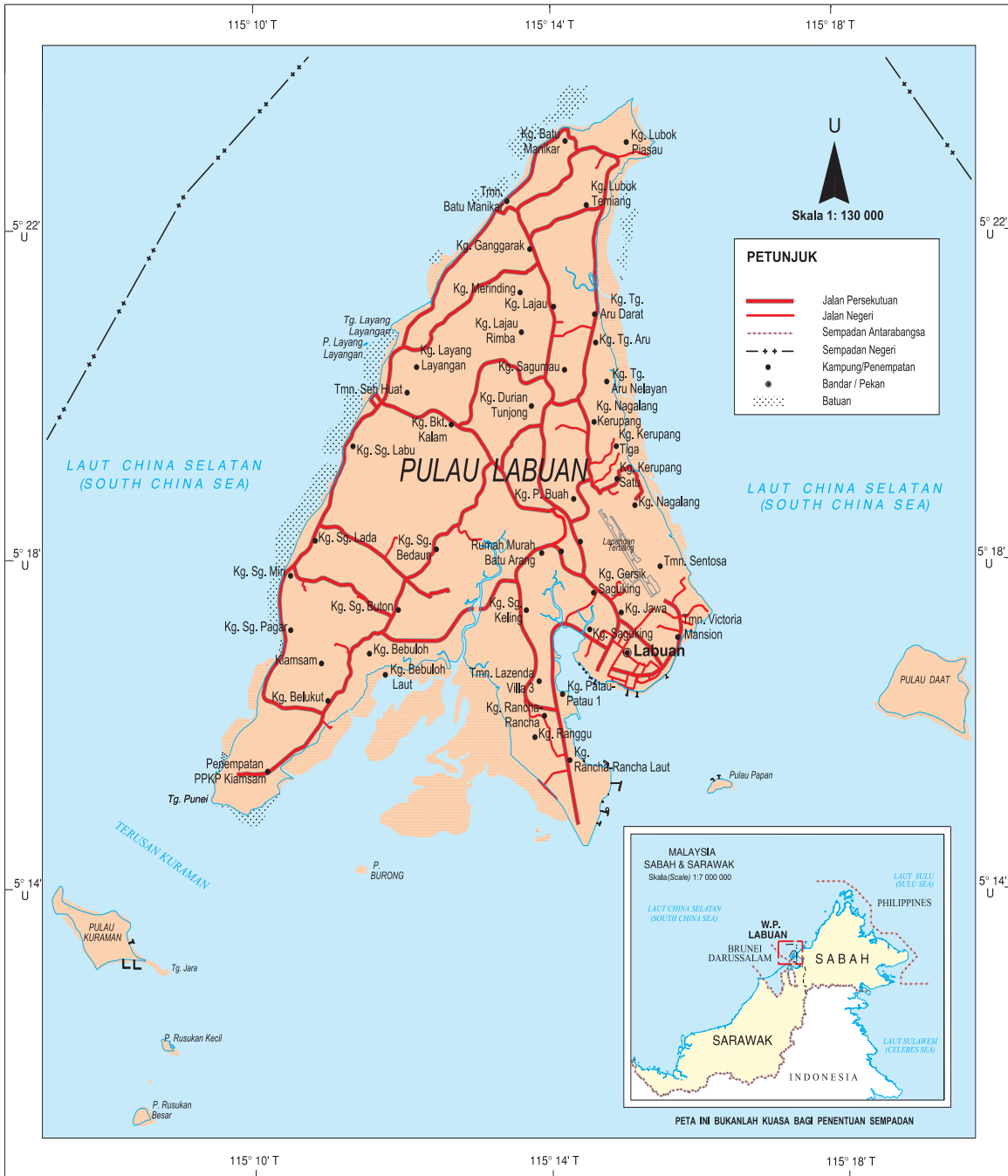
*Putrajaya property market is expected to maintain a positive trend as 2023, with residential sector is the main contributor to the total property transactions. The developments projects implemented would continue to support the property market. Among the developments that are expected to create positive impact on the state's property market are:*



**Table 2.2: Development Projects**

| No. | Development                    | Description  | Current Development Status                       |
|-----|--------------------------------|--|--|
| 4.  | Senna                          | <ul style="list-style-type: none"><li>- Located at Precinct 12, Putrajaya</li><li>- The project comprises 56 unit of 3 Storey Semi Detached with freehold tenure</li><li>- The units priced from 1,790,000.00 with standard Land Area 3,760 sq. ft.</li></ul>  | Completed and launching date on 1 September 2022 |
| 5.  | Sultan Haji Ahmad Shah Complex | <ul style="list-style-type: none"><li>- Location: Precinct 5, Putrajaya</li><li>- Headquarters of Football Association of Malaysia</li><li>- The RM30 million new building which sits on a 3 acres land will be equipped with office facilities, auditorium, seminar room, merchandise store, video assistant referee (VAR) room, hall of fame room and futsal arena</li></ul> | Expected to be commenced in Mei 2023             |

# WILAYAH PERSEKUTUAN LABUAN



# WILAYAH PERSEKUTUAN LABUAN

## GAMBARAN KESELURUHAN

Pasaran harta tanah negeri menunjukkan sedikit pemulihan dalam tempoh kajian oleh pertumbuhan aktiviti pasaran. Terdapat 599 transaksi bernilai RM225.97 juta yang direkodkan, meningkat 6.2% dalam bilangan manakala nilai menurun 46.1% berbanding 2021 (564 transaksi bernilai RM419.16 juta). Subsektor kediaman menerajui pasaran keseluruhan dengan menyumbang 45.6% dalam bilangan, diikuti dengan subsektor tanah pembangunan dan lain (30.4%), pertanian (15.7%), perdagangan (5.2%) dan industri (3.2%).

Pergerakan aktiviti pasaran adalah bercampur bagi keseluruhan negeri. Subsektor kediaman, perdagangan dan industri masing-masing menguncup 7.1%, 20.5% dan 5.0%. Walau bagaimanapun subsektor pertanian dan tanah pembangunan dan lain masing-masing menunjukkan peningkatan ketara 46.9% dan 23.8%. Sejalan dengan itu, trend bercampur yang sama juga digambarkan dari segi nilai.

## OVERVIEW

The state's property market saw a slight rebound in the review period indicated by the growth in the market activity. There were 599 transactions worth RM225.97 million recorded, increased by 6.2% in volume whilst value decreased by 46.1% against 2021 (564 transactions worth RM419.16 million). Residential sub-sector led the overall property market, with 45.6% contribution in volume, followed by development land and others (30.4%), agriculture (15.7%), commercial (5.2%) and industrial (3.2%) sub-sectors.

Mixed movements were recorded across the board. Residential, commercial and Industrial sub-sectors contracted 7.1%, 20.5% and 5.0%. However, agriculture and development land and others sub-sectors recorded substantial increase of 46.9% and 23.8% respectively. Correspondingly, similar mixed trend was depicted in term of value.

28

Chart 3.1

Volume of Property Transactions 2018 – 2022

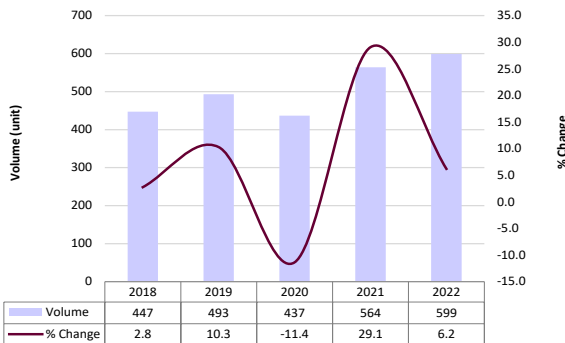


Chart 3.2

Value of Property Transactions 2018 – 2022

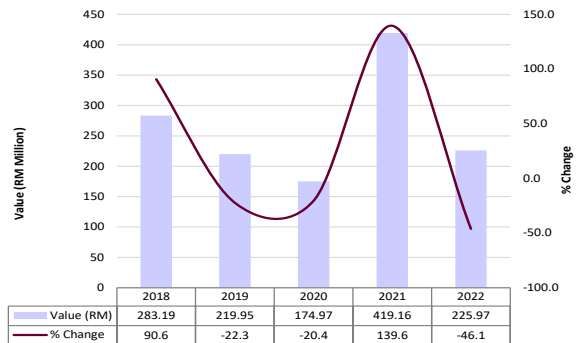


Chart 3.3

Contribution to Transaction Volume by Sub-sector 2022

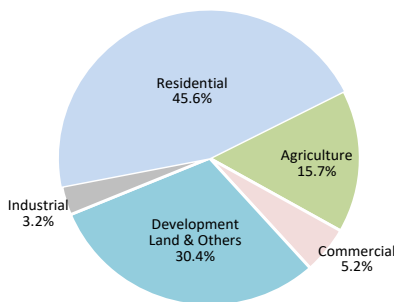
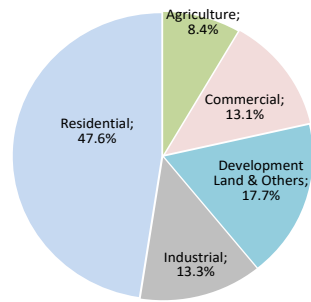


Chart 3.4

Contribution to Transaction Value by Sub-sector 2022



## JUALAN UTAMA

Terdapat satu transaksi tanah kediaman 100,600 m.p. dengan balasan RM8 juta dalam tempoh kajian.

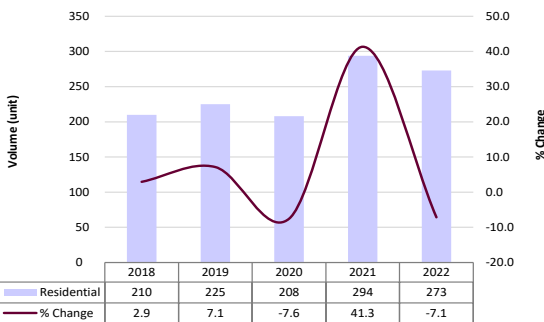
## HARTA TANAH KEDIAMAN

### Transaksi

Subsektor ini mencatatkan 273 transaksi bernilai RM107.53 juta, menunjukkan penurunan 7.1% dalam bilangan dan 1.2% dalam nilai berbanding 2021 (294 transaksi bernilai RM108.84 juta). Rumah teres menyumbang 39.6% (108 unit) kepada transaksi harta tanah kediaman.

Chart 3.5

Volume of Residential Property Transactions 2018 – 2022



## PROMINENT SALES

There was a 100,600 s.m. residential land transferred for a consideration of RM8 million in the review period.

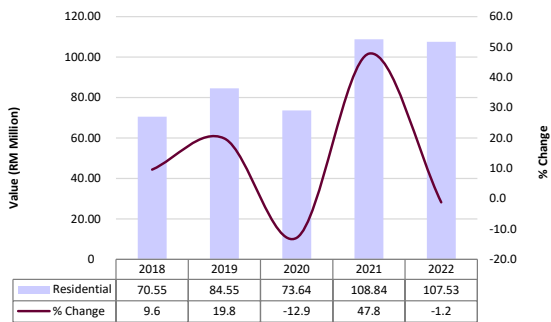
## RESIDENTIAL PROPERTY

### Transaction

The sub-sector recorded 273 transactions worth RM107.53 million, indicating decrease of 7.1% in volume and 1.2% in value against 2021 (294 transactions worth RM108.84 million). Terraced houses contributed 39.6% (108 units) to the residential property transactions.

Chart 3.6

Value of Residential Property Transactions 2018 – 2022



## Pelancaran Baharu

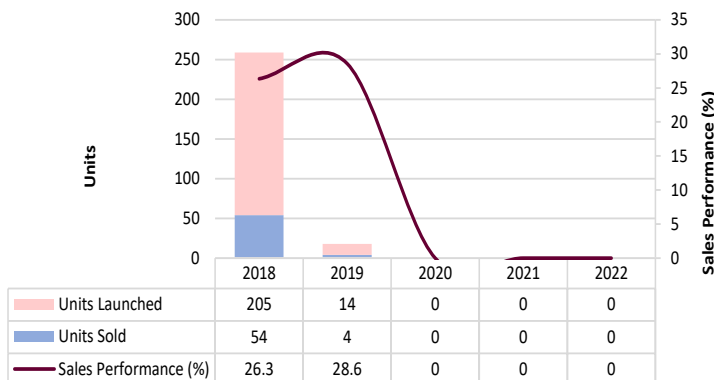
Tiada pelancaran baharu dalam tahun kajian.

## New Launches

No new launches recorded in the review period.

Chart 3.7

New Launches and Sales Performance 2018 – 2022



## Status Pasaran

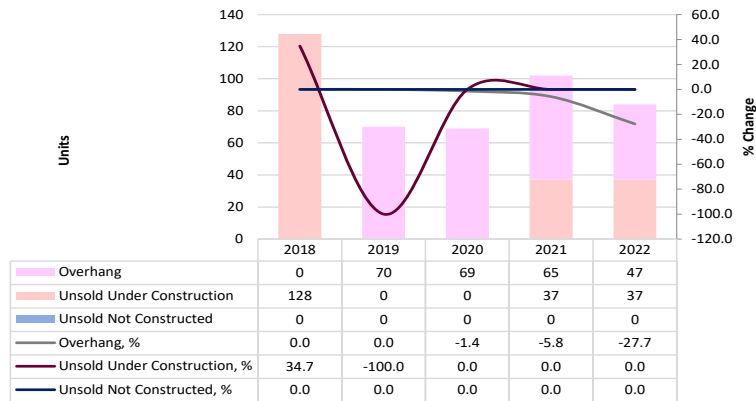
Unit kediaman siap dibina tidak terjual berkurang manakala dalam pembinaan belum terjual kekal sama dalam tahun 2022. Tiada unit belum terjual belum dibina direkodkan dalam tempoh kajian.

## Market Status

The residential overhang units reduced while the unsold under construction remained in 2022. No unsold not constructed unit recorded in the review period.

Chart 3.8

Residential Market Status 2018 – 2022



### Aktiviti Pembinaan

Aktiviti pembinaan harta kediaman berada pada mod perlahan. Sehingga akhir 2022, terdapat 13,174 unit kediaman sedia ada dan 1,135 unit lagi dalam penawaran akan datang dan lima (5) unit dalam penawaran dirancang.

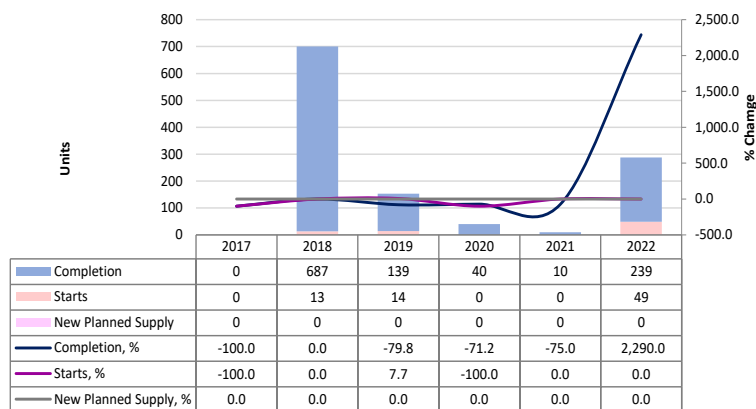
### Construction Activity

The residential construction activities were on a low mode. As at end-2022, there were 13,174 existing residential units and another 1,135 units in the incoming supply and five (5) units in planned supply recorded.

30

Chart 3.9

Residential Construction Activity 2018 – 2022



### Harga dan Sewa

Secara amnya, harga harta kediaman berada dalam keadaan stabil dengan beberapa pergerakan bercampur dilihat di lokasi terpilih. Teres setingkat di SEC Durian Tunjong dan Taman Lazenda Villa 5C merekodkan kenaikan nilai modal antara 10.8% hingga 13.2% manakala Taman Lazenda Vila 5 dan SEC Ranca-Ranca menurun antara 4.2% hingga 7.5%. Trend stabil yang sama juga dilihat di pasaran sewa kediaman. Ganggarak Permai merekodkan kenaikan sewa 9.8% dengan kadar RM950 hingga RM1,300 sebulan.

### Price and Rental

Generally, residential property prices were on a stable mode with some mixed movements noted in selected locations. Single storey terraced in SEC Durian Tunjong and Taman Lazenda Villa 5C recorded capital gains between 10.8% and 13.2% whereas Taman Lazenda Vila 5 and SEC Ranca-Ranca decreased between 4.2% and 7.5%. Similar stable trend also seen in the residential rental market. Ganggarak Permai recorded rental increase of 9.8% with RM950 to RM1,300 per month.

## HARTA TANAH PERDAGANGAN

### Transaksi

Subsektor perdagangan merekodkan 31 transaksi bernilai RM29.52 juta, masing-masing menurun 20.5% dalam bilangan dan 23.8% dalam nilai (2021: 39 transaksi bernilai RM38.76 juta).

### Kedai

#### Transaksi

Terdapat 30 transaksi kedai bernilai RM29.05 juta direkodkan, menunjukkan penurunan marginal masing-masing sebanyak 3.2% dan 11.2% dalam bilangan dan nilai berbanding 2021 (31 transaksi bernilai RM32.71 juta).

#### Harga dan Sewa

Kedai tiga tingkat di pusat bandar dipindahmilik antara RM1.6 juta hingga RM1.9 juta seunit. Dalam segmen sewa, kenaikan sebanyak 7.1% dicatatkan di Saguking Warehouse dengan sewa RM2,500 hingga RM3,500 sebulan.

## COMMERCIAL PROPERTY

### Transaction

*The commercial sub-sector recorded 31 transactions worth RM29.52 million, decreased by 20.5% in volume and 23.8% in value respectively (2021: 39 transactions worth RM38.76 million).*

### Shop

#### Transaction

*There were 30 shop transactions worth RM29.05 million recorded, indicating marginal decrease of 3.2% and 11.2% in volume and value respectively against 2021 (31 transactions worth RM32.71 million).*

#### Price and Rental

*Three storey shops in town centre transacted between RM1.6 million to RM1.9 million per unit. In the rental segment, 7.1% increase was recorded in Saguking Warehouse with rental RM2,500 to RM3,500 per month.*

## 2023 OUTLOOK

Pasaran harta tanah negeri ini dijangka kekal positif disokong oleh beberapa projek infrastruktur dan pembangunan akan datang dan sedang dalam pembinaan sejajar dengan Rangka Pembangunan Labuan 2030.

*The state' property market is expected to remain positive in coming year back by several incoming and on-going infrastructure and development projects in line with the Labuan Development Blueprint 2030.*

### Infrastructure Development

**Table 3.1: Infrastructure Projects**

| No. | Infrastructure Project   | Description  | Current Development Status  |
|-----|--|--|---|
| 1.  | Labuan - Menumbok Bridge   | <ul style="list-style-type: none"> <li>- Three routes have been proposed, namely:                             <ul style="list-style-type: none"> <li>i) From Tanjung Aru (Labuan) to Lambidan in Kuala Penyu District (13.8 kilometers);</li> <li>ii) From Bandar Labuan to Mempakul (8.3 kilometers); and</li> <li>iii) From Labuan to Menumbok (Sabah) via Pulau Daat (9.15 kilometers).</li> </ul> </li> <li>- Estimated Project cost: RM4 billion</li> </ul>   | Proposal  |
| 2.  | Labuan health care staff quarters  | <ul style="list-style-type: none"> <li>- Location: Membedai, Jalan Tanjung Teras</li> <li>- Land area: 3.24 hectares</li> <li>- The project comprises of four units of class D semi-detached houses, one block of five-storey apartment with 18 units (Block F) and one block of five-storey (Block G) with 16 units.</li> <li>- Project cost: RM27.51 million</li> </ul>  | Project has been started in 2020 and is expected to be completed in 2023. |
| 3.  | Asbestos Cement (AC) distribution pipe replacement project   | <ul style="list-style-type: none"> <li>- Location: Kampung Air Patau-Patau 2, Kampung Bebuloh Laut and Kampung Ranche-Ranche Laut</li> <li>- Length: 15 kilometres</li> <li>- Project cost: RM68 million.</li> </ul>   | Project has been started in 2021 and is expected to be completed in 2027. |
| 4.  | Labuan Smart City (Phase 1), Labuan Smart City Phase 1, upgrading works on Labuan Square, Labuan Corporation staff headquarters and Patau-Patau 1 Community Hall | <ul style="list-style-type: none"> <li>- Continuation projects under 12th Malaysia Plan.</li> <li>- Location: Labuan</li> <li>- Project cost: RM7.63 million</li> <li>- <u>Labuan Smart City (Phase 1)</u> <ul style="list-style-type: none"> <li>➤ Construction of siren and smart pole system in 13 areas (covering 27 villages), including one downtown in collaboration with Meteorological Department to channel updated information on the weather and natural disaster.</li> <li>➤ Project cost: RM2 million</li> </ul> </li> </ul> | Under construction  |
| 5.  | New cell sanitary landfill and upgrading works on the leachate treatment plant   | <ul style="list-style-type: none"> <li>- Location: Labuan</li> <li>- Project cost: RM2 million</li> </ul>  | Under construction  |

Table 3.2: Development Project

| No. | Development                         | Description  | Current Development Status                 |
|-----|-------------------------------------|--|--|
| 1.  | Batu Arang People's Housing Project | <ul style="list-style-type: none"> <li>- Location: Jalan Batu Arang, Tanjung Aru</li> <li>- Project involves two blocks of 13-storey apartments containing 500 residential units.</li> <li>- Construction work began in 2018.</li> </ul>   | Under Construction                         |
| 2.  | Hillford Lazanda                    | <ul style="list-style-type: none"> <li>- Location: Jalan Pohon Batu, Kampung Ganggarak.</li> <li>- Project consists of 20 units double storey terraced shop offices.</li> </ul>  | Under Construction                         |
| 3.  | CS Plaza                            | <ul style="list-style-type: none"> <li>- Location: Jalan Mohammad Salleh, Kampurn Sungai Bangat</li> <li>- Project consists of 16 units three storey shop offices.</li> </ul>  | Under Construction                         |
| 4.  | National Geopark Labuan             | <p>- Labuan National Geopark with an area of 402 square kilometers displayed the evolution of sedimentary rocks and landscapes that formed Labuan Island as well as biological sites.</p> <p><b>i) Geo sites</b></p> <ol style="list-style-type: none"> <li>1. Batu Pasir Belait Tanjung Kubong</li> <li>2. Batu Pasri Belait Tanjung Batu</li> <li>3. Landskap Hakisan Pantai Tanjung Layang-Layangan</li> <li>4. Batuan Sedimen Tamurong Bebuloh Darat</li> <li>5. Batuan Penakung Minyak Ganggarak</li> <li>6. Lidah Pasir Pulau Kuraman</li> <li>7. Pulau Rusukan Besar</li> <li>8. Bekas Lombong Batu Arang Lubok Temiang</li> <li>9. Batu Kapur Terumbu Pulau Burong</li> <li>10. Jurus Bukit Merinding</li> <li>11. Endapan Pesisir Simpang Sweetman</li> <li>12. Fosil Surih Tanjung Punei</li> <li>13. Gerbang laut Tanjung Layang-Layangan</li> <li>14. Tafoni Tanjung Batu</li> <li>15. Pantai Berbatu Tanjung Kubong</li> </ol> <p><b>ii) Bio sites</b></p> <ol style="list-style-type: none"> <li>1. Hutan Bakau Kinabenuwa</li> <li>2. Pantai Tanjung Kubong</li> <li>3. Sanktuari Hidupan Liar Pulau Ular</li> <li>4. Taman Laut (Pulau Rusukan Besar, Pulau Rusukan Kecil, Pulau Kuraman</li> </ol> <p><b>iii) Cultural sites</b></p> <ol style="list-style-type: none"> <li>1. Kampung Air Tradisi Bebuloh Laut</li> <li>2. Kampung Air Tradisi Patau-Patau</li> <li>3. Muzium Chimney</li> <li>4. Rumah Api Pulau Papan</li> <li>5. Muzium Labuan</li> <li>6. Rumah Api Pulau Kuraman</li> <li>7. Pulau Mayat Rusukan Kecil</li> <li>8. Pulau Mayat Rusukan Besar</li> </ol> | Various Geopark packages open for visitors |







# SELANGOR

## GAMBARAN KESELURUHAN

Pasaran harta tanah negeri ini bertambah baik dalam tempoh kajian. Terdapat 75,135 transaksi bernilai RM56.09 bilion telah direkodkan, menunjukkan peningkatan 22.2% dalam bilangan dan 22.4% dalam nilai berbanding dengan tahun lepas (2021: 61,507 transaksi bernilai RM45.82 bilion). Subsektor kediaman terus menguasai syer pasaran keseluruhan dengan 75.2% syer, diikuti dengan subsektor perdagangan (11.5%), pertanian (5.6%), tanah pembangunan & lain (4.0%) dan industri (3.6%).

Aktiviti pasaran menunjukkan prestasi lebih baik secara keseluruhan. Subsektor tanah pembangunan & lain mendahului dengan peningkatan 61.0%, diikuti pertanian (45.1%), perdagangan (43.7%), industri (39.9%) dan kediaman (15.9%). Sejalan dengan pergerakan aktiviti pasaran, nilai transaksi semua subsektor juga menunjukkan peningkatan.

## OVERVIEW

The state's property market performance improved in the review period. There were 75,135 transactions worth RM56.09 billion recorded, indicating increase of 22.2% in volume and 22.4% in value as compared to previous year (2021: 61,507 transactions worth RM45.82 billion). Residential sub-sector continued to dominate the overall market share with 75.2% share, followed by commercial (11.5%), agriculture (5.6%), development land & others (4.0%) and industrial (3.6%) sub-sectors.

Market activity showed better performance across the board. The development land & others led the growth with 61.0%, followed agriculture (45.1%), commercial (43.7%), industrial (39.9%) and residential (15.9%). Correspondingly with the market activity movement, transaction value for all sub-sectors also showed an increase.

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Chart 4.1

Volume of Property Transactions 2018 – 2022

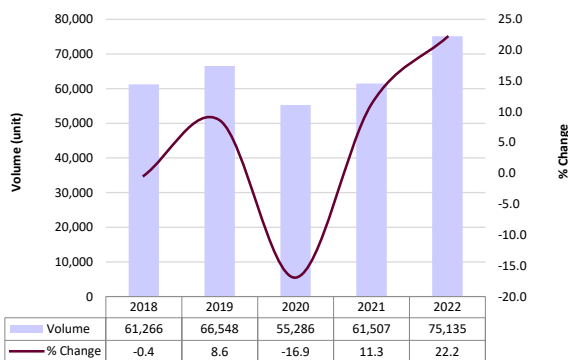


Chart 4.2

Value of Property Transactions 2018 – 2022

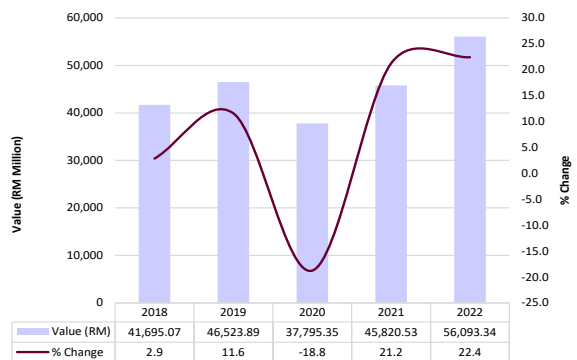


Chart 4.3

Contribution to Transaction Volume by Sub-sector 2022

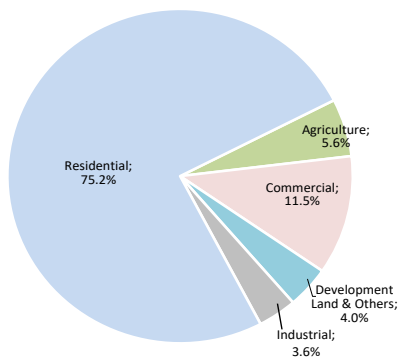
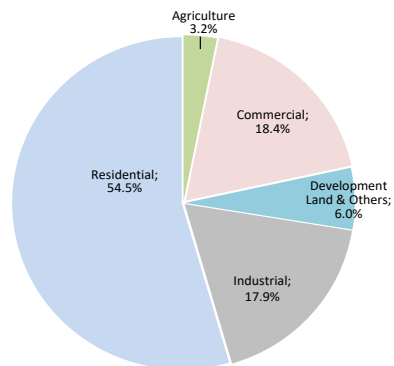


Chart 4.4

Contribution to Transaction Value by Sub-sector 2022



## PROMINENT SALES

Table 4.1

### Summary of Prominent Sales Recorded in 2022

| No.                         | Property            | Location                                     | Transaction Date | Consideration (RM) |
|-----------------------------|---------------------|--|------------------|--------------------|
| <b>Purpose Built Office</b> |                     |  |                  |                    |
| 1.                          | Quill 9             | Seksyen 19, Petaling Jaya, Selangor          | 2022             | 200,000,000        |
| 2.                          | Wisma Chung De      | Off Persiaran Raja Muda Musa                 | 2022             | 9,600,000          |
| 3.                          | Bangunan TM         | Persiaran Semarak Api, Cyberjaya             | 2022             | 44,750,000         |
| 4.                          | Bank Negara         | Jalan Persiaran Tasik, Seksyen 14, Shah Alam | 2022             | 33,400,000         |
| 5.                          | Menara Amfirst      | Jalan 19/3, Petaling Jaya                    | 2022             | 62,000,000         |
| 6.                          | Quill 9 Annexe      | Seksyen 19, Petaling Jaya, Selangor          | 2021             | 123,880,000        |
| 7.                          | VSQ Tower (Block 1) | Jalan Utara, Petaling Jaya, Selangor         | 2021             | 147,000,000        |
| 8.                          | SEGI Damansara      | Jalan Teknologi, PJU 5 Kota Damansara        | 2021             | 49,000,000         |
| 9.                          | Wisma Dato Shaari   | Jalan Forshore, Pelabuhan Klang              | 2021             | 34,100,000         |
| <b>Shopping Complex</b>     |                     |  |                  |                    |
| 10.                         | LOTUS Kajang        | Taman Saujana Impian                         | 2021             | 79,900,000         |
| <b>Hotel</b>                |                     |  |                  |                    |
| 11.                         | Hotel Lisa De Inn   | Jalan Harapan & Jalan Universiti, Petaling   | 2021             | 17,500,000         |

Tempoh kajian juga menyaksikan beberapa pembelian pukal. Antaranya ialah 500 plot kediaman teres di Kuala Selangor dan 74 plot kediaman teres di Kuala Langat.

*The review period also saw several bulk purchases. Among these were 500 residential terraced plots at Kuala Selangor and 74 residential terraced plots at Kuala Langat.*

## HARTA TANAH KEDIAMAN

### Transaksi

Terdapat 56,514 transaksi bernilai RM30.58 bilion dicatatkan dalam tempoh kajian, meningkat 15.9% dalam bilangan dan 15.4% dalam nilai berbanding 2021.

Mengikut lingkungan harga, unit kediaman berharga RM500,000 ke bawah menyumbang 63.7% (35,990 unit) daripada jumlah transaksi kediaman.

## RESIDENTIAL PROPERTY

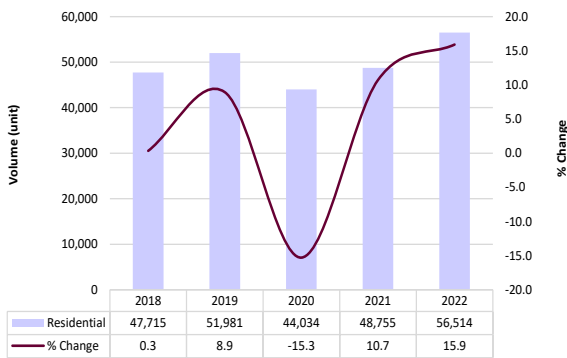
### Transaction

*There were 56,514 transactions worth RM30.58 billion recorded in the review period, surged by 15.9% in volume and 15.4% in value against 2021.*

*By price range, residential units priced below RM500,000 contributed 63.7% (35,990 units) of total residential transactions.*

Chart 4.5

Volume of Residential Transactions 2018 – 2022

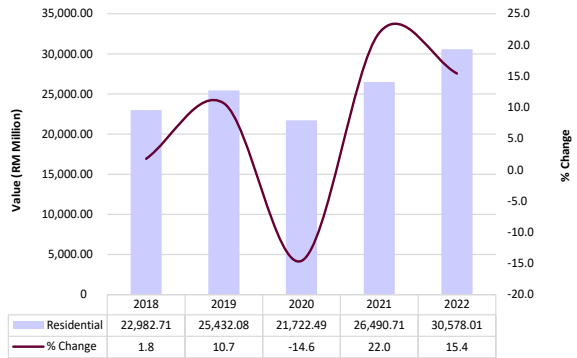


**Pelancaran Baharu**

Prestasi pasaran utama kediaman adalah memberangsangkan. Bilangan pelancaran adalah mendahului tahun lepas walaupun bagaimanapun prestasi jualan mencatatkan penurunan. Tempoh kajian telah merekodkan 11,176 unit dilancar serta 3,006 unit telah dijual, bersamaan 26.9% prestasi jualan.

Chart 4.6

Value of Residential Transactions 2018 – 2022

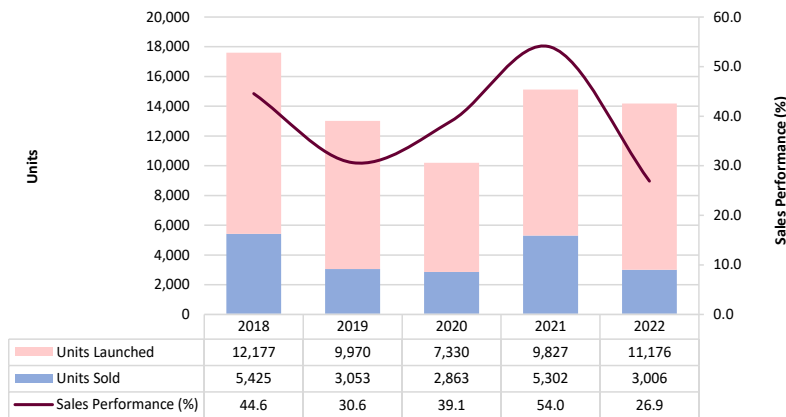


**New Launches**

The primary residential market’s performance was promising. The number of new launches were surpassed previous year however sales performance recorded a decline. The review period recorded 11,176 units launched and 3,006 units sold, equivalent to 26.9% sales performance.

Chart 4.7

New Launches and Sales Performance 2018 - 2022



**Status Pasaran**

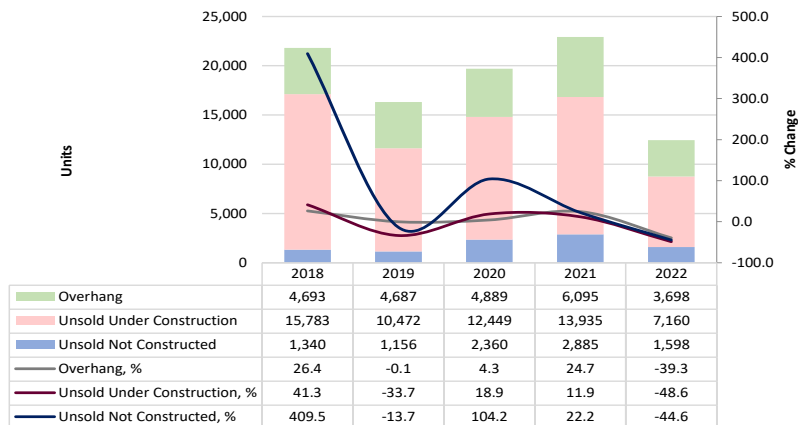
Situasi kediaman siap dibina tidak terjual bertambah baik dalam tempoh kajian. Bilangan unit siap dibina tidak terjual telah menurun 39.3% ke 3,698 unit, iaitu rekod terendah dalam tempoh lima tahun terdekat. Trend penurunan yang sama juga dilihat pada unit dalam pembinaan belum terjual dan unit belum dibina belum terjual, dimana kedua-dua telah menurun 48.6% dan 44.6% pada 2022.

**Market Status**

The residential overhang situation improved in the review period. The number of overhang decreased by 39.3% to 3,698 units, the lowest record in the recent five years. Similar downward trend was observed at unsold under construction and unsold not constructed whereby both decreased by 48.6% and 44.6% respectively in 2022.

Chart 4.8

Residential Market Status 2018 - 2022



### Aktiviti Pembinaan

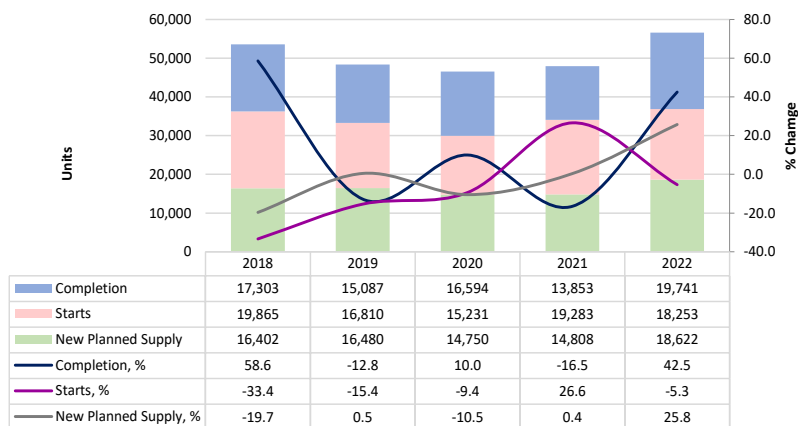
Aktiviti pembinaan subsektor menunjukkan pergerakan bercampur-campur. Siap dibina meningkat 42.5% kepada 19,741 unit. Sebaliknya, mula dibina menurun 5.3%, manakala penawaran baharu yang dirancang meningkat 25.8%. Sehingga akhir 2022, terdapat 1,657,709 unit kediaman sedia ada dengan 99,875 unit dalam penawaran akan datang serta 80,623 unit dalam penawaran yang dirancang.

### Construction Activity

The sub-sector's construction activity witnessed mixed movement. Completion increased by 42.5% to 19,741 units. On the other hand, starts decreased by 5.3%, meanwhile and new planned supply increased by 25.8%. As at end-2022, there were 1,657,709 existing residential units with another 99,875 units in the incoming supply and 80,623 units in the planned supply.

Chart 4.9

Residential Construction Activity 2018 - 2022



### Harga dan Sewa

Harga harta kediaman menunjukkan pergerakan bercampur-campur. Peningkatan modal telah direkodkan di skim-skim perumahan yang aktif dijual beli, antaranya adalah rumah teres dua tingkat di USJ 6 (8.4%), SS21 Damansara Utama (8.2%), Perumahan Kinrara (4.5%) dan Bandar Baru Sri Damansara (4.3%). Manakala bagi kediaman bertingkat tinggi jenis pangsapuri, peningkatan direkodkan antaranya di Flora Damansara-Jalan PJU 8/9 (8.4%), Bukit Sentosa (7.4%), Palm Spring - Seksyen 13 Kota Damansara (6.6%), Seri Jati & Baiduri-Bandar Setia Alam (4.6%) dan Mentari Court PJS 8 (3.6%).

### Price and Rental

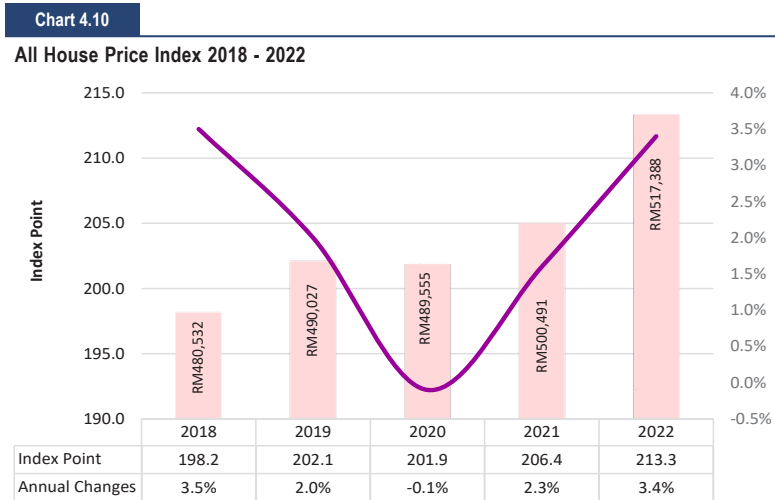
Prices of residential property showed a mixed performance. Capital appreciation recorded in housing schemes which were actively transacted, such as double storey terraced house at USJ 6 (8.4%), SS21 Damansara Utama (8.2%), Perumahan Kinrara (4.5%) and Bandar Baru Sri Damansara (4.3%). Meanwhile, for highrise residential type of apartment, capital appreciation recorded in Flora Damansara-Jalan PJU 8/9 (8.4%), Bukit Sentosa (7.4%), Palm Spring - Seksyen 13 Kota Damansara (6.6%), Seri Jati & Baiduri-Bandar Setia Alam (4.6%) and Mentari Court PJS 8 (3.6%).

Indeks Harga Semua Rumah untuk negeri berada pada 213.3 mata pada 2022<sup>P</sup>, naik 3.4% daripada 206.4 mata pada 2021. Pada 2022<sup>P</sup>, purata Harga Semua Rumah untuk negeri berada pada RM517,388, meningkat dari RM500,491 pada 2021.

The All House Price Index for the state stood at 213.3 points in 2022<sup>P</sup>, increased by 3.4% from 206.4 points in 2021. In 2022<sup>P</sup>, the average All House Price for the state stood at RM517,388, decreased from RM500,491 in 2021.

Pasaran sewa harta kediaman umumnya stabil dengan pergerakan positif direkodkan di beberapa kawasan. Sewa tertinggi bagi rumah teres dua tingkat telah direkodkan di Setia Eco Glade, Cyberjaya dengan sewa RM3,200 – RM3,800 sebulan.

The residential rental market was generally stable with positive movements recorded in several areas. Highest rental for double storey terraced house was recorded at Setia Eco Glade, Cyberjaya with rental of RM3,200 – RM3,800 per month.



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## HARTA TANAH PERDAGANGAN

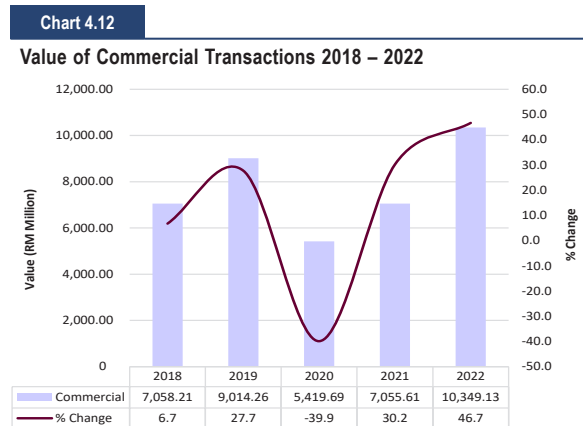
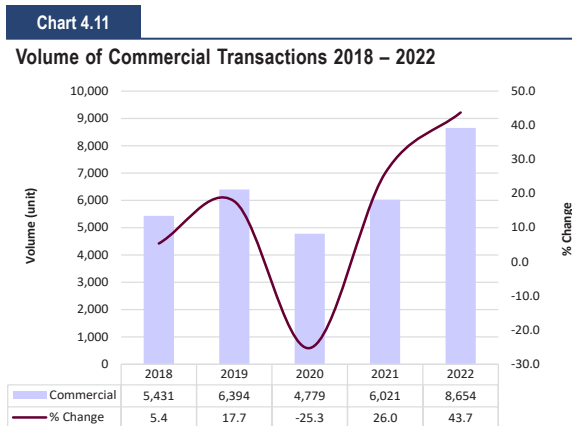
## COMMERCIAL PROPERTY

### Transaksi

### Transaction

Subsektor perdagangan merekodkan 8,654 transaksi dengan jumlah nilai RM10.35 bilion pada 2022. Ini menunjukkan peningkatan 43.7% dalam bilangan dan 46.7% dalam nilai berbanding 2021 (6,021 transaksi bernilai RM7.06 bilion).

The commercial sub-sector recorded 8,654 transactions with a total value of RM10.35 billion in 2022. This indicated a surge of 43.7% in volume and 46.7% in value as compared to 2021 (6,021 transactions worth RM7.06 billion).



## Kedai

### Transaksi

Sejajar dengan prestasi subsektor perdagangan yang baik, segmen kedai merekodkan 3,207 transaksi bernilai RM4.24 bilion dalam tempoh kajian (2021: 2,135 transaksi bernilai RM2.81 bilion) iaitu kenaikan 50.2% dalam bilangan dan 51.1% dalam nilai.

### Status Pasaran

Situasi kedai siap dibina tidak terjual dan kedai dalam pembinaan belum terjual memperlihatkan trend bercampur-campur. Siap dibina tidak terjual menyaksikan penurunan bilangan, manakala dalam pembinaan belum terjual menunjukkan sebaliknya. Negeri ini tidak dibebani dengan mana-mana unit kedai belum dibina belum terjual pada tahun 2022.

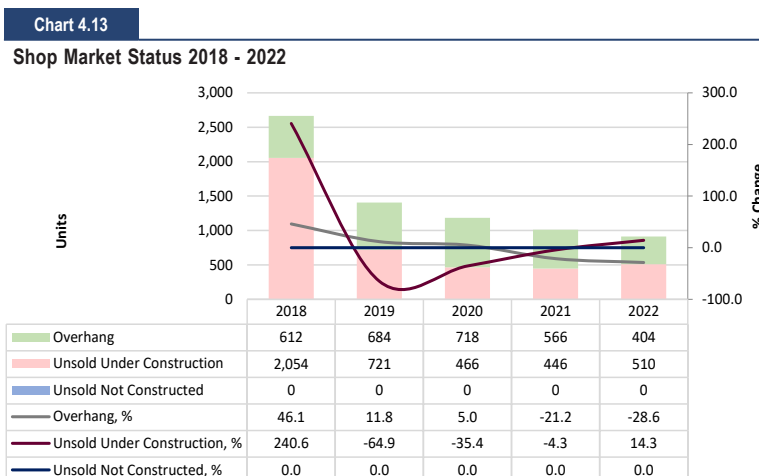
## Shop

### Transaction

Corresponding with better performance of commercial sub-sector, shop segment recorded 3,207 transactions worth RM4.24 billion in the review period (2021: 2,135 transactions worth RM2.81 billion), equivalent to up by 50.2% in volume and 51.1% in value.

### Market Status

Mixed trend was seen in shop overhang and unsold under construction. Overhang witnessed decreasing numbers, whereas unsold under construction saw otherwise. The state was unencumbered with any unsold not constructed shop in 2022.



### Aktiviti Pembinaan

Segmen ini mencatatkan peningkatan aktiviti pembinaan. Terdapat 588 unit siap dibina dalam tempoh kajian, meningkat 20.7% (2021: 487 unit). Mula dibina dan penawaran baharu dirancang juga menyaksikan peningkatan 0.9% dan 15.3%. Pada akhir tahun 2022, terdapat 110,574 unit kedai sedia ada dengan 5,467 unit lagi dalam penawaran yang akan datang dan 3,571 unit dalam penawaran yang dirancang.

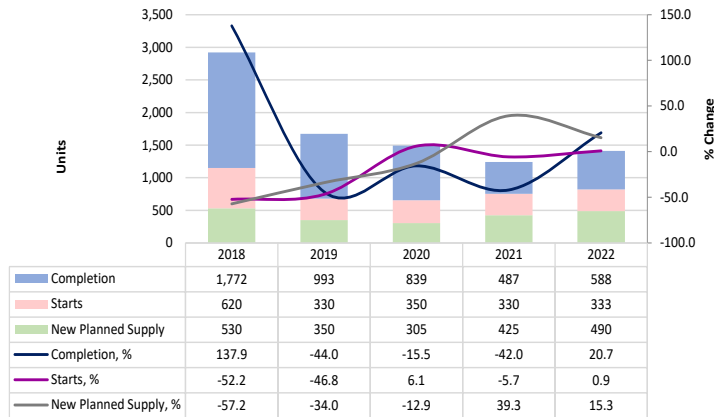
### Construction Activity

The segment recorded higher construction activities. There were 588 units newly completion in the review period, increase 20.7% (2021: 487 units). Starts and new planned supply also increase of 0.9% and 15.3%. As at end-2022, there were 110,574 existing shop units with another 5,467 units in the incoming supply and 3,571 units in the planned supply.



Chart 4.14

Shop Construction Activity 2018 - 2022



**Pangsapuri Khidmat**

**Transaksi**

Segmen mencatatkan 2,435 transaksi bernilai RM1.28 billion pada 2022 (2021: 1,694 unit bernilai RM884.96 juta) mencakupi 28.1% daripada transaksi harta perdagangan dan 12.4% daripada jumlah nilai.

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**Market Status**

Pangsapuri khidmat siap dibina tidak terjual merekodkan peningkatan bilangan. Terdapat 2,926 unit siap tidak terjual bernilai RM1.75 bilion yang direkodkan, meningkat 27.1% dalam bilangan dan 22.5% dalam nilai. Perkembangan yang lebih baik pada unit dalam pembinaan belum terjual, telah menurun 22.7% kepada 8,212 unit (2021: 10,619 unit). Walau bagaimanapun unit belum dibina belum terjual telah meningkat 41.2% kepada 925 unit dalam tempoh kajian (2021: 655 unit).

**Serviced Apartment**

**Transaction**

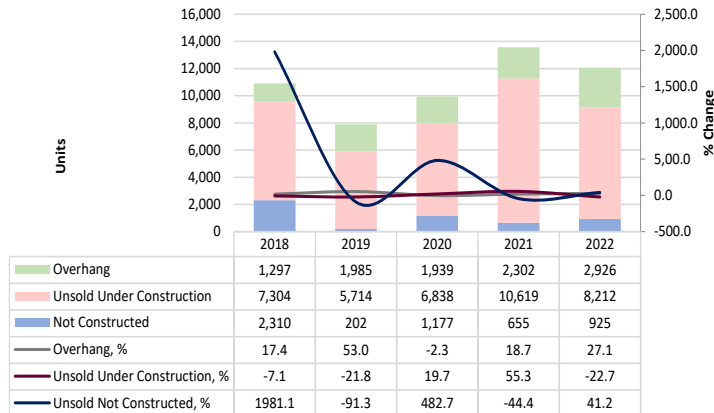
The segment recorded 2,435 transactions worth RM1.28 billion in 2022 (2021: 1,694 units worth RM884.96 million) accounting for 28.1% of the commercial property transactions and 12.4% of the total value.

**Market Status**

Serviced apartment overhang recorded increasing in numbers. There were 2,926 overhang units worth RM1.75 billion recorded, indicating an increase of 27.1% in volume and 22.5% in value. On a better note, unsold under construction decreased by 22.7% to 8,212 unit (2021: 10,619 units). However, unsold not constructed increase by 41.2% to 925 units in the review period (2021: 655 units)

Chart 4.15

Service Apartment Market Status 2018 - 2022



## Aktiviti Pembinaan

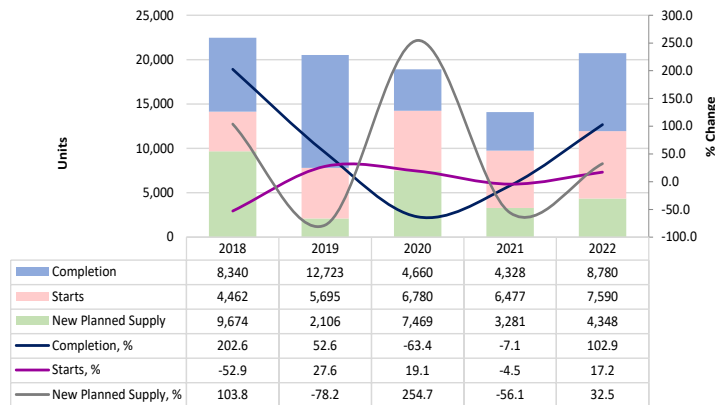
Segmen ini mencatatkan peningkatan aktiviti pembinaan. Terdapat 8,780 unit siap dibina dalam tempoh kajian, meningkat 102.9% (2021: 4,328 unit). Mula dibina dan penawaran baharu dirancang juga menyaksikan peningkatan 17.2% dan 32.5%. Sehingga akhir 2022, terdapat 94,333 units pangsapuri khidmat sedia ada dengan 54,743 unit lagi dalam penawaran akan datang dan 21,377 unit dalam penawaran yang dirancang.

## Construction Activity

The segment recorded higher construction activities. There were 8,780 units newly completion in the review period, increase by 102.9% (2021: 4,328 units). Starts and new planned supply also increase of 17.2% and 32.5%. As at end-2022, there were 94,333 existing serviced apartments units with another 54,743 units in the incoming supply and 21,377 units in the planned supply.

Chart 4.16

Service Apartment Construction Activity 2018 - 2022



## Harga dan Sewa

Harga pangsapuri khidmat menunjukkan pergerakan bercampur dengan pertumbuhan positif antara 2.1% - 11.3% dilihat di skim-skim tertentu. Walau bagaimanapun, penurunan harga yang ketara juga direkodkan seperti di Zeva Residence - Seri Kembangan (-7.7%), Emerald Service Apartment (-3.7%), Mutiara Ville-Service Apartment, Cyberjaya (-3.7%) dan Damai Hillpark, Bandar Damai Perdana (-3.3%). Sewa tertinggi bagi pangsapuri khidmat direkodkan dalam tempoh kajian di Isola Subang Jaya dengan sewa RM3,500 – RM4,000 sebulan, menurun 2.8% berbanding 2021 (RM3,500 – RM4,300 sebulan). Purata pulangan sewa bagi pangsapuri khidmat adalah di antara 1.7% dan 5.7%.

## Price and Rental

Prices of serviced apartment showed mixed movement with growth between 2.1% - 11.3% in selected schemes. Nevertheless, significant price reduction was recorded at Zeva Residence - Seri Kembangan (-7.7%), Emerald Service Apartment (-3.7%), Mutiara Ville-Service Apartment, Cyberjaya (-3.7%) and Damai Hillpark, Bandar Damai Perdana (-3.3%). The highest rental for serviced apartment recorded in review period was Isola Subang Jaya with the rental of RM3,500 – RM4,000 per month, decreased by 2.8% compared to 2021 (RM3,500 – RM4,300 per month). The average gross yield for service apartment were between 1.7% and 5.7%.

## Kompleks Perniagaan

## Shopping Complex

### Penghunian dan Ketersediaan Ruang

### Occupancy and Space Availability

Segmen niaga menyaksikan prestasi sedikit rendah berdasarkan purata kadar penghunian yang berkurang kepada 77.5% berbanding 80.7% pada 2021. Ambilan tahunan adalah 61,399 m.p.

The retail segment saw a slightly lesser performance as its average occupancy rate reduced to 77.5% as compared to 80.7% in 2021. The annual take-up was at 61,399 s.m.

Chart 4.17

## Supply and Occupancy of Shopping Complex 2018 – 2022

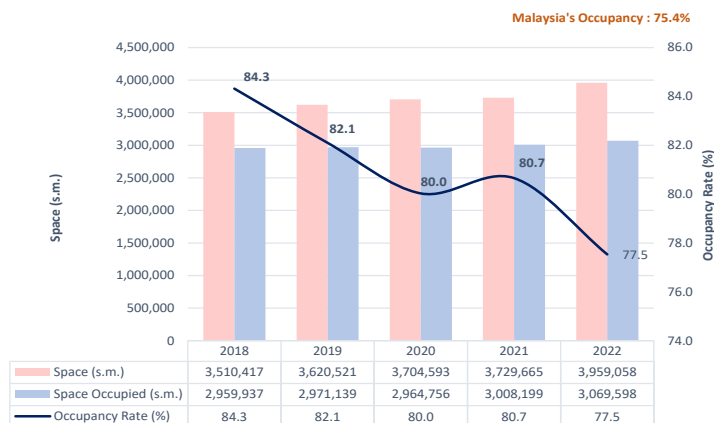


Table 4.2

## Pertinent Movements in Shopping Complexes

| No. | Shopping Complex      | Space (s.m.)         | Tenant Movement |
|-----|-----------------------|----------------------|-----------------|
| 1.  | Sanctuary Mall        | 1,378                | Move Out        |
| 2.  | KIP Mall Kota Warisan | 607                  | Move Out        |
| 3.  | Setia City Mall       | 2,829<br>(2 Tenants) | Move In         |
| 4.  | Shaw Centerpoint      | 7,134<br>(6 Tenants) | Move Out        |
| 5.  | Aeon Big Bukit Rimau  | 1,092                | Move Out        |

## Aktiviti Pembinaan

Segmen niaga menyaksikan tiga siap dibina baharu yang menyuntik 177,092 m.p. ke dalam pasaran. Pada akhir 2022, terdapat 156 kompleks membeli-belah sedia ada (3,959,058 m.p.) dengan lima kompleks (331,202 m.p.) dalam penawaran akan datang.

## Construction Activity

The retail segment witnessed three new completions which injected 177,092 s.m. into the market. As at end-2022, there were 156 existing shopping complexes (3,959,058 s.m.) with five complexes (331,202 s.m.) in the incoming supply.

Table 4.3

## List of Completion for Shopping Complex

| No. | Property               | Location                     | Net Lettable Area (s.m.) |
|-----|------------------------|------------------------------|--------------------------|
| 1.  | Datum Mall Jelatek     | Jalan Jelatek                | 29,449                   |
| 2.  | IOI City Mall (Fasa 2) | Lebuhraya SKVE               | 92,900                   |
| 3.  | KSL Esplanade Mall     | Persiaran Bestari 2/<br>KS09 | 54,743                   |

## Sewa

Di segmen ruang niaga, sewa secara amnya stabil dengan pergerakan menurun 2.1% - 8.4% dilihat di beberapa kompleks, antaranya adalah IOI City Mall (Sepang) dan D'Pulze (Cyberjaya) dan GIANT Kemuning Utama (Klang).

## Rental

Generally, rentals of retail space were stable with negative movements between 2.1% - 8.4% observed in IOI Mall (Sepang), D'Pulze (Cyberjaya) and GIANT Kemuning Utama (Klang).

Indeks Sewa Kompleks Beli Belah Selangor berada pada 107.7 mata, meningkat 0.7% daripada 107.0 mata dalam 2021. Pada 2022, Sewa Kompleks Beli Belah bagi Selangor berada pada RM106.66 s.m.p., meningkat daripada RM105.97 s.m.p., direkodkan pada 2021.

The Shopping Complex Rental Index for Selangor stood at 107.7 points, increase by 0.7% from 107.0 points in 2021. The Shopping Complex Average Rental for Selangor stood at RM106.66 p.s.m., increase from RM105.97 p.s.m., recorded in 2021.

### Pejabat Binaan Khas

### Purpose-Built Office

#### Transaksi

#### Transaction

Segmen pejabat binaan khas menyaksikan sembilan transaksi utama dalam tempoh kajian termasuk Bangunan Bank Negara di Shah Alam, Bangunan Quill 9 dan Menara Amfirst di Petaling Jaya, Wisma Chung De di Klang dan Bangunan TM di Cyberjaya. Sementara itu, transaksi Quill 9 Annexe, VSQ Tower (Block 1), SEGI Damansara dan Wisma Dato Shaari yang bertarikh 2021 telah disempurnakan dalam tempoh kajian.

The purpose-built office segment saw nine prominent transactions in the review period included Bangunan Bank Negara located at Shah Alam, and Bangunan Quill 9 and Menara Amfirst where both located at Petaling Jaya, Wisma Chung De at Klang and Bangunan TM at Cyberjaya. Meanwhile, the transaction of Quill 9 Annexe, VSQ Tower (Block 1), SEGI Damansara and Wisma Dato Shaari were completed during the review period.

#### Penghunian dan Ketersediaan Ruang

#### Occupancy and Space Availability

Prestasi segmen pejabat binaan khas kurang menggalakkan. Kadar penghunian purata menyaksikan peningkatan yang marginal iaitu 68.9% berbanding 68.8% pada 2021. Ambilan tahunan adalah 189,648 m.p.

The purpose-built office segment performance was less promising. The average occupancy witnessed a marginal increase of 68.9% compared to 68.8% in 2021. The annual take-up was at 189,648 s.m.

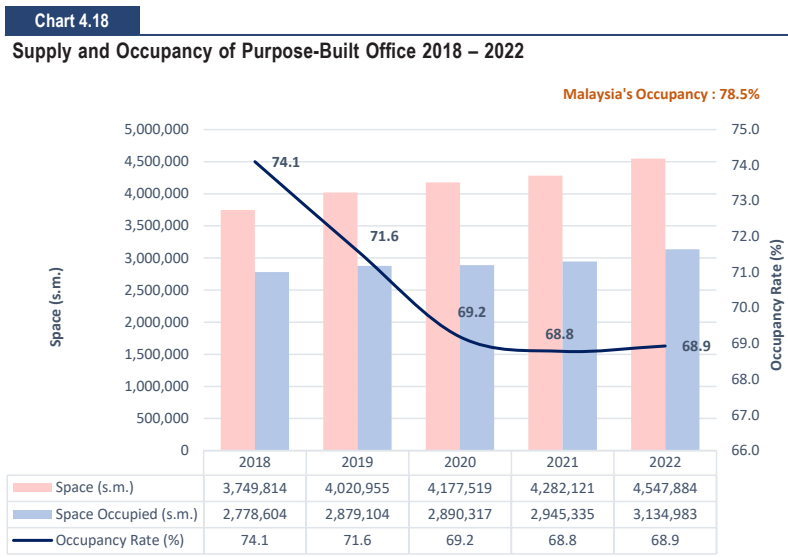


Table 4.4

## Pertinent Movements in Purpose-Built Office

| No. | Purpose-Built Office          | Space (s.m.)          | Tenant Movement |
|-----|-------------------------------|-----------------------|-----------------|
| 1.  | Sapura Mines                  | 4,537                 | Move In         |
| 2.  | CP Tower                      | 1,304                 | Move Out        |
| 3.  | Menara Axis                   | 1,069                 | Move Out        |
| 4.  | IDCC Shah Alam                | 1,178                 | Move In         |
| 5.  | Kelana Centre Point (Block D) | 3,499                 | Move In         |
| 6.  | Uptown 2 Damansara            | 1,144                 | Move In         |
| 7.  | Imazium Damansara             | 23,851<br>(8 Tenants) | Move In         |
| 8.  | Crystal Plaza                 | 8,573                 | Move In         |
| 9.  | Menara Naza TTDI              | 1,792                 | Move In         |
| 10. | PFCC Puchong - Tower 4        | 1,423                 | Move In         |
| 11. | CP Tower                      | 1,426                 | Move Out        |
| 12. | Menara Axis                   | 1,908                 | Move Out        |
| 13. | PFCC Puchong - Tower 4        | 1,168                 | Move Out        |

## Aktiviti Pembinaan

Tempoh kajian mencatatkan satu bangunan baru siap dibina yang menyuntik 29,154 m.p. ruang pejabat ke dalam pasaran. Sehingga akhir 2022, terdapat 273 bangunan pejabat sedia ada (4,547,884 m.p.) dengan tiga bangunan (60,243 m.p.) dalam penawaran akan datang dan satu lagi (10,276 m.p.) dalam penawaran yang dirancang.

## Construction Activity

The review period registered one completion which injected 29,154 s.m. office space into the market. As at end-2022, there were 273 existing office buildings (4,547,884 s.m.) with three buildings (60,243 s.m.) in the incoming supply and another one (10,276 s.m.) in the planned supply.

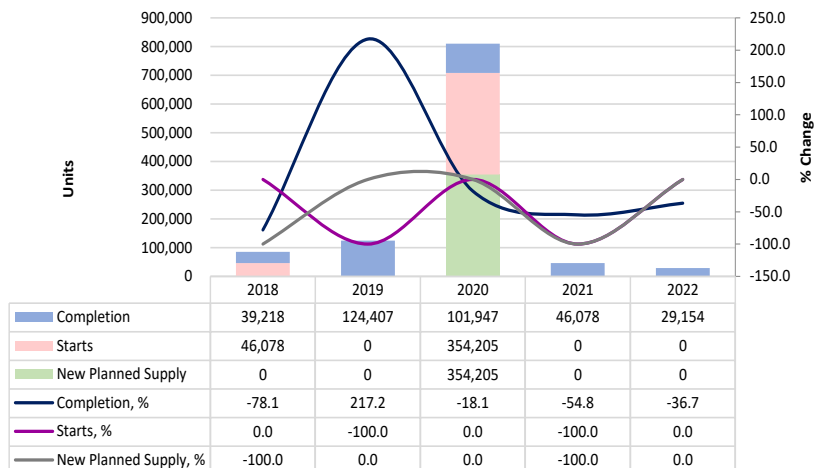
Table 4.5

## List of Completion for Purpose-Built Office

| No. | Property                         | Location                  | Net Lettable Area (s.m.) |
|-----|----------------------------------|---------------------------|--------------------------|
| 1.  | Empire City (Blok J) (HCK Tower) | Seksyen 13, Petaling Jaya | 29,154                   |

Chart 4.19

## Purpose-Built Office Construction Activity 2018 - 2022



## Sewa

Sewa pasaran pejabat adalah stabil. Di Petaling, kenaikan sewa antara 2.5% - 17.0% telah dilihat antaranya di Sunway Pinnacle (Subang Jaya), Kompleks MAIS Klang (Klang) dan NTS (Klang).

Indeks Sewa Pejabat Binaan Khas Selangor berada pada 125.3 mata, sama seperti 2021. Pada 2022, Sewa Purata Pejabat Binaan Khas bagi Selangor berada pada RM46.14 s.m.p., menurun daripada RM46.15 s.m.p., direkodkan pada 2021.

## Riadah

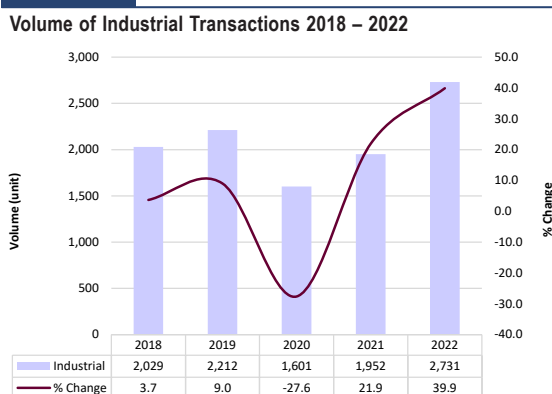
Segmen riadah tidak merekodkan apa-apa bangunan siap dibina dalam tempoh kajian. Pada akhir tahun 2022, terdapat 205 hotel (24,201 bilik) penawaran sedia ada dengan tiga lagi hotel (878 bilik) dalam penawaran akan datang dan satu hotel (200 bilik) dalam penawaran yang dirancang.

## HARTA TANAH INDUSTRI

### Transaksi

Subsektor perindustrian merekodkan 2,731 transaksi bernilai RM10.05 bilion, masing-masing meningkat 39.9% dan 12.7% dalam bilangan dan nilai (2021: 1,952 transaksi bernilai RM8.92 bilion).

Chart 4.20



### Status Pasaran

Situasi industri siap dibina tidak terjual dan belum terjual bertambah baik. Unit siap dibina tidak terjual dan unit dalam pembinaan belum terjual masing-masing menurun 10.0% dan 25.0% dalam tempoh kajian. Selain itu, negeri ini tiada sebarang bebanan unit belum dibina belum terjual.

## Rental

The office rental market was largely stable. In Petaling, rental increment between 2.5% - 17.0% observed at Sunway Pinnacle (Subang Jaya), Kompleks MAIS Klang (Klang) and NTS (Klang).

The Purpose-Built Office Rental Index for Selangor stood at 125.3 points, remains the same as 2021. In 2022, The Purpose-Built Office Average Rental for Selangor stood at RM46.14 p.s.m., declined from RM46.15 p.s.m., recorded in 2021.

## Leisure

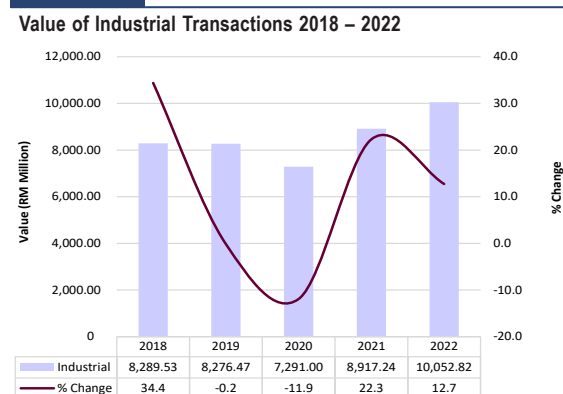
No completion was recorded in leisure segmen within the review period. As at end-2022, there were 205 hotels (24,201 rooms) in the existing supply with another tiga hotels (878 rooms) in the incoming supply and one hotel (200 rooms) in the planned supply.

## INDUSTRIAL PROPERTY

### Transaction

The industrial sub-sector recorded 2,731 transactions worth RM10.05 bilion, declined by 39.9% and 12.7% in volume and value respectively 2021: 1,952 transactions worth RM8.92 bilion).

Chart 4.21

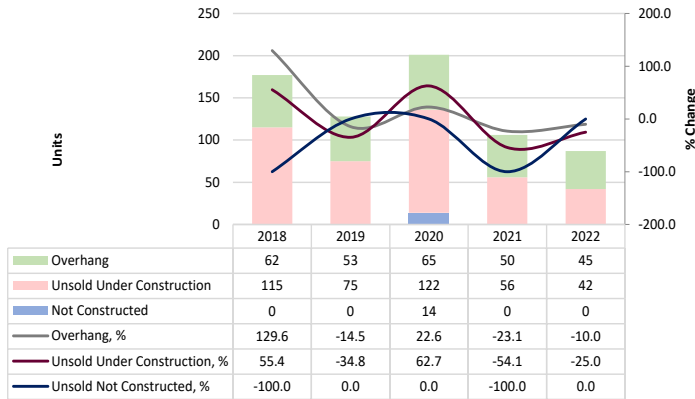


### Market Status

The industrial overhang and unsold situation improved. Both overhang and unsold under construction reduced by 10.0% and 25.0% in the review period. Besides, the state was unencumbered with any unsold not constructed.

Chart 4.22

Industrial Market Status 2018 – 2022



**Aktiviti Pembinaan**

Aktiviti pembinaan menunjukkan pergerakan bercampur-campur dalam tempoh kajian iaitu berkurang dalam siap dibina tetapi meningkat dalam mula dibina dan penawaran baru. Unit siap dibina menurun 2.0%, unit mula dibina dan penawaran baru dirancang masing-masing meningkat 86.5% dan 32.0%. Pada akhir 2022, terdapat 41,642 unit industri sedia ada dengan 1,578 unit lagi dalam penawaran akan datang dan 1,768 unit dalam penawaran yang dirancang.

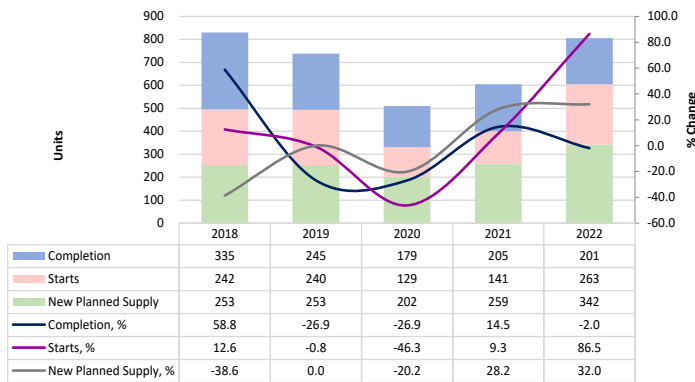
**Construction Activity**

Construction activities showed mixed movements in the review period down for completion but up for starts and new planned supply. Completion decreases by 2.0%, starts and new planned supply increase by 86.5% and 32.0% respectively. As at end-2022, there were 41,642 existing industrial units with another 1,578 units in the incoming supply and 1,768 units in the planned supply.

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Chart 4.23

Industrial Construction Activity 2018 - 2022



**Harga**

Harga harta tanah industri menunjukkan prestasi bercampur-campur. Di Petaling, kilang teres satu tingkat di kawasan Taman Industri Puchong Perdana dan Perindustrian Maju Jaya masing-masing telah meningkat 13.1% dan 9.5% dengan harga antara RM760,000 - RM840,000 dan RM695,000 - RM760,000. Walau bagaimanapun, di Hulu Langat, kilang berkembar dua tingkat di Taman Taming Jaya dan Taman Industri Balakong Jaya telah menurun masing-masing 9.2% dan 8.5% dengan harga RM5,900,000 dan RM5,400,000.

**Price**

Prices of industrial property showed a mixed performance. At District of Petaling, single storey terraced factory in Taman Industri Puchong Perdana and Perindustrian Maju Jaya increased 13.1% and 9.5% with the price range of RM760,000 - RM840,000 and RM695,000 - RM760,000 respectively. However, in Hulu Langat, double storey semi detached factory at Taman Taming Jaya and Taman Industri Balakong Jaya saw a price reduction by 9.2% and 8.5% with the price RM5,900,000 dan RM5,400,000 respectively.



## PROSPEK 2023

Prospek pasaran harta tanah di negeri ini akan kekal positif di 2023 dengan harga harta tanah dijangka kekal kukuh. Bajet 2023 Negeri Selangor bernilai RM2.45 bilion telah diumumkan pada 25 November 2022. Bajet tersebut memfokuskan kepada pemerkasaan kegiatan ekonomi negeri.

Projek pembangunan yang sedang/ akan dilaksanakan serta polisi kerajaan negeri yang dijangka merangsang pasaran harta tanah di Selangor adalah seperti berikut:

## 2023 OUTLOOK

*The prospects of the state's property market would remain positive in 2023 with prices of properties remain firm. The Selangor State Budget 2023 worth RM2.45 billion was tabled on 25 November 2022. The budget focuses on empowering the state's economic activities.*

*Development projects that are /will be implemented as well as state government policies which are expected to stimulate the property market in Selangor are as follows:*

## Infrastructure Development

Table 4.6: Infrastructure Projects

| No. | Infrastructure   | Descriptions   | Current Development Status |
|-----|--|--|----------------------------|
| 1.  | Light Rail Transit (LRT 3)                                 | <ul style="list-style-type: none"> <li>Total Length - 37.0 km</li> <li>Link Bandar Utama with Johan Setia in Klang</li> <li>Travel Time: 60 minutes</li> <li>No. of stations: 20</li> <li>Expected to be completed by Feb 2024.</li> </ul>   | Under Construction         |
| 2.  | The Putrajaya Line (MRT 2)                                 | <ul style="list-style-type: none"> <li>Previously known as Sungai Buloh - Serdang-Putrajaya Line.</li> <li>The alignment will have a length of 56.2 km, consisting of 42.7 km of elevated tracks and 13.5 km running through underground tunnels.</li> <li>Expected to be in operational in March 2023.</li> </ul>   | Completed                  |
| 3.  | Damansara - Shah Alam Elevated Expressway (DASH)           | <ul style="list-style-type: none"> <li>The Damansara - Shah Alam Elevated Expressway (DASH)</li> <li>This 20.1 km route with 13 interchanges offering much-needed traffic dispersal alternatives in a highly congested area such as Puncak Perdana, Alam Impian, Alam Suria, Denai Alam, Kampung Melayu Subang, Pinggiran Subang, Subang Dua, Subang Airport, RRIM, Surian, Seksyen 5, Kota Damansara, Sunway Damansara, Damansara Perdana and Penchala.</li> <li>Open to public on 14 October 2022</li> </ul>   | Completed                  |
| 4.  | Sungai Besi - Ulu Kelang Elevated Expressway (Suke)        | <ul style="list-style-type: none"> <li>This 24.4 km route connects Sri Petaling to Ulu Kelang. Consist of 6 routes (3 routes per way), 14 (fourteen) "interchanges" and 3 tolls.</li> <li>This highway project aims to facilitate traffic flow in Cheras, Pandan Indah and Ampang areas.</li> <li>The project completed in October 2022.</li> </ul>  | Completed                  |
| 5.  | East Klang Valley Expressway (EKVE)                        | <ul style="list-style-type: none"> <li>A 36-kilometer route connecting Sg Long from SILK Highway in the south and Ukay Perdana in the north. The highway comprises 4 routes (2 routes per way), 5 (five) "interchanges" and 5 (five) tolls. The construction of this highway is aimed at smoothing the flow of traffic on the MRR II route.</li> <li>The project expected to be completed by 2023.</li> </ul>  | Under Construction         |
| 6.  | Lebuhraya Pantai Barat (LPB) / West Coast Expressway (WCE) | <ul style="list-style-type: none"> <li>The West Coast Expressway or better known as the WCE built in the West Coast, Peninsular Malaysia connects two states, namely Perak and Selangor. The highway starts from Taiping, Perak and ends in Banting, Selangor along 233 kilometers involving 11 packages. The construction of WCE involves the Selangor State line of 93.8 kilometers, while the Perak State line of 139.2 kilometers.</li> <li>For Package 7, namely Assam Jawa Elevated Interchange to Tanjung Karang Elevated Interchange, it is divided into Package 7A (19.5 kilometers) and Package 7B (10.0 kilometers).</li> <li>The project is expected to be completed by 2025.</li> </ul> | Under Construction         |



**Table 4.6: Infrastructure Projects**

| No. | Infrastructure              | Descriptions  | Current Development Status                |
|-----|-----------------------------|---|---|
| 7.  | East Coast Rail Link (ECRL) | <ul style="list-style-type: none"> <li>This east and west coast rail network connecting Kota Bharu, Kelantan to Port Klang, Selangor.</li> <li>The new ECRL alignment for Section C commences from Mentakab, Gombak, Serendah, Puncak Alam, Kapar to Port Klang.</li> <li>The distance from Mentakab to Port Klang is 204 km.</li> <li>The project expected to be completed by Dec 2026</li> </ul>  | Selangor: Land acquisition stage          |
| 8.  | MRT Circle Line (MRT 3)     | <ul style="list-style-type: none"> <li>Total Length: 50.8 km</li> <li>No of Stations: 33 (26 elevated and 7 underground)</li> <li>The circle line is from Bukit Kiara to PPUM</li> <li>Link densely populated areas such as Mont Kiara, Segambut, KL Metropolis, Titiwangsa, Setapak, Setiawangsa, Ampang, Salak South, Pandan Indah, Pantai Dalam, Cheras and University Malaya.</li> <li>The construction expected to begin in early 2023.</li> <li>Expected operation for first phase in the year 2028 and second phase in year 2030.</li> </ul> | Land acquisition stage<br>Under section 4 |

**Mega Project**

**Table 4.7: Development Projects**

| No. | Development                     | Descriptions  | Current Development Status |
|-----|---------------------------------|---|----------------------------|
| 1.  | Astrum Jelatek/ Ampang          | <ul style="list-style-type: none"> <li>Location: Jalan Ampang/Jalan Jelatek</li> <li>Land area: 2.5212 hectares</li> <li>Developer: Green Stone Development Sdn Bhd</li> <li>Composition of development: 6 towers comprise of 5,228 units of Rumah Selangorku with price at RM230,000 per unit.</li> <li>Floor area: 26.02 square meters (280 square feet) (Studio type).</li> <li>This project is one of the transit-oriented development residential projects (TOD).</li> <li>The project expected to be completed by Oct 2026.</li> </ul>  | Under construction         |
| 2.  | Traders Park @ Cheras Selatan 2 | <ul style="list-style-type: none"> <li>Location: Hulu Langat, Bandar Cheras.</li> <li>Land area: 2.2267 hectares.</li> <li>Developer: SCP Balakong Sdn Bhd</li> <li>Consists of 3 blocks of 27-storey service apartments with a total of 899 units. The detail total units per block are as below: <ul style="list-style-type: none"> <li>Blok A – 297 units,</li> <li>Blok B – 297 units,</li> <li>Blok C – 305 units.</li> </ul> </li> <li>Size unit: 51.28 – 79.80 square meters.</li> <li>Price launch: RM314,000 and above.</li> <li>The project expected to be completed in 2025</li> </ul> | Under construction         |
| 3.  | IOI Mall City Phase 2           | <ul style="list-style-type: none"> <li>Location: Located in front of SKVE highway, under area Sepang, Mukim of Pekan Bukit Bisa.</li> <li>Developer: Tetuan IOI Mall City Sdn Bhd</li> <li>Type of development: Commercial Complex consisting of commercial area, cinema, exhibition hall, sport centre and gym. Total built up area is 92,903.05 square meters (1,000,000 square feet).</li> <li>The project completed in August 2022.</li> </ul>  | Completed                  |

Table 4.7: Development Projects

| No. | Development               | Descriptions  | Current Development Status  |
|-----|---------------------------|---|---|
| 4.  | Serenia City              | <ul style="list-style-type: none"> <li>• This project consists of 3 new phases that is Serenia Amalia, Serenia Aiora and Serenia Ariya.</li> <li>• Location: Jalan Pintas Dengkil - Putrajaya (FT29), Bandar Serenia, Sepang.</li> <li>• Developer: Sime Darby Property (Serenia City) Sdn Bhd.</li> <li>• Details of development:               <ul style="list-style-type: none"> <li>➢ Serenia Amalia:                   <ul style="list-style-type: none"> <li>- 202 units of town house and 230 units single storey terrace house.</li> <li>- Price: RM250,000.00 – RM300,000.00 for terrace house. RM42,000.00 – RM100,000.00 for town house</li> <li>- Built up area: 65.03 square meters (single storey terrace house) 65.03 square meters – 69.68 square meters (town house).</li> <li>- Expected completion: March 2024.</li> <li>- This phase is under the initiative project of affordable housing Rumah Selangorku.</li> </ul> </li> <li>➢ Serenia Aiora:                   <ul style="list-style-type: none"> <li>- 273 units of double storey terrace house.</li> <li>- Land area: 6.10 meter x 21.34 meter</li> <li>- Price: RM702,888.00 – RM1,162,888.00</li> <li>- Expected completion: November 2023.</li> </ul> </li> <li>➢ Serenia Ariya:                   <ul style="list-style-type: none"> <li>- 324 units of double storey terrace house.</li> <li>- Land area: 6.10 meter x 21.33 meter</li> <li>- Price: RM750,888.00 - RM1,501,888.00.</li> </ul> </li> </ul> </li> </ul> | <p><b>Serenia Amalia</b><br/>Under construction (70% completed)</p> <p><b>Serenia Aiora:</b><br/>Under construction (55% completed)</p> <p><b>Serenia Ariya:</b><br/>completed by the end of 2022</p> |
| 5.  | KSL Esplanade Mall, Klang | <ul style="list-style-type: none"> <li>• The KSL Esplanade Mall is a shopping complex located within the integrated development of KSL Bandar Bestari in Klang, Selangor. The shopping complex is located near to Johan Setia LRT station which is under construction and is scheduled to operate by 2024.</li> <li>• This project with a gross development value of RM600 million is a development project by KSL City Management, a wholly-owned subsidiary of Johor-based real estate developer KSL Holdings Berhad.</li> <li>• It will catalyze the growth of the 448-hectare municipality which is an integrated project covering residential, commercial, hotel and shopping complexes in the Klang district.</li> <li>• The development covers an area of 12 hectares of freehold land where this 4-storey shopping complex will have a gross floor area covering 92,903 square meters and a retail space of 60,387 square meters. The shopping complex will be equipped with 4-storey parking facilities that house over 3,000 compartments. The main access is connected to the roads, major highways and the nearby Johan Setia Light Rail Transit (LRT) station.</li> </ul>  | Completed with CCC: 25 November 2022  |
| 6.  | Gravit8, Klang            | <ul style="list-style-type: none"> <li>• Gravit8 is a mixed development project involving apartments, corporate offices, a shopping mall and a hotel which is estimated to cover approximately 15 acres of freehold land in Kota Bayu Emas, South Klang.</li> <li>• The development phase includes:               <ul style="list-style-type: none"> <li>○ <b>First Phase:</b> <ul style="list-style-type: none"> <li>▪ 22 office shop units with the size of 4,909 to 18,190 square feet.</li> <li>▪ The phase completed in 2019.</li> </ul> </li> </ul> </li> </ul>   | Phase 1: Completed  |

Table 4.7: Development Projects

| No. | Development               | Descriptions   | Current Development Status   |
|-----|---------------------------|--|--|
|     |                           | <ul style="list-style-type: none"> <li>○ <b>Second Phase</b> <ul style="list-style-type: none"> <li>▪ Two tower buildings called Nordica and Andria where both have 4 types of layout design.</li> <li>▪ A total of 374 units of serviced apartments are in the construction which has started on October 1, 2020. The price of these serviced apartments is between RM510,883.00 to RM787,606.00 with the size of 952 to 1,206 square feet.</li> <li>▪ There are also 42 affordable housing units with an area of 551 square feet which will be sold at a price of RM270,000.00 per unit.</li> <li>▪ The expected date of completion and obtaining the certificate of completion and compliance or Certificate of Completion and Compliance (CCC) is in February 2025.</li> </ul> </li> <li>○ <b>Third Phase – Future Project</b> <ul style="list-style-type: none"> <li>▪ Development such as offices, boutique hotels, grocery stores, shopping mall.</li> </ul> </li> </ul>  | <p><b>Phase 2:</b><br/>Phase 2A<br/>Completed</p> <p><b>Phase 2B &amp; 2C</b><br/>Under Construction</p> <p><b>Phase 3:</b><br/>Future Project</p> |
| 7.  | Mutiara Hills, Semenyih   | <ul style="list-style-type: none"> <li>• The total project area covers 485.60 hectares which consists of mixed development which is divided into 3 development sectors consisting of residential, Rumah Selangorku residential program as well as businesses and business hubs.</li> <li>• Pearl Hills is also equipped with the development of recreation areas, school complexes, synagogues, halls and petrol stations.</li> <li>• The development consists of: <ul style="list-style-type: none"> <li>i. <b>Residential</b> <ul style="list-style-type: none"> <li>a) Involves 5 phases</li> <li>b) Double storey terrace houses: 814 units</li> <li>c) Rumah Selangorku: 810 units</li> </ul> </li> <li>ii. <b>Business</b> <ul style="list-style-type: none"> <li>a) Shop/office 2 &amp; 3 Floors: 33 units</li> </ul> </li> <li>iii. <b>Petrol Station</b></li> </ul> </li> <li>• The selling prices from RM465,000 – RM795,000.</li> <li>• Expected to be completed in 2023</li> </ul>   | Phase 1A:<br>Under Construction  |
| 8.  | Compass, Kota Seri Langat | <ul style="list-style-type: none"> <li>• Compass @ Kota Seri Langat is an integrated industrial and logistics hub development located in Kota Seri Langat, Kuala Langat District, Selangor.</li> <li>• The development can be connected via the West Coast Expressway via a special junction as well as a connection to Jalan Langat.</li> <li>• This development offers larger land plot sizes ranging from 9,290.00 square meters to 92,903.00 square meters.</li> <li>• The following is a brief description of the development, namely: <ul style="list-style-type: none"> <li>a) Covers 80.93 hectares for the Integrated Industrial Park</li> <li>b) Easy access via direct junction to the West Coast Expressway (WCE)</li> <li>c) Permanent Tenure Land</li> <li>d) Location close to cities, ports and major airports</li> <li>e) Flexible is built (unlimited construction ie either for sale or rent) with an area ranging from 9,290.00 square meters to 92,903.00 square meters. Ready -to -Build SME Units range from 743.22 to 4,645.15 square meters</li> <li>f) 24 -hour security control system</li> </ul> </li> </ul> | Incoming Project<br>(Expected to start construction on 2023)   |

Table 4.7: Development Projects

| No. | Development              | Descriptions  | Current Development Status |
|-----|--------------------------|---|----------------------------|
| 9.  | Bandar Bukit Raja, Klang | <ul style="list-style-type: none"> <li>• The scheme located in Bandar Bukit Raja which offers easy access to major highways such as West Coast Expressway, NKVE, Shahpadu Highway and Federal Highway.</li> <li>• located in a strategic location close to BBR Townpark, Columbia Asia Hospital, AEON Bukit Raja, Terminal Bus Klang Central, schools, commercial centre (Taipan BBR) and other facilities.</li> <li>• Developer: Sime Darby USJ Development Sdn Bhd</li> <li>• Details of development:               <ol style="list-style-type: none"> <li>i. <b>Bandar Bukit Raja 2 Fasa R1A (Nadira)</b> <ul style="list-style-type: none"> <li>▪ Nadira is divided into two phases namely Phase R1A-1 and Phase R1A-2.</li> <li>▪ The development consists of 242 units of two-storey terrace houses                   <ul style="list-style-type: none"> <li>- Phase R1A-1 – 119 units,</li> <li>- Phase R1A-2 – 123 units,</li> </ul> </li> <li>▪ The launch of Bandar Bukit Raja Phase 2 R1A (Nadira) is in May 2022 with an area of each unit of 177 square meter - 207 square meter. The launched price starts from RM783,888 – RM1,067,888.</li> <li>▪ Expected to be completed by May 2024</li> </ul> </li> <li>ii. <b>Bandar Bukit Raja Fasa R11B2 (Lyra)</b> <ul style="list-style-type: none"> <li>▪ Lyra development consists of 156 units of 2-storey terrace houses.</li> <li>▪ The launched of Bandar Bukit Raja Phase R11B2 (Lyra) is on 2 June 2022 with an area of 161 square meter - 213 square meter for each unit.</li> <li>▪ Expected to be completed by June 2024</li> </ul> </li> </ol> </li> </ul> | Under construction         |
| 10. | Holiday Inn Sepang       | <ul style="list-style-type: none"> <li>• Holiday Inn Sepang is located in Kota Warisan, Mukim Dengkil, District of Sepang.</li> <li>• Estimated distance is around 49 km to Kuala Lumpur, 13 km to KLIA &amp; 21 km to Putrajaya &amp; Cyberjaya.</li> <li>• The owner of Holiday Inn is Warisan City Development Sdn Bhd in collaboration with IHG (InterContinental Hotels Group).</li> <li>• Type of development: Commercial (Hotel)</li> <li>• The composition of the development includes:               <ul style="list-style-type: none"> <li>- 26 strata type affordable shop units – 20' x 35' (Level 1 - 4)</li> <li>- 253 units hotel rooms (Level 4 -18)</li> <li>- One level car parking area in the basement</li> </ul> </li> <li>• Expected to be completed with Certificate of Completion and Compliance (CCC) in Q1 2023.</li> </ul>   | Under construction         |
| 11. | M Senyum @ Salak Tinggi  | <ul style="list-style-type: none"> <li>• M Senyum is 40.5 hectares (100 acres) landed residential development located at Salak Tinggi.</li> <li>• The development comprising a total of 1,176 units of double storey terrace which are:               <ul style="list-style-type: none"> <li>- Camellia</li> <li>- Camellia 2</li> <li>- Rosalia (coming soon)</li> </ul> </li> <li>i. <b>Camellia (Phase 1A)</b> <ul style="list-style-type: none"> <li>• Phase 1A (Camellia): 262 units</li> <li>• Land Area: 20' x 60'</li> <li>• Selling Price: (Min) RM546,000 - (Max) RM731,000.</li> <li>• Expected completion by April 2025</li> </ul> </li> <li>ii. <b>Camellia 2 (Phase 1B)</b> <ul style="list-style-type: none"> <li>• Phase 1B (Camellia 2): 270 units</li> <li>• Land Area :20' x 65' and 20' x 70'</li> <li>• Selling Price: (Min) RM592,000 - (Max) RM837,000</li> <li>• Expected completion by July 2025</li> </ul> </li> </ul>  | Under construction         |

**Table 4.7: Development Projects**

| No. | Development     | Descriptions  | Current Development Status |
|-----|-----------------|---|----------------------------|
| 12. | Robin @ Rimbayu | <ul style="list-style-type: none"> <li>• Robin @ Rimbayu is the 14th phase of the development in the existing project scheme in Rimbayu township.</li> <li>• The overall development size of the scheme is 3.5 hectares (8.6 acres) consisting of residential and recreational components.</li> <li>• The scheme development consists of 4 phases of 615 units double-storey terrace                             <ul style="list-style-type: none"> <li>○ Phase 14A – 128 units,</li> <li>○ Phase 14B – 80 units,</li> <li>○ Phase 14C – 132 units,</li> <li>○ Phase 14D - 175 units</li> </ul> </li> <li>• Type: Land size: 18' x 65', 20' x 65' and 28' x 65'.</li> <li>• Building size: 143 square meter / 155 square meter / 187 square meter.</li> <li>• The launched price starts from RM 755,800 to RM1,423,800</li> <li>• Expected completion by December 2023</li> </ul> | Under construction         |

**State Government Policy and Initiative**

**Table 4.8: State Government Policy and Initiative**

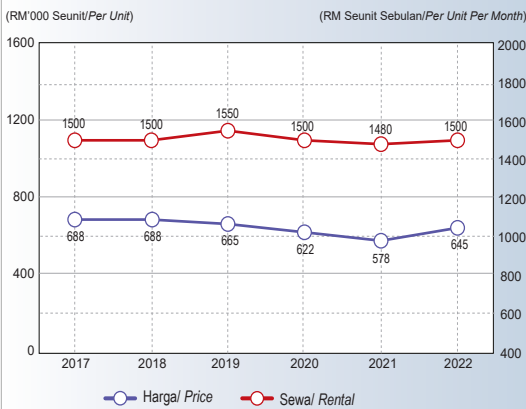
| No. | Policy  | Details  |
|-----|---|--|
| 1.  | Special Program on Limit the Price of Sale and Acquisition of Real Estate for Foreign Citizens. | <ul style="list-style-type: none"> <li>• Sales Quota: Increase the quota to 20 percent of the quota/ Non-Bumiputera unit for overall development approval.</li> <li>• Types of Real Estate:                             <ol style="list-style-type: none"> <li>i. Subject to "Leasehold" status residential property only;</li> <li>ii. Reduction of the minimum price level from RM1,500,000.00 to RM1,000,000.00 for strata type property including "Landed Strata" and applicable throughout the State of Selangor;</li> <li>iii. The setting of the minimum price level for "Landed" type property is worth RM2,000,000.00 which is limited to bungalow units and twin terrace houses;</li> <li>iv. The strata and "Landed Strata" units involved are unsold units and have received Certificate of Completion and Compliance (CCC) approval until 2020 only; and</li> <li>v. Imposition of lease term of 60 years with restriction of interest by the State Authority.</li> </ol> </li> <li>• Effective Date: 1 January 2021 until 31 December 2022.</li> </ul> |
| 2.  | Smart Rental Scheme to Ownership (2STAY)  | <ul style="list-style-type: none"> <li>• Was introduced on 2020 and continues on 2022</li> <li>• The Smart Rent Then Buy Scheme (2STAY) initiative which will offer 2,175 units of rental houses to the low -income group which is offered under the Selangor Housing and Property Board (LPHS). The rental of Rumah Selangorku Harapan and Rumah Idaman units is aimed at helping those who find it difficult to get a bank loan to buy their first house as well as helping the low -income group (B40) to own their home for less than RM200,000.</li> <li>• The scheme provides a minimum rental period of two to five years. Upon expiration, tenants will be given the option to purchase the house. Otherwise, to move out with refund 30 percent (%) of the rental payment. Rumah Selangorku Harapan and Rumah Idaman units are equipped with air conditioning, kitchen cabinets, clothes cabinets and water heaters.</li> </ul>   |
| 3.  | DanaSel Scheme  | <ul style="list-style-type: none"> <li>• This is a hire purchase mechanism, a platform to help citizens who do not qualify for housing loans from the banks. Under this scheme, the houses are first bought by the state government and the buyers can make monthly payments for a stipulated number of years before taking full ownerships of the properties.</li> <li>• The State Government has allocated RM10 million to the Selangor Property and Housing Board (LPHS) to implement the scheme.</li> </ul>  |
| 4.  | Ceria Scheme  | <ul style="list-style-type: none"> <li>• This scheme is a cost-sharing scheme between occupants of low-cost and medium-cost flats with the State Government in an effort to enliven the areas surrounding the flats and to cultivate a sense of belonging in taking care and maintaining the common property.</li> <li>• 80 percent of the work cost will be funded by the state Government and the balance of 20 per cent is shouldered by the residents or the Joint Management Body (JMB).</li> </ul>   |

**Table 4.8: State Government Policy and Initiative**

| No. | Policy   | Details   |
|-----|--|---|
| 5.  | The development of Kompleks Perumahan Pekerja Selangor                                 | <ul style="list-style-type: none"> <li>Through the Selangor Economic Development Corporation (PKNS), the Selangor State has identified an area of 58.67 hectares of land which 23.87 hectares belongs to the state government and 34.8 hectares PKNS land to be developed as worker housing complexes which were expected to house about 60,000 workers.</li> <li>The locations identified includes the USJ 1 Industrial Park, Subang Jaya (1.21 hectare), Pulau Indah Industrial Park, Klang (4.04 hectare), Kg Balakong Industrial Park, Hulu Langat (0.8 hectare) and Taman Velox, Rawang (2.02 hectare).</li> </ul> |
| 6.  | Incentives For the Construction of Affordable Homes Post Covid – 19 (Rumah Selangorku) | <ul style="list-style-type: none"> <li>This incentive allows the developer to amend the condition of Rumah Selangorku type A, B, C and D to one type only, which is type E (khas) or known as Rumah Selangorku Harapan and Rumah Idaman MBI.</li> <li>The features of homes are minimum size of 92.90 square meter and the selling prices is not more than RM250,000.00 include equipped with basis home appliances such as air conditioning and so on.</li> </ul>  |
| 7.  | Insurance Scheme for Low-cost Flats  | <ul style="list-style-type: none"> <li>This scheme was established to resolve the inability of JMB/MC in low-cost flats to insure buildings in accordance with Section 93 of the Strata Management Act 2013 (757). Its purpose is to help JMB/MC to bear the cost of damage due to natural disasters.</li> </ul>  |

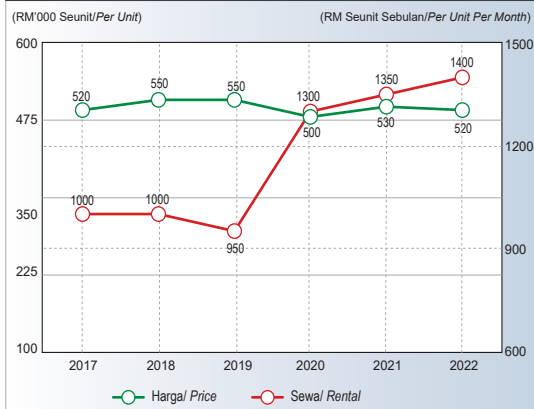
**SELANGOR 4.1**

Pergerakan Harga dan Sewa Purata Rumah Teres Satu Tingkat di Subang Jaya  
Average Price and Rental Movements of Single Storey Terraced Houses in Subang Jaya



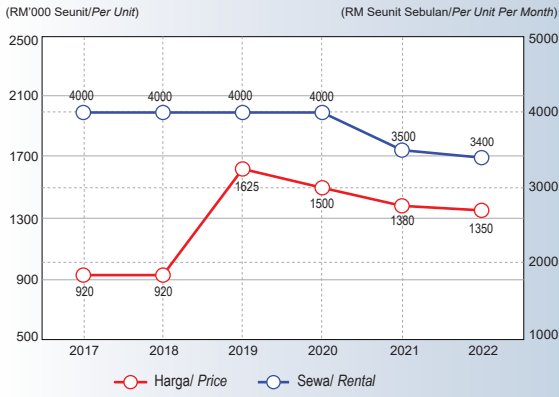
**SELANGOR 4.2**

Pergerakan Harga dan Sewa Purata Rumah Teres Dua Tingkat di Bandar Mahkota Cheras  
Average Price and Rental Movements of Double Storey Terraced Houses in Bandar Mahkota Cheras



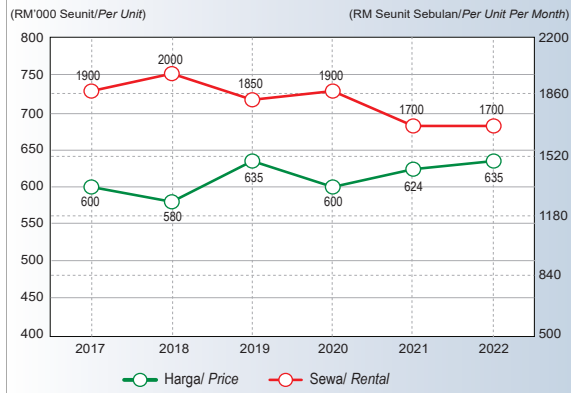
### SELANGOR 4.3

Pergerakan Harga Dan Sewa Purata Rumah Berkembar Satu Tingkat di Petaling Jaya  
Average Price and Rental Movements of Single Storey Semi-Detached Houses in Petaling Jaya



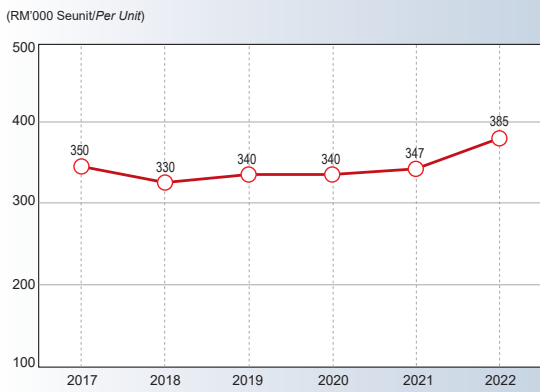
### SELANGOR 4.4

Pergerakan Harga dan Sewa Purata Rumah Teres Dua Tingkat di Shah Alam  
Average Price and Rental Movements of Double Storey Terraced Houses in Shah Alam



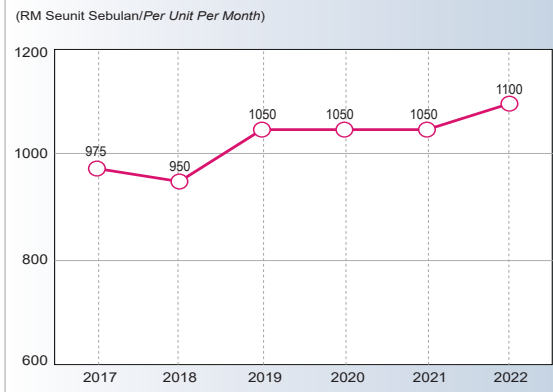
### SELANGOR 4.5

Pergerakan Harga Purata Pangsapuri Lima Tingkat di Subang Perdana  
Average Price Movements of Five Storey Apartment in Subang Perdana



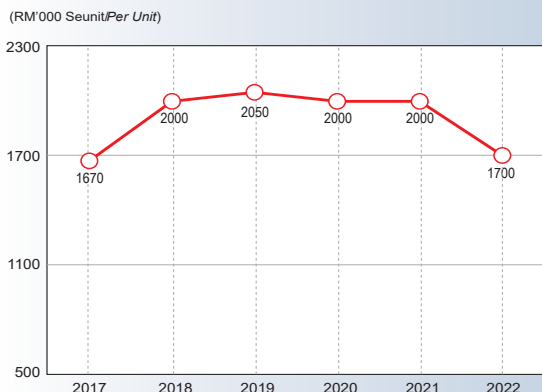
### SELANGOR 4.6

Pergerakan Sewaan Purata Pangsapuri Lima Tingkat di Shah Alam  
Average Rental Movements of Five Storey Apartment in Shah Alam



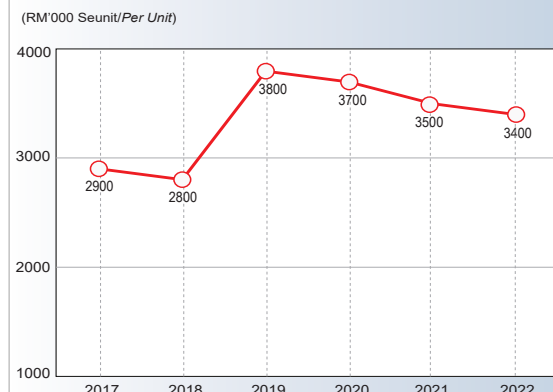
### SELANGOR 4.7

Pergerakan Harga Purata Kedai Dua Tingkat di Shah Alam  
Average Price Movements of Double Storey Shop in Shah Alam



### SELANGOR 4.8

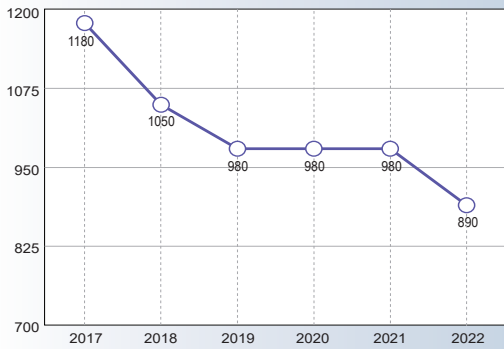
Pergerakan Harga Purata Kedai Tiga Tingkat di USJ 10  
Average Price Movements of Three Storey Shop in USJ 10



### SELANGOR 4.9

Pergerakan Harga Purata Kedai Empat Tingkat di Bandar Klang  
*Average Price Movements of Four Storey Shop in Bandar Klang*

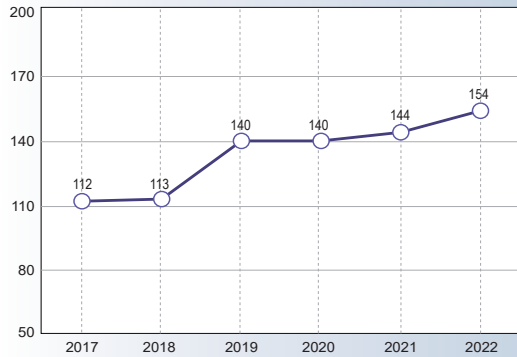
(RM'000 Seunit/Per Unit)



### SELANGOR 4.10

Pergerakan Sewaan Purata Ruang Niaga di Pusat Membeli-belah The Curve, Petaling Jaya  
*Average Rental Movements of Office Space in The Curve, Petaling Jaya*

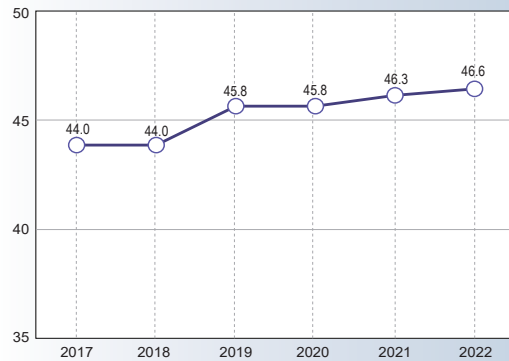
(RM Semeter Persegi/Per Square Meter)



### SELANGOR 4.10

Pergerakan Sewaan Purata Ruang Pejabat di Menara Consplant, Subang Jaya  
*Average Rental Movements of Office Space in Menara Consplant, Subang Jaya*

(RM Semeter Persegi/Per Square Meter)







# JOHOR



# JOHOR

## GAMBARAN KESELURUHAN

Pasaran harta tanah negeri menyaksikan perubahan positif pada tempoh kajian ini yang ditunjukkan melalui peningkatan aktiviti pasaran dan pembinaan. Terdapat 46,785 transaksi bernilai RM25.14 bilion dicatatkan dalam tempoh kajian, menunjukkan kenaikan dalam bilangan dan nilai masing-masing sebanyak 29.4% dan 30.8% (2021: 36,145 transaksi bernilai RM19.22 bilion). Harta kediaman kekal sebagai subsektor utama, menguasai 60.0% daripada keseluruhan aktiviti pasaran, diikuti oleh subsektor pertanian dengan 22.4% syer pasaran.

Aktiviti pasaran semua subsektor berada pada mod yang baik. Subsektor perdagangan meningkat sebanyak 57.2%, diikuti dengan subsektor industri (39.5%), pertanian (36.1%), kediaman (24.3%) dan tanah pembangunan (15.2%). Dari segi nilai transaksi, kesemua subsektor mencatatkan peningkatan.

## OVERVIEW

The state property market saw positive changes during the review period as shown by increased market and construction activity. There were 46,785 transactions worth RM25.14 billion recorded during the period under review, showing an increase in number and value of 29.4% and 30.8% respectively (2021: 36,145 transactions worth RM19.22 billion). Residential properties remained the major sub-sector, accounting for 60.0% of total market activity, followed by the agriculture sub-sector with 22.4% market share.

Market activity of all sub-sectors are in good mode. The commercial sub-sector increased by 57.2%, followed by the industrial (39.5%), agriculture (36.1%), residential (24.3%) and development land (15.2%) sub-sectors. In terms of transaction value, all sub-sectors recorded increases.

Chart 5.1

Volume of Property Transactions 2018 – 2022

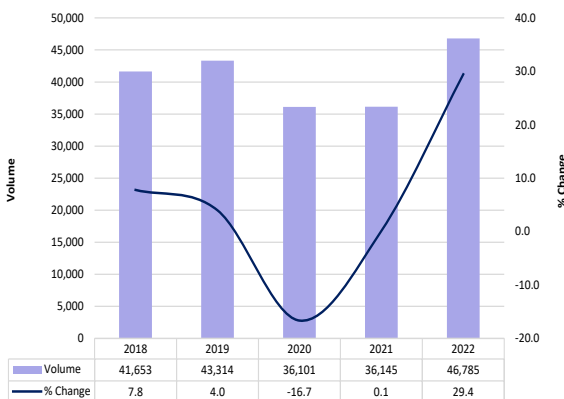


Chart 5.2

Value of Property Transactions 2018 – 2022

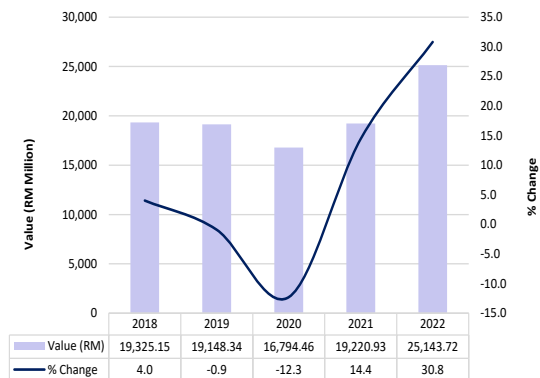


Chart 5.3

Contribution to Transaction Volume by Sub-sector 2022

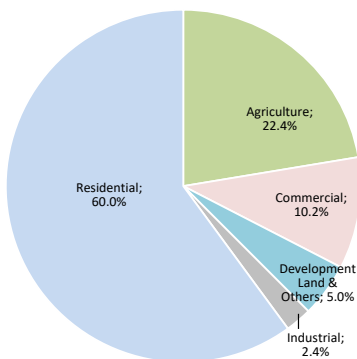
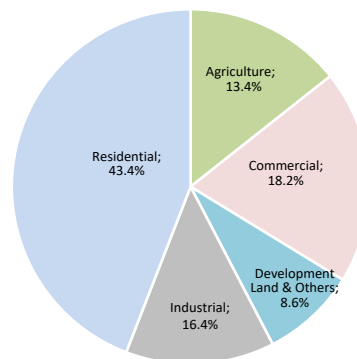


Chart 5.4

Contribution to Transaction Value by Sub-sector 2022



## PROMINENT SALES

Table 5.1

### Summary of Prominent Sales Recorded in 2022

| No.                         | Property  | Location                             | Transaction Year | Consideration Price |
|-----------------------------|---|--------------------------------------|------------------|---------------------|
| <b>SHOPPING COMPLEX</b>     |   |                                      |                  |                     |
| 1.                          | Pasaraya Econsave   | Taman Scientex, Pasir Gudang         | 2022             | RM25,000,000        |
| <b>PURPOSE BUILT OFFICE</b> |   |                                      |                  |                     |
| 2.                          | Two Storey Factory connected with Two Storey Office                                   | Pelabuhan Tanjung Pelepas            | 2022             | RM390,000,000       |
| 3.                          | Detached Factory connected with One and Half Storey Office                            | Indahpura Industrial Park            | 2022             | RM140,000,000       |
| 4.                          | Detached Factory connected with One and Half Storey Office                            | Indahpura Industrial Park            | 2022             | RM140,000,000       |
| 5.                          | Detached Factory connected with Two and Half Storey Office                            | Taman Perindustrian Tanjung Pelepas  | 2021             | RM404,800,000       |
| 6.                          | Vacant industrial land ( 202,342.80 square metres)                                    | I-Park Senai Airport City            | 2021             | RM108,900,000       |
| <b>OTHERS</b>               |   |                                      |                  |                     |
| 7.                          | Vacant commercial land (74,462 square metres)   | Jalan Tun Razak, Off Jalan Kolam Air | 2022             | RM151,320,000       |
| 8.                          | Private Hospital (KPJ) Pasir Gudang Specialist  | Taman Bukit Dahlia, Pasir Gudang     | 2022             | RM93,000,000        |
| 9.                          | Marlborough College Malaysia, Iskandar Puteri   | Jalan Marlborough, Nusa Jaya         | 2021             | RM400,000,000       |
| 10.                         | Workers Hostel  | Taman Perindustrian Maju Cemerlang   | 2021             | RM48,000,000        |
| 11.                         | Industrial Zone Land (74,462 square metres)   | Off Jalan Seelong - Senai            | 2021             | RM31,840,000        |
| <b>BULK TRANSFER</b>        |   |                                      |                  |                     |
| 12.                         | Mixed Development land that includes 616 fractions lot with various title categories. | Bandar Baru Seri Alam, Pasir Gudang  | 2022             | RM1,128,670,000     |

## HARTA TANAH KEDIAMAN

### Transaksi

Subsektor mencatatkan 28,087 transaksi bernilai RM10.91 bilion, meningkat 24.3% dalam bilangan dan 28.6% dalam nilai. Rumah teres menguasai 53.4% (14,996 unit) transaksi harta kediaman yang merangkumi 6,189 teres satu tingkat dan 8,807 teres dua tingkat.

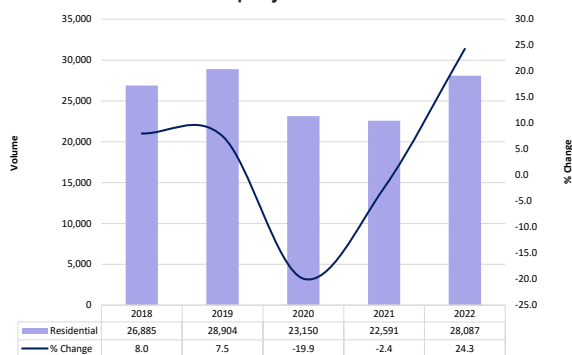
## RESIDENTIAL PROPERTY

### Transaction

The sub-sector recorded 28,087 transactions worth RM10.91 billion, increased by 24.3% in volume and 28.6% in value. Terraced houses dominated 53.4% (14,996 units) of the residential property transactions comprising 6,189 single storey terraced and 8,807 double storey terraced.

Chart 5.5

Volume of Residential Property Transactions 2018 – 2022

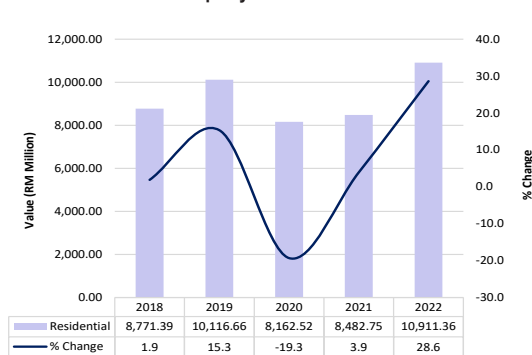


### Pelancaran Baharu

Pasaran utama merekodkan penurunan dalam pelancaran baharu. Selari dengan itu, permintaan pasaran kurang memberangsangkan berbanding tahun sebelumnya. Kebanyakan pelancaran baharu ini adalah rumah teres satu hingga dua tingkat, menyumbang 67.8% (5,234 unit) dari jumlah keseluruhan.

Chart 5.6

Value of Residential Property Transactions 2018 – 2022

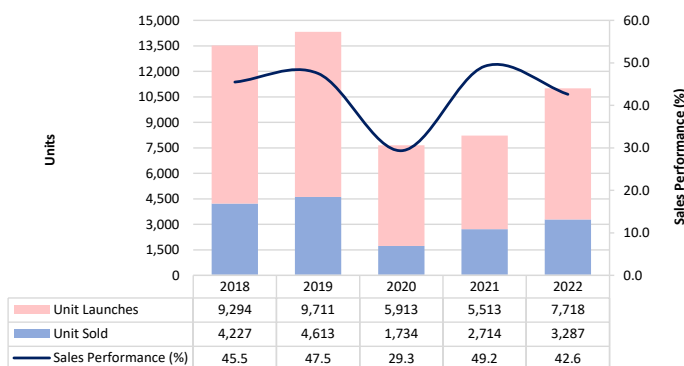


### New Launches

The primary market recorded a slowdown in new launches. Correspondingly, market response was less encouraging as compared to previous year. Most of these new launches were one to two storey terraced houses, accounting for 67.8% (5,234 unit) of total.

Chart 5.7

New Launches and Sales Performance 2018 – 2022



### Status Pasaran

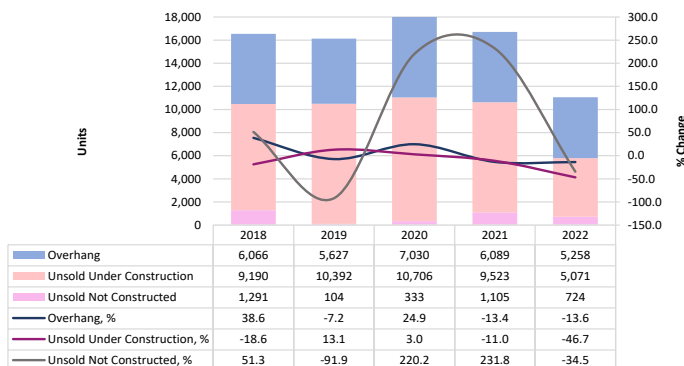
Situasi kediaman tidak terjual bertambah baik dalam tempoh kajian. Trend ini ditunjukkan di Carta 5.8.

### Market Status

The residential unsold situation improved in the review period. The trend is shown in Chart 5.8.

Chart 5.8

Residential Market Status 2018 – 2022

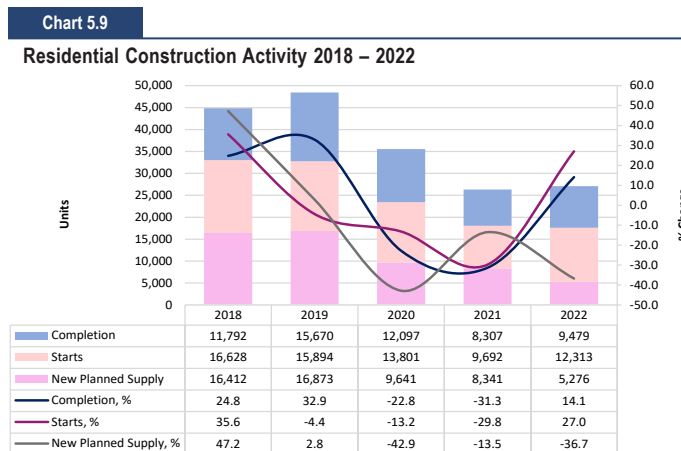


## Aktiviti Pembinaan

Seiring dengan aktiviti pasaran yang semakin baik, aktiviti pembinaan secara keseluruhannya menyaksikan peningkatan dalam tempoh kajian. Pada akhir 2022, terdapat 894,510 unit kediaman sedia ada dengan 43,531 unit lagi dalam penawaran akan datang dan 60,968 unit dalam penawaran dirancang.

## Construction Activity

*In tandem with softening market, the construction activities witnessed slowdown in the review period. As at end-2022, there were 894,510 existing residential units with another 43,531 units in the incoming supply and 60,968 units in the planned supply.*



## Harga dan Sewa

Pergerakan harga harta kediaman adalah pelbagai sepanjang tempoh kajian. Rumah teres kos rendah setingkat di Taman Puteri, Kluang mencatat kenaikan modal 15.9% kerana lokasi yang strategik serta bersebelahan dengan skim perumahan baharu dibina iaitu Taman Puterimas.

## Price and Rental

*Price movements of residential properties varied during the review period. Single storey low-cost terraced house at Taman Puteri in Kluang recorded a capital appreciation of 15.9% due to their strategic location and next to the new housing scheme namely Taman Puterimas.*

Indeks Harga Semua Rumah untuk negeri berada pada 247.2 mata di 2022<sup>P</sup>, naik 2.2% daripada 241.9 mata di 2021. Pada 2022<sup>P</sup>, Harga Purata Semua Rumah untuk negeri ialah RM385,690, meningkat daripada RM377,488 yang direkodkan pada 2021.

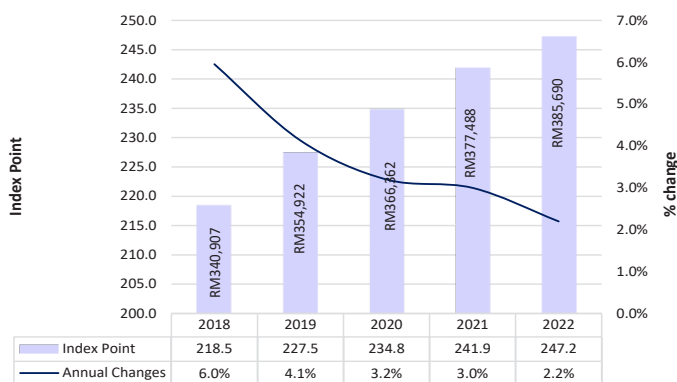
*The All House Price Index for the state stood at 247.2 points in 2022<sup>P</sup>, up by 2.2% from 241.9 points in 2021. In 2022<sup>P</sup>, the Average All House Price for the state stood at RM385,690, increased from RM377,488 recorded in 2021.*

Pasaran sewa kediaman sebahagian besarnya stabil dengan beberapa pengecualian. Sewa rumah teres dan unit bertingkat di lokasi yang baik, bersebelahan pusat bandar dan dilengkapi dengan rangkaian jalan raya yang efisien memperolehi peningkatan sewa yang ketara. Sewaan rumah kondominium di Lagenda Tasek kondominium mencatatkan kenaikan perubahan sewaan tertinggi sebanyak 20.0% kerana mempunyai lokasi dan kemudahan akses yang baik iaitu bersebelahan dengan jalan utama iaitu Jalan Tun Abdul Razak.

*The residential rental market was largely stable with a few exceptions. Rentals of terraced houses and high-rise units in good location, adjacent to city centres and served with efficient road linkages earned a significant increase in rents. Rental of condominium in Lagenda Tasek Condominium recorded the highest increase to 20.0% due to its good location and accessibility which is next to main road namely Jalan Tun Abdul Razak.*

Chart 5.10

All House Price Index 2018 – 2022



## HARTA TANAH PERDAGANGAN

### Transaksi

Subsektor perdagangan merekodkan 4,787 transaksi dengan jumlah nilai RM4.57 bilion pada 2022, meningkat 57.2% dalam bilangan dan 22.0% dalam nilai berbanding tahun sebelumnya (2021: 3,046 transaksi bernilai RM3.75 bilion).

## COMMERCIAL PROPERTY

### Transaction

The commercial sub-sector recorded 4,787 transactions with a total value RM4.57 billion in 2022, increased by 57.2% in volume and 22.0% in value as compared to previous year (2021: 3,046 transactions worth RM3.75 billion).

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Chart 5.11

Volume of Commercial Property Transactions 2018 – 2022



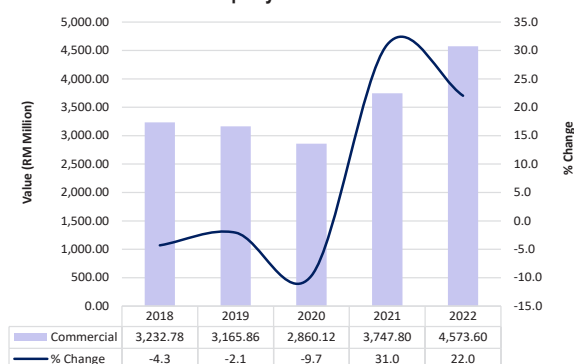
### Kedai

### Transaksi

Segmen kedai merekodkan 2,880 transaksi bernilai RM2.31 bilion pada 2022 (2021: 1,946 unit bernilai RM1.44 bilion) meliputi 60.2% daripada bilangan transaksi harta tanah perdagangan. Kedai dua hingga dua setengah tingkat mencatatkan bilangan transaksi tertinggi sebanyak 1,734 unit daripada jumlah transaksi harta kedai.

Chart 5.12

Value of Commercial Property Transactions 2018 – 2022



### Shop

### Transaction

Shop segment recorded 2,880 transactions worth RM2.31 billion in 2022 (2021: 1,946 units worth RM1.44 billion) accounting for 60.2% of the commercial property transactions volume. Two to two and a-half storey shops show the highest transactions by 1,734 units of the total shop property transactions.

### Status Pasaran

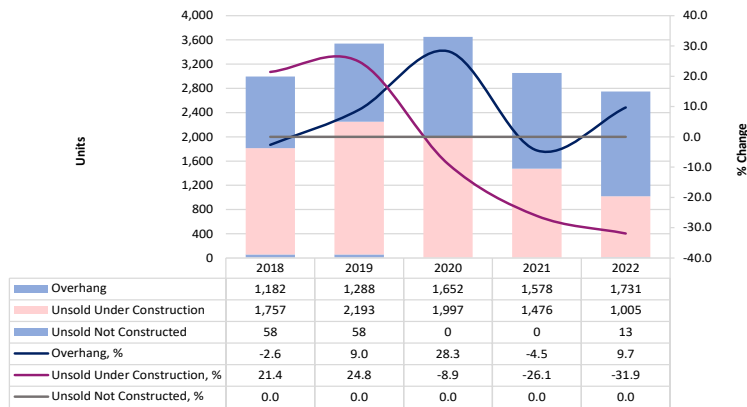
Situasi unit-unit kedai tidak terjual adalah bercampur dalam tempoh kajian. Unit dibina tidak terjual dan unit belum dibina tidak terjual mencatatkan kenaikan masing-masing sebanyak sebanyak 1,005 unit dan 13 unit. Trend ini ditunjukkan di Carta 5.13.

### Market Status

The situations of unsold shop units were mixed during the review period. Overhang and unsold not constructed units increased by 1,005 units and 13 units respectively. The trend is shown in Chart 5.13.

Chart 5.13

Shop Market Status 2018 – 2022



### Aktiviti Pembinaan

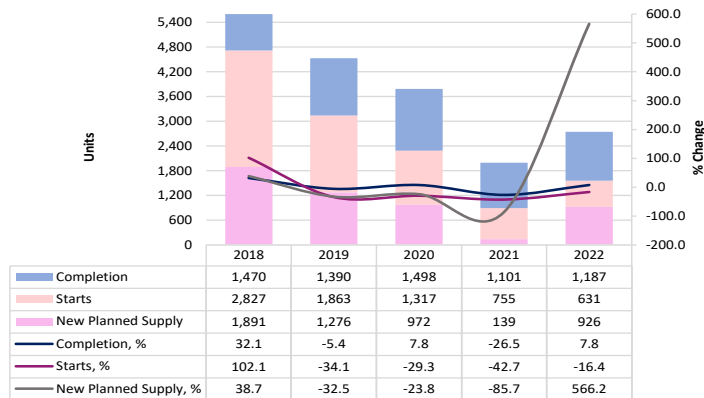
Selari dengan pasaran harta tanah yang semakin baik, aktiviti pembinaan adalah memberansangkan. Penawaran baru dirancang dan siap dibina masing-masing meningkat sebanyak 926 unit (2021: 139 unit) dan 1,187 unit (2021: 1,101 unit). Manakala mula dibina mengalami sedikit penurunan kepada 631 unit daripada 755 unit pada 2021.

### Construction Activity

*In line with the improving property market, construction activity is encouraging. New planned supply and completion an increased by 926 units (2021: 139 units) and 1,187 units (2021: 1,101 units) respectively. While start experienced a slight decrease to 631 units from 755 units in 2021.*

Chart 5.14

Shop Construction Activity 2018 – 2022



### Pangsapuri Khidmat

#### Transaksi

Segmen pangsapuri khidmat mencatatkan 850 transaksi bernilai RM390.01 juta pada 2022 (2021: 529 unit bernilai RM256.39 juta) mencakupi 17.8% daripada jumlah transaksi harta perdagangan dan 8.5% daripada jumlah nilai.

### Serviced Apartment

#### Transaction

*The serviced apartments segment recorded 850 transactions worth RM390.01 million in 2022 (2021: 529 units worth RM256.39 million) accounting for 17.8% of total commercial property transactions and 8.5% of total value.*

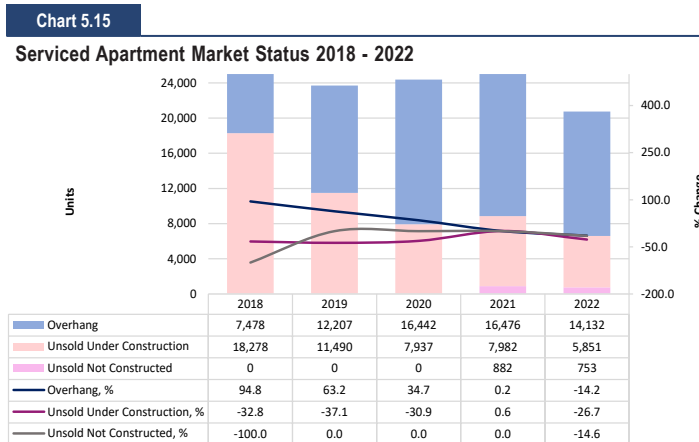


## Status Pasaran

Situasi pangsapuri khidmat siap dibina tidak terjual, dalam pembinaan belum terjual dan belum dibina belum terjual adalah memberangsangkan kerana bilangannya berkurangan berbanding 2021. Trend ditunjukkan dalam Carta 5.15.

## Market Status

The serviced apartment overhang, unsold under construction and unsold not constructed situation is encouraging as the numbers decreased compared than 2021. The trend is shown in Chart 5.15.

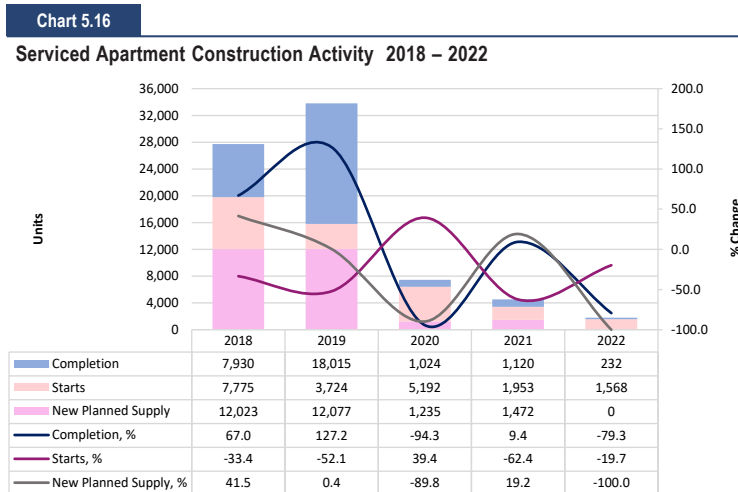


## Aktiviti Pembinaan

## Construction Activity

66 Aktiviti pembinaan menunjukkan pergerakan bercampur-campur dalam tempoh kajian. Pada akhir 2022, terdapat 86,257 unit pangsapuri khidmat sedia ada dengan 18,913 unit lagi dalam penawaran akan datang dan 53,717 unit dalam penawaran dirancang.

Construction activities showed mixed movements in the review period. As at end-2022, there were 86,257 existing serviced apartment units with another 18,913 units in the incoming supply and 53,717 units in the planned supply.



## Harga dan Sewa

Trend harga bagi pangsapuri khidmat di seluruh negeri adalah bercampur dengan penurunan marginal dilihat di Teega Residence @ Puteri Harbour, Johor Bahru sebanyak 10.3%. Pada situasi sama, pasaran sewa juga bercampur dalam tempoh kajian. D'summit Residence @ Kempas menunjukkan kenaikan sebanyak 11.1% disebabkan kemudahan akses dan terletak berhampiran dengan persimpangan lebuh raya Kempas.

## Price and Rental

The serviced apartment price trend was mixed with marginal decrease observed in Teega Residence @ Puteri Harbour, Johor Bahru by 10.3%. On similar note, the rental market also mixed in the review period. D'summit Residence @ Kempas shown an increased by 11.1% because have a good accessibility and located near to Kempas Interchange Highway.

## Kompleks Perniagaan

### Transaksi

Satu transaksi direkodkan dalam tempoh kajian iaitu Pasaraya Econsave di Taman Scientex, Pasir Gudang, Johor yang dipindahmilik pada tahun 2022.

### Penghunian dan Ketersediaan Ruang

Segmen ruang niaga menyaksikan prestasi kurang memberangsangkan apabila purata kadar penghunian berkurang kepada 68.8% pada 2022 berbanding 73.0% pada 2021. Ambilan tahunan menurun pada 90,527 m.p. selari dengan keadaan pasaran bagi segmen ini yang agak perlahan.

## Shopping Complex

### Transaction

One transaction was recorded in the Southern Region in the review period, namely the Econsave Supermarket in Taman Scientex, Pasir Gudang, Johor transferred in 2022.

### Occupancy and Space Availability

The retail segment saw a less promising performance as its average occupancy rate reduced to 68.8% in 2022 as compared to 73.0% in 2021. The annual take-up decreased at 90,527 s.m. in line with softening market conditions for this segment.

Chart 5.17

Supply and Occupancy of Shopping Complex 2018 – 2022

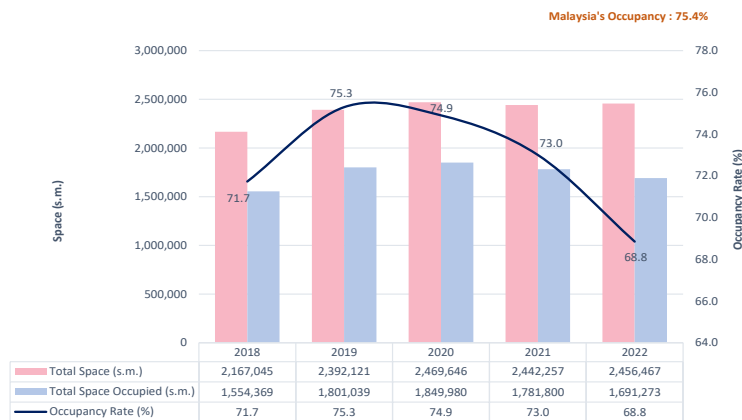


Table 5.2

Pertinent Movements in Shopping Complexes

| No. | Shopping Complex                | Space (s.m.) | Tenant Movement |
|-----|---------------------------------|--------------|-----------------|
| 1.  | Skudai Parade, Johor Bahru      | 4,805        | Move Out        |
| 2.  | Galleria Kota Raya, Johor Bahru | 1,666        | Move Out        |

### Aktiviti Pembinaan

Tiada kompleks perniagaan baharu siap dibina pada tahun ini. Pada akhir 2022, terdapat 155 kompleks beli-belah sedia ada (2,456,467 m.p.) dengan satu kompleks (3,716 m.p.) dalam penawaran akan datang.

### Sewa

Secara amnya, penyewaan ruang niaga stabil di kebanyakan kompleks beli-belah dengan pergerakan positif direkodkan di kawasan-kawasan terpilih. Walau bagaimanapun, sewaan di beberapa kompleks membeli-belah iaitu Pasaraya Komuniti @mart Kempas di Johor Bahru mengalami penurunan sewaan disebabkan kadar sewaan baharu yang di tawarkan kepada penyewa yang baru.

### Construction Activity

There are no new shopping complexes were completed this year. As at end-2022, there were 155 existing shopping complexes (2,456,467 s.m.) with one complex (3,716 s.m.) in the incoming supply.

### Rental

Generally, rentals of retail space were stable for most shopping complexes with positive movements recorded in selected areas. However, rental of some shopping complexes namely Komuniti @mart Kempas hypermarket, Johor Bahru experienced rental reduction due to new rental rate by owner for new tenant.

## Pejabat Binaan Khas

### Penghunan dan Ketersediaan Ruang

Segmen pejabat binaan khas menyaksikan prestasi menurun dengan purata kadar penghunan 70.2% berbanding 72.5% pada 2021. Subsektor ini menyaksikan ambilan tahunan 18,481 m.p., menurun daripada 28,430 m.p. yang direkodkan tahun sebelumnya. Pergerakan penyewa utama ditunjukkan di Jadual 5.3.

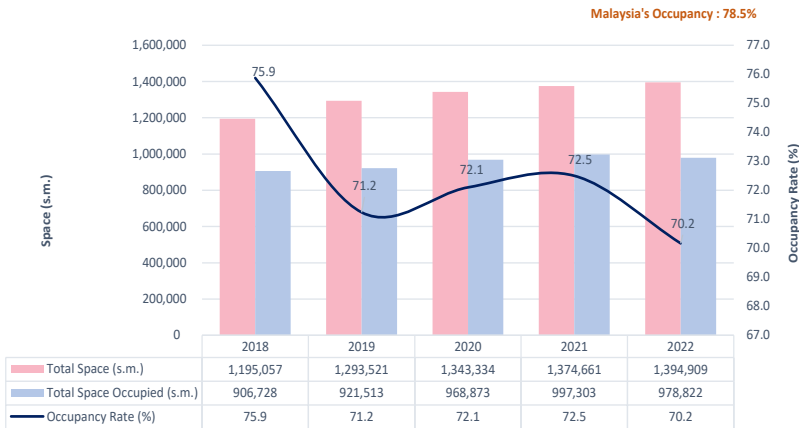
## Purpose-Built Office

### Occupancy and Space Availability

The purpose-built office segment saw a slightly declined with an average occupancy rate of 70.2% as compared to 72.5% in 2021. The sub-sector witnessed an annual take-up of 18,481 s.m., lower than 28,430 s.m. recorded previous year. Pertinent movements of tenants as shown in Table 5.3.

Chart 5.18

Supply and Occupancy of Purpose-Built Office 2018 – 2022



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Table 5.3

Pertinent Movements in Purpose-Built Office

| No. | Purpose-built Office Name      | Estimated Space (s.m.) | Tenant Movement |
|-----|--------------------------------|------------------------|-----------------|
| 1.  | Menara Jland, Johor Bahru      | 3,766                  | Move In         |
| 2.  | Medini 7 @ Medini, Johor Bahru | 2,280                  | Move In         |
| 3.  | Bangunan Allianz, Johor Bahru  | 477                    | Move Out        |

## Aktiviti Pembinaan

Tempoh kajian mencatatkan bangunan pejabat Menara 2, Mid Valley Southkey, Johor Bahru telah siap dibina yang menyuntik sejumlah 32,500 m.p. ruang pejabat ke dalam pasaran. Pada akhir 2022, terdapat 219 bangunan pejabat binaan khas sedia ada (1,394,909 m.p.) dengan enam bangunan (197,433 m.p.) dalam penawaran akan datang dan satu bangunan (33,817 m.p.) dalam penawaran yang dirancang.

## Construction Activity

The review period registered the completion of Tower 2, Mid Valley Southkey in Johor Bahru which injected a total of 32,500 s.m. office space into the market. As at end-2022, there were 219 existing purpose-built office buildings (1,394,909 s.m.) with six buildings (197,433 s.m.) in the incoming supply and one building (33,817 s.m.) in the planned supply.

## Harga dan Sewa

Tiada data transaksi bagi bangunan pejabat binaan khas pada tempoh kajian. Manakala, sewaan ruang pejabat kebanyakannya stabil di seluruh daerah. Plaza Lian Hoe di Batu Pahat mencatatkan penurunan kadar sewaan bagi tingkat 1 dan 2 masing-masing sebanyak 4.9% dan 8.2%.

## Price and Rental

There are no transaction data for purpose-built office during review period. Meanwhile, office space rental remained stable across the district. Plaza Lian Hoe in Batu Pahat recorded rental rate decreased for 1st and 2nd floors by 1.9% and 8.2% respectively.

## Riadah

Segmen riadah menyaksikan tiada transaksi telah direkodkan dalam tempoh kajian iaitu. Pada akhir tahun 2022, terdapat 486 hotel (31,791 bilik) dalam penawaran sedia ada dengan 10 hotel (2,450 bilik) dalam penawaran akan datang dan 10 hotel (3,401 bilik) dalam penawaran yang dirancang.

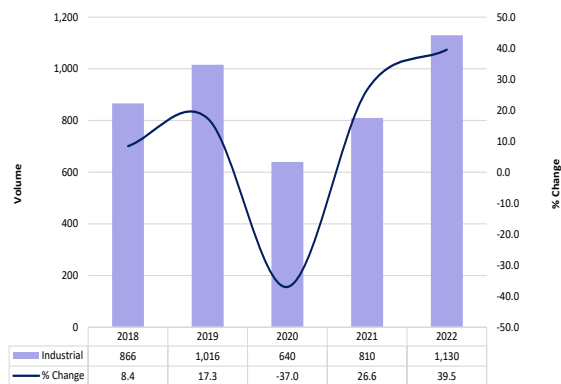
## HARTA TANAH INDUSTRI

### Transaksi

Subsektor perindustrian merekodkan 1,130 transaksi bernilai RM4.13 bilion, meningkat 39.5% dalam bilangan dan 59.5% dalam nilai (2021: 810 transaksi bernilai RM2.59 bilion).

Chart 5.19

Volume of Industrial Property Transactions 2018 – 2022

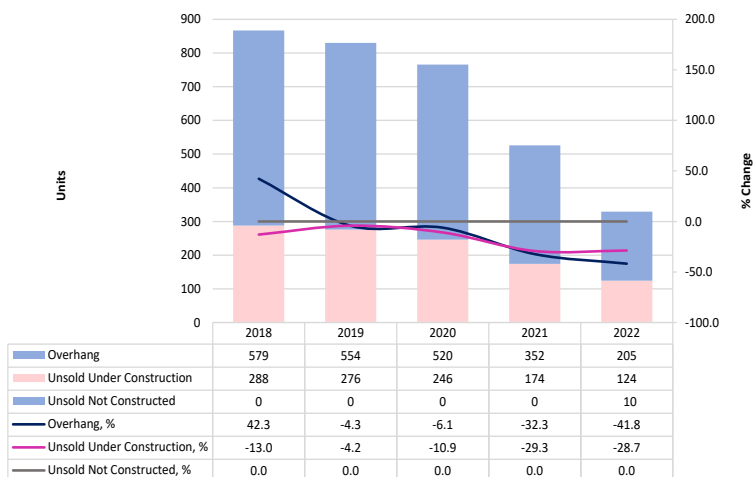


### Status Pasaran

Situasi industri siap dibina tidak terjual dan dalam pembinaan belum terjual bertambah baik berdasarkan bilangan yang berkurangan. Trend ini ditunjukkan dalam Carta 5.21.

Chart 5.21

Industrial Market Status 2018 – 2022



## Leisure

The leisure segment saw no transactions were recorded during the review period. As at end-2022, there were 486 hotels (31,791 rooms) in the existing supply with another 10 hotels (2,450 rooms) in the incoming supply and 10 hotels (3,401 rooms) in planned supply.

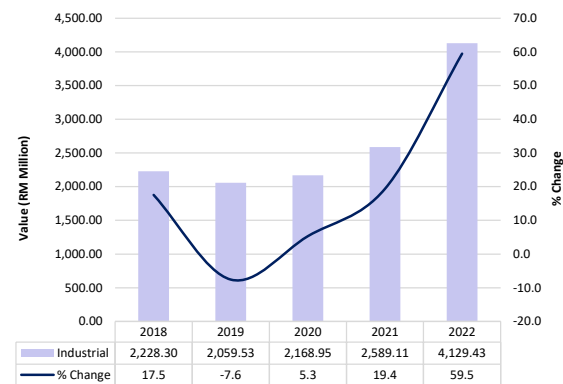
## INDUSTRIAL PROPERTY

### Transaction

The industrial sub-sector recorded 1,130 transactions worth RM4.13 bilion, increased by 39.5% in volume and 59.5% in value (2021: 810 transactions worth RM2.59 bilion).

Chart 5.20

Value of Industrial Property Transactions 2018 – 2022



### Market Status

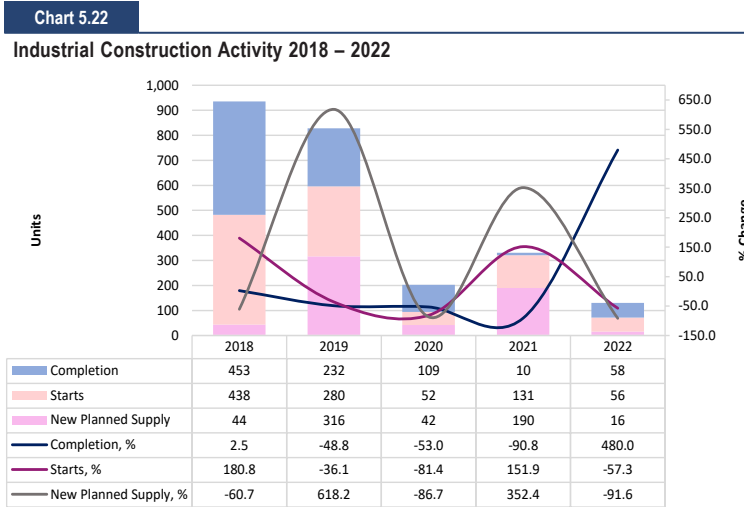
The industrial overhang and unsold situation improved as the numbers decreased. The trend is shown in Chart 5.21.

## Aktiviti Pembinaan

Aktiviti pembinaan subsektor industri agak perlahan dalam tempoh kajian. Mula dibina dan penawaran baru dirancang menurun dengan ketara kecuali siap dibina mengalami sedikit peningkatan. Pada akhir 2022, terdapat 18,718 unit industri sedia ada dengan 728 unit lagi dalam penawaran akan datang dan 818 unit dalam penawaran dirancang.

## Construction Activity

The sub-sector construction activity was slow in the review period. Start and new planned supply decreased substantially except for completion has recorded slightly increased. As at end-2022, there were 18,718 existing industrial units with another 728 units in the incoming supply and 818 units in the planned supply.



## Harga

Harga subsektor industri mencatatkan pergerakan bercampur-campur. Kilang berkembar satu setengah tingkat di Pekan Nenas Industrial Park, Pontian dan kilang teres satu setengah tingkat di Taman Universiti, Johor Bahru diantara yang mencatatkan penurunan tertinggi sebanyak 11.3% dan 7.0% masing-masing. Penurunan ini disebabkan keadaan pasaran semasa dan permintaan yang kurang dari industri skala sederhana di sekitarnya.

## Price

Price of industrial sub-sector recorded mixed movements. One and a half storey semi-detached factory in Pekan Nenas Industrial Park, Pontian and one and a half storey terrace factory in Taman University, Johor Bahru were among the highest declines of 11.3% and 7.0% respectively. The decline was due to current market conditions and less demand from surrounding medium-scale industries.

## PROSPEK 2023

Keadaan ekonomi Negeri Johor mulai rancak dalam era pemulihan meskipun ia dihipit oleh ketidaktentuan ekonomi global. Pasaran harta tanah Johor dilihat bergerak secara positif iaitu seiring dengan kerancakan ekonomi Johor yang telah menunjukkan prestasi yang memberangsangkan sepanjang tahun 2022. Keadaan ini dipacu dengan pembukaan semula sempadan negara iaitu Singapura – Johor mulai 1 April 2022, kedudukan politik yang lebih stabil, dasar atau polisi yang mesra pelabur dan penambahbaikan sistem penyampaian awam serta pembangunan modal insan.

Merujuk kepada pembentangan belanjawan Negeri Johor Tahun 2023, prestasi ekonomi yang lebih baik telah dapat dibuktikan dengan Johor telah mencatatkan pelaburan tertinggi di Malaysia iaitu sebanyak RM60.9 billion serta peningkatan jumlah eksport dan import dengan masing-masingnya 42% dan 49 % berbanding tahun 2021. Selain itu, sektor pembinaan di negeri Johor juga menunjukkan pemulihan apabila mencatatkan nilai berjumlah RM5.68 billion berbanding RM5.15 billion pada tahun 2021 bagi tempoh separuh tahun.

## 2023 OUTLOOK

*The economy of Johor began to grow rapidly in the era of recovery despite being squeezed by the uncertainty of the global economy. The Johor property market is seen to be moving positively which is in line with the vitality of the Johor economy which is showing encouraging performance throughout 2022. This situation is driven by the re-opening of the national border which is Singapore - Johor from 1 April 2022, a more stable political position, policies or investor-friendly and improving the public delivery system as well as human capital development.*

*Referring to the presentation of the Johor State budget for the year 2023, better economic performance has been proven with Johor having recorded the highest investment in Malaysia amounting to RM60.9 billion as well as an increase in exports and imports by 42% and 49% respectively compared to 2021. In addition that, the construction sector in the state of Johor also showed recovery when it recorded a value of RM5.68 billion compared to RM5.15 billion in 2021 for a period of half a year.*

## Infrastructure Development

**Table 5.4: Infrastructure Projects**

| No. | Infrastructure Project                      | Description  | Current Development Status   |
|-----|---|--|--|
| 1.  | Iskandar Malaysia Bus Rapid Transit (IMBRT) | <ul style="list-style-type: none"> <li>- A 51 kilometres network with 39 stations, 26 direct-pass systems and 42 feeder systems.</li> <li>- Three hubs; Skudai (UTM Hub), Tebrau (Desa Jaya Hub) and Iskandar Puteri (Medini Hub).</li> <li>- Developed by Iskandar Regional Development Authority (IRDA) and involves three phases.</li> </ul>  | <p>Under Construction</p> <p>Expected to be completed in 2024</p>                |
| 2.  | Rail Transit System (RTS), Johor            | <ul style="list-style-type: none"> <li>- Linking Johor Bahru, Malaysia with Woodlands, Singapore (through Strait of Johor).</li> <li>- Consists of two stop stations which are at Bukit Chagar Station, Malaysia and Woodlands North Station, Singapore</li> <li>- Length: 4 kilometres (2.3 kilometers in Malaysia and 1.7 kilometers in Singapore)</li> <li>- Concessionaire: RTS Operation Sdn. Bhd. (RTSO): (Joint Operating Company between Prasarana Malaysia Berhad and SMRT Corporation Ltd from Singapore)</li> <li>- Project cost: RM10 billion</li> <li>- The groundbreaking ceremony was held at the Bukit Chagar station construction site on 22 November 2020</li> <li>- Involves two phases of construction:                             <ul style="list-style-type: none"> <li>a) <u>Phase 1</u> <ul style="list-style-type: none"> <li>➢ The development phase is from 2021 to the end of 2024.</li> </ul> </li> <li>b) <u>Phase 2</u> <ul style="list-style-type: none"> <li>➢ Testing and installation phase from 2025 to end of 2026.</li> </ul> </li> </ul> </li> </ul> | <p>Under Construction</p> <p>The project is expected to be completed in 2026</p> |

**Table 5.4: Infrastructure Projects**

| No. | Infrastructure Project                            | Description  | Current Development Status  |
|-----|---|--|---|
| 3.  | Johor Bahru - Pontian Bridge                      | <ul style="list-style-type: none"> <li>- The project involves an alignment of 7.5 km</li> <li>- Which is from Pelabuhan Tanjung Pelepas (PTP), Daerah Johor Bahru to Tanjung Bin, Kukup</li> </ul>   | Under Construction  |
| 4.  | Electrified Double Track from Gemas – Johor Bharu | <ul style="list-style-type: none"> <li>- The project, which involved the construction of 192km of electrified double track and 11 stations</li> <li>- Estimated project costs: RM9.55 billion (including consultation costs and acquisition of rolling stocks)</li> <li>- This project involves alignment starting from Gemas connecting Bandar Segamat, Kluang, Labis, Bekok, Paloh, Renggam, Layang-Layang, Mengkibol, Kulai and Kempas Baharu.</li> </ul>   | <p>Under Construction</p> <p>Expected to be completed by October 2023</p> |
| 5.  | Maharani Energy Gateway                           | <ul style="list-style-type: none"> <li>- Location: Muar, Johor</li> <li>- Maharani Energy Gate is a catalytic development known as a deep sea port and energy hub involving the creation of three man-made islands and an LNG Terminal.</li> <li>- Located in the waters of the Straits of Malacca, approximately 1 to 3 nautical miles from Jeti Parit Unas, Jeti Parit Bakar, Jeti Parit Kedondong and Tanjung Toho, Muar. The location is strategic to build deep water energy hubs and distribution centers mainly from the Middle East.</li> <li>- Area: 3,250 acres (1,315.228 hectares)</li> <li>- Expected completion: Q4 2030</li> <li>- Key development components;               <ul style="list-style-type: none"> <li>➤ Plot A : 1,500 acres (607.0285 hectares) of land to be used for ship-to-ship transfer (STS) operations, Marine activities and Oil and Gas Storage.</li> <li>➤ Plot B : for the purpose of ship-to-ship transfer (STS) operations, marine activities and oil and gas storage with a land area of 1,500 acres (607.0285 hectares).</li> <li>➤ Plot C : for the purpose of ship repair operations (Ship Repair &amp; Facilities) with a land area of 200 acres (80.9371 hectares)</li> <li>➤ Plot D : for Heavy Industrial site purpose for Regas Station Site for gas storage and Trestle Site for gas pipeline from 'Floating LNG Terminal' with an area of 40.038 acres (16.2028 hectares)</li> </ul> </li> </ul> | <p>Under Construction</p> <p>In the early stages of seawall works</p>     |



## Mega Project

Table 5.5: Development Project

| No. | Development Project       | Description  | Current Development Status |
|-----|---------------------------|--|----------------------------|
| 1.  | Coronation Square, Johor  | <ul style="list-style-type: none"> <li>- Locations: located between Jalan Trus and Jalan Abdullah Ibrahim, Mukim Bandar Johor Bahru, Johor Bahru</li> <li>- Area: 3.88 hectare in Johor Bahru.</li> <li>- It was launched in November 2015 by the Sultan of Johor, DYMM Sultan Ibrahim Almarhum Sultan Iskandar.</li> <li>- First project under the Ibrahim International Business District (IBD) transformation plan.</li> <li>- It is jointly developed by Johor Corporation (JCorp) and the Johor State Government.</li> <li>- Comprise six towers; a hotel, residences, an office, medical suites, two serviced apartment towers and a shopping mall.</li> <li>- Project cost: RM4 billion</li> <li>- Developer: Coronade Properties Sdn Bhd</li> <li>- Phase 1               <ul style="list-style-type: none"> <li>a) Bank Rakyat Tower                   <ul style="list-style-type: none"> <li>➢ Contains 39 floors</li> <li>➢ Owned by Bank Rakyat</li> <li>➢ 90% completed and expected to be fully completed by the end of 2022</li> <li>➢ Built as a digital business hub for banking and entrepreneurial transactions</li> </ul> </li> <li>b) Medical Suites                   <ul style="list-style-type: none"> <li>➢ Contains 25 floors</li> <li>➢ Operated by KPJ Healthcare Berhad</li> <li>➢ Still under construction with 75% completed</li> <li>➢ Expected to be completed in the second quarter of 2023</li> </ul> </li> </ul> </li> </ul> | Under Construction         |
| 2.  | Muar Furniture Park (MFP) | <ul style="list-style-type: none"> <li>- The project is along Jalan Bakri, Muar to Parit Sulong, Batu Pahat an involves an alignment of 994.60 acres</li> <li>- Will become an industrial hub for furniture purposes. It is Malaysia's First Furniture Hub and was developed to bring together medium and light industries related to timber trade, furniture manufacturing and support services in one place.</li> <li>- Developer: JCORP</li> <li>- Specific locations of project               <ul style="list-style-type: none"> <li>a) Phase 1 – Medium industrial plot land available for sale and development.</li> <li>b) Phase 2 - Medium industrial plot land available for sale and development.</li> <li>c) Phase 3 - Employee Dormitory Area and industrial plot.</li> <li>d) Phase 4 - Commercial areas, cargo and light industrial plots</li> </ul> </li> </ul>   | Under Construction         |
| 3.  | Twin Tower Residence      | <ul style="list-style-type: none"> <li>- Locations: Located at Jalan Tengku Azizah, Mukim Bandar Johor Bahru &amp; Johor Bahru District which is in Bukit Cagar Area.</li> <li>- The first serviced apartment built in Bandar Penawar, Kota Tinggi with a rent and buy concept by Continental Management Sdn. Bhd.</li> <li>- Consists of 3 blocks as high as 15 floors &amp; 700 units.</li> <li>- Area: 3.73 hectares</li> <li>- Developer: Parasky Project Sdn. Bhd.</li> <li>- Development components:               <ul style="list-style-type: none"> <li>➢ 458 units of Serviced Apartment with type units:                   <ul style="list-style-type: none"> <li>• Type A (Studio) – 559 square feet</li> <li>• Type B (2 R) – 882 square feet</li> <li>• Type C (2R+1) – 1,054 square feet</li> <li>• Type D (3R) – 1,216 square feet</li> </ul> </li> <li>➢ Has been launched on September 2019</li> <li>➢ Sales prices starting from RM470,000 – RM924,000</li> <li>➢ Expected completed: December 2023</li> </ul> </li> </ul>   | Under Construction         |



**Table 5.5: Development Project**

| No.               | Development Project                                 | Description   | Current Development Status                                 |                |                  |                 |                    |                      |                 |                    |                      |    |     |     |         |     |         |       |       |     |    |     |        |         |     |         |       |       |     |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |    |      |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |     |     |     |        |     |         |       |       |    |     |      |           |         |     |         |   |       |         |                   |  |  |  |              |  |  |  |  |  |
|-------------------|---|---|--|----------------|------------------|-----------------|--------------------|----------------------|-----------------|--------------------|----------------------|----|-----|-----|---------|-----|---------|-------|-------|-----|----|-----|--------|---------|-----|---------|-------|-------|-----|----|-----|-----|--------|-----|---------|-------|-------|----|----|-----|--------|--------|-----|---------|-------|-------|----|----|-----|-----|---------|-----|---------|-------|-------|----|----|-----|-----|--------|-----|---------|-------|-------|----|----|-----|--------|--------|-----|---------|-------|-------|----|----|----|------|--------|-----|---------|-------|-------|----|----|-----|-----|---------|-----|---------|-------|-------|----|-----|-----|-----|--------|-----|---------|-------|-------|----|-----|------|-----------|---------|-----|---------|---|-------|---------|-------------------|--|--|--|--------------|--|--|--|--|--|
| 4.                | Pasir Gudang Hospital                               | <ul style="list-style-type: none"> <li>- The construction of Pasir Gudang Hospital is one of the Johor state health facility projects under the 11th Malaysia Plan and 2019 budget.</li> <li>- Location: Located 17 km from Bandar Johor Bahru</li> <li>- It can benefit 500,000 residents and overcome patient congestion at Sultanah Aminah Hospital and others Hospital.</li> <li>- The project was developed on a 50 acres site in Bandar Seri Alam, Masai with a height of 6 storeys.</li> <li>- Project cost: RM375 million</li> <li>- The project started in Q1 2021 and is expected to be completed in 2024.</li> </ul>   | Under construction   |                |                  |                 |                    |                      |                 |                    |                      |    |     |     |         |     |         |       |       |     |    |     |        |         |     |         |       |       |     |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |    |      |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |     |     |     |        |     |         |       |       |    |     |      |           |         |     |         |   |       |         |                   |  |  |  |              |  |  |  |  |  |
| 5.                | Segamat Plantation Training Institute               | <ul style="list-style-type: none"> <li>- Location: It is on 5 lots, namely PTD 19183, PTD 19184, PTD 19185 and PTD 19186, Mukim Buloh Kasap, Segamat and located by the main road of Jalan Batu Anam - Buloh Kasap.</li> <li>- The Federal Government through the Ministry of Human Resources has agreed to establish the Segamat Plantation Training Institute.</li> <li>- One of the purposes of establishing this institute is to increase the productivity and wage rates of the plantation sector.</li> <li>- Estimated project cost: RM21.35 million</li> <li>- Expected completion: In year 2023.</li> <li>- The project includes 36 units of shophouses under construction specially designed for the use of the Segamat Plantation Training Institute.</li> </ul>  | Under construction   |                |                  |                 |                    |                      |                 |                    |                      |    |     |     |         |     |         |       |       |     |    |     |        |         |     |         |       |       |     |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |    |      |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |     |     |     |        |     |         |       |       |    |     |      |           |         |     |         |   |       |         |                   |  |  |  |              |  |  |  |  |  |
| 6.                | Sime Darby Industrial Park, Bandar Universiti Pagoh | <ul style="list-style-type: none"> <li>- Known as Sime Darby Industrial Park, Pagoh University Town involves the sale of medium industrial plots.</li> <li>- It is part of the Pagoh University City development which is located at the strategic location of Jalan Muar - Pagoh and near the Pagoh Toll Plaza.</li> <li>- Development components: <ul style="list-style-type: none"> <li>➢ 142 units of industrial plots with real conditions as medium industrial</li> <li>➢ Phase 1: <ul style="list-style-type: none"> <li>• 42 industrial plots with size range between 4,318.78 square metres to 6,712.54 square metres</li> <li>• Sales prices starting from RM26 to RM30 square feet</li> </ul> </li> </ul> </li> <li>- Expected completed: Q3 2023</li> <li>- Developer: Sime Darby Property</li> </ul>   | Under construction<br><br>(Earthwork has been carried out) |                |                  |                 |                    |                      |                 |                    |                      |    |     |     |         |     |         |       |       |     |    |     |        |         |     |         |       |       |     |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |    |      |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |     |     |     |        |     |         |       |       |    |     |      |           |         |     |         |   |       |         |                   |  |  |  |              |  |  |  |  |  |
| 7.                | Taman Pulau Mutiara 2                               | <ul style="list-style-type: none"> <li>- Locations: Mukim Pulau, Johor Bahru, next Taman Pulau Mutiara (New Township) which is approximately 2 km from Johor Bahru Road – Pontian and 28 kilometers from Johor Bahru City Centre.</li> <li>- Area: 136 hectares</li> <li>- Developer: Amber Land Berhad</li> <li>- Tumpuan kepada harta tanah bertanah dengan harga mampu milik</li> <li>- Project has been launched on October 2019</li> <li>- Total units launched: 4,500 unit</li> <li>- Project status: 40% completed</li> <li>- Expected completed: Year 2024</li> <li>- Components of development:</li> </ul> <table border="1"> <thead> <tr> <th>No.</th> <th>Phase</th> <th>Type of Building</th> <th>Date of Launch</th> <th>Total Launched</th> <th>Price (RM) From</th> <th>Land Area (sq.)</th> <th>Built-up Area(sq.)</th> <th>Status Construction'</th> </tr> </thead> <tbody> <tr> <td>1.</td> <td>A1A</td> <td>2/T</td> <td>12/2019</td> <td>392</td> <td>379,780</td> <td>1,170</td> <td>1,670</td> <td>CCC</td> </tr> <tr> <td>2.</td> <td>A2A</td> <td>2 ½ /T</td> <td>10/2019</td> <td>199</td> <td>433,500</td> <td>1,170</td> <td>1,998</td> <td>CCC</td> </tr> <tr> <td>3.</td> <td>A1B</td> <td>2/T</td> <td>6/2020</td> <td>163</td> <td>395,675</td> <td>1,170</td> <td>1,670</td> <td>UC</td> </tr> <tr> <td>4.</td> <td>A2B</td> <td>2 ½ /T</td> <td>6/2020</td> <td>201</td> <td>433,500</td> <td>1,170</td> <td>1,998</td> <td>UC</td> </tr> <tr> <td>5.</td> <td>A1C</td> <td>2/T</td> <td>10/2020</td> <td>184</td> <td>395,675</td> <td>1,170</td> <td>1,670</td> <td>UC</td> </tr> <tr> <td>6.</td> <td>A1D</td> <td>2/T</td> <td>2/2021</td> <td>184</td> <td>395,675</td> <td>1,170</td> <td>1,670</td> <td>UC</td> </tr> <tr> <td>7.</td> <td>A2C</td> <td>2 ½ /T</td> <td>8/2021</td> <td>177</td> <td>433,500</td> <td>1,170</td> <td>1,998</td> <td>UC</td> </tr> <tr> <td>8.</td> <td>A5</td> <td>2/SO</td> <td>7/2021</td> <td>104</td> <td>568,480</td> <td>1,540</td> <td>3,080</td> <td>UC</td> </tr> <tr> <td>9.</td> <td>A6A</td> <td>2/T</td> <td>11/2021</td> <td>214</td> <td>395,675</td> <td>1,170</td> <td>1,670</td> <td>UC</td> </tr> <tr> <td>10.</td> <td>A6B</td> <td>2/T</td> <td>3/2022</td> <td>236</td> <td>395,675</td> <td>1,170</td> <td>1,670</td> <td>UC</td> </tr> <tr> <td>11.</td> <td>RMBC</td> <td>Apartment</td> <td>Not yet</td> <td>609</td> <td>150,000</td> <td>-</td> <td>1,000</td> <td>Not yet</td> </tr> <tr> <td colspan="4"><b>Total Unit</b></td> <td><b>2,663</b></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>Note:<br/>CCC - Certificate of completion and compliance<br/>UC – Under Construction</p> | No.  | Phase          | Type of Building | Date of Launch  | Total Launched     | Price (RM) From      | Land Area (sq.) | Built-up Area(sq.) | Status Construction' | 1. | A1A | 2/T | 12/2019 | 392 | 379,780 | 1,170 | 1,670 | CCC | 2. | A2A | 2 ½ /T | 10/2019 | 199 | 433,500 | 1,170 | 1,998 | CCC | 3. | A1B | 2/T | 6/2020 | 163 | 395,675 | 1,170 | 1,670 | UC | 4. | A2B | 2 ½ /T | 6/2020 | 201 | 433,500 | 1,170 | 1,998 | UC | 5. | A1C | 2/T | 10/2020 | 184 | 395,675 | 1,170 | 1,670 | UC | 6. | A1D | 2/T | 2/2021 | 184 | 395,675 | 1,170 | 1,670 | UC | 7. | A2C | 2 ½ /T | 8/2021 | 177 | 433,500 | 1,170 | 1,998 | UC | 8. | A5 | 2/SO | 7/2021 | 104 | 568,480 | 1,540 | 3,080 | UC | 9. | A6A | 2/T | 11/2021 | 214 | 395,675 | 1,170 | 1,670 | UC | 10. | A6B | 2/T | 3/2022 | 236 | 395,675 | 1,170 | 1,670 | UC | 11. | RMBC | Apartment | Not yet | 609 | 150,000 | - | 1,000 | Not yet | <b>Total Unit</b> |  |  |  | <b>2,663</b> |  |  |  |  |  |
| No.               | Phase   | Type of Building  | Date of Launch   | Total Launched | Price (RM) From  | Land Area (sq.) | Built-up Area(sq.) | Status Construction' |                 |                    |                      |    |     |     |         |     |         |       |       |     |    |     |        |         |     |         |       |       |     |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |    |      |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |     |     |     |        |     |         |       |       |    |     |      |           |         |     |         |   |       |         |                   |  |  |  |              |  |  |  |  |  |
| 1.                | A1A   | 2/T   | 12/2019  | 392            | 379,780          | 1,170           | 1,670              | CCC                  |                 |                    |                      |    |     |     |         |     |         |       |       |     |    |     |        |         |     |         |       |       |     |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |    |      |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |     |     |     |        |     |         |       |       |    |     |      |           |         |     |         |   |       |         |                   |  |  |  |              |  |  |  |  |  |
| 2.                | A2A   | 2 ½ /T  | 10/2019  | 199            | 433,500          | 1,170           | 1,998              | CCC                  |                 |                    |                      |    |     |     |         |     |         |       |       |     |    |     |        |         |     |         |       |       |     |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |    |      |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |     |     |     |        |     |         |       |       |    |     |      |           |         |     |         |   |       |         |                   |  |  |  |              |  |  |  |  |  |
| 3.                | A1B   | 2/T   | 6/2020   | 163            | 395,675          | 1,170           | 1,670              | UC                   |                 |                    |                      |    |     |     |         |     |         |       |       |     |    |     |        |         |     |         |       |       |     |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |    |      |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |     |     |     |        |     |         |       |       |    |     |      |           |         |     |         |   |       |         |                   |  |  |  |              |  |  |  |  |  |
| 4.                | A2B   | 2 ½ /T  | 6/2020   | 201            | 433,500          | 1,170           | 1,998              | UC                   |                 |                    |                      |    |     |     |         |     |         |       |       |     |    |     |        |         |     |         |       |       |     |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |    |      |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |     |     |     |        |     |         |       |       |    |     |      |           |         |     |         |   |       |         |                   |  |  |  |              |  |  |  |  |  |
| 5.                | A1C   | 2/T   | 10/2020  | 184            | 395,675          | 1,170           | 1,670              | UC                   |                 |                    |                      |    |     |     |         |     |         |       |       |     |    |     |        |         |     |         |       |       |     |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |    |      |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |     |     |     |        |     |         |       |       |    |     |      |           |         |     |         |   |       |         |                   |  |  |  |              |  |  |  |  |  |
| 6.                | A1D   | 2/T   | 2/2021   | 184            | 395,675          | 1,170           | 1,670              | UC                   |                 |                    |                      |    |     |     |         |     |         |       |       |     |    |     |        |         |     |         |       |       |     |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |    |      |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |     |     |     |        |     |         |       |       |    |     |      |           |         |     |         |   |       |         |                   |  |  |  |              |  |  |  |  |  |
| 7.                | A2C   | 2 ½ /T  | 8/2021   | 177            | 433,500          | 1,170           | 1,998              | UC                   |                 |                    |                      |    |     |     |         |     |         |       |       |     |    |     |        |         |     |         |       |       |     |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |    |      |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |     |     |     |        |     |         |       |       |    |     |      |           |         |     |         |   |       |         |                   |  |  |  |              |  |  |  |  |  |
| 8.                | A5  | 2/SO  | 7/2021   | 104            | 568,480          | 1,540           | 3,080              | UC                   |                 |                    |                      |    |     |     |         |     |         |       |       |     |    |     |        |         |     |         |       |       |     |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |    |      |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |     |     |     |        |     |         |       |       |    |     |      |           |         |     |         |   |       |         |                   |  |  |  |              |  |  |  |  |  |
| 9.                | A6A   | 2/T   | 11/2021  | 214            | 395,675          | 1,170           | 1,670              | UC                   |                 |                    |                      |    |     |     |         |     |         |       |       |     |    |     |        |         |     |         |       |       |     |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |    |      |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |     |     |     |        |     |         |       |       |    |     |      |           |         |     |         |   |       |         |                   |  |  |  |              |  |  |  |  |  |
| 10.               | A6B   | 2/T   | 3/2022   | 236            | 395,675          | 1,170           | 1,670              | UC                   |                 |                    |                      |    |     |     |         |     |         |       |       |     |    |     |        |         |     |         |       |       |     |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |    |      |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |     |     |     |        |     |         |       |       |    |     |      |           |         |     |         |   |       |         |                   |  |  |  |              |  |  |  |  |  |
| 11.               | RMBC  | Apartment   | Not yet  | 609            | 150,000          | -               | 1,000              | Not yet              |                 |                    |                      |    |     |     |         |     |         |       |       |     |    |     |        |         |     |         |       |       |     |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |    |      |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |     |     |     |        |     |         |       |       |    |     |      |           |         |     |         |   |       |         |                   |  |  |  |              |  |  |  |  |  |
| <b>Total Unit</b> |   |   |  | <b>2,663</b>   |                  |                 |                    |                      |                 |                    |                      |    |     |     |         |     |         |       |       |     |    |     |        |         |     |         |       |       |     |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |    |     |     |        |     |         |       |       |    |    |     |        |        |     |         |       |       |    |    |    |      |        |     |         |       |       |    |    |     |     |         |     |         |       |       |    |     |     |     |        |     |         |       |       |    |     |      |           |         |     |         |   |       |         |                   |  |  |  |              |  |  |  |  |  |

**Table 5.5: Development Project**

| No. | Development Project   | Description  | Current Development Status |            |                |   |  |  |   |   |                                    |   |   |                     |   |  |                                    |   |   |                     |   |                                    |                     |  |
|-----|---|--|----------------------------|------------|----------------|---|--|--|---|---|------------------------------------|---|---|---------------------|---|--|------------------------------------|---|---|---------------------|---|------------------------------------|---------------------|--|
| 8.  | New Park Kluang   | <ul style="list-style-type: none"> <li>- As a one of big development in Kluang</li> <li>- Locations: Located at KM 4.5, Kluang Road - Air Hitam</li> <li>- Developer: Maju Padu Development Sdn. Bhd.</li> <li>- Project area is 247.56 acres (100.184 hectares) for two phase of development:               <ul style="list-style-type: none"> <li>Phase 1: 90.94 acres (36.802 hectares)</li> <li>Phase 2: 156.62 acres (63.382 hectares)</li> </ul> </li> </ul> <p>a) Phase 1</p> <ul style="list-style-type: none"> <li>➤ Government and commercial building:</li> </ul> <table border="1" data-bbox="523 495 1233 975"> <thead> <tr> <th data-bbox="523 495 590 524">Nos</th> <th data-bbox="590 495 928 524">Components</th> <th data-bbox="928 495 1233 524">Project status</th> </tr> </thead> <tbody> <tr> <td data-bbox="523 524 590 617">1</td> <td data-bbox="590 524 928 617">                     LHDN building<br/>                     - 9 levels with green technology concepts<br/>                     - Land area: 20,230 sqm<br/>                     - Built up: 5,311 sqm                 </td> <td data-bbox="928 524 1233 617">Completed and has been operated since May 2019</td> </tr> <tr> <td data-bbox="523 617 590 754">2</td> <td data-bbox="590 617 928 754">                     Kluang City Council building<br/>                     - 9 levels<br/>                     - Land area: 20,230 sqm<br/>                     - Built up (main building): 15,102.37 sqm<br/>                     - Built up (exterior building): 361.86 sqm<br/>                     - Approved plans: 26 September 2019                 </td> <td data-bbox="928 617 1233 754">Under construction (35% completed)</td> </tr> <tr> <td data-bbox="523 754 590 803">3</td> <td data-bbox="590 754 928 803">                     Kluang Land &amp; District Office Building<br/>                     - Approved plans: 26 September 2019                 </td> <td data-bbox="928 754 1233 803">Not constructed yet</td> </tr> <tr> <td data-bbox="523 803 590 876">4</td> <td data-bbox="590 803 928 876">                     LOTUS Hypermarket<br/>                     - Land area: 20,230 sqm<br/>                     - Built up: 7,053.59 sqm                 </td> <td data-bbox="928 803 1233 876">Under construction (80% completed)</td> </tr> <tr> <td data-bbox="523 876 590 948">5</td> <td data-bbox="590 876 928 948">                     Two storey of shop/ office building<br/>                     - 70 units (Phase A)<br/>                     - 114 units Phase B)                 </td> <td data-bbox="928 876 1233 948">Not constructed yet</td> </tr> <tr> <td data-bbox="523 948 590 975">6</td> <td data-bbox="590 948 928 975">Resort Hotel &amp; Serviced Apartments</td> <td data-bbox="928 948 1233 975">Not constructed yet</td> </tr> </tbody> </table> <p>b) Phase 2:</p> <ul style="list-style-type: none"> <li>- Still in planning stages</li> </ul> | Nos                        | Components | Project status | 1 | LHDN building<br>- 9 levels with green technology concepts<br>- Land area: 20,230 sqm<br>- Built up: 5,311 sqm | Completed and has been operated since May 2019 | 2 | Kluang City Council building<br>- 9 levels<br>- Land area: 20,230 sqm<br>- Built up (main building): 15,102.37 sqm<br>- Built up (exterior building): 361.86 sqm<br>- Approved plans: 26 September 2019 | Under construction (35% completed) | 3 | Kluang Land & District Office Building<br>- Approved plans: 26 September 2019 | Not constructed yet | 4 | LOTUS Hypermarket<br>- Land area: 20,230 sqm<br>- Built up: 7,053.59 sqm | Under construction (80% completed) | 5 | Two storey of shop/ office building<br>- 70 units (Phase A)<br>- 114 units Phase B) | Not constructed yet | 6 | Resort Hotel & Serviced Apartments | Not constructed yet |  |
| Nos | Components  | Project status   |                            |            |                |   |  |  |   |   |                                    |   |   |                     |   |  |                                    |   |   |                     |   |                                    |                     |  |
| 1   | LHDN building<br>- 9 levels with green technology concepts<br>- Land area: 20,230 sqm<br>- Built up: 5,311 sqm  | Completed and has been operated since May 2019   |                            |            |                |   |  |  |   |   |                                    |   |   |                     |   |  |                                    |   |   |                     |   |                                    |                     |  |
| 2   | Kluang City Council building<br>- 9 levels<br>- Land area: 20,230 sqm<br>- Built up (main building): 15,102.37 sqm<br>- Built up (exterior building): 361.86 sqm<br>- Approved plans: 26 September 2019 | Under construction (35% completed)   |                            |            |                |   |  |  |   |   |                                    |   |   |                     |   |  |                                    |   |   |                     |   |                                    |                     |  |
| 3   | Kluang Land & District Office Building<br>- Approved plans: 26 September 2019   | Not constructed yet  |                            |            |                |   |  |  |   |   |                                    |   |   |                     |   |  |                                    |   |   |                     |   |                                    |                     |  |
| 4   | LOTUS Hypermarket<br>- Land area: 20,230 sqm<br>- Built up: 7,053.59 sqm  | Under construction (80% completed)   |                            |            |                |   |  |  |   |   |                                    |   |   |                     |   |  |                                    |   |   |                     |   |                                    |                     |  |
| 5   | Two storey of shop/ office building<br>- 70 units (Phase A)<br>- 114 units Phase B)   | Not constructed yet  |                            |            |                |   |  |  |   |   |                                    |   |   |                     |   |  |                                    |   |   |                     |   |                                    |                     |  |
| 6   | Resort Hotel & Serviced Apartments  | Not constructed yet  |                            |            |                |   |  |  |   |   |                                    |   |   |                     |   |  |                                    |   |   |                     |   |                                    |                     |  |

## State Government Policy and initiative

**Table 5.6: State Government Policy**

The State Government approved several policies and incentives to investors who are interested in investing in Johor. Among the policies and incentives are as follows: -

| No                                     | Policy/ incentives  | Details   |                       |                                   |                          |                              |                      |                               |                              |                       |                               |                              |                       |                                |           |          |            |               |             |       |                 |                    |                                  |                              |   |                   |      |                       |                        |                    |  |                                      |                                  |     |     |                     |       |                    |                                 |                                      |     |       |      |                        |                       |           |                                 |                              |  |     |       |                         |     |           |                                     |   |     |                          |     |
|--|---|---|-----------------------|-----------------------------------|--------------------------|------------------------------|----------------------|-------------------------------|------------------------------|-----------------------|-------------------------------|------------------------------|-----------------------|--------------------------------|-----------|----------|------------|---------------|-------------|-------|-----------------|--------------------|----------------------------------|------------------------------|---|-------------------|------|-----------------------|------------------------|--------------------|--|--------------------------------------|----------------------------------|-----|-----|---------------------|-------|--------------------|---------------------------------|--------------------------------------|-----|-------|------|------------------------|-----------------------|-----------|---------------------------------|------------------------------|--|-----|-------|-------------------------|-----|-----------|-------------------------------------|---|-----|--------------------------|-----|
| 1.                                     | Special Program for Setting the Sale Price Limit and Acquisition of Property for Foreign Citizens | <p>- It has been implemented under the 2020 Budget by the Federal Government and Johor still remain the minimum price that has been decided for this year as follows;</p> <table border="1"> <thead> <tr> <th rowspan="2">State</th> <th colspan="2">Foreign Ownership Price Threshold</th> <th rowspan="2">Property Type</th> <th rowspan="2">Remarks</th> </tr> <tr> <th>Year 2020</th> <th>Year 2021</th> </tr> </thead> <tbody> <tr> <td>Johor</td> <td>RM600,000</td> <td>RM600,000</td> <td>Stratified/ high-rise</td> <td>-</td> </tr> </tbody> </table>   | State                 | Foreign Ownership Price Threshold |                          | Property Type                | Remarks              | Year 2020                     | Year 2021                    | Johor                 | RM600,000                     | RM600,000                    | Stratified/ high-rise | -                              |           |          |            |               |             |       |                 |                    |                                  |                              |   |                   |      |                       |                        |                    |  |                                      |                                  |     |     |                     |       |                    |                                 |                                      |     |       |      |                        |                       |           |                                 |                              |  |     |       |                         |     |           |                                     |   |     |                          |     |
| State                                  | Foreign Ownership Price Threshold   |   |                       | Property Type                     | Remarks                  |                              |                      |                               |                              |                       |                               |                              |                       |                                |           |          |            |               |             |       |                 |                    |                                  |                              |   |                   |      |                       |                        |                    |  |                                      |                                  |     |     |                     |       |                    |                                 |                                      |     |       |      |                        |                       |           |                                 |                              |  |     |       |                         |     |           |                                     |   |     |                          |     |
|  | Year 2020   | Year 2021   |                       |                                   |                          |                              |                      |                               |                              |                       |                               |                              |                       |                                |           |          |            |               |             |       |                 |                    |                                  |                              |   |                   |      |                       |                        |                    |  |                                      |                                  |     |     |                     |       |                    |                                 |                                      |     |       |      |                        |                       |           |                                 |                              |  |     |       |                         |     |           |                                     |   |     |                          |     |
| Johor                                  | RM600,000   | RM600,000   | Stratified/ high-rise | -                                 |                          |                              |                      |                               |                              |                       |                               |                              |                       |                                |           |          |            |               |             |       |                 |                    |                                  |                              |   |                   |      |                       |                        |                    |  |                                      |                                  |     |     |                     |       |                    |                                 |                                      |     |       |      |                        |                       |           |                                 |                              |  |     |       |                         |     |           |                                     |   |     |                          |     |
| 2.                                     | Johor Nation's Dream Home Policy  | <p>- There are four locations project will be developed as follows were given to applicants who do not own property with the household income conditions as shown at Table I below:</p> <table border="1"> <thead> <tr> <th>House Type</th> <th>Price</th> <th>Household Income</th> </tr> </thead> <tbody> <tr> <td>Sultan Ibrahim's Dream House</td> <td>RM80,000 – RM100,000</td> <td>Not more then RM5,000 a month</td> </tr> <tr> <td>Johor Dream House (Type - A)</td> <td>RM100,000 – RM150,000</td> <td>Not more then RM8,000 a month</td> </tr> <tr> <td>Johor Dream House (Type - B)</td> <td>RM150,000 and above</td> <td>Open and subject to applicants</td> </tr> </tbody> </table><br><table border="1"> <thead> <tr> <th>Locations</th> <th>Category</th> <th>House Type</th> <th>Total Of Unit</th> <th>Area (Acre)</th> <th>Price</th> <th>Built-Up (Sqft)</th> <th>Development Status</th> </tr> </thead> <tbody> <tr> <td>i) Bandar Dato' Onn, Johor Bahru</td> <td>Sultan Ibrahim's Dream House</td> <td>Teres House<br/>SemiDetach House<br/>Detach House</td> <td>190<br/>130<br/>200</td> <td>52.7</td> <td>RM80,000 to RM100,000</td> <td>(kp)<br/>1,000<br/>1,300</td> <td>Under Construction</td> </tr> <tr> <td>ii) Bandar Baharu Majidee, Johor Bahru</td> <td>Rumah Impian Bangsa Johor (Type - A)</td> <td>2 block of strata unn (12 floor)</td> <td>320</td> <td>6.8</td> <td>Less then RM150,000</td> <td>1,030</td> <td>Under Construction</td> </tr> <tr> <td>iii) Bukit Saujana, Johor Bahru</td> <td>Rumah Impian Bangsa Johor (Type - B)</td> <td>TBC</td> <td>1,000</td> <td>7.99</td> <td>RM297,000 to RM429,000</td> <td>850<br/>1,000<br/>1,200</td> <td>Not Built</td> </tr> <tr> <td rowspan="2">iv) Kampung Sni Pantai, Mersing</td> <td>Sultan Ibrahim's Dream House</td> <td>Rumah teres satu tingkat dengan tiga bilik tidur dan dua bilik mandi</td> <td>TBC</td> <td rowspan="2">140.8</td> <td>Starting from RM 70,000</td> <td>TBC</td> <td rowspan="2">Not Built</td> </tr> <tr> <td>Rumah Impian Bangsa Johor (Tvoe:BI)</td> <td>Rumah teres dua lingkat dengan tiga bilik tidur dan dua bilik mandi</td> <td>TBC</td> <td>Starting from RM 200,000</td> <td>TBC</td> </tr> </tbody> </table> <p>Note:<br/>TBC = To Be Confirm</p> | House Type            | Price                             | Household Income         | Sultan Ibrahim's Dream House | RM80,000 – RM100,000 | Not more then RM5,000 a month | Johor Dream House (Type - A) | RM100,000 – RM150,000 | Not more then RM8,000 a month | Johor Dream House (Type - B) | RM150,000 and above   | Open and subject to applicants | Locations | Category | House Type | Total Of Unit | Area (Acre) | Price | Built-Up (Sqft) | Development Status | i) Bandar Dato' Onn, Johor Bahru | Sultan Ibrahim's Dream House | Teres House<br>SemiDetach House<br>Detach House | 190<br>130<br>200 | 52.7 | RM80,000 to RM100,000 | (kp)<br>1,000<br>1,300 | Under Construction | ii) Bandar Baharu Majidee, Johor Bahru | Rumah Impian Bangsa Johor (Type - A) | 2 block of strata unn (12 floor) | 320 | 6.8 | Less then RM150,000 | 1,030 | Under Construction | iii) Bukit Saujana, Johor Bahru | Rumah Impian Bangsa Johor (Type - B) | TBC | 1,000 | 7.99 | RM297,000 to RM429,000 | 850<br>1,000<br>1,200 | Not Built | iv) Kampung Sni Pantai, Mersing | Sultan Ibrahim's Dream House | Rumah teres satu tingkat dengan tiga bilik tidur dan dua bilik mandi | TBC | 140.8 | Starting from RM 70,000 | TBC | Not Built | Rumah Impian Bangsa Johor (Tvoe:BI) | Rumah teres dua lingkat dengan tiga bilik tidur dan dua bilik mandi | TBC | Starting from RM 200,000 | TBC |
| House Type                             | Price   | Household Income  |                       |                                   |                          |                              |                      |                               |                              |                       |                               |                              |                       |                                |           |          |            |               |             |       |                 |                    |                                  |                              |   |                   |      |                       |                        |                    |  |                                      |                                  |     |     |                     |       |                    |                                 |                                      |     |       |      |                        |                       |           |                                 |                              |  |     |       |                         |     |           |                                     |   |     |                          |     |
| Sultan Ibrahim's Dream House           | RM80,000 – RM100,000  | Not more then RM5,000 a month   |                       |                                   |                          |                              |                      |                               |                              |                       |                               |                              |                       |                                |           |          |            |               |             |       |                 |                    |                                  |                              |   |                   |      |                       |                        |                    |  |                                      |                                  |     |     |                     |       |                    |                                 |                                      |     |       |      |                        |                       |           |                                 |                              |  |     |       |                         |     |           |                                     |   |     |                          |     |
| Johor Dream House (Type - A)           | RM100,000 – RM150,000   | Not more then RM8,000 a month   |                       |                                   |                          |                              |                      |                               |                              |                       |                               |                              |                       |                                |           |          |            |               |             |       |                 |                    |                                  |                              |   |                   |      |                       |                        |                    |  |                                      |                                  |     |     |                     |       |                    |                                 |                                      |     |       |      |                        |                       |           |                                 |                              |  |     |       |                         |     |           |                                     |   |     |                          |     |
| Johor Dream House (Type - B)           | RM150,000 and above   | Open and subject to applicants  |                       |                                   |                          |                              |                      |                               |                              |                       |                               |                              |                       |                                |           |          |            |               |             |       |                 |                    |                                  |                              |   |                   |      |                       |                        |                    |  |                                      |                                  |     |     |                     |       |                    |                                 |                                      |     |       |      |                        |                       |           |                                 |                              |  |     |       |                         |     |           |                                     |   |     |                          |     |
| Locations                              | Category  | House Type  | Total Of Unit         | Area (Acre)                       | Price                    | Built-Up (Sqft)              | Development Status   |                               |                              |                       |                               |                              |                       |                                |           |          |            |               |             |       |                 |                    |                                  |                              |   |                   |      |                       |                        |                    |  |                                      |                                  |     |     |                     |       |                    |                                 |                                      |     |       |      |                        |                       |           |                                 |                              |  |     |       |                         |     |           |                                     |   |     |                          |     |
| i) Bandar Dato' Onn, Johor Bahru       | Sultan Ibrahim's Dream House  | Teres House<br>SemiDetach House<br>Detach House   | 190<br>130<br>200     | 52.7                              | RM80,000 to RM100,000    | (kp)<br>1,000<br>1,300       | Under Construction   |                               |                              |                       |                               |                              |                       |                                |           |          |            |               |             |       |                 |                    |                                  |                              |   |                   |      |                       |                        |                    |  |                                      |                                  |     |     |                     |       |                    |                                 |                                      |     |       |      |                        |                       |           |                                 |                              |  |     |       |                         |     |           |                                     |   |     |                          |     |
| ii) Bandar Baharu Majidee, Johor Bahru | Rumah Impian Bangsa Johor (Type - A)  | 2 block of strata unn (12 floor)  | 320                   | 6.8                               | Less then RM150,000      | 1,030                        | Under Construction   |                               |                              |                       |                               |                              |                       |                                |           |          |            |               |             |       |                 |                    |                                  |                              |   |                   |      |                       |                        |                    |  |                                      |                                  |     |     |                     |       |                    |                                 |                                      |     |       |      |                        |                       |           |                                 |                              |  |     |       |                         |     |           |                                     |   |     |                          |     |
| iii) Bukit Saujana, Johor Bahru        | Rumah Impian Bangsa Johor (Type - B)  | TBC   | 1,000                 | 7.99                              | RM297,000 to RM429,000   | 850<br>1,000<br>1,200        | Not Built            |                               |                              |                       |                               |                              |                       |                                |           |          |            |               |             |       |                 |                    |                                  |                              |   |                   |      |                       |                        |                    |  |                                      |                                  |     |     |                     |       |                    |                                 |                                      |     |       |      |                        |                       |           |                                 |                              |  |     |       |                         |     |           |                                     |   |     |                          |     |
| iv) Kampung Sni Pantai, Mersing        | Sultan Ibrahim's Dream House  | Rumah teres satu tingkat dengan tiga bilik tidur dan dua bilik mandi  | TBC                   | 140.8                             | Starting from RM 70,000  | TBC                          | Not Built            |                               |                              |                       |                               |                              |                       |                                |           |          |            |               |             |       |                 |                    |                                  |                              |   |                   |      |                       |                        |                    |  |                                      |                                  |     |     |                     |       |                    |                                 |                                      |     |       |      |                        |                       |           |                                 |                              |  |     |       |                         |     |           |                                     |   |     |                          |     |
|  | Rumah Impian Bangsa Johor (Tvoe:BI)   | Rumah teres dua lingkat dengan tiga bilik tidur dan dua bilik mandi   | TBC                   |                                   | Starting from RM 200,000 | TBC                          |                      |                               |                              |                       |                               |                              |                       |                                |           |          |            |               |             |       |                 |                    |                                  |                              |   |                   |      |                       |                        |                    |  |                                      |                                  |     |     |                     |       |                    |                                 |                                      |     |       |      |                        |                       |           |                                 |                              |  |     |       |                         |     |           |                                     |   |     |                          |     |

**Table 5.6: State Government Policy**

The State Government approved several policies and incentives to investors who are interested in investing in Johor. Among the policies and incentives are as follows: -

| No   | Policy/ incentives                         | Details  |                      |                              |                            |                      |           |            |               |  |        |    |     |    |        |          |        |     |     |                 |               |          |        |     |       |                              |                            |           |        |     |       |                 |               |           |                  |    |       |    |        |           |  |        |    |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |     |       |           |        |           |                  |    |       |    |        |           |  |        |     |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |                                 |  |  |  |  |                  |    |       |  |  |           |                     |       |                      |        |          |        |          |        |          |        |           |                  |           |           |          |   |                  |          |            |     |              |     |
|--|--|--|----------------------|------------------------------|----------------------------|----------------------|-----------|------------|---------------|--|--------|----|-----|----|--------|----------|--------|-----|-----|-----------------|---------------|----------|--------|-----|-------|------------------------------|----------------------------|-----------|--------|-----|-------|-----------------|---------------|-----------|------------------|----|-------|----|--------|-----------|--|--------|----|-----|-----------|--------|----------|--------|-----|-----|-----------|--------|----------|--------|-----|-------|-----------|--------|-----------|--------|-----|-------|-----------|--------|-----------|------------------|----|-------|----|--------|-----------|--|--------|-----|-----|-----------|--------|----------|--------|-----|-----|-----------|--------|----------|--------|-----|-------|-----------|--------|-----------|--------|---------------------------------|--|--|--|--|------------------|----|-------|--|--|-----------|---------------------|-------|----------------------|--------|----------|--------|----------|--------|----------|--------|-----------|------------------|-----------|-----------|----------|---|------------------|----------|------------|-----|--------------|-----|
| 3.   | The Johor Affordable Housing Policy        | <ul style="list-style-type: none"> <li>- It is effective from 1st April 2019 until now and aims to strengthen the Low Cost/ Low Medium Cost Housing Policy and the Housing Policy for the People of Johor</li> <li>- The construction of affordable housing imposed on the developer for a permanent housing project is subject to the land area determined by the composition breakdown as follow;</li> </ul> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Zone</th> <th>Categories</th> <th>Composition</th> <th>Built-Up Area (Sqft)</th> <th>Plot Size</th> <th>House Type</th> <th>Price Control</th> </tr> </thead> <tbody> <tr> <td rowspan="5">A<br/>(District of Johor Bahru &amp; Kulai)</td> <td>RMBJ A</td> <td>5%</td> <td>720</td> <td>NA</td> <td>Strata</td> <td>RM42,000</td> </tr> <tr> <td>RMBJ B</td> <td>10%</td> <td>850</td> <td>NA<br/>'16 x 65'</td> <td>Strata Landed</td> <td>RM80,000</td> </tr> <tr> <td>RMBJ C</td> <td>10%</td> <td>1,000</td> <td>NA<br/>'18 x 60'<br/>'20 x 70'</td> <td>Strata Landed<br/>Townhouse</td> <td>RM150,000</td> </tr> <tr> <td>RMBJ D</td> <td>10%</td> <td>1,400</td> <td>NA<br/>'20 x 70'</td> <td>Strata Landed</td> <td>RM300,000</td> </tr> <tr> <td>Medium Cost Shop</td> <td>5%</td> <td>1,200</td> <td>NA</td> <td>Landed</td> <td>RM200,000</td> </tr> <tr> <td rowspan="5">B<br/>(District of Muar, Batu Pahat, Segamat, Kluang &amp; Pengerang)</td> <td>RMBJ A</td> <td>5%</td> <td>720</td> <td>'18 x 60'</td> <td>Landed</td> <td>RM42,000</td> </tr> <tr> <td>RMBJ B</td> <td>10%</td> <td>850</td> <td>'18 x 60'</td> <td>Landed</td> <td>RM80,000</td> </tr> <tr> <td>RMBJ C</td> <td>10%</td> <td>1,000</td> <td>'20 x 70'</td> <td>Landed</td> <td>RM150,000</td> </tr> <tr> <td>RMBJ D</td> <td>10%</td> <td>1,400</td> <td>'20 x 70'</td> <td>Landed</td> <td>RM250,000</td> </tr> <tr> <td>Medium Cost Shop</td> <td>5%</td> <td>1,200</td> <td>NA</td> <td>Landed</td> <td>RM200,000</td> </tr> <tr> <td rowspan="5">B<br/>(District of Muar, Batu Pahat, Segamat, Kluang &amp; Pengerang)</td> <td>RMBJ A</td> <td>10%</td> <td>720</td> <td>'18 x 60'</td> <td>Landed</td> <td>RM42,000</td> </tr> <tr> <td>RMBJ B</td> <td>15%</td> <td>850</td> <td>'18 x 60'</td> <td>Landed</td> <td>RM80,000</td> </tr> <tr> <td>RMBJ C</td> <td>10%</td> <td>1,000</td> <td>'20 x 70'</td> <td>Landed</td> <td>RM150,000</td> </tr> <tr> <td>RMBJ D</td> <td colspan="5">No RMBJD Development is allowed</td> </tr> <tr> <td>Medium Cost Shop</td> <td>5%</td> <td>1,200</td> <td></td> <td></td> <td>RM200,000</td> </tr> </tbody> </table><br><table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Eligibility of RMBJ</th> <th>Price</th> <th rowspan="5">Maximum Income Limit</th> </tr> </thead> <tbody> <tr> <td>RMBJ A</td> <td>RM 4,000</td> </tr> <tr> <td>RMBJ B</td> <td>RM 6,000</td> </tr> <tr> <td>RMBJ C</td> <td>RM 8,000</td> </tr> <tr> <td>RMBJ D</td> <td>RM 10,000</td> </tr> <tr> <td>Medium Cost Shop</td> <td>RM 13,000</td> </tr> </tbody> </table><br><table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Land Area</th> <th>Excluded</th> <th rowspan="3">Of the total number of units developed (residential &amp; commercial)</th> </tr> </thead> <tbody> <tr> <td>Less than 3 acre</td> <td>Excluded</td> </tr> <tr> <td>3 - 5 acre</td> <td>20%</td> </tr> <tr> <td>Above 5 acre</td> <td>40%</td> </tr> </tbody> </table> | Zone                 | Categories                   | Composition                | Built-Up Area (Sqft) | Plot Size | House Type | Price Control | A<br>(District of Johor Bahru & Kulai) | RMBJ A | 5% | 720 | NA | Strata | RM42,000 | RMBJ B | 10% | 850 | NA<br>'16 x 65' | Strata Landed | RM80,000 | RMBJ C | 10% | 1,000 | NA<br>'18 x 60'<br>'20 x 70' | Strata Landed<br>Townhouse | RM150,000 | RMBJ D | 10% | 1,400 | NA<br>'20 x 70' | Strata Landed | RM300,000 | Medium Cost Shop | 5% | 1,200 | NA | Landed | RM200,000 | B<br>(District of Muar, Batu Pahat, Segamat, Kluang & Pengerang) | RMBJ A | 5% | 720 | '18 x 60' | Landed | RM42,000 | RMBJ B | 10% | 850 | '18 x 60' | Landed | RM80,000 | RMBJ C | 10% | 1,000 | '20 x 70' | Landed | RM150,000 | RMBJ D | 10% | 1,400 | '20 x 70' | Landed | RM250,000 | Medium Cost Shop | 5% | 1,200 | NA | Landed | RM200,000 | B<br>(District of Muar, Batu Pahat, Segamat, Kluang & Pengerang) | RMBJ A | 10% | 720 | '18 x 60' | Landed | RM42,000 | RMBJ B | 15% | 850 | '18 x 60' | Landed | RM80,000 | RMBJ C | 10% | 1,000 | '20 x 70' | Landed | RM150,000 | RMBJ D | No RMBJD Development is allowed |  |  |  |  | Medium Cost Shop | 5% | 1,200 |  |  | RM200,000 | Eligibility of RMBJ | Price | Maximum Income Limit | RMBJ A | RM 4,000 | RMBJ B | RM 6,000 | RMBJ C | RM 8,000 | RMBJ D | RM 10,000 | Medium Cost Shop | RM 13,000 | Land Area | Excluded | Of the total number of units developed (residential & commercial) | Less than 3 acre | Excluded | 3 - 5 acre | 20% | Above 5 acre | 40% |
| Zone   | Categories                                 | Composition  | Built-Up Area (Sqft) | Plot Size                    | House Type                 | Price Control        |           |            |               |  |        |    |     |    |        |          |        |     |     |                 |               |          |        |     |       |                              |                            |           |        |     |       |                 |               |           |                  |    |       |    |        |           |  |        |    |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |     |       |           |        |           |                  |    |       |    |        |           |  |        |     |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |                                 |  |  |  |  |                  |    |       |  |  |           |                     |       |                      |        |          |        |          |        |          |        |           |                  |           |           |          |   |                  |          |            |     |              |     |
| A<br>(District of Johor Bahru & Kulai)                           | RMBJ A                                     | 5%   | 720                  | NA                           | Strata                     | RM42,000             |           |            |               |  |        |    |     |    |        |          |        |     |     |                 |               |          |        |     |       |                              |                            |           |        |     |       |                 |               |           |                  |    |       |    |        |           |  |        |    |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |     |       |           |        |           |                  |    |       |    |        |           |  |        |     |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |                                 |  |  |  |  |                  |    |       |  |  |           |                     |       |                      |        |          |        |          |        |          |        |           |                  |           |           |          |   |                  |          |            |     |              |     |
|  | RMBJ B                                     | 10%  | 850                  | NA<br>'16 x 65'              | Strata Landed              | RM80,000             |           |            |               |  |        |    |     |    |        |          |        |     |     |                 |               |          |        |     |       |                              |                            |           |        |     |       |                 |               |           |                  |    |       |    |        |           |  |        |    |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |     |       |           |        |           |                  |    |       |    |        |           |  |        |     |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |                                 |  |  |  |  |                  |    |       |  |  |           |                     |       |                      |        |          |        |          |        |          |        |           |                  |           |           |          |   |                  |          |            |     |              |     |
|  | RMBJ C                                     | 10%  | 1,000                | NA<br>'18 x 60'<br>'20 x 70' | Strata Landed<br>Townhouse | RM150,000            |           |            |               |  |        |    |     |    |        |          |        |     |     |                 |               |          |        |     |       |                              |                            |           |        |     |       |                 |               |           |                  |    |       |    |        |           |  |        |    |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |     |       |           |        |           |                  |    |       |    |        |           |  |        |     |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |                                 |  |  |  |  |                  |    |       |  |  |           |                     |       |                      |        |          |        |          |        |          |        |           |                  |           |           |          |   |                  |          |            |     |              |     |
|  | RMBJ D                                     | 10%  | 1,400                | NA<br>'20 x 70'              | Strata Landed              | RM300,000            |           |            |               |  |        |    |     |    |        |          |        |     |     |                 |               |          |        |     |       |                              |                            |           |        |     |       |                 |               |           |                  |    |       |    |        |           |  |        |    |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |     |       |           |        |           |                  |    |       |    |        |           |  |        |     |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |                                 |  |  |  |  |                  |    |       |  |  |           |                     |       |                      |        |          |        |          |        |          |        |           |                  |           |           |          |   |                  |          |            |     |              |     |
|  | Medium Cost Shop                           | 5%   | 1,200                | NA                           | Landed                     | RM200,000            |           |            |               |  |        |    |     |    |        |          |        |     |     |                 |               |          |        |     |       |                              |                            |           |        |     |       |                 |               |           |                  |    |       |    |        |           |  |        |    |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |     |       |           |        |           |                  |    |       |    |        |           |  |        |     |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |                                 |  |  |  |  |                  |    |       |  |  |           |                     |       |                      |        |          |        |          |        |          |        |           |                  |           |           |          |   |                  |          |            |     |              |     |
| B<br>(District of Muar, Batu Pahat, Segamat, Kluang & Pengerang) | RMBJ A                                     | 5%   | 720                  | '18 x 60'                    | Landed                     | RM42,000             |           |            |               |  |        |    |     |    |        |          |        |     |     |                 |               |          |        |     |       |                              |                            |           |        |     |       |                 |               |           |                  |    |       |    |        |           |  |        |    |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |     |       |           |        |           |                  |    |       |    |        |           |  |        |     |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |                                 |  |  |  |  |                  |    |       |  |  |           |                     |       |                      |        |          |        |          |        |          |        |           |                  |           |           |          |   |                  |          |            |     |              |     |
|  | RMBJ B                                     | 10%  | 850                  | '18 x 60'                    | Landed                     | RM80,000             |           |            |               |  |        |    |     |    |        |          |        |     |     |                 |               |          |        |     |       |                              |                            |           |        |     |       |                 |               |           |                  |    |       |    |        |           |  |        |    |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |     |       |           |        |           |                  |    |       |    |        |           |  |        |     |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |                                 |  |  |  |  |                  |    |       |  |  |           |                     |       |                      |        |          |        |          |        |          |        |           |                  |           |           |          |   |                  |          |            |     |              |     |
|  | RMBJ C                                     | 10%  | 1,000                | '20 x 70'                    | Landed                     | RM150,000            |           |            |               |  |        |    |     |    |        |          |        |     |     |                 |               |          |        |     |       |                              |                            |           |        |     |       |                 |               |           |                  |    |       |    |        |           |  |        |    |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |     |       |           |        |           |                  |    |       |    |        |           |  |        |     |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |                                 |  |  |  |  |                  |    |       |  |  |           |                     |       |                      |        |          |        |          |        |          |        |           |                  |           |           |          |   |                  |          |            |     |              |     |
|  | RMBJ D                                     | 10%  | 1,400                | '20 x 70'                    | Landed                     | RM250,000            |           |            |               |  |        |    |     |    |        |          |        |     |     |                 |               |          |        |     |       |                              |                            |           |        |     |       |                 |               |           |                  |    |       |    |        |           |  |        |    |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |     |       |           |        |           |                  |    |       |    |        |           |  |        |     |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |                                 |  |  |  |  |                  |    |       |  |  |           |                     |       |                      |        |          |        |          |        |          |        |           |                  |           |           |          |   |                  |          |            |     |              |     |
|  | Medium Cost Shop                           | 5%   | 1,200                | NA                           | Landed                     | RM200,000            |           |            |               |  |        |    |     |    |        |          |        |     |     |                 |               |          |        |     |       |                              |                            |           |        |     |       |                 |               |           |                  |    |       |    |        |           |  |        |    |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |     |       |           |        |           |                  |    |       |    |        |           |  |        |     |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |                                 |  |  |  |  |                  |    |       |  |  |           |                     |       |                      |        |          |        |          |        |          |        |           |                  |           |           |          |   |                  |          |            |     |              |     |
| B<br>(District of Muar, Batu Pahat, Segamat, Kluang & Pengerang) | RMBJ A                                     | 10%  | 720                  | '18 x 60'                    | Landed                     | RM42,000             |           |            |               |  |        |    |     |    |        |          |        |     |     |                 |               |          |        |     |       |                              |                            |           |        |     |       |                 |               |           |                  |    |       |    |        |           |  |        |    |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |     |       |           |        |           |                  |    |       |    |        |           |  |        |     |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |                                 |  |  |  |  |                  |    |       |  |  |           |                     |       |                      |        |          |        |          |        |          |        |           |                  |           |           |          |   |                  |          |            |     |              |     |
|  | RMBJ B                                     | 15%  | 850                  | '18 x 60'                    | Landed                     | RM80,000             |           |            |               |  |        |    |     |    |        |          |        |     |     |                 |               |          |        |     |       |                              |                            |           |        |     |       |                 |               |           |                  |    |       |    |        |           |  |        |    |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |     |       |           |        |           |                  |    |       |    |        |           |  |        |     |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |                                 |  |  |  |  |                  |    |       |  |  |           |                     |       |                      |        |          |        |          |        |          |        |           |                  |           |           |          |   |                  |          |            |     |              |     |
|  | RMBJ C                                     | 10%  | 1,000                | '20 x 70'                    | Landed                     | RM150,000            |           |            |               |  |        |    |     |    |        |          |        |     |     |                 |               |          |        |     |       |                              |                            |           |        |     |       |                 |               |           |                  |    |       |    |        |           |  |        |    |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |     |       |           |        |           |                  |    |       |    |        |           |  |        |     |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |                                 |  |  |  |  |                  |    |       |  |  |           |                     |       |                      |        |          |        |          |        |          |        |           |                  |           |           |          |   |                  |          |            |     |              |     |
|  | RMBJ D                                     | No RMBJD Development is allowed  |                      |                              |                            |                      |           |            |               |  |        |    |     |    |        |          |        |     |     |                 |               |          |        |     |       |                              |                            |           |        |     |       |                 |               |           |                  |    |       |    |        |           |  |        |    |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |     |       |           |        |           |                  |    |       |    |        |           |  |        |     |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |                                 |  |  |  |  |                  |    |       |  |  |           |                     |       |                      |        |          |        |          |        |          |        |           |                  |           |           |          |   |                  |          |            |     |              |     |
|  | Medium Cost Shop                           | 5%   | 1,200                |                              |                            | RM200,000            |           |            |               |  |        |    |     |    |        |          |        |     |     |                 |               |          |        |     |       |                              |                            |           |        |     |       |                 |               |           |                  |    |       |    |        |           |  |        |    |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |     |       |           |        |           |                  |    |       |    |        |           |  |        |     |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |                                 |  |  |  |  |                  |    |       |  |  |           |                     |       |                      |        |          |        |          |        |          |        |           |                  |           |           |          |   |                  |          |            |     |              |     |
| Eligibility of RMBJ  | Price                                      | Maximum Income Limit   |                      |                              |                            |                      |           |            |               |  |        |    |     |    |        |          |        |     |     |                 |               |          |        |     |       |                              |                            |           |        |     |       |                 |               |           |                  |    |       |    |        |           |  |        |    |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |     |       |           |        |           |                  |    |       |    |        |           |  |        |     |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |                                 |  |  |  |  |                  |    |       |  |  |           |                     |       |                      |        |          |        |          |        |          |        |           |                  |           |           |          |   |                  |          |            |     |              |     |
| RMBJ A   | RM 4,000                                   |  |                      |                              |                            |                      |           |            |               |  |        |    |     |    |        |          |        |     |     |                 |               |          |        |     |       |                              |                            |           |        |     |       |                 |               |           |                  |    |       |    |        |           |  |        |    |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |     |       |           |        |           |                  |    |       |    |        |           |  |        |     |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |                                 |  |  |  |  |                  |    |       |  |  |           |                     |       |                      |        |          |        |          |        |          |        |           |                  |           |           |          |   |                  |          |            |     |              |     |
| RMBJ B   | RM 6,000                                   |  |                      |                              |                            |                      |           |            |               |  |        |    |     |    |        |          |        |     |     |                 |               |          |        |     |       |                              |                            |           |        |     |       |                 |               |           |                  |    |       |    |        |           |  |        |    |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |     |       |           |        |           |                  |    |       |    |        |           |  |        |     |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |                                 |  |  |  |  |                  |    |       |  |  |           |                     |       |                      |        |          |        |          |        |          |        |           |                  |           |           |          |   |                  |          |            |     |              |     |
| RMBJ C   | RM 8,000                                   |  |                      |                              |                            |                      |           |            |               |  |        |    |     |    |        |          |        |     |     |                 |               |          |        |     |       |                              |                            |           |        |     |       |                 |               |           |                  |    |       |    |        |           |  |        |    |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |     |       |           |        |           |                  |    |       |    |        |           |  |        |     |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |                                 |  |  |  |  |                  |    |       |  |  |           |                     |       |                      |        |          |        |          |        |          |        |           |                  |           |           |          |   |                  |          |            |     |              |     |
| RMBJ D   | RM 10,000                                  |  |                      |                              |                            |                      |           |            |               |  |        |    |     |    |        |          |        |     |     |                 |               |          |        |     |       |                              |                            |           |        |     |       |                 |               |           |                  |    |       |    |        |           |  |        |    |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |     |       |           |        |           |                  |    |       |    |        |           |  |        |     |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |                                 |  |  |  |  |                  |    |       |  |  |           |                     |       |                      |        |          |        |          |        |          |        |           |                  |           |           |          |   |                  |          |            |     |              |     |
| Medium Cost Shop   | RM 13,000                                  |  |                      |                              |                            |                      |           |            |               |  |        |    |     |    |        |          |        |     |     |                 |               |          |        |     |       |                              |                            |           |        |     |       |                 |               |           |                  |    |       |    |        |           |  |        |    |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |     |       |           |        |           |                  |    |       |    |        |           |  |        |     |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |                                 |  |  |  |  |                  |    |       |  |  |           |                     |       |                      |        |          |        |          |        |          |        |           |                  |           |           |          |   |                  |          |            |     |              |     |
| Land Area  | Excluded                                   | Of the total number of units developed (residential & commercial)  |                      |                              |                            |                      |           |            |               |  |        |    |     |    |        |          |        |     |     |                 |               |          |        |     |       |                              |                            |           |        |     |       |                 |               |           |                  |    |       |    |        |           |  |        |    |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |     |       |           |        |           |                  |    |       |    |        |           |  |        |     |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |                                 |  |  |  |  |                  |    |       |  |  |           |                     |       |                      |        |          |        |          |        |          |        |           |                  |           |           |          |   |                  |          |            |     |              |     |
| Less than 3 acre   | Excluded                                   |  |                      |                              |                            |                      |           |            |               |  |        |    |     |    |        |          |        |     |     |                 |               |          |        |     |       |                              |                            |           |        |     |       |                 |               |           |                  |    |       |    |        |           |  |        |    |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |     |       |           |        |           |                  |    |       |    |        |           |  |        |     |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |                                 |  |  |  |  |                  |    |       |  |  |           |                     |       |                      |        |          |        |          |        |          |        |           |                  |           |           |          |   |                  |          |            |     |              |     |
| 3 - 5 acre   | 20%  |  |                      |                              |                            |                      |           |            |               |  |        |    |     |    |        |          |        |     |     |                 |               |          |        |     |       |                              |                            |           |        |     |       |                 |               |           |                  |    |       |    |        |           |  |        |    |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |     |       |           |        |           |                  |    |       |    |        |           |  |        |     |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |                                 |  |  |  |  |                  |    |       |  |  |           |                     |       |                      |        |          |        |          |        |          |        |           |                  |           |           |          |   |                  |          |            |     |              |     |
| Above 5 acre   | 40%  |  |                      |                              |                            |                      |           |            |               |  |        |    |     |    |        |          |        |     |     |                 |               |          |        |     |       |                              |                            |           |        |     |       |                 |               |           |                  |    |       |    |        |           |  |        |    |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |     |       |           |        |           |                  |    |       |    |        |           |  |        |     |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |                                 |  |  |  |  |                  |    |       |  |  |           |                     |       |                      |        |          |        |          |        |          |        |           |                  |           |           |          |   |                  |          |            |     |              |     |
| 4.   | Johor State Approval Over Submission (AOS) | <ul style="list-style-type: none"> <li>- This initiative was agreed by the Johor Land Revenue and Economic Development Committee on 9 December 2020, where the implementation of AOS with the initiative to reduce 50% of the fine imposed on land change approval for land with an area of less than 4 hectares (10 acres) has violated the land conditions from 1st January 2021 to 31 March 2021. In addition, this 50% fine reduction offer is open to all types of agriculture (trees) and is not limited to applications for conversion of real conditions to oil palm only.</li> </ul>  |                      |                              |                            |                      |           |            |               |  |        |    |     |    |        |          |        |     |     |                 |               |          |        |     |       |                              |                            |           |        |     |       |                 |               |           |                  |    |       |    |        |           |  |        |    |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |     |       |           |        |           |                  |    |       |    |        |           |  |        |     |     |           |        |          |        |     |     |           |        |          |        |     |       |           |        |           |        |                                 |  |  |  |  |                  |    |       |  |  |           |                     |       |                      |        |          |        |          |        |          |        |           |                  |           |           |          |   |                  |          |            |     |              |     |

**Table 5.6: State Government Policy**

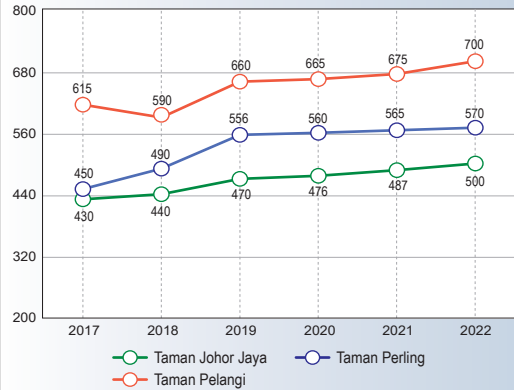
The State Government approved several policies and incentives to investors who are interested in investing in Johor. Among the policies and incentives are as follows: -

| No   | Policy/ incentives   | Details   |      |                   |      |     |      |     |      |    |
|------|--|---|------|-------------------|------|-----|------|-----|------|----|
| 5.   | Johor State Land Tax Rebate 2020 – 2022                                | <ul style="list-style-type: none"> <li>- This initiative was agreed in the Second Meeting of the Third Session of the 14th Johor State Assembly on 13 September 2020.</li> <li>- The implementation of land tax rebates to landowners is effective from 1st October 2020 - 31 March 2021 and is extended until 30 September 2021 according to the year with the rate set as follows;                             <table border="1" data-bbox="535 451 851 588" style="margin-left: 20px;"> <thead> <tr> <th>Year</th> <th>Rebate Percentage</th> </tr> </thead> <tbody> <tr> <td>2020</td> <td>15%</td> </tr> <tr> <td>2021</td> <td>10%</td> </tr> <tr> <td>2022</td> <td>5%</td> </tr> </tbody> </table> </li> <li>- For land taxpayers who have paid land tax in 2020, the excess payment will be credited to the following year. This means that in 2021 the rebate received by land taxpayers will be 25%.</li> <li>- Meanwhile, to enjoy the 2021 and 2022 rebates, all landowners must pay the land tax before or no later than 31 May.</li> </ul> | Year | Rebate Percentage | 2020 | 15% | 2021 | 10% | 2022 | 5% |
| Year | Rebate Percentage  |   |      |                   |      |     |      |     |      |    |
| 2020 | 15%  |   |      |                   |      |     |      |     |      |    |
| 2021 | 10%  |   |      |                   |      |     |      |     |      |    |
| 2022 | 5%   |   |      |                   |      |     |      |     |      |    |
| 6.   | Johor Housing Rejuvenation   | <ul style="list-style-type: none"> <li>- The Johor Housing Rejuvenation Initiative through the Planning, Design and Review Committee that was established and the implementation of Fast Lane Approval. The approval period for public housing proposals at the Local Authority level will be shortened from 99 days to 45 days.</li> </ul>   |      |                   |      |     |      |     |      |    |
| 7.   | Improvements by the Johor State Housing Development Corporation (PKPJ) | <ul style="list-style-type: none"> <li>- The Johor State Housing Development Corporation (PKPJ) has carried out the improvements in housing matters, among the them are:                             <ul style="list-style-type: none"> <li>➤ All information related to the development of Johor Affordable Homes will be accessible to the public through a database dashboard known as the Johor Real Estate Information Center (JREIC).</li> <li>➤ The implementation of a one-stop center (OSC) to enable the submission of Home Ownership Certificates (SLMR), completion of sale and purchase agreements and financing applications to be carried out simultaneously and;</li> <li>➤ Buying bumiputera real estate becomes easier when the transaction can be carried out completely online through the real estate portal in the e-Rumah Johor system.</li> </ul> </li> </ul>   |      |                   |      |     |      |     |      |    |

**JOHOR 5.1**

Pergerakan Harga Purata Rumah Teres Dua Tingkat di Johor Bahru  
Average Price Movements of Double Storey Terraced Houses in Johor Bahru

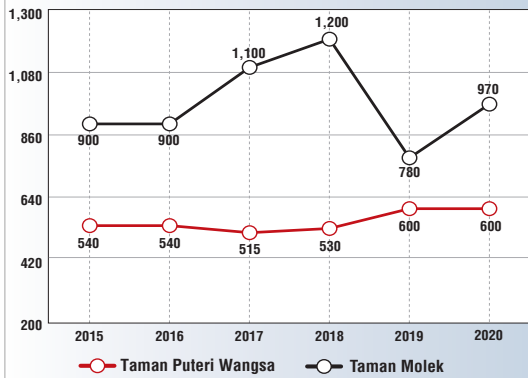
(RM'000 Seunit Sebulan/Per Unit Per Month)



**JOHOR 5.2**

Pergerakan Harga Purata Kedai Dua Tingkat di Johor Bahru  
Average Price Movements of Double Storey Shop in Johor Bahru

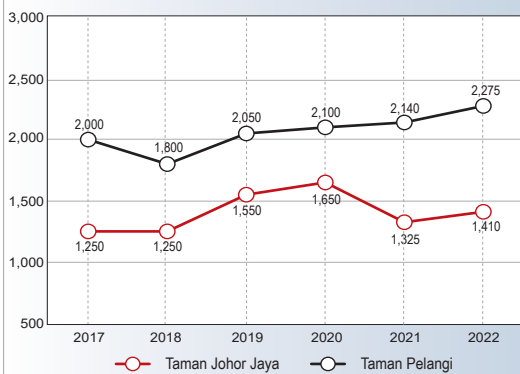
(RM Seunit/ Per Unit)



**JOHOR 5.3**

Pergerakan Harga Purata Kedai Tiga Tingkat di Johor Bahru  
Average Price Movements of Three Storey Shop in Johor Bahru

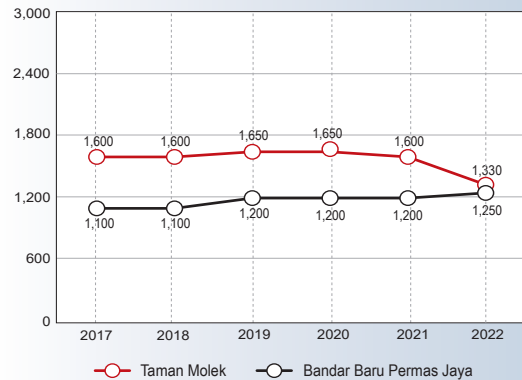
(RM'000 Seunit/Per Unit)



**JOHOR 5.4**

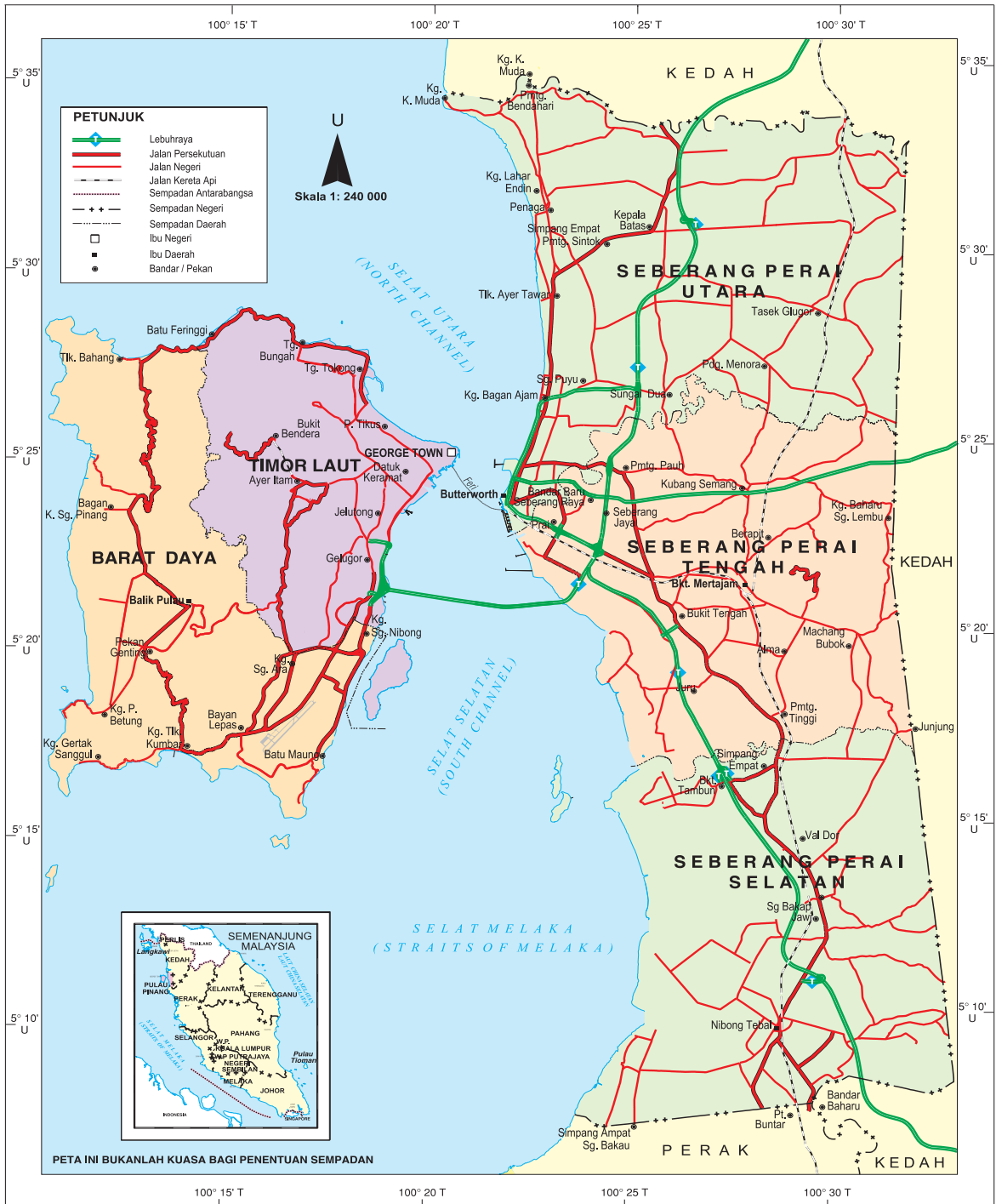
Pergerakan Sewaan Purata Pejabat di Kedai di Johor Bahru  
Average Rental Movements of Office at Shop in Johor Bahru

(RM Sebulan Seunit/ Per Unit Per Month)





# PULAU PINANG





# PULAU PINANG

## GAMBARAN KESELURUHAN

Prestasi pasaran harta tanah di Pulau Pinang menunjukkan pemulihan disebabkan oleh pertumbuhan dalam aktiviti pasaran. Terdapat 23,481 transaksi bernilai RM13.38 bilion, peningkatan 34.0% dan 28.0% dalam bilangan dan nilai masing-masing. Subsektor kediaman terus menguasai pasaran keseluruhan, merangkumi 76.2% daripada jumlah bilangan transaksi harta tanah negeri ini diikuti subsektor perdagangan (8.4%), pertanian (7.6%), tanah pembangunan & lain (5.6%) dan industri (2.2%).

Pergerakan pasaran bagi semua subsektor berada pada aliran meningkat dimana subsektor pertanian mendahului peningkatan sebanyak 56.2%, diikuti oleh subsektor perdagangan (55.5%), kediaman (31.1%), tanah pembangunan & lain (30.7%) dan industri (12.5%). Dari segi nilai, semua subsektor turut mencatat aliran menaik.

## OVERVIEW

The performance of the property market in Pulau Pinang showing a recovery driven by growth in market activity. There were 23,481 transactions worth RM13.38 billion, substantially increased by 34.0% and 28.0% in volume and value respectively. Residential sub-sector continued to lead the overall market, accounting for 76.2% of the total transactions within the state, followed by commercial (8.4%), agriculture (7.6%), development land & others (5.6%) and industrial (2.2%).

Market movements across all sub-sectors were on the uptrend where agriculture sub-sector led the increase with 56.2%, followed by commercial (55.5%), residential (31.1%), development land & others (30.7%) and industrial (12.5%). In term of value, all subsectors also recorded upward trend.

Chart 6.1

Volume of Property Transactions 2018 – 2022

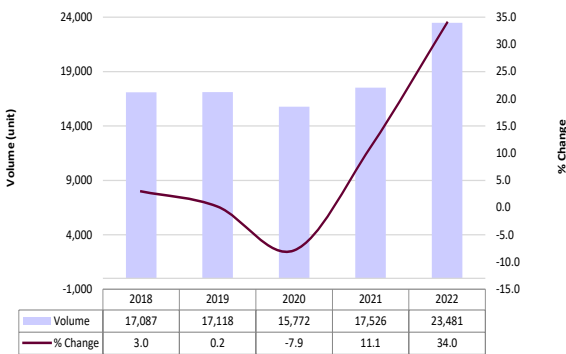


Chart 6.2

Value of Property Transactions 2018 – 2022

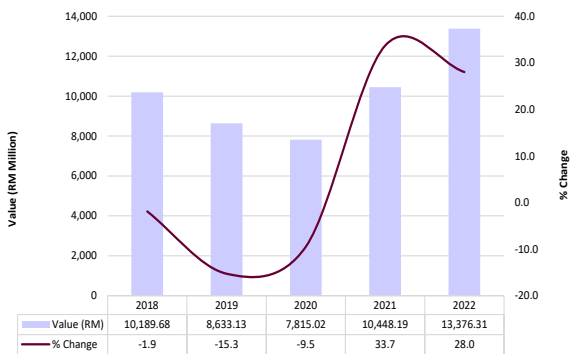


Chart 6.3

Contribution to Transaction Volume by Sub-sector 2022

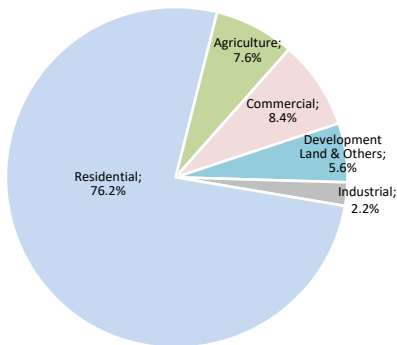
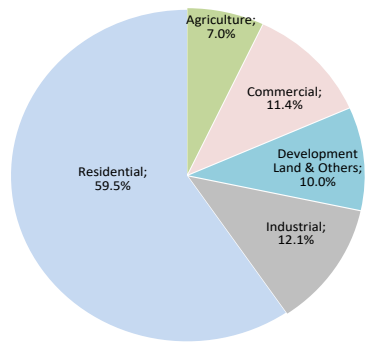


Chart 6.4

Contribution to Transaction Value by Sub-sector 2022



## PROMINENT SALE

Table 6.1

Summary of Prominent Sales Recorded in 2022

| No. | Property   | Location / Mukim                           | Transaction Year | Consideration Price |
|-----|--|--|------------------|---------------------|
| 1.  | Warehouse  | Kawasan Perindustrian Valdor, Sungai Bakap | 2022             | RM80,000,000        |
| 2.  | Industrial Land (138,722 sq. metres)               | Bandar Cassia                              | 2020             | RM68,331,000        |
| 3.  | Development Land - Residential (13,695 sq. metres) | Jalan Perak                                | 2022             | RM66,335,000        |
| 4.  | Industrial Land (45,598 sq. metres)                | Kawasan Perindustrian Valdor, Sungai Bakap | 2022             | RM48,110,000        |
| 5.  | Detached Factory                                   | Kawasan Perindustrian Prai Fasa 4          | 2022             | RM43,500,000        |
| 6.  | Mix Development Land (227,332 sq. metres)          | Permatang Tinggi, Off Jalan Rozhan         | 2022             | RM32,626,000        |
| 7.  | Pre - War Building                                 | Persiaran Gurney                           | 2022             | RM11,000,000        |

## HARTA HARTA KEDIAMAN

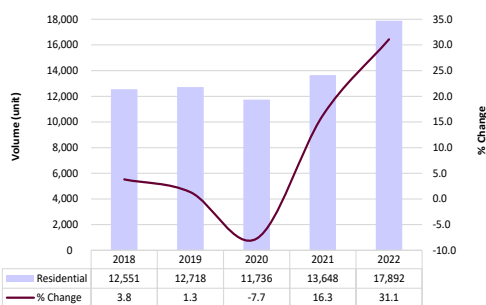
### Transaksi

Subsektor kediaman merekodkan jumlah transaksi dan jumlah nilai tertinggi bagi tempoh 5 tahun yang lepas (17,892 transaksi bernilai RM7.96 bilion), iaitu peningkatan sebanyak 31.1% dan 33.4% berbanding dengan tahun 2021.

Unit strata terdiri daripada kondominium, pangsapuri dan flat mendahului pasaran kediaman, merangkumi 35.6% daripada jumlah transaksi.

Chart 6.5

Volume of Residential Property Transactions 2018 – 2022



### Pelancaran Baharu

Aktiviti pasaran utama menyaksikan pelancaran baharu sebanyak 4,442 units, meningkat 90.0% berbanding 2,338 unit direkodkan pada tahun 2021. Prestasi jualan kurang memberangsangkan pada 32.4% iaitu jauh lebih rendah daripada 65.1% yang direkodkan pada tahun lepas.

## RESIDENTIAL PROPERTY

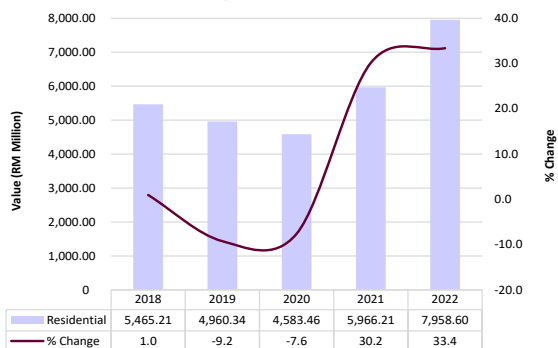
### Transaction

The residential sub-sector recorded highest volume and value of transaction for the past 5 years (17,892 transactions worth RM7.96 bilion), indicating an increase of 31.1% and 33.4% respectively as compared to 2021.

Stratified units comprising condominium, apartment and flat led the residential market, accounting for 35.6% of the total transactions.

Chart 6.6

Value of Residential Property Transactions 2018 – 2022

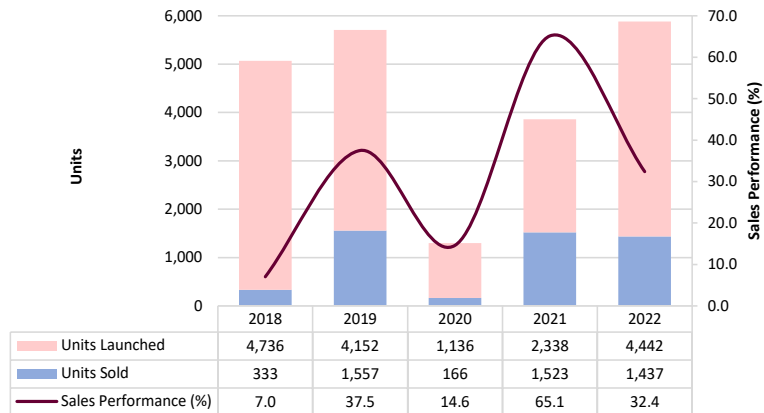


### New Launches

The primary residential market saw the launching of 4,442 units, increased by 90.0% against 2,338 units recorded in 2021. The sales performance was not encouraging at 32.4%, lower than 65.1% registered last year.

Chart 6.7

New Launches and Sales Performance 2018 – 2022



**Status Pasaran**

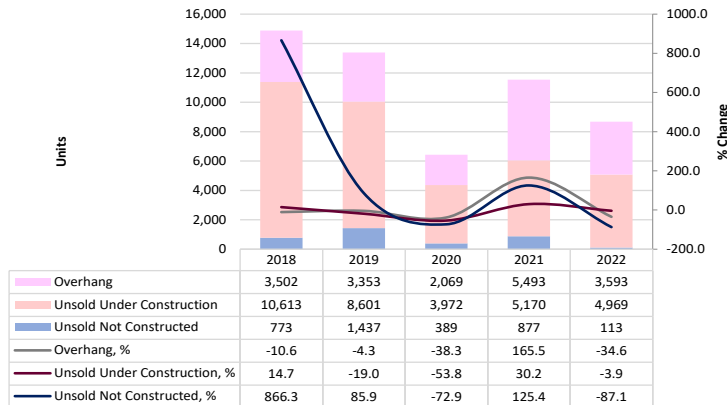
Secara keseluruhan, prestasi unit kediaman tidak terjual bertambah baik dengan jumlah unit tidak terjual berkurangan dalam tempoh kajian.

**Market Status**

The overall performance of unsold residential units improved as the number eased in the review period.

Chart 6.8

Residential Market Status 2018 – 2022



**Aktiviti Pembinaan**

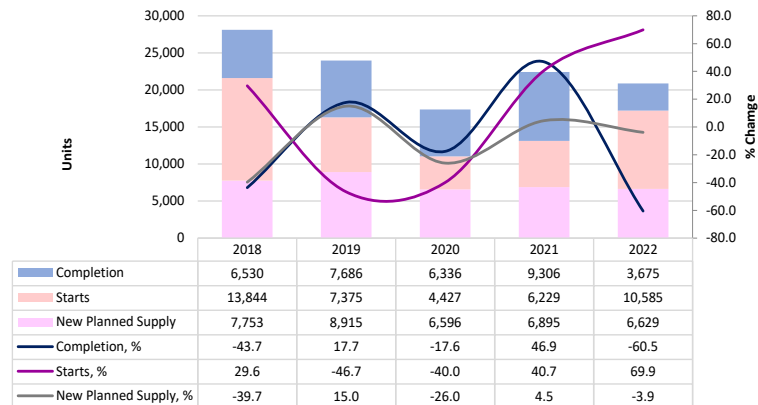
Terdapat penurunan aktiviti pembinaan direkod pada tahun 2022. Siap dibina menyaksikan penurunan ketara sebanyak 60.5% kepada 3,675 unit (2021: 9,306 unit) manakala penawaran baharu dirancang menunjukkan sedikit penurunan iaitu sebanyak 3.9% kepada 6,629 unit (2021: 6,895 unit). Trend menaik dilihat bagi mula dibina iaitu meningkat 69.9% dalam tempoh kajian.

**Construction Activity**

There is a decrease in construction activity recorded in 2022. Completion witnessed a significant decrease by 60.5% to 3,675 units (2021: 9,306 units) while new planned supply showed a slight decrease of 3.9% to 6,629 units (2021: 6,895 units). Upward trend was also observed in starts, which increased by 69.9% in the review period.

Chart 6.9

Residential Construction Activity 2018 – 2022



## Harga dan Sewa

Harga harta tanah kediaman berada pada keadaan stabil dengan beberapa pergerakan bercampur dilihat di lokasi terpilih. Di Pulau, disebabkan penawaran yang terhad, harta tanah kediaman bertanah di kawasan utama terus menikmati peningkatan modal. Rumah teres dua tingkat di Taman Pekaka, Bandar Baru Air Itam dan Jalan Burmah telah mencatat kenaikan 4.7% - 10.9% pada tahun 2022. Di Seberang Perai, trend kenaikan juga dilihat di beberapa kawasan perumahan, antaranya adalah rumah teres dua tingkat di Taman Inderawasih, Taman Seri Bayu dan Taman Fajar Indah yang meningkat 12.6% - 19.0%. Pada tahun 2022<sup>P</sup>, Indeks Harga Semua Rumah bagi negeri ini adalah 199.7 mata, naik 3.2% daripada 193.5 mata pada 2021. Purata Harga Semua Rumah bagi negeri ini pada 2022<sup>P</sup> berjumlah RM447,739, meningkat sedikit dari RM433,848 pada 2021.

Pasaran sewa harta tanah kediaman adalah stabil dengan beberapa pengecualian. Sewa tertinggi bagi rumah bertanah dan bertingkat tinggi adalah rumah sesebuah tiga tingkat di Seri Tanjung Pinang dengan sewa RM8,500 - RM13,000 sebulan serta condominium The Cove yang direkodkan sewa RM7,500 - RM10,000 sebulan.

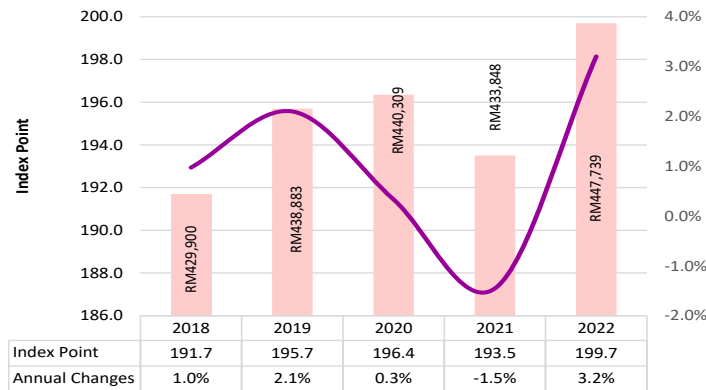
## Price and Rental

Residential property prices were on a stable mode with some mixed movements noted in selected locations. In the island, due to limited supply, landed property in prominent areas continued to enjoy capital appreciations. Double storey terraced at Taman Pekaka, Bandar Baru Air Itam and Jalan Burmah recorded price increase of 4.7% - 10.9% in 2022. In mainland, upward trend was observed at a few housing schemes, for example double storey terraced at Taman Inderawasih, Taman Seri Bayu and Taman Fajar Indah increased by 12.6% - 19.0%. As at 2022<sup>P</sup>, the All House Price Index for the state stood at 199.7 points, up by 3.2% from 193.5 points in 2021. The average All House Price for the state as at 2022<sup>P</sup> stood at RM447,739, increased marginally from RM433,848 in 2021.

The residential rental market was generally stable with some exceptions. The highest rental of landed property and high rise was three storey terraced house at Seri Tanjung Pinang with the rental of RM8,500 – RM13,000 per month as well as The Cove condominium with the rental of RM7,500 – RM10,000 per month.

Chart 6.10

All House Price Index Annual Changes 2018 - 2022



## HARTA TANAH PERDAGANGAN

### Transaksi

Subsektor perdagangan menyaksikan prestasi yang aktif. Subsektor ini merekodkan 1,973 transaksi dengan jumlah nilai RM1.52 bilion pada tahun 2022. Bilangan transaksi menunjukkan peningkatan yang ketara sebanyak 55.5%, manakala jumlah nilai transaksi pula meningkat 15.4% berbanding dengan tahun 2021 (1,269 transaksi bernilai RM1.32 bilion).

## COMMERCIAL PROPERTY

### Transaction

The commercial sub-sector showed active market performance. The sub-sector recorded 1,973 transactions with a total value of RM1.52 billion in 2022. The volume of transaction showed a significant increase by 55.5%, while the total value of transaction increased by 15.4% as compared to 2021 (1,269 transactions worth RM1.32 billion).

Chart 6.11

Volume of Commercial Property Transactions 2018 – 2022

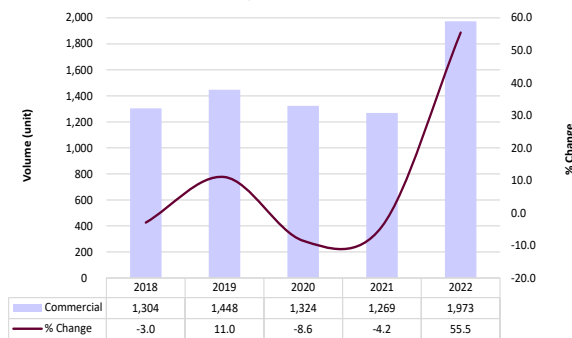
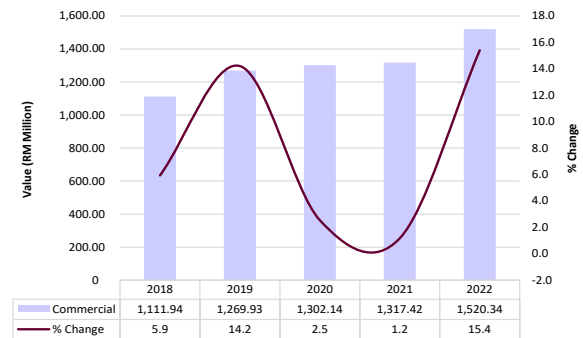


Chart 6.12

Value of Commercial Property Transactions 2018 – 2022



## Kedai

### Transaksi

Segmen kedai mencatat 1,238 transaksi bernilai RM1.13 bilion pada 2022, mencakupi 62.7% daripada jumlah transaksi harta tanah perdagangan dan 74.4% daripada jumlah nilai. Aktiviti pasaran masing – masing menunjukkan peningkatan 56.1% & 51.3% dalam bilangan dan nilai.

## Shop

### Transaction

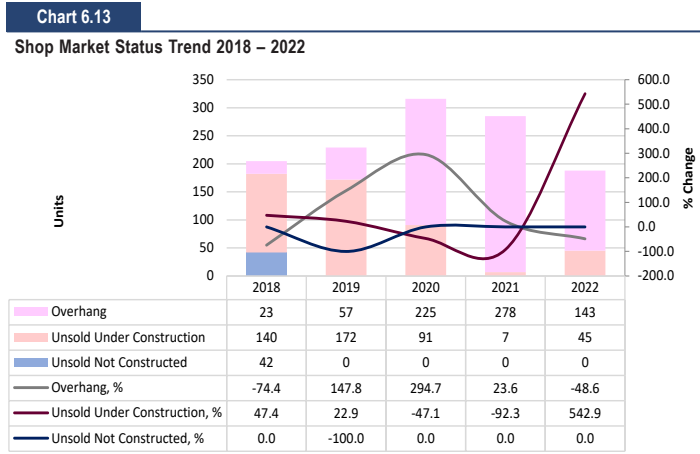
Shop segment recorded 1,238 transactions worth RM1.13 billion in 2022, accounting for 62.7% of the commercial property transactions volume and 74.4% of the total value. Market activity increased by 56.1% & 51.3% in volume and value respectively.

### Status Pasaran

Situasi siap dibina tidak terjual bagi segmen kedai semakin baik. Terdapat 143 unit siap dibina tidak terjual, menurun 48.6% dalam bilangan berbanding tahun lepas. Walau bagaimanapun, kedai belum terjual dalam pembinaan meningkat ke 45 unit, iaitu peningkatan sebanyak 542.9%.

### Market Status

The shop overhang situation is getting better. There were 143 units overhang recorded, decrease of 48.6% in volume compared to previous year. However, the unsold under construction increased drastically to 45 units, an increase of 542.9%.

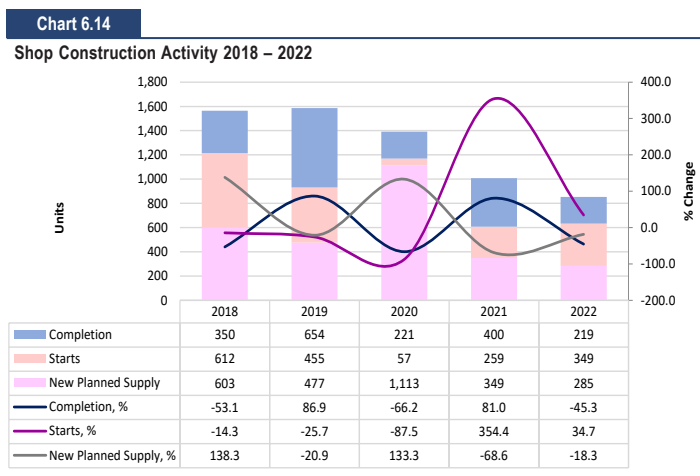


### Aktiviti Pembinaan

Segmen ini menyaksikan pergerakan bercampur-campur dalam aktiviti pembinaan. Siap dibina dan penawaran baharu dirancang telah menurun 45.3% dan 18.3% masing-masing. Walau bagaimanapun mula dibina telah meningkat 34.7% dalam tempoh kajian.

### Construction Activity

The segment saw mixed movements in construction activity. Completion and new planned supply were decreased 45.3% and 18.3% respectively. On the other hand, starts increased by 34.7% during the review period.



### Pangsapuri Khidmat

#### Transaksi

Segmen ini mencatatkan 228 transaksi bernilai RM140.02 juta pada 2022 (2021: 91 unit bernilai RM58.07 juta), masing - masing meningkat 150.6% dan 141.1% dalam bilangan dan nilai.

### Serviced Apartment

#### Transaction

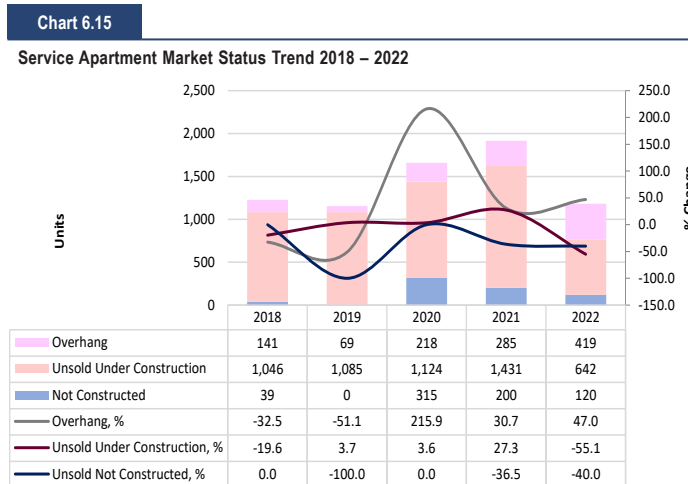
The segment recorded 228 transactions worth RM140.02 million in 2022 (2021: 91 units worth RM58.07 million), increased by 150.6% and 141.1% in volume and value respectively.

## Status Pasaran

Pangsapuri khidmat siap dibina tidak terjual menyaksikan bilangan lebih tinggi. Terdapat 419 unit siap dibina tidak terjual bernilai RM545.17 juta direkodkan, meningkat 47.0% dalam bilangan dan 45.8% dalam nilai berbanding 2021 (285 unit bernilai RM373.82 juta). Walaubagaimanapun, berlaku penurunan bagi unit belum terjual dalam pembinaan, iaitu penurunan 55.1% ke 642 unit. Selain itu, unit belum terjual belum dibina juga menurun 40.0% ke 120 unit dalam tempoh kajian.

## Market Status

The serviced apartment overhang saw higher numbers. There were 419 overhang units worth RM545.17 million recorded, increased by 47.0% in volume and 45.8% in value as compared to 2021 (285 units worth RM373.82 million). Nevertheless, there was a decrease for unsold under construction, down by 55.1% to 642 units. In addition, unsold not constructed also decreased by 40.0% to 120 units during the review period.



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## Aktiviti Pembinaan

Aktiviti pembinaan menyaksikan pergerakan menaik. Siap dibina telah meningkat 208.1% ke 758 unit (2021: 246 unit). Mula dibina meningkat 198.2% ke 2,994 unit (2021: 1,004 unit) dan penawaran baharu dirancang meningkat 473.4% ke 2,397 unit (2021: 418 unit). Sehingga akhir 2022, terdapat 7,372 pangsapuri khidmat sedia ada dengan 5,114 unit lagi dalam penawaran akan datang dan 6,438 unit dalam penawaran dirancang.

## Construction Activity

The construction activity saw an upward movement. Completion increases 208.1% to 758 units (2021: 246 units). Starts increased by 198.2% to 2,994 units (2021: 1,004 units) and new planned supply increased by 473.4% to 2,397 units (2021: 418 units). As at end of 2022, there are 7,372 existing units with 5,114 units in the incoming supply and 6,438 units in the planned supply.

## Harga dan Sewa

Secara umumnya, pergerakan harga pangsapuri khidmat adalah bercampur-campur. Sewa tertinggi telah direkodkan di skim Tropicana 218 dengan sewa RM2,200 – RM3,500 sebulan. Kadar pulangan purata bagi pangsapuri khidmat adalah dalam lingkungan 2.1% - 5.0%.

## Price and Rental

Generally, prices of serviced apartments portrayed mixed movements. Highest rental was recorded in Tropicana 218 with the rental of RM2,200 – RM3,500 per month. Average gross yield for serviced apartment within the range of 2.1% - 5.0%.

## Kompleks Perniagaan

### Ketersediaan Ruang dan Penghunian

Prestasi segmen kompleks perniagaan secara keseluruhan adalah sederhana, disebabkan kadar penghunian telah meningkat ke 72.6%, daripada 70.9% pada tahun 2021. Segmen ini menyaksikan ambilan tahunan meningkat sebanyak 16,573 m.p.

## Shopping Complex

### Occupancy and Space Availability

The overall performance of shopping complex segment was moderate as the occupancy rate increased to 72.6%, up from 70.9% in 2021. The segment witnessed a positive annual take-up of 16,573 s.m.



Chart 6.16

Supply and Occupancy of Shopping Complex 2018 - 2022

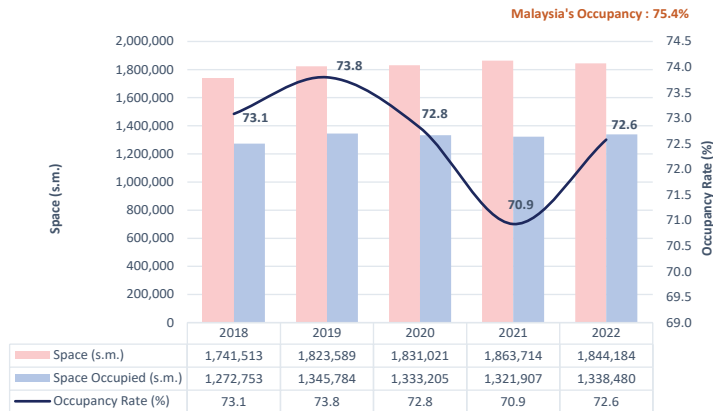


Table 6.2

Pertinent Movements in Shopping Complex

| No. | Shopping Complex     | Space (s.m.) | Tenant Movement |
|-----|----------------------|--------------|-----------------|
| 1.  | Gembira Parade       | -1,144       | Move Out        |
| 2.  | Gurney Paragon       | -6,354       | Move Out        |
| 3.  | Penang Times Square  | -7,365       | Move Out        |
| 4.  | Island Plaza         | 939          | Move In         |
| 5.  | Harbour Trade Centre | 1,049        | Move In         |
| 6.  | 1st AVENUE           | 1,764        | Move In         |
| 7.  | Straits Quay Mall    | 2,218        | Move In         |
| 8.  | M MALL               | 3,355        | Move In         |
| 9.  | Gurney Plaza         | 6,981        | Move In         |

Aktiviti Pembinaan

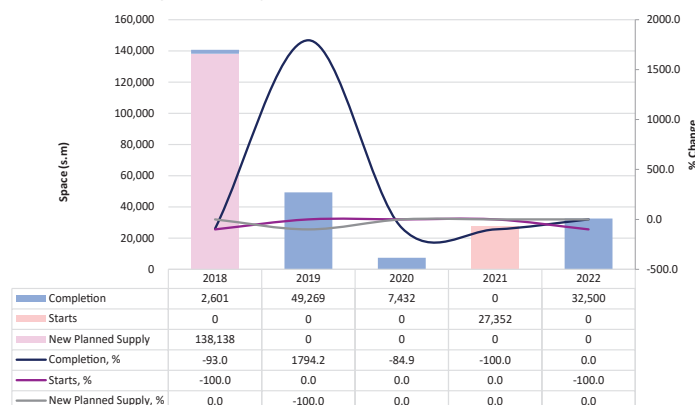
Aktiviti pembinaan adalah perlahan. Hanya sebuah bangunan siap dibina direkodkan dalam tempoh kajian. Bangunan tersebut dikenali sebagai Sunway Carnival Mall Expansion yang terletak di Jalan Todak, Seberang Perai serta menawarkan ruang perniagaan seluas 32,500 meter persegi. Tiada penawaran baharu dirancang serta mula dibina direkodkan dalam tempoh kajian. Sehingga akhir 2022, terdapat 106 kompleks perniagaan sedia ada (1,844,184 m.p.).

Construction Activity

Construction activity slowed down. Only one completed building was recorded during the review period. The building is known as Sunway Carnival Mall Expansion which located along Jalan Todak, Seberang Perai and offers 32,500 square meters of retail space. No new planned supply and starts captured in the review period. As at end-2022, there were 106 existing shopping complexes (1,844,184 s.m.).

Chart 6.17

Construction Activity of Shopping Complex 2018 - 2022





## Sewa

Sewa ruang niaga di kebanyakan kompleks mengalami trend menurun terutamanya bangunan - bangunan di kawasan utama, antaranya adalah Penang Plaza (-6.3% hingga -7.8%), Gurney Plaza (-4.5% hingga - 6.0%) dan Gurney Paragon (-2.1% hingga -11.4%).

## Rental

Rentals of retail space in most shopping complexes were experienced downturn, especially those located in prime area, amongst are Penang Plaza (-6.3% to -7.8%), Gurney Plaza (-4.5% to -6.0%) and Gurney Paragon (-2.1% to -11.4%)

## Pejabat Binaan Khas

### Ketersediaan Ruang dan Penghunian

Prestasi segmen pejabat adalah menggalakkan apabila kadar penghunian kian meningkat dari 84.8% (2020), 85.4% (2021) dan terkini 85.7%. Namun begitu, ambilan tahunan yang direkodkan bagi tempoh kajian menurun 26,114 m.p.

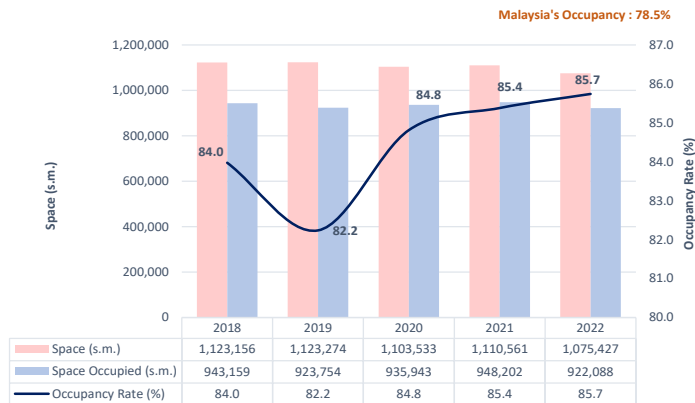
## Purpose - Built Office

### Occupancy and Space Availability

The performance of office segment was promising as the occupancy rate increased gradually from 84.8% (2020), 85.4% (2021) and the latest 85.7%. Nevertheless, the annual take-up recorded for the review period decreases by 26,114 s.m.

Chart 6.18

Supply and Occupancy of Purpose-Built Office 2018 – 2022



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Table 6.3

Pertinent Movements in Purpose-Built Office

| No. | Purpose-Built Office           | Space (s.m.) | Tenant Movement |
|-----|--------------------------------|--------------|-----------------|
| 1.  | Wisma Cheok Holdings           | -809         | Move Out        |
| 2.  | Bangunan Heng Guan             | -812         | Move Out        |
| 3.  | Wisma Boon Siew                | -866         | Move Out        |
| 4.  | MARA                           | -938         | Move Out        |
| 5.  | Menara IJM Land                | -1,183       | Move Out        |
| 6.  | Straits Quay Commercial Suites | 961          | Move In         |
| 7.  | Wisma Choo                     | 1,054        | Move In         |
| 8.  | Wisma Kinta                    | 1,201        | Move In         |
| 9.  | MARA                           | 1,255        | Move In         |
| 10. | Menara Skymind                 | 2,033        | Move In         |
| 11. | Menara Northam                 | 2,301        | Move In         |
| 12. | Bangunan PERKESO               | 2,408        | Move In         |

## Aktiviti Pembinaan

Prestasi segmen itu kekal lembap kerana telah empat tahun berturut - turut tiada bangunan siap dibina dan tiada bangunan mula dibina direkodkan. Sehingga akhir 2022, terdapat 210 bangunan pejabat binaan khas sedia ada (1,075,427 m.p.) dengan tiga bangunan lagi (56,486 m.p) dalam penawaran akan datang.

### Sewa

Segmen pejabat binaan khas mencatat trend yang stabil dengan pergerakan positif 2.1% - 9.2% dilihat di Wisma Boon Siew, Hunza Tower Gurney Paragon, Menara BHL dan Bangunan Mutiara I&P. Walau bagaimanapun, penurunan sewa juga direkodkan di Wisma Leader (-5.4%) dan Wisma Kinta (-6.9%).

Sehingga 2022, Indeks Sewa Pejabat Binaan Khas bagi George Town berada pada 126.5 mata, menurun sedikit daripada 126.7 mata pada 2021. Sewa Purata Pejabat Binaan Khas pada 2022 berada pada RM31.06 s.m.p., menurun dari RM31.10 s.m.p. yang direkodkan pada 2021.

### Riadah

Subsektor riadah merekodkan enam hotel baharu siap dibina yang menawarkan 948 bilik ke dalam pasaran. Sehingga akhir 2022, terdapat 239 hotel (23,185 bilik) sedia ada dengan 21 hotel (4,106 bilik) dalam penawaran akan datang dan 17 hotel (2,617 bilik) dalam penawaran yang dirancang.

## Construction Activity

*Performance of the segment was remains stagnant as there was no completion and no starts recorded for four consecutive years. As at end-2022, there were 210 existing purpose-built office buildings (1,075,427 s.m.) with another three buildings (56,486 s.m.) in the incoming supply.*

### Rental

*The purpose-built office segment noted a stable trend with positive movements of 2.1% - 9.2% observed at Wisma Boon Siew, Hunza Tower Gurney Paragon, Menara BHL and Bangunan Mutiara I&P. However reduction on rentals were recorded at Wisma Leader (-5.4%) and Wisma Kinta (-6.9%).*

*As at 2022, the Purpose-Built Office Rental Index for the George Town stood at 126.5 points, marginally down from 126.7 points in 2021. The Purpose-Built Office Average Rental as 2022 stood at RM31.06 p.s.m., decreased from RM31.10 p.s.m., recorded in 2021.*

### Leisure

*The leisure subsector witnessed the completion of six new hotels offering 948 rooms into market. As at end of 2022, there were 239 hotels (23,185 rooms) in the existing supply with another 21 hotels (4,106 rooms) in the incoming supply and 17 hotels (2,617 rooms) in planned supply.*

**PROSPEK 2023**

Pasaran harta tanah di negeri ini akan kekal pada landasan positif disokong oleh pelbagai projek pembangunan semasa dan akan datang. Belanjawan 2023 negeri Pulau Pinang berjumlah RM989.47 juta bagi memastikan kesinambungan projek-projek berimpak tinggi yang telah dirancang untuk merangsang pemulihan ekonomi negeri.

**2023 OUTLOOK**

*The state’s property market would remain on a positive path backed by various on-going and proposed development projects. The 2023 Penang state’s budget with the total of RM989.47 million to ensure continuity of all high-impact development projects planned to stimulate the state’s economic recovery.*

**Infrastructure Development**

**Table 6.4: Infrastructure Projects**

| No. | Infrastructure   | Description  | Current Development Status                                   |
|-----|--|--|--|
| 1.  | Bayan Lepas Light Rail Transit (BLLRT)                       | <ul style="list-style-type: none"> <li>- Location: Penang Island</li> <li>- Connecting areas: The LRT line will start from Komtar until Penang South Islands (PSI) Smart City’s Island A, B and C.</li> <li>- Length: 26.8 kilometres</li> <li>- Project cost/ Estimating Cost: RM9.5 billion</li> <li>- Descriptions: The length of the LRT line is 26.8 km and comes with 23 stations. It will become the main North-South rail backbone on the island.</li> </ul>                   | Proposal stage and expected to begin construction in Q3 2023 |
| 2.  | Tun Dr Lim Chong Eu Expressway - Air Itam Bypass (Package 2) | <ul style="list-style-type: none"> <li>- Location: Penang Island</li> <li>- Connecting areas: Ayer Itam to Lebu Raya Tun Dr Lim Chong Eu (LCE)</li> <li>- Length: 6.0 kilometres</li> <li>- Project cost/ Estimating Cost: RM851 million</li> <li>- Descriptions: The expressway will become an alternative route that connects the northern and southern parts of the Island as well as to reduce traffic congestion.</li> </ul>  | Under construction and expected to be completed in Q1 2025   |
| 3.  | Nibong Tebal Arena   | <ul style="list-style-type: none"> <li>- Location: Seberang Perai, Pulau Pinang.</li> <li>- Land area: 0.73 hectares</li> <li>- Gross Development Value: RM8.78 million</li> <li>- Descriptions: The sports centre will be equipped with nine badminton courts and a multi-purpose hall.</li> </ul>  | Under construction and expected to be completed in Q1 2023   |
| 4.  | Northern Corridor Highway                                    | <ul style="list-style-type: none"> <li>- Phase 1B:</li> <li>- Location: District covered Bandar Baharu and Seberang Perai Selatan</li> <li>- Connecting areas: Serdang – Batu Kawan</li> <li>- Length: 25.5 kilometres</li> <li>- Descriptions: NCH connects the West Coast Expressway (WCE) and PLUS Expressway. It is also expected to improve inter-city connectivity, reduce congestion on the PLUS Expressway as well as catalyzed the growth of less developed areas.</li> </ul> | Proposed Development   |

Table 6.4: Infrastructure Projects

| No. | Infrastructure                         | Description   | Current Development Status |
|-----|--|---|----------------------------|
| 5.  | Penang South Reclamation (PSR) Project | <p>Location: South of Penang Beach, 22 kilometers from George Town</p> <p>Land Area: 4,500.0 acres:</p> <p>By island breakdown:</p> <ul style="list-style-type: none"> <li>i) Island A – 2,300.0 acres</li> <li>ii) Island B – 1,400.0 acres</li> <li>iii) Island C – 800.0 acres</li> </ul> <p>Project Duration:</p> <ul style="list-style-type: none"> <li>i) Island A: 9 years</li> <li>ii) Island B: 9 years</li> <li>iii) Island C: 5 years</li> </ul> <p>Descriptions:</p> <ul style="list-style-type: none"> <li>i) Penang South Islands (PSI) is the State Government's strategic transformative development plan that will reconstruct the sleepy southern coast into a Smart City, and a world-class trade and tourist destination.</li> <li>ii) The Penang South reclamation will also provide new land for commercial and residential development, including affordable housing, and tourism.</li> <li>iii) By 2050, PSI will be supporting over 460,000 jobs, especially in the high-tech industries; and bring a total of RM2.2 trillion national gross domestic product (GDP) impact and over RM70 billion in foreign direct investment (FDI) to Penang and Malaysia.</li> </ul> | Proposed Development       |

## Mega Project

Table 6.5: Development Projects

| No. | Development                      | Description  | Current Development Status  |
|-----|----------------------------------|--|-----------------------------|
| 1.  | Andaman Island                   | <ul style="list-style-type: none"> <li>- Location: Seri Tanjung Pinang phase 2</li> <li>- Land area: 760 acres</li> <li>- Estimated Gross Development Value: RM17 billion</li> <li>- Developer: Eastern &amp; Oriental Bhd (E&amp;O)</li> <li>- Descriptions: Adaman Island is named after the sea that surrounds it. It is a 760 acres island and the island will be an integrated township built based on six core pillars, namely housing, education, shopping, health and well-being, work, and sustainability.</li> </ul> | Under Construction          |
| 2.  | LeMéri dien Penang Airport Hotel | <ul style="list-style-type: none"> <li>- Location: Bayan Lepas, Pulau Pinang</li> <li>- Developer: Rackson Group</li> <li>- Description: The 200-room hotel is part of the mixed use development known as Penang Gateway in Bayan Lepas, Penang. The project will feature a link bridge connecting to Penang International Airport upon completion in 2026.</li> </ul>   | Due to commence by mid-2022 |
| 3.  | Setia Fontaines Township         | <ul style="list-style-type: none"> <li>- Location: North of Seberang Perai, Pulau Pinang</li> <li>- Land area: 1,691 acres</li> <li>- Estimated Gross Development Value: RM12 billion</li> <li>- Developer: SP Setia Berhad</li> <li>- Description: It is an integrated development that will include residential and commercial development including office space, a trade centre, warehousing, a technological hub, shopping centres, F&amp;B, a convention centre, a hotel, and a leisure area.</li> </ul>                 | Under Construction          |

**Table 6.5: Development Projects**

| No. | Development                 | Description   | Current Development Status |
|-----|-----------------------------|---|----------------------------|
| 4.  | The Light Waterfront Penang | <ul style="list-style-type: none"> <li>- Location: Penang Island</li> <li>- Land area: 152 acres</li> <li>- Estimated Gross Development Value: RM6.5 billion</li> <li>- Developer: IJM Perennial Development Sdn Bhd</li> <li>- Descriptions: The Light Waterfront Penang development, which was first launched in 2009 and comprises three phases. It will have residential, recreational, business, entertainment, retail, hospitality and commercial components. Phase 1 comprises 42 acres of residential development in which a total of 1,177 units of high-end residential units have been completed. Phase 2 is a 103-acre mixed-use development, while Phase 3 is a 7-acre Seafront Park.</li> </ul> | Under Construction         |
| 5.  | Eco Horizon                 | <ul style="list-style-type: none"> <li>- Location: Simpang Ampat, Pulau Pinang</li> <li>- Land area: 300 acres</li> <li>- Estimated Gross Development Value: RM7 billion</li> <li>- Developer: Eco World Development Berhad</li> <li>- Descriptions: Eco Horizon project serves as the latest benchmark township in Penang which boasts a 300-acre master-planned mixed development and located strategically off the primary interchange linking the 2nd Penang Bridge to the North South Highway.</li> </ul>  | Under Construction         |

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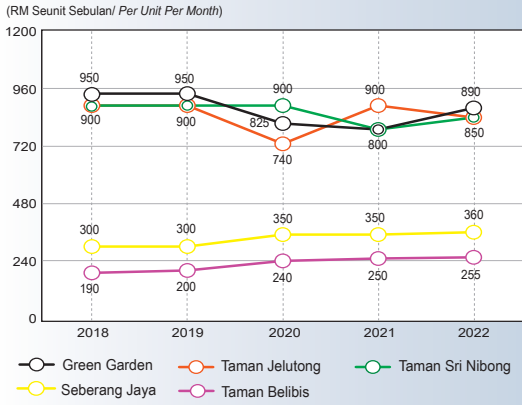
## State Government Policy and Initiative

**Table 6.6: State Government Policy and Initiative**

| No. | Policy                                      | Description   |
|-----|---|---|
| 1.  | The Penang Home Ownership Campaign (HOC)    | The Penang Home Ownership Campaign (HOC) ends in June 2022. The ceiling price of affordable housing on both the island and mainland will be reduced by up to 10%. The state has approved the guidelines to increase the density limit of low-medium cost (LMC) units to 120 units per acre on the island.   |
| 2.  | Penang Affordable Housing (PAH) 2021 – 2025 | <ol style="list-style-type: none"> <li>1) There are 14 projects under the State Government's Housing Masterplan called the 'Penang Affordable Housing (PAH) 2021 – 2025'. It comprises nine affordable housing projects and five urban regeneration programmes (Urban Regeneration City - URC). The State Government intends to build 220,000 units of affordable homes by 2030.</li> <li>2) Some of the areas involved in the redevelopment project are: <ol style="list-style-type: none"> <li>i. Lorong Mahsuri Flat, Southwest District.</li> <li>ii. Free School Flat, North East District.</li> <li>iii. Mak Mandin Flat, North Seberang Perai District.</li> <li>iv. Taman Siakap Flat, Central Seberang Perai District.</li> <li>v. Padang Tembak Flat, North East District.</li> </ol> </li> </ol> |

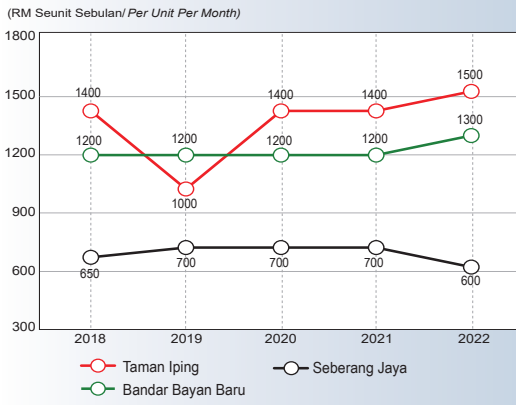
### PULAU PINANG 6.1

Pergerakan Harga Purata Rumah Teres Satu Tingkat di Pulau Pinang  
Average Price Movements of Single Storey Terrace Houses in Pulau Pinang



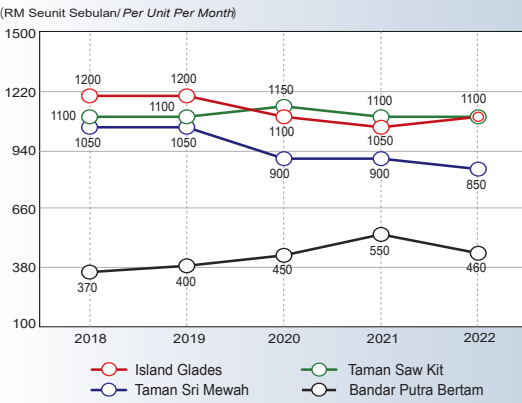
### PULAU PINANG 6.2

Pergerakan Sewaan Purata Rumah Teres Satu Tingkat di Pulau Pinang  
Average Rental Movements of Single Storey Terrace Houses in Pulau Pinang



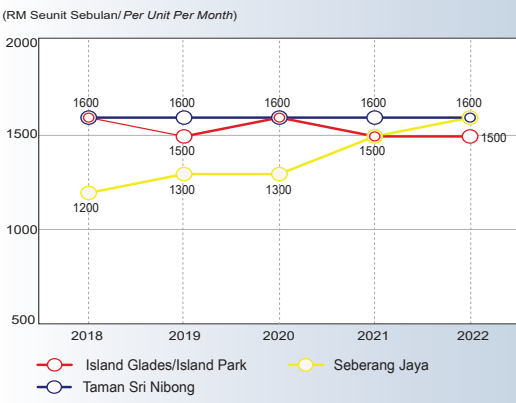
### PULAU PINANG 6.3

Pergerakan Harga Purata Rumah Teres Dua Tingkat di Pulau Pinang  
Average Price Movements of Double Storey Terrace Houses in Pulau Pinang



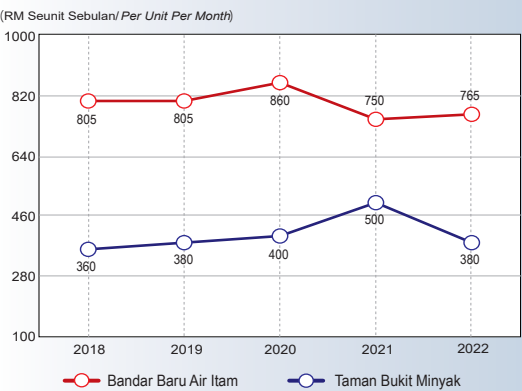
### PULAU PINANG 6.4

Pergerakan Sewaan Purata Rumah Teres Dua Tingkat di Pulau Pinang  
Average Rental Movements of Double Storey Terrace Houses in Pulau Pinang



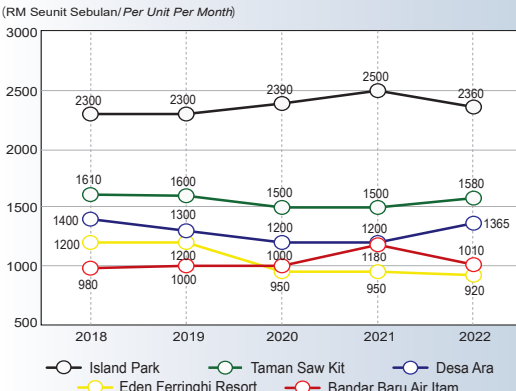
### PULAU PINANG 6.5

Pergerakan Harga Purata Rumah Berkembar Satu Tingkat di Pulau Pinang  
Average Price Movements of Single Storey Semi-Detached in Pulau Pinang



### PULAU PINANG 6.6

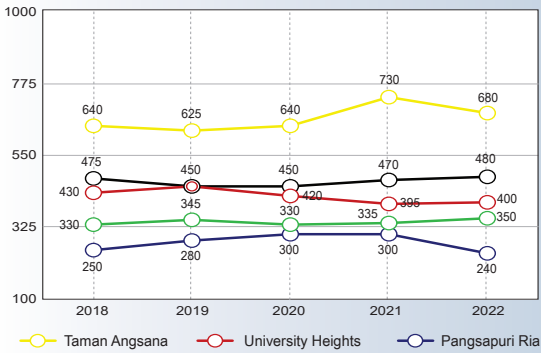
Pergerakan Harga Purata Rumah Berkembar Dua Tingkat di Pulau Pinang  
Average Price Movements of Double Storey Semi-Detached in Pulau Pinang



### PULAU PINANG 6.7

Pergerakan Harga Purata Pangsapuri di Pulau Pinang  
Average Price Movements of Apartments in Pulau Pinang

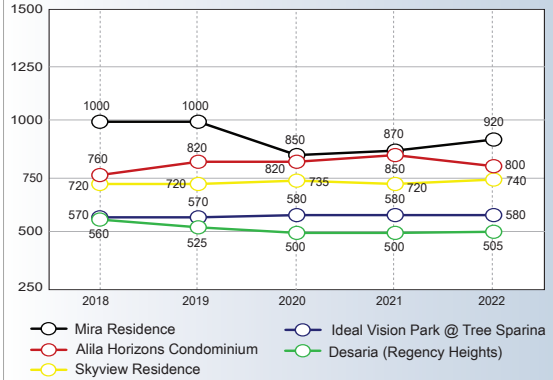
(RM Seunit Sebulan/ Per Unit Per Month)



### PULAU PINANG 6.8

Pergerakan Harga Purata Kondominium di Pulau Pinang  
Average Price Movements of Condominium in Pulau Pinang

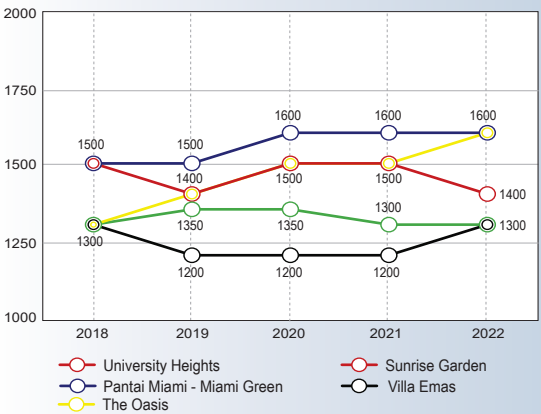
(RM Seunit Sebulan/ Per Unit Per Month)



### PULAU PINANG 6.9

Pergerakan Sewaan Purata Pangsapuri di Pulau Pinang  
Average Rental Movements of Apartments in Pulau Pinang

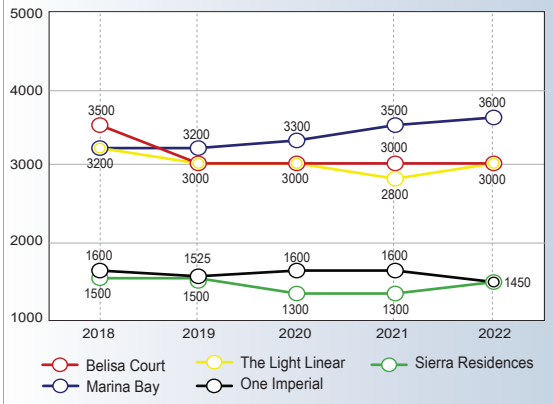
(RM Seunit Sebulan/ Per Unit Per Month)



### PULAU PINANG 6.10

Pergerakan Sewaan Purata Kondominium di Pulau Pinang  
Average Rental Movements of Condominium in Pulau Pinang

(RM Seunit Sebulan/ Per Unit Per Month)



# PERAK





# PERAK

## GAMBARAN KESELURUHAN

Prestasi pasaran harta tanah di negeri ini adalah memberangsangkan pada tahun 2022. Terdapat 47,867 transaksi bernilai RM11.48 bilion yang dicatatkan pada tempoh kajian, menunjukkan peningkatan 29.7% dalam bilangan dan 32.0% dalam nilai berbanding dengan tahun lepas. Subsektor kediaman mengekalkan syer pasaran terbesar pada 62.9%. Subsektor pertanian di kedudukan kedua dengan syer pasaran 29.0%, diikuti perdagangan (5.7%), industri (1.4%) dan tanah pembangunan & lain – lain (1.1%).

Aktiviti pasaran menunjukkan trend pergerakan menaik. Subsektor pertanian mendahului peningkatan sebanyak 57.3%, diikuti oleh subsektor perdagangan (44.8%), tanah pembangunan & lain – lain (41.2%), industri (29.5%) dan kediaman (18.9%).

Dari segi nilai, hampir kesemua subsektor mencatatkan trend positif dengan kenaikan tertinggi dicapai oleh subsektor pertanian (87.3%), diikuti tanah pembangunan & lain – lain (71.2%), perdagangan (41.8%) dan kediaman (22.2%) manakala subsektor industri mencatatkan penurunan sebanyak 16.7%.

## OVERVIEW

The state's property market performance was encouraging in 2022. There were 47,867 transactions with the total value of RM11.48 billion recorded in the review period, up by 29.7% in volume and 32.0% in value compared to previous year. Residential sub-sector retained its largest share of the market at 62.9%. Agriculture sub-sector ranked second with 29.0% market share, followed by commercial (5.7%), industrial (1.4%) and development land & others (1.1%) sub-sector.

Market activity saw an upward movement. Agriculture sub-sector led the increase with 57.3%, followed by commercial (44.8%), development land & others (41.2%), industrial (29.5%) and residential (18.9%).

In term of value, almost all sub-sectors recorded positive trend with highest increment achieved by agriculture (87.3%), followed by development land & others (71.2%), commercial (41.8%) and residential (22.2%) while industrial subsector recorded a decrease of 16.7%.

Chart 7.1

Volume of Property Transactions 2018 – 2022

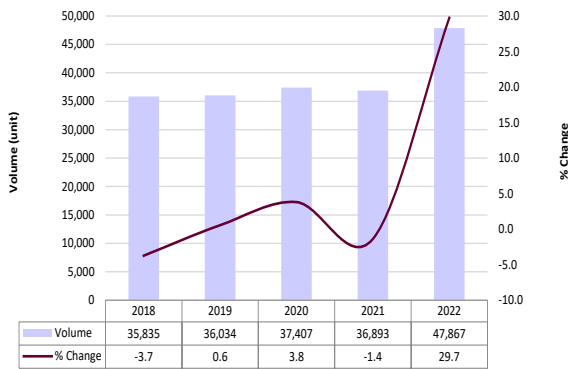


Chart 7.3

Contribution to Transaction Volume by Sub-sector 2022

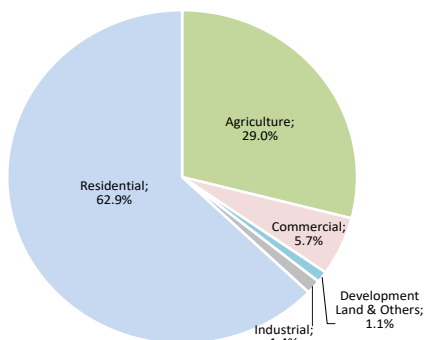


Chart 7.2

Value of Property Transactions 2018 – 2022

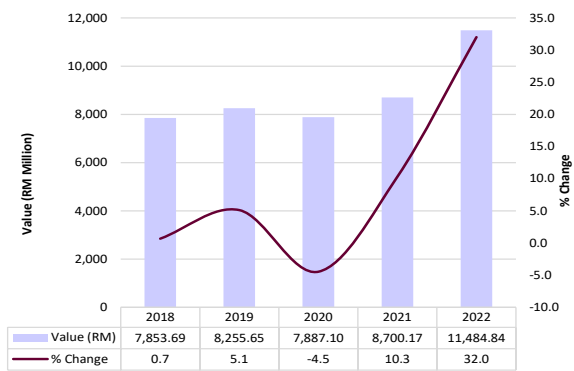
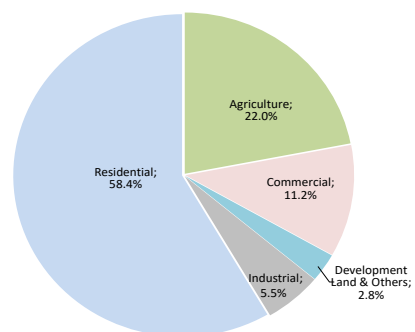


Chart 7.4

Contribution to Transaction Value by Sub-sector 2022



## PROMINENT SALE

Table 7.1

Summary of Prominent Sales Recorded in 2022

| No. | Property  | Location/ Mukim                          | Transaction Year | Consideration Price |
|-----|---|--|------------------|---------------------|
| 1.  | Palm Oil Plantation (Estate Land – 813.92 hectares) | Changkat Jong, Hilir Perak               | 2022             | RM100,562,000       |
| 2.  | Ladang Trong (Estate Land – 475.78 hectares)        | Jalan Trong – Temerlok, Larut Matang     | 2021             | RM68,272,000        |
| 3.  | Estate Land (88.73 hectares)                        | Wilayah Klebang Restu, Kinta             | 2021             | RM66,852,000        |
| 4.  | Ladang Bukit Sedim (Estate Land – 88.71 hectares)   | Ladang Bukit Sedim, Selama               | 2021             | RM19,730,000        |
| 5.  | Detached Factory / Warehouse                        | Persiaran Perindustrian Kanthan 6, Kinta | 2022             | RM19,000,000        |
| 6.  | Pasaraya Eonsave                                    | Pusat Perdagangan Jelapang, Ipoh         | 2021             | RM17,000,000        |
| 7.  | Vacant Industrial Plot (28,331.00 square metres)    | Jalan Simpang Pulai - Cameron            | 2022             | RM15,840,000        |
| 8.  | Vacant Industrial Plot (98,550.00 square metres)    | Lumut Port Industrial Park, Manjung      | 2022             | RM15,700,000        |

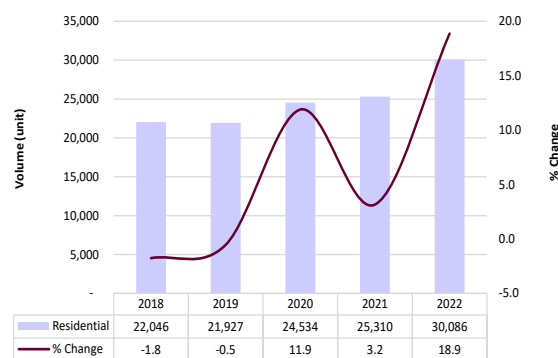
## HARTA TANAH KEDIAMAN

### Transaksi

Subsektor kediaman mencatat 30,086 transaksi bernilai RM6.71 bilion, iaitu peningkatan 18.9% dan 22.2% dalam bilangan dan nilai masing-masing berbanding dengan tahun lepas.

Chart 7.5

Volume of Residential Transactions 2018 – 2022



### Pelancaran Baharu

Prestasi pelancaran baharu di pasaran utama memberangsangkan dalam tempoh kajian. Terdapat 6,052 unit dilancarkan, iaitu 15.5% lebih tinggi berbanding dengan tahun lepas. Seajar dengan itu, prestasi jualan juga lebih tinggi pada 35.0%.

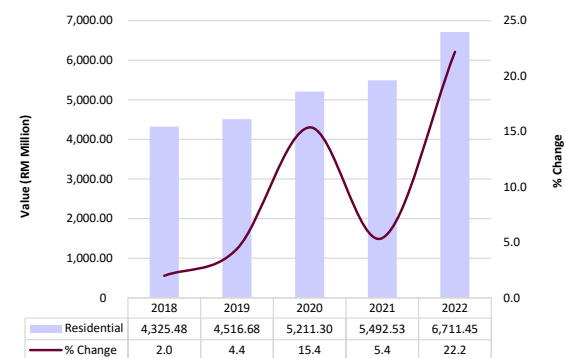
## RESIDENTIAL PROPERTY

### Transaction

The residential sub-sector recorded 30,086 transactions worth RM6.71 billion, increased by 18.9% and 22.2% in volume and value respectively compared to previous year.

Chart 7.6

Value of Residential Transactions 2018 – 2022

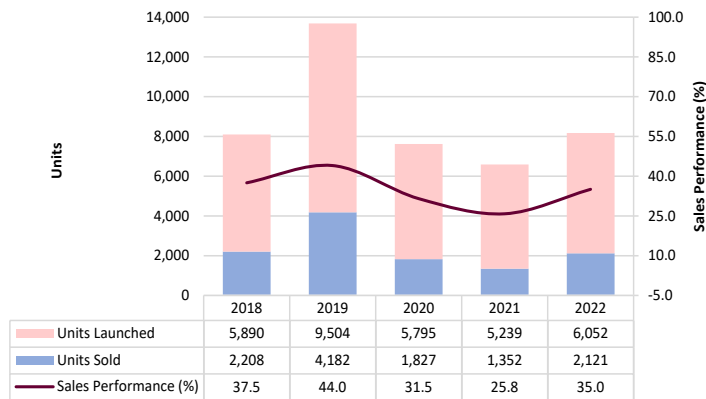


### New Launches

The performance of new launches in the primary market was encouraging in the review period. There were 6,052 units launched, up by 15.5% against previous year. Correspondingly, the sales performance was also high at 35.0%.

Chart 7.7

New Launches and Sales Performance 2018 – 2022



**Status Pasaran**

Situasi harta tanah kediaman siap dibina tidak terjual bertambah baik di mana bilangannya berkurang dalam tempoh kajian. Terdapat 2,312 unit bernilai RM775.95 juta, menurun 15.9% dalam bilangan dan 15.7% dalam nilai berbanding 2021 (2,748 unit bernilai RM920.29 bilion). Sejalan dengan itu, unit dalam pembinaan belum terjual dan unit belum dibina belum terjual juga telah berkurangan 4.4% kepada 9,338 unit dan 48.6% kepada 1,151 unit pada tahun 2022.

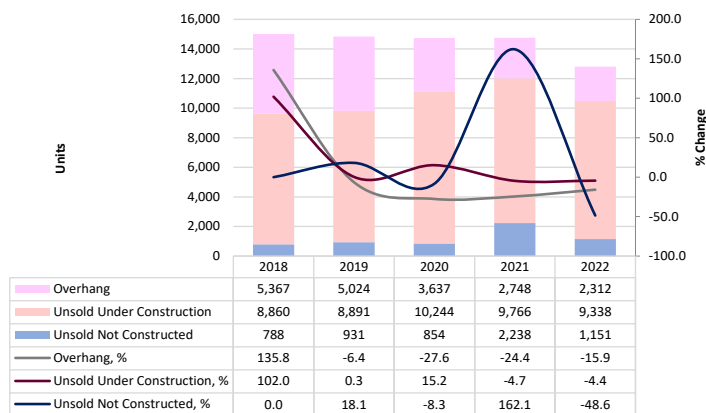
**Market Status**

The residential overhang situation improved as the number eased in the review period. There were 2,312 units worth RM775.95 million, decreased by 15.9% in volume and 15.7% in value as compared to 2021 (2,748 units worth RM920.29 million). Correspondingly, unsold under construction and unsold not constructed reduced 4.4% to 9,338 units and 48.6% to 1,151 units in 2022.

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Chart 7.8

Residential Market Status 2018 – 2022



**Aktiviti Pembinaan**

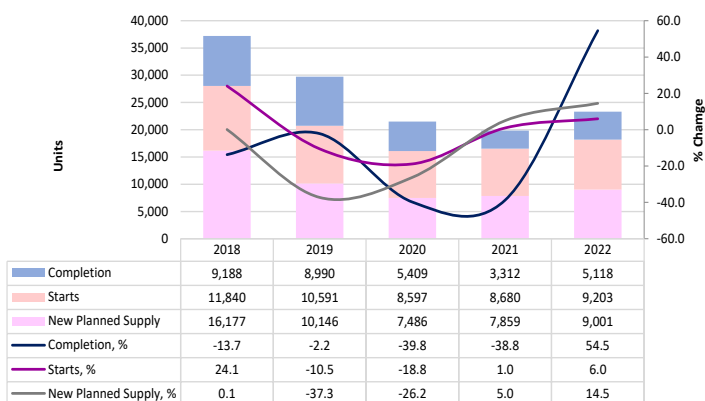
Aktiviti pembinaan menyaksikan pergerakan menaik dalam tempoh kajian. Siap dibina mencatatkan peningkatan 54.5% kepada 5,118 unit. Selain itu, mula dibina dan penawaran baharu dirancang turut menaik 6.0% ke 9,203 unit dan 14.5% ke 9,001 unit.

**Construction Activity**

The construction activities witnessed an upward movement in the review period. Completion saw an increase of 54.5% to 5,118 units. Other than that, starts and new planned supply also increases by 6.0% to 9,203 units and 14.5% to 9,001 units.

Chart 7.9

Residential Construction Activity 2018 – 2022



### Harga dan Sewa

Harga harta tanah kediaman menunjukkan prestasi bercampur di seluruh negeri. Rumah teres setingkat terletak di Bandaraya Ipoh pada amnya menikmati kenaikan nilai modal dalam lingkungan 2.4% - 13.5% dengan kenaikan tertinggi dilihat di Skim Panorama Lapangan Perdana (13.5%). Manakala bagi kediaman bertingkat tinggi didapati kenaikan yang ketara dicatatkan di Pangsapuri Taman Meru Impiana (8.6%).

Sehingga 2022<sup>p</sup>, Indeks Harga Semua Rumah untuk negeri ini berada pada 220.3 mata, meningkat 3.1% daripada 213.8 mata pada 2021. Purata Harga Semua Rumah untuk negeri pada 2022 adalah RM252,176 meningkat daripada RM244,710 pada 2021.

Pasaran sewa kediaman amnya stabil dengan beberapa pengecualian. Sewa tertinggi bagi unit teres dua tingkat dicatatkan di Taman Setia Residen, Manjung dengan sewa antara RM1,900 – RM2,000 sebulan.

### Price and Rental

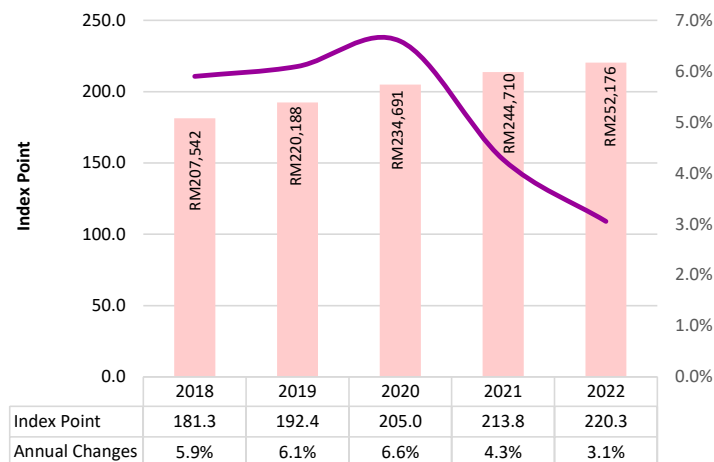
Prices of residential properties showed mixed performances across the board. Single storey terraced located at Ipoh City generally enjoyed capital appreciation of 2.4% - 13.5% with highest appreciation observed at Panorama Lapangan Perdana scheme (13.5%). Whereas for high rise residential, significant increment in rental was noted at Taman Meru Impiana Apartment (8.6%).

All House Price Index for the state marked at 220.3 points as at 2022<sup>p</sup>, increased by 3.1% from 213.8 points in 2021. The average All House Price for the state as at 2022 stood at RM252,176 increased from RM244,710 in 2021.

The residential rental market was generally stable with some exceptions. The highest rental for double storey terraced house was recorded at Taman Setia residen, Manjung with the rental of RM1,900 – RM2,000 per month.

Chart 7.10

All House Price Index 2018 – 2022



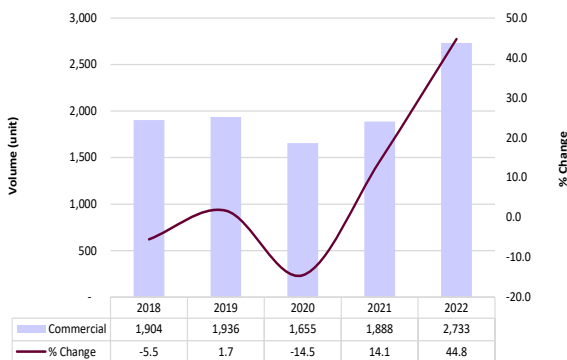
## HARTA TANAH PERDAGANGAN

### Transaksi

Prestasi subsektor perdagangan mengukuh pada 2022. Terdapat 2,733 transaksi direkodkan dengan jumlah nilai RM1.29 bilion (2021: 1,888 transaksi bernilai RM909.43 juta). Aktiviti pasaran ini menunjukkan penambahan 44.8% dalam bilangan dan 41.8% dalam nilai berbanding tahun lepas.

Chart 7.11

Volume of Commercial Property Transactions 2018 – 2022



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### Kedai

#### Transaksi

Segmen kedai terus mencatat aktiviti pasaran tinggi dengan 1,998 transaksi bernilai RM980.11 juta (2021: 1,324 transaksi bernilai RM650.36). Berbanding 2021, bilangan dan nilai transaksi masing-masing meningkat 50.9% dan 50.7%. Transaksi kedai dua hingga dua setengah tingkat menguasai 65.3% daripada jumlah transaksi kedai.

#### Status Pasaran

Kedai siap dibina tidak terjual kurang memberangsangkan dalam tempoh kajian. Sebanyak 707 unit direkodkan bernilai RM336.98 juta, peningkatan sebanyak 0.1% dalam bilangan berbanding tahun lepas.

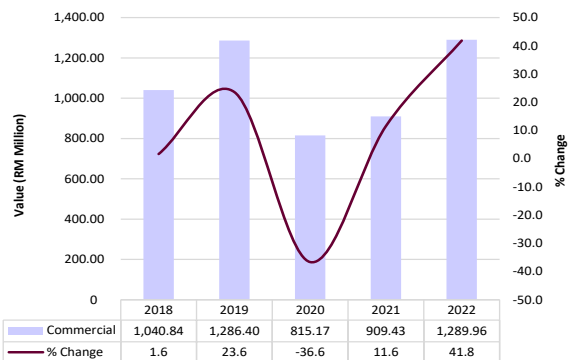
## COMMERCIAL PROPERTY

### Transaction

The performance of commercial sub-sector strengthened in 2022. There were 2,733 transactions recorded with a total value of RM1.29 billion (2021: 1,888 transactions worth RM909.43 million). This market activity showed an increase of 44.8% in volume and 41.8% in value as compared to last year.

Chart 7.12

Value of Commercial Property Transactions 2018 – 2022



### Shop

#### Transaction

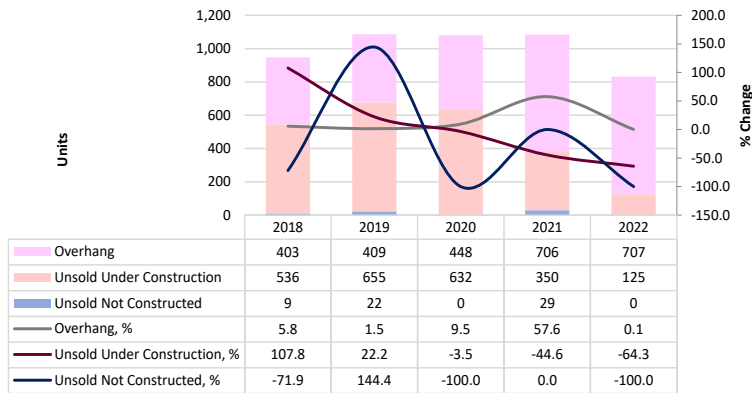
Shop Segment recorded highest market activity with 1,998 transactions worth RM980.11 million (2021: 1,324 transactions worth RM650.36 million). In comparison to 2021, the volume and value of transactions increased by 50.9% and 50.7% respectively. Two to two and a-half storey shop transactions dominated 65.3% of the total shop transactions.

#### Market Status

The shop overhang was less encouraging as the numbers increased in the review period. A total of 707 units recorded worth RM336.98 million, an increase of 0.1% in volume as compared to previous year.

Chart 7.13

Shop Market Status 2018 – 2022



### Aktiviti Pembinaan

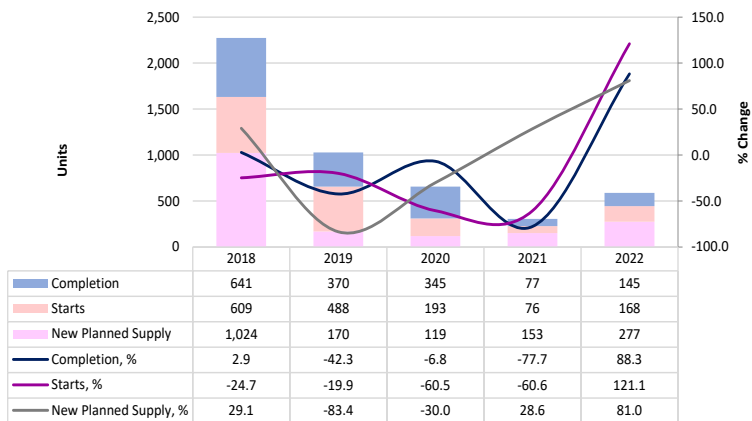
Aktiviti pembinaan menyaksikan pergerakan menaik dalam tempoh kajian. Terdapat 145 unit kedai siap dibina, peningkatan 88.3% berbanding 2021. Selain itu, unit kedai mula dibina dan penawaran baharu dirancang juga meningkat melebihi dua kali ganda kepada 168 unit dan 81.0% ke 277 unit.

### Construction Activity

Construction activities witnessed an upward movement in the review period. There were 145 completed shop units, increased by 88.3% as compared to 2021. Besides, shop units commenced construction and new planned supply increased more than double to 168 units and 81.0% to 277 units.

Chart 7.14

Shop Construction Activity 2018 – 2022



### Kompleks Perniagaan

#### Penghunian dan Ketersediaan Ruang

Prestasi segment kompleks perniagaan menurun apabila kadar purata penghunian menurun kepada 76.2% berbanding 83.1% yang dicatatkan pada 2021. Selain itu, ambilan tahunan turut menurun pada 10,422 m.p.

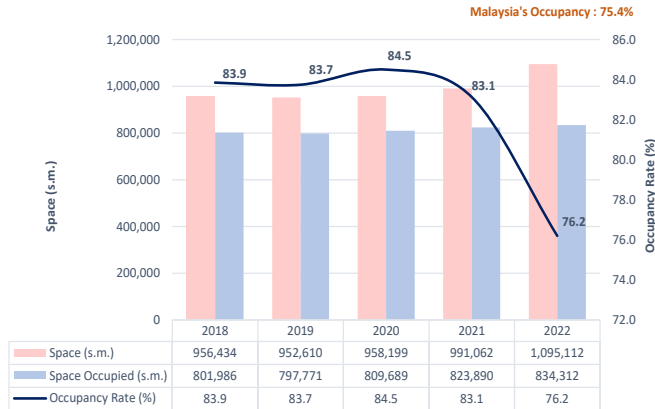
### Shopping Complex

#### Occupancy and Space Availability

The performance of retail segment dropped as the average occupancy rate decreased to 76.2% as compared with 83.1% recorded in 2021. Other than that, the annual take-up rate also decreased to 10,422 s.m

Chart 7.15

Supply and Occupancy of Shopping Complex 2018 - 2022



**Aktiviti Pembinaan**

Segmen kompleks perniagaan menyaksikan tiga kompleks baru siap dibina dalam tempoh kajian. Ia adalah Pasaraya Lotus's Pulai Hartamas, Pasaraya Econsave Chemor dan Bazar @ Botani Village dengan jumlah ruang 15,437 m.p. Sehingga akhir 2022, terdapat 81 kompleks perniagaan sedia ada (1,095,112 m.p.) dengan tiga kompleks lagi (24,373 m.p.) dalam penawaran akan datang.

**Construction Activity**

Shopping complex segment saw three new completions in the review period. They were Pasaraya Lotus's Pulai Hartamas, Pasaraya Econsave Chemor dan Bazar @ Botani Village with a combined space of 15,437 s.m. As at end-2022, there were 81 existing shopping complexes (1,095,112 s.m.) with another three complexes (24,373 s.m.) in the incoming supply.

Table 7.2

List of the Shopping Complex Completions

| No. | Hotel Name                      | Location                                       | Floor Area (s.m.) |
|-----|---------------------------------|--|-------------------|
| 1.  | Pasaraya Lotus's Pulai Hartamas | Medan Pulai Hartamas, Jalan Sultan Nazrin Shah | 4,970             |
| 2.  | Pasaraya Econsave Chemor        | Jalan Jelapang - Chemor                        | 5,368             |
| 3.  | Bazar @ Botani Village          | Medan Botani                                   | 5,099             |

**Pejabat Binaan Khas**

**Purpose-Built Office**

**Penghunian dan Ketersediaan Ruang**

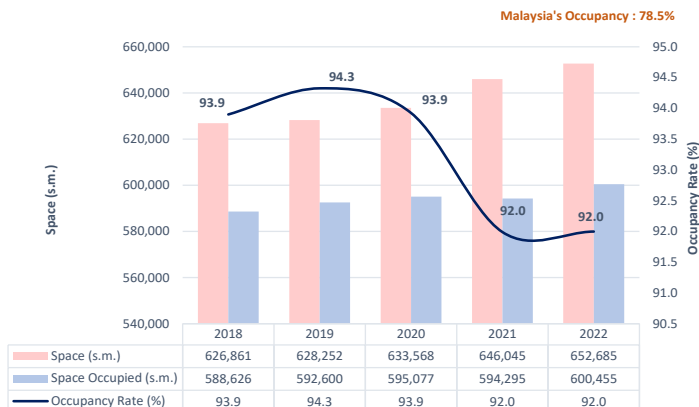
**Occupancy and Space Availability**

Prestasi pejabat binaan khas kekal dengan kadar purata penghunian 92.0% dibandingkan dengan 2021. Ambilan tahunan adalah 6,160 m.p.

The performance of purpose-built office remained with an average occupancy rate of 92.0% compared 2021. The annual take-up rate was 6,160 s.m.

Chart 7.16

Supply and Occupancy of Purpose- Built Office 2018 – 2022



## Aktiviti Pembinaan

Terdapat sebuah bangunan pejabat binaan khas baru siap dibina pada tahun 2022, iaitu Bangunan Bonanza Venture Holdings, Ipoh dengan jumlah ruang 2,738 m.p. Sehingga akhir tahun 2022, terdapat 224 pejabat binaan khas sedia ada (652,685 m.p) dengan tiga lagi bangunan (23,174 m.p) dalam penawaran akan datang.

## Construction Activity

There was one new completion of purpose-built office building recorded in 2022, namely Bonanza Venture Holdings Building, Ipoh with a total space of 2,738 s.m. As at end-2022, there were 224 existing purpose-built office buildings (652,685 s.m.) with another three buildings (23,174 s.m.) in the incoming supply.

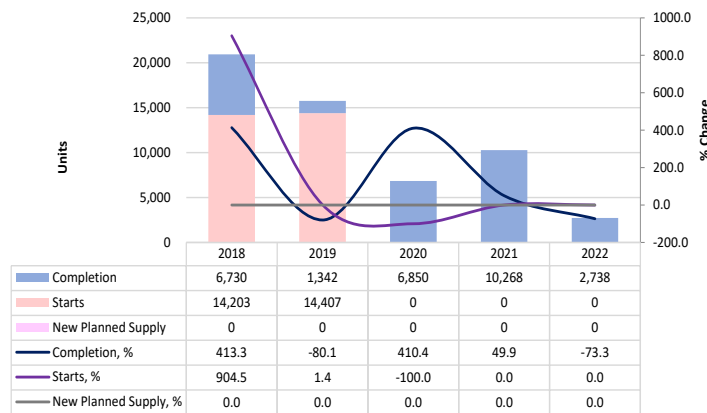
Table 7.3

List of the Purpose-Built Office Building Completions

| No. | Property                          | Location | Floor Area (s.m.) |
|-----|-----------------------------------|----------|-------------------|
| 1.  | Bangunan Bonanza Venture Holdings | Ipoh     | 2,738             |

Chart 7.17

Construction Activity of Purpose-Built Office 2018 – 2022



## Riadah

Di segmen riadah, tiada hotel siap dibina dicatatkan dalam tempoh kajian. Sehingga akhir 2022, terdapat 330 hotel (16,451 bilik) sedia ada dengan lapan hotel (685 bilik) dalam penawaran akan datang.

## Leisure

In the leisure segment, no completion was recorded during the review period. As at end-2022, there were 330 hotels (16,451 rooms) in the existing supply with another eight hotels (685 rooms) in the incoming supply.



**PROSPEK 2023**

Pasaran harta tanah di negeri Perak dijangka bertambah baik pada 2023. Peningkatan sentimen pasaran harta tanah dan ekonomi yang semakin pulih hasil daripada pelbagai inisiatif serta pakej rangsangan pemulihan ekonomi yang telah dirancang dan dilaksanakan oleh Kerajaan Persekutuan dan Kerajaan Negeri.

**2023 OUTLOOK**

*The property market in Perak is expected to improve in 2023. The improving market sentiment and recovery of economic resulted from various incentives and economic stimulus packages planned and implemented by both Federal and State Government.*

**Infrastructure Development**

**Table 7.4: Infrastructure Projects**

| No. | Infrastructure Project           | Description   | Current Development Status       |
|-----|----------------------------------|---|----------------------------------|
| 1.  | West Ipoh Span Expressway (WISE) | <ul style="list-style-type: none"> <li>- Location: Ipoh, Perak</li> <li>- Connecting areas: Gopeng - Kuala Kangsar</li> <li>- Length: 60 - 65 kilometres.</li> <li>- Project cost/ Estimating Cost: RM5.75 billion.</li> <li>- Descriptions: The proposed West Ipoh Span Expressway is a project designed with a dual three - lane carriageway with a dedicated motorcycle lane starting from the Gopeng North - South Expressway intersection and ends at the Kuala Kangsar intersection. It is a Private Finance Initiative (PFI) project and will be funded by East Coast Road Sdn Bhd.</li> </ul> | Construction to begin in Q4 2022 |
| 2.  | Northern Corridor Highway        | <ul style="list-style-type: none"> <li>- Phase 2:</li> <li>- Location: District covered Bandar Baharu, Larut, Matang and Selama</li> <li>- Connecting areas: Serdang – Changkat Jering</li> <li>- Length: 37 kilometres</li> <li>- Descriptions: NCH connects the West Coast Expressway (WCE) and PLUS Expressway. It is also expected to improve inter-city connectivity, reduce congestion on the PLUS Expressway as well as catalyzed the growth of less developed areas, especially in hinterland Kedah and Perak.</li> </ul>   | Proposed Development             |

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**Mega Project**

**Table 7.5: Development Projects**

| No. | Development Project  | Description  | Current Development Status  |
|-----|--|--|---|
| 1.  | Ipoh Raya Integrated Park                                      | <ul style="list-style-type: none"> <li>- Location: Ipoh, Perak.</li> <li>- Land area: 832.38 acres</li> <li>- Gross Development Value: RM5 billion</li> <li>- Developer: MRCB Land (Malaysian Resources Corporation Berhad)</li> <li>- Descriptions: The Ipoh Raya Integrated Park will consist of agro-based industrial hub, a logistics hub, managed industrial park 1, 2, and 3, accommodation facilities, technical and vocational education and training facilities.</li> </ul> | Project launched in H1 2022 and expected to be completed by 2043. |
| 2.  | National Neuro-Robotics and Cybernetics Rehabilitation Centre. | <ul style="list-style-type: none"> <li>- Location: Ipoh, Perak</li> <li>- Land area: 37 hectares</li> <li>- Gross Development Value: RM654 million</li> <li>- Descriptions: It will accommodate 700 patients at a time and act as a center of excellence for Perkeso's rehabilitation and return to work programs.</li> </ul>  | Under construction and expected to be completed by 2024.          |

**Table 7.5: Development Projects**

| No. | Development Project                  | Description   | Current Development Status                                  |
|-----|--------------------------------------|---|---|
| 3.  | Silver Valley Technology Park (SVTP) | <ul style="list-style-type: none"> <li>- Location: Ipoh, Perak.</li> <li>- Land area: 1,139.2 hectares</li> <li>- Gross Development Value: RM14 billion</li> <li>- Developer: PKNP (Kumpulan Perbadanan Kemajuan Negeri Perak) &amp; Majuperak Holdings Bhd</li> <li>- Descriptions: SVTP will facilitate the development of emerging applied technologies. It also strategically located with easy access to Ipoh Cargo Terminal, Sultan Azlan Shah Airport, Penang Port and Port Klang.</li> </ul>                | Under construction and expected to be completed by 2024.    |
| 4.  | The Anderson                         | <ul style="list-style-type: none"> <li>- Location: Ipoh, Perak</li> <li>- Land area: 7.25 acres</li> <li>- Descriptions: Condominium with 1,030 units. Equipped with facilities such as hall, swimming pool, cafeteria, futsal court, gymnasium, badminton court and jogging track.</li> <li>- Consists of 4 types namely A1 with 1 room (516 sq.ft.), A2 with 1 room (516 sq.ft.), B with 2 rooms (667 sq.ft.) and B1 with 2 rooms (710 sq.ft.)</li> <li>- Selling price between RM170,000 to RM240,000</li> </ul> | Under construction and expected to be completed in Q1 2023. |

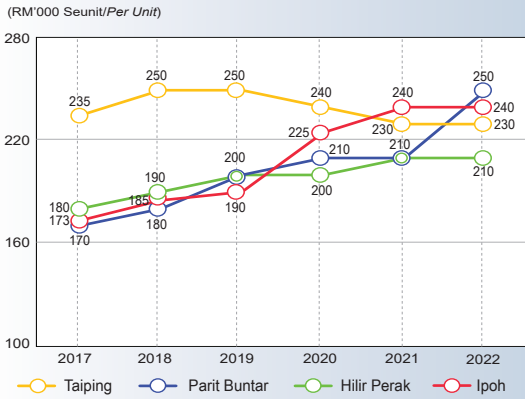
**State Government Policy and Initiatives**

**Table 7.6: State Government Policy Initiatives**

| No. | Policy  | Details  |
|-----|---|--|
| 1.  | Low Cost Housing Transfer of Ownership Policy | <p>In February 2022, Lembaga Perumahan Hartanah Perak has issued a circular entitled: 'Dasar Kawalan Pindahmilik Perumahan Kos Rendah Dengan Mengenakan Syarat Kebenaran Pindahmilik Untuk Kategori Rumah Kos Rendah Bagi Negeri Perak'.</p> <p>This circular aims to control the transfer of ownership for low-cost houses that have been sold to the low-income groups so that the ownership and purchase of low cost houses is only for those who are registered with the Lembaga Perumahan Hartanah Perak. This is to ensure that low cost house transactions can be maintained in the market for the B40 and M40 groups only.</p> |
| 2.  | Interest Free Housing Loan Program            | The State Government provides special interest-free housing loan program for the B40 group who reside in Perak.  |
| 3.  | Public Housing Maintenance                    | A total of RM4.3 million has been allocated for the purpose of maintaining public housing to provide comfortable and safe public housing.  |

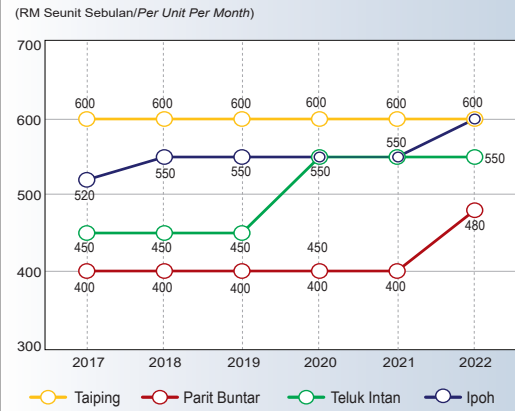
### PERAK 7.1

Pergerakan Harga Purata Rumah Teres Satu Tingkat di Perak  
Average Price Movements of Single Storey Terraced Houses in Perak



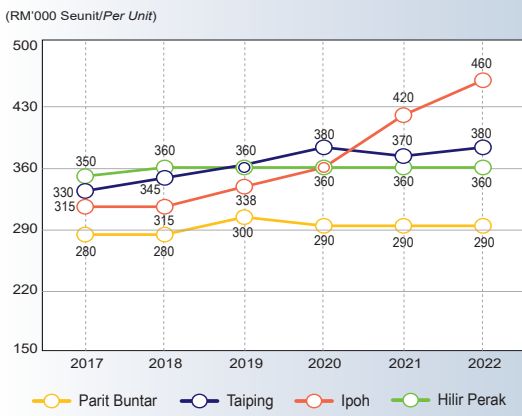
### PERAK 7.2

Pergerakan Sewaan Purata Rumah Teres Satu Tingkat di Perak  
Average Rental Movements of Single Storey Terraced Houses in Perak



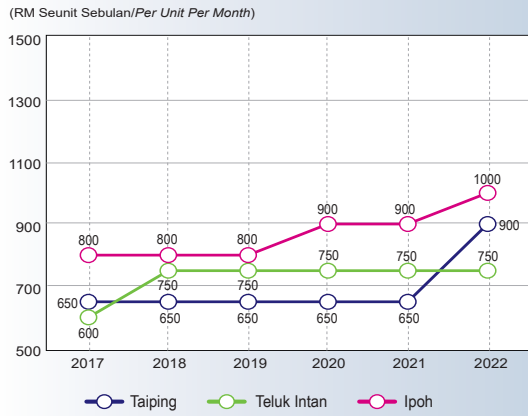
### PERAK 7.3

Pergerakan Harga Purata Rumah Teres Dua Tingkat di Perak  
Average Price Movements of Double Storey Terraced Houses in Perak



### PERAK 7.4

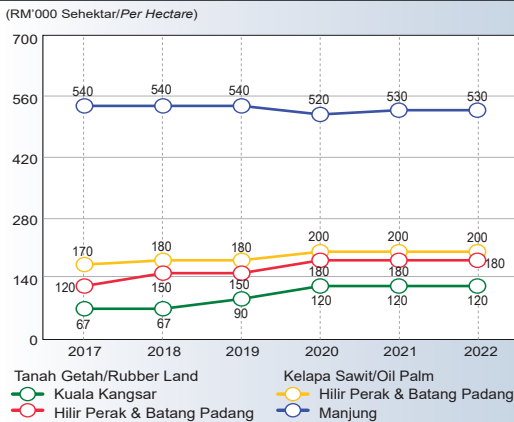
Pergerakan Sewaan Purata Rumah Teres Dua Tingkat di Perak  
Average Rental Movements of Double Storey Terraced Houses in Perak



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### PERAK 7.5

Pergerakan Harga Purata Tanah Kelapa Sawit dan Getah di Perak  
Average Price Movements of Oil Palm and Rubber Lands in Perak





# NEGERI SEMBILAN

## GAMBARAN KESELURUHAN

Prestasi pasaran harta tanah negeri ini menyaksikan pemulihan dalam tempoh kajian oleh pertumbuhan aktiviti pasaran. Terdapat 23,531 transaksi direkodkan bernilai RM8.77 bilion, meningkat 39.4% dan 31.2% dalam bilangan dan nilai berbanding 2021 (16,882 transaksi bernilai RM6.69 bilion).

Subsektor kediaman mengekalkan syer terbesar dengan 71.3% daripada bilangan jumlah transaksi diikuti oleh subsektor pertanian (18.6%), subsektor perdagangan (5.4%), subsektor tanah pembangunan dan lain (2.5%) dan subsektor industri (2.2%).

Prestasi semua subsektor pada aliran menaik. Subsektor kediaman, perdagangan, industri, pertanian dan tanah pembangunan dan lain masing-masing meningkat sebanyak 37.3%, 74.6%, 66.9%, 33.6% dan 71.4%. Sejalan dengan pergerakan aktiviti pasaran, nilai transaksi semua subsektor juga menunjukkan peningkatan.

## OVERVIEW

The state's property market saw a rebound in the review period indicated by the growth in the market activity. There were 23,531 transactions recorded worth RM8.77 billion, increased by 39.4% and 31.2% in volume and value respectively against 2021 (16,882 transactions worth RM6.69 billion).

The residential sub-sector retained its lion share with 71.3% of the total transactions followed by agriculture (18.6%), commercial (5.4%), development land and others (2.5%) and industrial (2.2%) sub-sectors.

The performance of all sub-sectors were on uptrend. Residential, commercial, Industrial, agriculture and development land and others sub-sectors increased by 37.3%, 74.6%, 66.9%, 33.6% and 71.4% respectively. Correspondingly with the market activity movement, transaction value for all sub-sectors also showed an increase.

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Chart 8.1

Volume of Property Transactions 2018 – 2022

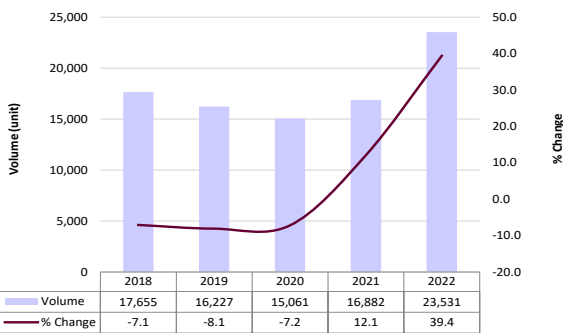


Chart 8.2

Value of Property Transactions 2018 – 2022

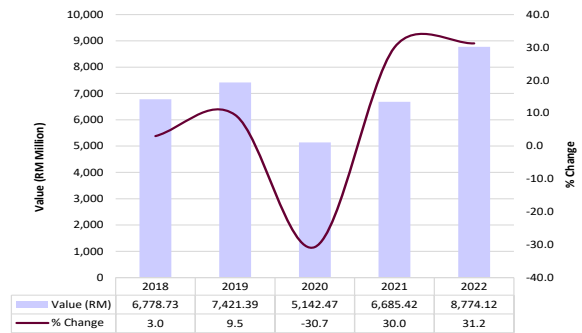


Chart 8.3

Contribution to Transaction Volume by Sub-sector 2022

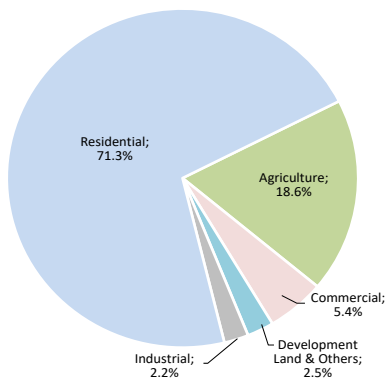
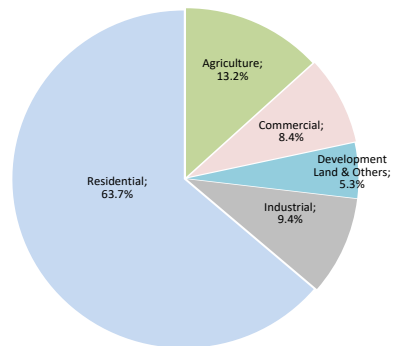


Chart 8.4

Contribution to Transaction Value by Sub-sector 2022



## PROMINENT SALES

Table 8.1

Summary of Prominent Sales Recorded in 2022

| No. | Property                       | Location  | Transaction Year | Consideration Price (RM) |
|-----|--------------------------------|---|------------------|--------------------------|
| 1.  | Estate Land (621.155 hectares) | Ladang Bukit Keledek, Off Jalan Nyalas - Air Kuning | 2022             | 118,000,000              |
| 2.  | Pasaraya Gmart                 | Off Bandar Gemas                                    | 2021             | 6,000,000                |
| 3.  | Vacant Industrial Lot          | Techpark @ Enstek Phase 2                           | 2021             | 33,940,271               |

Tempoh kajian juga menyaksikan beberapa pembelian pukal. Antaranya ialah 1,119 plot teres dan sesebuah bagi pembangunan bercampur di Mambau.

The review period also saw several bulk purchases. Among these were 1,119 terraced and detached plot for mix development at Mambau.

## HARTA TANAH KEDIAMAN

### Transaksi

Subsektor ini mencatatkan 16,786 transaksi bernilai RM5.59 bilion, meningkat 37.3% dalam bilangan dan 34.2% dalam nilai dengan 2021 (12,230 transaksi bernilai RM4.17 bilion). Mengikut jenis, rumah teres adalah yang paling aktif, teres satu tingkat (4,629 unit) dan dua tingkat (5,556 unit) bersama-sama merangkumi 60.7% daripada keseluruhan bahagian pasaran kediaman.

## RESIDENTIAL PROPERTY

### Transaction

The sub-sector recorded 16,786 transactions worth RM5.59 billion, increased by 37.3% in volume and 34.2% in value as compared to 2021 (12,230 transactions worth RM4.17 billion). By type, terraced houses were the most active, single storey (4,629 units) and double storey (5,556 units) together capturing 60.7% of the total residential's market share.

Chart 8.5

Volume of Residential Property Transactions 2018 – 2022

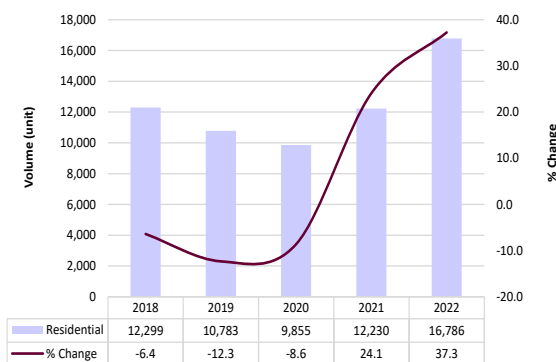
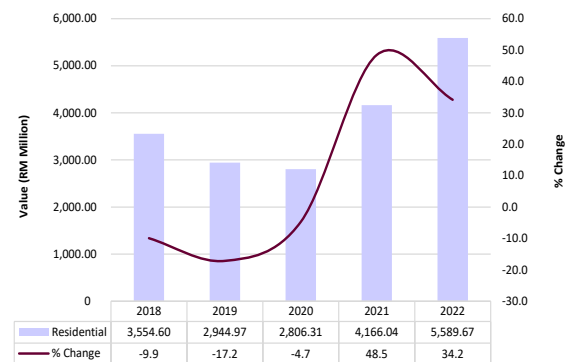


Chart 8.6

Value of Residential Property Transactions 2018 – 2022



## Pelancaran Baharu

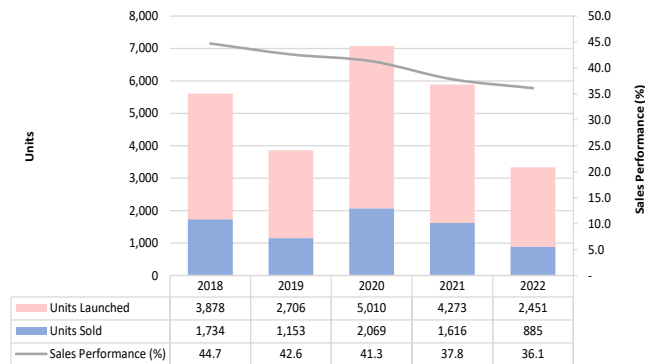
Prestasi pelancaran baharu di pasaran utama menurun 42.6% pada tahun kajian. Terdapat 2,451 unit dilancarkan berbanding 4,273 unit pada 2021. Prestasi jualan direkodkan lebih rendah pada 36.1% berbanding 2021 (37.8%). Teres dua tingkat membentuk sebahagian besar daripada pelancaran baharu, menyumbang 75.6% (1,853 unit) daripada keseluruhan.

## New Launches

The performance of new launches in the primary market decreased by 42.6% in the review period. There were 2,451 units launched as compared to 4,273 units in 2021. Sales performance was recorded lower at 36.1% compared to 2021 (37.8%). Double storey terraces formed the bulk of the new launches, accounting for 75.6% (1,853 units) of the total.

Chart 8.7

New Launches and Sales Performance 2018 – 2022



### Status Pasaran

Situasi kediaman siap dibina tidak terjual bertambah baik dalam tempoh kajian. Bilangan unit siap dibina tidak terjual telah menurun 36.8% ke 886 unit. Trend penurunan yang sama juga dilihat pada unit dalam pembinaan belum terjual dan unit belum dibina belum terjual, dimana kedua-dua telah menurun 4.4% dan 70.2% pada 2022.

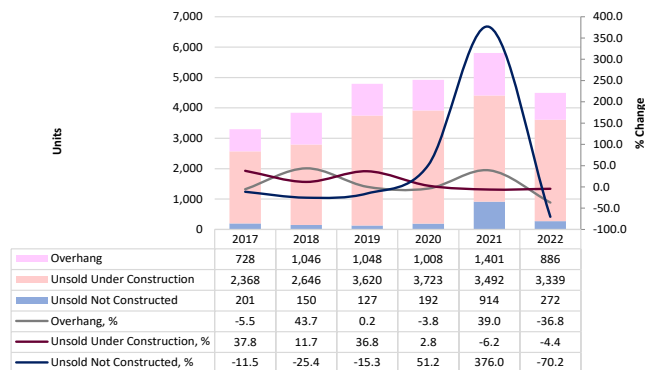
### Market Status

The residential overhang situation improved in the review period. The number of overhang decreased by 36.8% to 886 units. Similar downward trend was observed at unsold under construction and unsold not constructed whereby both decreased by 4.4% and 70.2% respectively in 2022.

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Chart 8.8

Residential Market Status 2018 – 2022



### Aktiviti Pembinaan

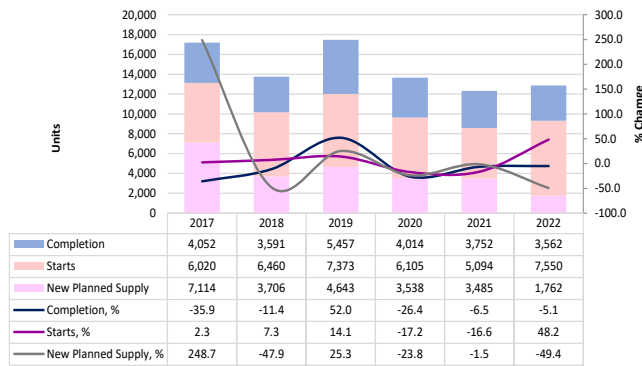
Aktiviti pembinaan subsektor menunjukkan pergerakan bercampur-campur. Siap dibina menurun 5.1% kepada 3,562 unit (2021: 3,752 unit). Sebaliknya, mula dibina meningkat 48.2%, manakala penawaran baharu yang dirancang menurun 49.4%. Sehingga akhir 2022, terdapat 297,754 unit kediaman sediaada dengan 21,203 unit lagi dalam penawaran akan datang dan 25,825 unit dalam penawaran yang dirancang.

### Construction Activity

The sub-sector's construction activity witnessed mixed movement. Completion decreased by 5.1% to 3,562 units (2021: 3,752 units). On the other hand, starts increased by 48.2%, meanwhile and new planned supply decreased by 49.4%. As at end 2022, there were 297,754 existing residential units with another 21,203 units in the incoming supply and 25,825 units in the planned supply.

Chart 8.9

Residential Construction Activity 2018 – 2022



### Harga dan Sewa

Harga harta tanah kediaman menunjukkan pergerakan bercampur-campur di seluruh negeri. Mengikut jenis, rumah teres satu tingkat dan dua tingkat paling aktif dijual beli dengan kenaikan direkodkan masing-masing antara 2.1% hingga 16.7% dan 2.2% hingga 12.1%. Segmen bertingkat tinggi menyaksikan prestasi bercampur-campur secara keseluruhan.

Indeks Harga Semua Rumah untuk negeri berada pada 219.0 mata pada 2022<sup>P</sup>, naik 6.5% daripada 205.6 mata pada tahun 2021. Pada tahun 2022<sup>P</sup>, purata Harga Semua Rumah bagi negeri ini adalah pada RM294,009 meningkat dari RM276,009 pada tahun 2021.

Pasaran sewa secara amnya stabil dengan pergerakan menaik direkodkan di lokasi yang baik. Purata pulangan sewa kediaman berada dalam lingkungan antara 1.6% dan 10.0%.

### Price and Rental

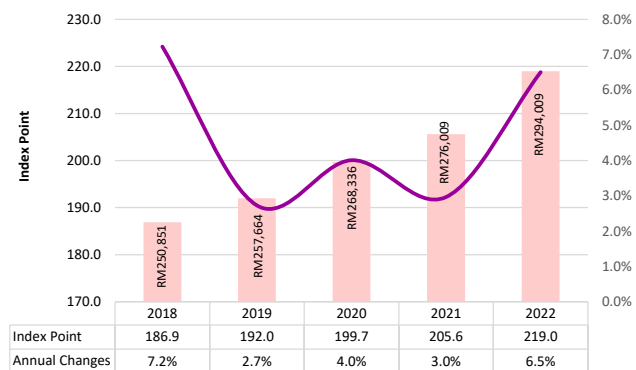
Residential property prices registered mix movement across the state. By type, single storey and double storey terraced houses were the most actively transacted with increases recorded between 2.1% to 16.7% and 2.2% to 12.1% respectively. The high-rise segment witnessed mixed performance across the board.

The All House Price Index for the state stood at 219.0 points in 2022<sup>P</sup>, increased by 6.5% from 205.6 points in 2021. In 2022<sup>P</sup>, the average All House Price for the state stood at RM294,009 increased from RM276,009 in 2021.

The rental market was generally stable with upward movements recorded in favourable locations. The average gross yields for residential is in the range of 1.6% and 10.0%.

Chart 8.10

All House Price Index Annual Changes 2018 – 2022





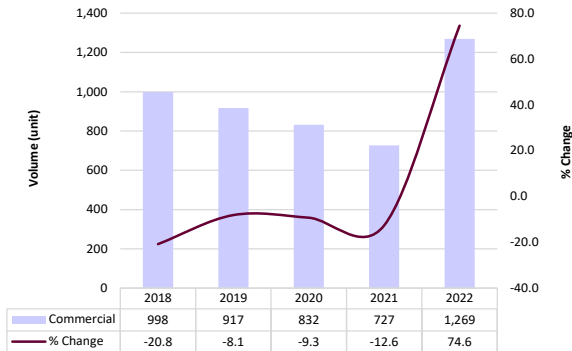
## HARTA TANAH PERDAGANGAN

### Transaksi

Subsektor perdagangan mencatatkan 1,269 transaksi bernilai RM738.59 juta dalam tempoh kajian, meningkat 74.6% dalam bilangan dan 21.5% dalam nilai berbanding 2021 (727 transaksi bernilai RM607.73 juta).

Chart 8.11

Volume of Commercial Property Transactions 2018 – 2022



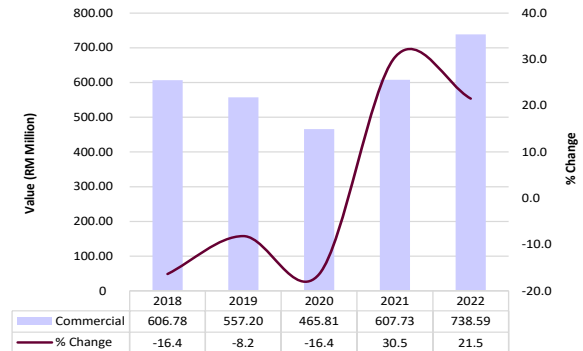
## COMMERCIAL PROPERTY

### Transaction

The commercial sub-sector recorded 1,269 transactions worth RM738.59 million in the review period, increased by 74.6% in volume and 21.5% in value as compared to 2021 (727 transactions worth RM607.73 million).

Chart 8.12

Value of Commercial Property Transactions 2018 – 2022



## 114 Kedai

### Transaksi

Segmen kedai mencatat 871 transaksi bernilai RM504.87 juta pada tahun 2022, menyumbang 68.6% dalam bilangan dan 68.4% dalam jumlah nilai transaksi harta tanah perdagangan. Aktiviti pasaran direkodkan meningkat masing-masing 53.9% dan 42.1% dalam nilai (2021: 566 transaksi bernilai RM355.39 juta). Kedai dua hingga dua setengah tingkat mendominasi 68.1% (593 unit) transaksi harta tanah kedai.

### Status Pasaran

Unit kedai siap dibina tidak terjual dan unit dalam pembinaan belum terjual menunjukkan prestasi yang lebih baik berdasarkan bilangan yang berkurang dalam tempoh kajian masing-masing 1.9% dan 87.3%. Walau bagaimanapun unit belum dibina belum terjual mencatatkan kenaikan 16.7% berbanding tahun 2021.

## Shop

### Transaction

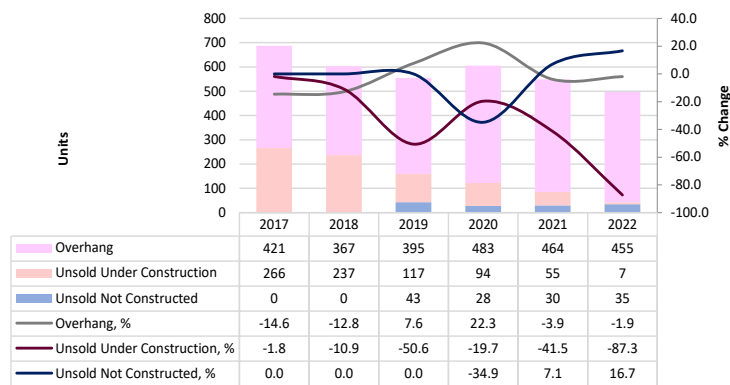
Shop segment recorded 871 transactions worth RM504.87 million in 2022, accounting for 68.6% in volume and 68.4% in total value of the commercial property transactions. Market performance activity recorded an increased of 53.9% in volume and 42.1% in value respectively. (2021: 566 transactions worth RM355.39 million). Two to two and a-half storey shops dominated 68.1% (593 units) of the shop property transactions.

### Market Status

The shop overhang and unsold under construction units showed better performance as the number reduced in the review period 1.9% and 87.3% respectively. However unsold not constructed recorded an increase of 16.7% compared to 2021.

Chart 8.13

Shop Market Status 2018 – 2022



### Aktiviti Pembinaan

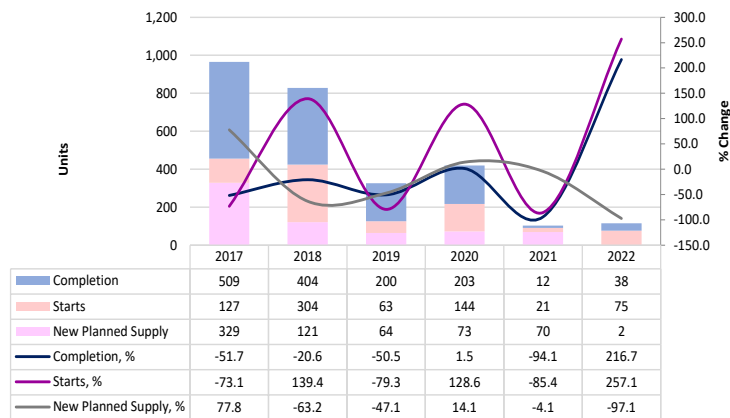
Aktiviti pembinaan berada dalam mod sederhana. Pada akhir 2022, terdapat 27,211 unit kedai sediaada dengan 868 unit lagi dalam penawaran akan datang dan 2,342 unit penawaran yang dirancang.

### Construction Activity

Construction activities was on a moderate mode. As at end-2022, there were 27,211 existing shop units with another 868 units in the incoming supply and 2,342 units in the planned supply.

Chart 8.14

Shop Construction Activity 2018 – 2022



### Kompleks Perniagaan

#### Transaksi

Di segmen kompleks perniagaan, menyaksikan satu jualanbeli utama yang disempurnakan dalam tempoh kajian iaitu Pasaraya Gmart di Tampin.

### Shopping Complex

#### Transaction

In the complex segment, witnessed one major sales that were completed during the study period, namely Gmart Supermarket in Tampin.

#### Penghunan dan Ketersediaan Ruang

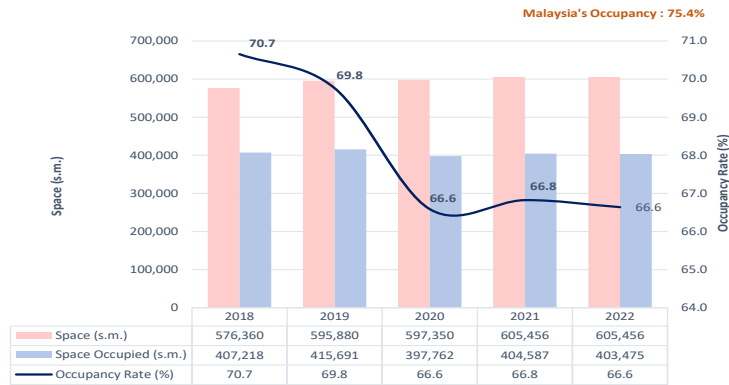
Prestasi keseluruhan kompleks membeli-belah kekal sederhana, mencatat kadar penghunan 66.6%, menurun sedikit dari 66.8% pada 2021. Ambilan tahunan menurun pada 1,112 m.p.

#### Occupancy and Space Availability

The overall performance of shopping complex remain moderated, recording an occupancy rate of 66.6%, decreased marginally from 66.8% in 2021. The annual take-up dropped at 1,112 s.m.

Chart 8.15

Supply and Occupancy of Shopping Complex 2018 – 2022



**Aktiviti Pembinaan**

Tiada kompleks perniagaan siap dibina dalam tempoh kajian. Pada akhir 2022, terdapat 93 kompleks membeli-belah sedia ada (605,456 m.p.) dengan dua bangunan (8,155 m.p.) dalam penawaran akan datang dan tiada penawaran yang dirancang.

**Construction Activity**

*There was no completion of Shopping Complex during the review period. As at end-2022, there were 93 existing shopping complexes (605,456 s.m.) with two buildings (8,155 s.m.) in the incoming supply and planned supply was nil.*

**Sewa**

**Rental**

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Secara amnya, sewa ruang niaga adalah stabil secara keseluruhannya. Sewa tertinggi subsektor direkodkan di aras bawah AEON Seremban 2 dari RM54.90 s.m.p. hingga setinggi RM466.09 s.m.p.

*Generally, rental of retail space was stable across the board. Highest rental in the sub-sector was recorded at ground level AEON Seremban 2 from RM54.90 p.s.m. to as high as RM466.09 p.s.m.*

**Pejabat Binaan Khas**

**Purpose-Built Office**

**Penghunian dan Ketersediaan Ruang**

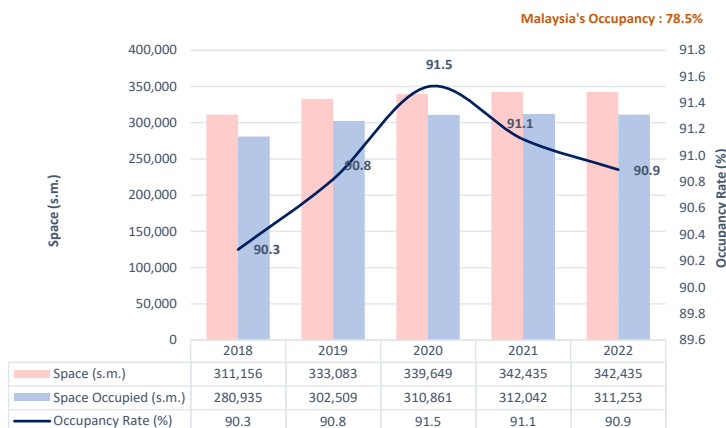
**Occupancy and Space Availability**

Prestasi bangunan pejabat binaan khas kekal kukuh. Purata kadar penghunian menyaksikan pengurangan marginal iaitu 90.9% berbanding 91.1% pada 2021. Ambilan tahunan adalah berkurang kepada 789 m.p.

*The performance of purpose-built office remained stable. The average occupancy rate witnessed a marginal decrease of 90.9% compared to 91.1% in 2021. The annual take-up decrease at 789 s.m.*

Chart 8.16

Supply and Occupancy of Purpose-Built Office 2018 – 2022



## Aktiviti Pembinaan

Tiada bangunan pejabat binaan khas siap dibina dalam tempoh kajian. Pada akhir 2022, terdapat 108 bangunan pejabat binaan khas sedia ada (342,435 m.p.) dengan empat bangunan (10,437 m.p.) dalam penawaran akan datang dan tiada penawaran yang dirancang.

## Sewa

Sewa pasaran pejabat adalah stabil. Seremban City Centre mengekalkan keunggulannya, mencapai sewa tertinggi dari RM36.26 s.m.p. hingga RM46.51 s.m.p.

## RIADAH

Tiada hotel siap dibina dalam tahun 2022. Sehingga akhir 2022, terdapat 143 hotel (9,542 bilik) sedia ada dengan lima hotel (1,546 bilik) dalam penawaran akan datang dan tiga hotel (358 bilik) dalam penawaran yang dirancang.

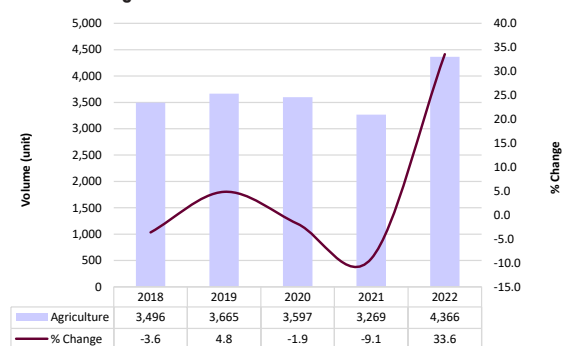
## HARTA TANAH PERTANIAN

### Transaksi

Subsektor pertanian merupakan penyumbang kedua kepada transaksi harta tanah keseluruhan. Terdapat 4,366 transaksi bernilai RM1.16 billion, mencakupi 18.6% daripada jumlah urus niaga hartanah. Aktiviti pasarannya menunjukkan peningkatan sebanyak 33.6% dalam bilangan dan 19.9% dalam nilai berbanding 2021 (3,269 transaksi bernilai RM965.57 juta).

Chart 8.17

Volume of Agriculture Transactions 2018 – 2022



## Harga

Harga harta pertanian menunjukkan pergerakan bercampur dengan pertumbuhan positif antara 2.5% - 15.8% dilihat bagi tanaman tertentu. Walau bagaimanapun, penurunan harga juga direkodkan seperti tanah kosong pertanian di Seremban dan Port Dickson menurun antara 2.9% hingga 11.7%.

## Construction Activity

There was no completion of purpose-built offices during the review period. As at end-2022, there were 108 existing shopping complexes (342,435 s.m.) with four buildings (10,437 s.m.) in the incoming supply and planned supply was nil.

## Rental

The office rental market was largely stable. Seremban City Centre sustained its prominence, fetching the highest rental from RM36.26 p.s.m. to RM46.51 p.s.m.

## LEISURE

There was no completion hotel in 2022. As at end-2022, there were 143 hotels (9,542 rooms) in the existing supply with another five hotels (1,546 rooms) in the incoming supply and three hotel (358 rooms) in planned supply.

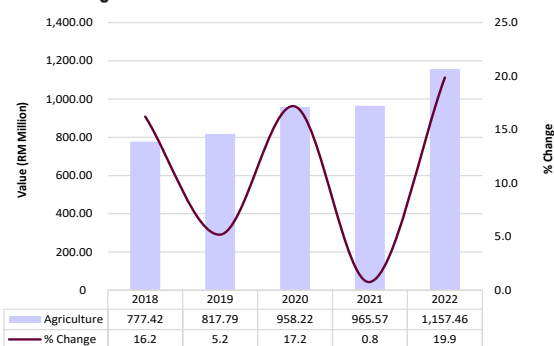
## AGRICULTURE PROPERTY

### Transaction

The agriculture sub-sector was second highest contributor to overall property transactions. There were 4,366 transactions worth RM1.16 billion, accounting for 18.6% of the total property transactions. The market activity increased by 33.6% in volume and 19.9% in value against 2021 (3,269 transactions worth RM965.57 million).

Chart 8.18

Value of Agriculture Transactions 2018 – 2022



## Price

Prices of agriculture property showed mixed movement with growth between 2.5% - 15.8% seen for certain crops. However, a decrease in prices was also recorded such as vacant agricultural land in Seremban and Port Dickson decreased between 2.9% to 11.7%.

## PROSPEK 2023

Prospek pasaran harta tanah di negeri ini akan kekal positif di 2023 dengan harga harta tanah dijangka kekal kukuh. Projek pembangunan yang dilaksanakan akan terus menyokong pasaran harta tanah. Antara pembangunan yang dijangka memberi kesan positif ke atas pasaran harta tanah adalah:

## 2023 OUTLOOK

*The prospects of the state's property market would remain positive in 2023 with prices of properties remain firm. The developments projects implemented would continue to support the property market. Among the developments that are expected to create positive impact on the state's property market are:*

### Infrastructure Development

**Table 8.2: Infrastructure Projects**

| No. | Infrastructure Project                                  | Description  | Current Development Status |
|-----|---|--|----------------------------|
| 1.  | Jalan Nilai - Labu - Bandar Enstek                      | <ul style="list-style-type: none"> <li>• Connecting Nilai - Labu - Bandar Enstek.</li> <li>• The two-way four-lane road project involves the construction of three main intersections, six bridges, retaining walls, streetlights and traffic lights.</li> <li>• Total length: 16.82 kilometres</li> <li>• Estimated construction cost: RM415 million.</li> <li>• This project is to be part of the requirements for the Malaysian Vision Valley 2.0 project.</li> <li>• expected to be completed in 2023</li> </ul> | Under Construction         |
| 2.  | Hospital Tuanku Ampuan Najihah (HTAN) upgrading project | <ul style="list-style-type: none"> <li>• Location: Hospital Tuanku Ampuan Najihah, Kuala Pilah.</li> <li>• The project involves construction of a new 6-storeys hospital extension building with additional floor area of 22,700 square meters.</li> <li>• Land area: 1.7 hectare</li> <li>• Allocation approved: RM139.35 million</li> <li>• expected to be completed in 2024.</li> </ul>   | Under Construction         |
| 3.  | Hospital Port Dickson upgrading project                 | <ul style="list-style-type: none"> <li>• Location: Hospital Port Dickson, Port Dickson.</li> <li>• The project involves construction of a new hospital specialist block.</li> <li>• Allocation approved: RM140 million</li> </ul>  | Incoming Project           |
| 4.  | Kompleks Belia dan Sukan Rembau                         | <ul style="list-style-type: none"> <li>• Location: Chembong, Rembau</li> <li>• The project involves construction of a stadium, equipped with synthetic pitches, racetrack, hall that can accommodate six badminton courts, two futsal courts, two sepak takraw courts, a basketball court and a netball court.</li> <li>• Land area: 8.094 hectare</li> <li>• Construction cost: RM27 million</li> <li>• expected to be completed in 2024.</li> </ul>  | Under Construction         |
| 5.  | Jalan Seremban – Kuala Pilah                            | <ul style="list-style-type: none"> <li>• Location : Seksyen 8.50 Jalan Seremban – Kuala Pilah</li> <li>• This upgrading two-lane two way to four-lane two-way road project involve 21 lots individual title along the road.</li> <li>• Total length: 1 kilometre</li> </ul>  | Site Clearance             |

## Mega Project

**Table 8.3: Development Project**

| No. | Development Projects                  | Description   | Current Development Status |
|-----|---------------------------------------|---|----------------------------|
| 1.  | Malaysian Vision Valley 2.0 (MVV 2.0) | <ul style="list-style-type: none"> <li>The project has an area of 153,411 hectares at Negeri Sembilan South (Seremban and Port Dickson Area)</li> <li>This project is expected to attract investments worth RM294 billion over 30 years which focuses on four major economic compositions such as High -Tech Industry, Services and Tourism Industry, Skills -Based Education and Research Sector and Logistics, Aviation, Maritime and Specialized Services Hub.</li> </ul>  | Started 2015               |
| 2.  | Hamilton City                         | <ul style="list-style-type: none"> <li>Location: Nilai, Negeri Sembilan</li> <li>Land area: 2,723-acre</li> <li>The city is a full-fledged managed industrial township in MVV 2.0, focusing on medium to heavy manufacturing-based industries to drive direct investments into the development, as well as to generate socio-economic improvement in the township.</li> <li>Divided into four phases</li> </ul> <p><u>Phases 1, 2 and 4</u></p> <ul style="list-style-type: none"> <li>Focusing on medium and heavy industrial activities.</li> </ul> <p><u>Phase 3</u></p> <ul style="list-style-type: none"> <li>Light industry comprising detached and semi-detached factories with a managed industrial park concept.</li> </ul> <ul style="list-style-type: none"> <li>Expected to create job opportunities for the population of 740,000 living within and around the township.</li> <li>expected to be completed in 2029.</li> </ul> | Under Construction         |
| 3.  | Bayu Sutera Precent 2B                | <ul style="list-style-type: none"> <li>Location: Off Jalan Labu – Port Dickson, approximately 15 kilometers from Bandar Seremban.</li> <li>Toral development area: 8.55 hectar</li> <li>Developer: BSS Development Sdn Bhd (subsidiary Matrix Concepts)</li> <li>The development consists of: <ul style="list-style-type: none"> <li>2 Storey terrace (Type A) – 156 units, selling price range RM588,888 – RM1,081,888</li> <li>2 Storey terrace (Type B) – 169 units, selling price starting at RM529,999</li> </ul> </li> <li>expected to be completed in 2023.</li> </ul>   | Under Construction         |
| 4.  | Rimbun Aman @ S2 Heights              | <ul style="list-style-type: none"> <li>Location: Jalan Labu Lama, approximately 8 kilometers from Bandar Seremban near to exit toll plaza Bandar Ainsdale - North-South Expressway (Lebuhraya PLUS).</li> <li>Toral development area: 17.00 hectar</li> <li>Developer: Seremban Two Holdings</li> <li>The development consists of: <ul style="list-style-type: none"> <li>1 Storey terrace (Type RT1) – 120 units, selling price starting at RM349,920</li> <li>1 Storey terrace (Type RT2) – 174 units, selling price starting at RM398,800</li> <li>1 Storey terrace (Type RT3) – 10 units, selling price starting at RM408,800</li> </ul> </li> <li>expected to be completed in 2023.</li> </ul>   | Under Construction         |
| 5.  | Pinggiran Bayu                        | <ul style="list-style-type: none"> <li>Location: Jalan Mantau Indah, approximately 10 kilometers from Bandar Seremban.</li> <li>Toral development area: 18.37 hectar</li> <li>Developer: Pagar Budi (M) Sdn Bhd</li> <li>The development consists of: <ul style="list-style-type: none"> <li>Town House – 49 units</li> <li>2 and 2 1/2 Storey terrace – 273 units</li> </ul> </li> <li>expected to be completed in 2023.</li> </ul>  | Under Construction         |

**Table 8.3: Development Project**

| No. | Development Projects                     | Description   | Current Development Status |
|-----|--|---|----------------------------|
| 6.  | XME Business Park @ Nilai Impian Phase 1 | <ul style="list-style-type: none"> <li>• Location: Persiaran Pusat Bandar, approximately 5 kilometers from Bandar Baru Nilai.</li> <li>• Total development area: 2.53 hectar</li> <li>• Developer: Sime Darby Property (Nilai Sdn Bhd)</li> <li>• The development consists of:                             <ul style="list-style-type: none"> <li>○ Semi Detached Office Factory – 54 units, selling price starting at RM2,259,778</li> <li>○ Detached Office Factory – 21 units, selling price starting at RM3,743,756</li> </ul> </li> <li>• expected to be completed in October 2023.</li> </ul> | Under Construction         |
| 7.  | Scientex Seremban                        | <ul style="list-style-type: none"> <li>• Location: Jalan Labu Lama, approximately 6 kilometers from Bandar Seremban.</li> <li>• Total development area: 43.926 hectar</li> <li>• Developer: Scientex Park (M) Sdn Bhd</li> <li>• The development consists of:                             <ul style="list-style-type: none"> <li>○ 2 Storey terrace – 365 units</li> <li>○ 1 Storey RMM – 233 units</li> </ul> </li> </ul>  | Under Construction         |

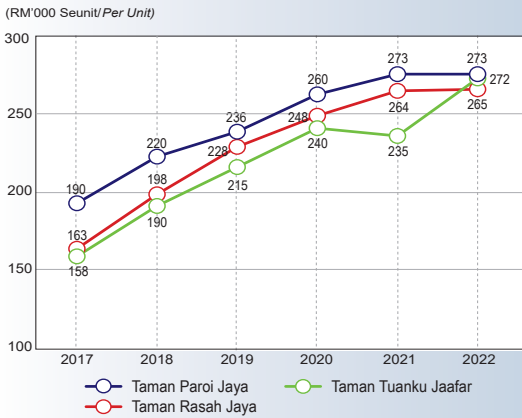
120 **State Government Policy and Initiative**

**Table 8.4: State Government Policy**

| No. | Policy   | Description   |
|-----|--|---|
| 1.  | Determination of Premium Discount for Land Development | <ul style="list-style-type: none"> <li>• The Negeri Sembilan Government meeting on January 19, 2022 has given an incentive to discount land development premium payments from January 1, 2022 to December 31, 2022</li> <li>• This implementation involves giving discounts only for land development. A discount of 25% is given to applicants who pay a lump sum premium within 30 days from the date of receipt of Notice 5A or 7G from the District Land Administrator and 15% to applicants who pay a lump sum premium within 60 days</li> </ul> |

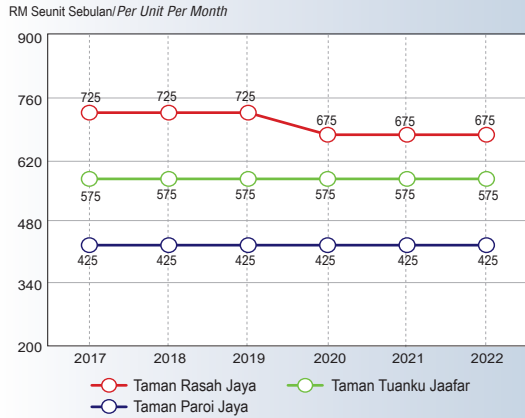
### NEGERI SEMBILAN 8.1

Pergerakan Harga Purata Rumah Teres Satu Tingkat di Seremban  
Average Price Movements of Single Storey Terraced Houses in Seremban



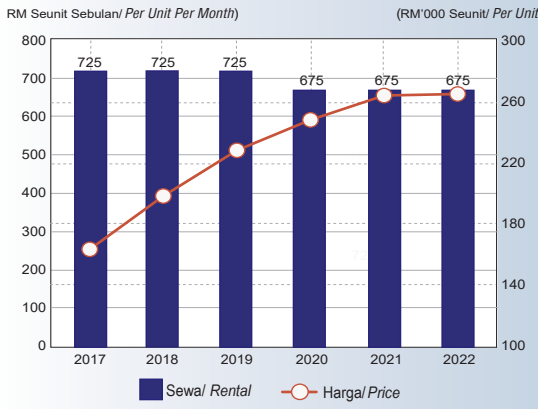
### NEGERI SEMBILAN 8.2

Pergerakan Sewaan Purata Rumah Teres Satu Tingkat di Seremban  
Average Rental Movements of Single Storey Terraced Houses in Seremban



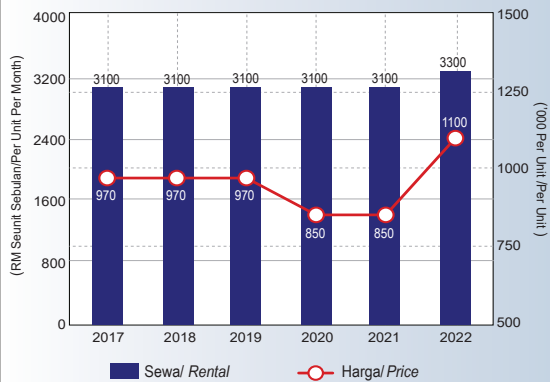
### NEGERI SEMBILAN 8.3

Pergerakan Harga dan Sewa Purata Rumah Teres Satu Tingkat di Taman Rasah Jaya  
Average Price and Rental Movements of Single Storey Terraced Houses in Taman Rasah Jaya



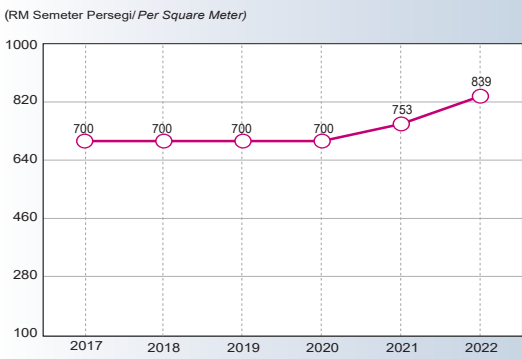
### NEGERI SEMBILAN 8.4

Pergerakan Harga dan Sewa Purata Kedai Dua Tingkat Sebelum Perang di Jalan Dato Bandar Tunggal  
Average Price and Rental Movements of Double Storey Pre-war Shop in Jalan Dato Bandar Tunggal



### NEGERI SEMBILAN 8.5

Pergerakan Harga Purata Plot Perindustrian di Taman Perindustrian Arab Malaysian, Nilai (Dengan Infrastruktur)  
Average Price Movements of Industrial Plot at Arab Malaysian Industrial Park, Nilai (With Infrastructure)







# MELAKA



# MELAKA

## GAMBARAN KESELURUHAN

Pasaran harta tanah negeri ini bertambah baik dalam tempoh kajian. Terdapat 17,387 transaksi bernilai RM6.10 bilion telah direkodkan, menunjukkan peningkatan 35.2% dalam bilangan dan 36.9% dalam nilai berbanding dengan tahun lepas (2021: 12,859 transaksi bernilai RM4.46 bilion). Subsektor kediaman terus menguasai syer pasaran keseluruhan dengan 62.8% syer, diikuti dengan subsektor tanah pembangunan & lain (15.8%), pertanian (11.6%), perdagangan (7.0%), dan industri (2.8%).

Aktiviti pasaran menunjukkan prestasi lebih baik secara keseluruhan. Subsektor tanah pembangunan & lain mendahului dengan peningkatan 78.7%, diikuti perdagangan (72.2%), industri (60.7%), kediaman (31.4%) dan pertanian (0.6%). Sejajar dengan pergerakan aktiviti pasaran, nilai transaksi semua subsektor juga menunjukkan peningkatan kecuali tanah pembangunan & lain menurun 23.3%.

## OVERVIEW

The state's property market performance improved in the review period. There were 17,387 transactions worth RM6.10 billion recorded, indicating increase of 35.2% in volume and 36.9% in value as compared to previous year (2021: 12,859 transactions worth RM4.46 billion). Residential sub-sector continued to dominate the overall market share with 62.8% share, followed by development land & others (15.8%), agriculture (11.6%), commercial (7.0%) and industrial (2.8%) sub-sectors.

Market activity showed better performance across the board. The development land & others led the growth with 78.7%, followed commercial (72.2%), industrial (60.7%), residential (31.4%) and agriculture (0.6%). Correspondingly with the market activity movement, transaction value for all sub-sectors also showed an increase except for development land & others decreased by 23.3% .

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Chart 9.1

Volume of Property Transactions 2018 – 2022

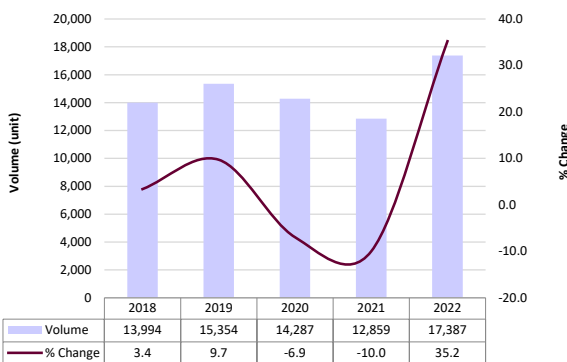


Chart 9.2

Value of Property Transactions 2018 – 2022

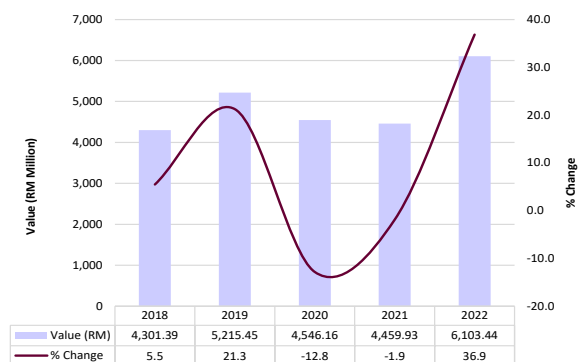


Chart 9.3

Contribution to Transaction Volume by Sub-sector 2022

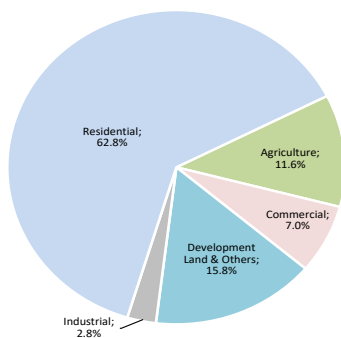
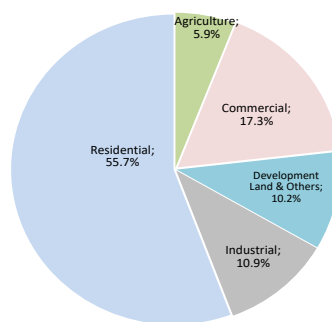


Chart 9.4

Contribution to Transaction Value by Sub-sector 2022



## PROMINENT SALES

Table 9.1

Summary of Prominent Sales Recorded in 2022

| No. | Property  | Location/Mukim               | Transaction Year | Consideration Price (RM) |
|-----|---|------------------------------|------------------|--------------------------|
| 1.  | MYDIN Hypermarket                                 | Jalan MiTC Mukim Bukit Katil | 2022             | 142,000,000.00           |
| 2.  | Detached Factory                                  | Jalan PBB 2, Melaka          | 2022             | 90,000,000               |
| 3.  | Vacant Residential and Commercial Land - (9 lots) | Jalan Gapam Bemban           | 2022             | 104,627,269.30           |
| 4.  | Golden Valley Golf                                | Jalan Ayer Panas - Kesang    | 2021             | 95,095,656.60            |

## HARTA TANAH KEDIAMAN

### Transaksi

Prestasi pasaran bagi subsektor kediaman meningkat dalam tempoh kajian dengan 10,918 transaksi bernilai RM3.40 bilion, masing-masing menunjukkan kenaikan 31.4% dan 46.1% dalam bilangan dan nilai berbanding 2021 (8,309 transaksi bernilai RM2.33 bilion). Mengikut jenis, rumah teres adalah yang paling aktif, teres satu tingkat (3,355 unit) dan dua tingkat (2,630 unit) bersama-sama merangkumi 54.8% daripada keseluruhan bahagian pasaran kediaman.

## RESIDENTIAL PROPERTY

### Transaction

The residential sub-sector's market performance improved in the review period with 10,918 transactions worth RM3.40 billion, increase 31.4% and 46.1% in volume and value respectively against 2021 (8,309 transactions worth RM2.33 billion). By type, terraced houses were the most active, single storey (3,355 units) and double storey (2,630 units) together capturing 54.8% of the total residential's market share.

Chart 9.5

Volume of Residential Property Transactions 2018 – 2022

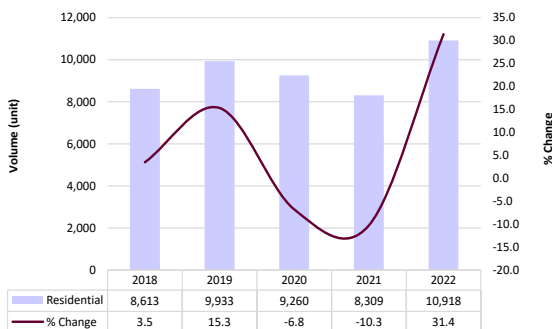
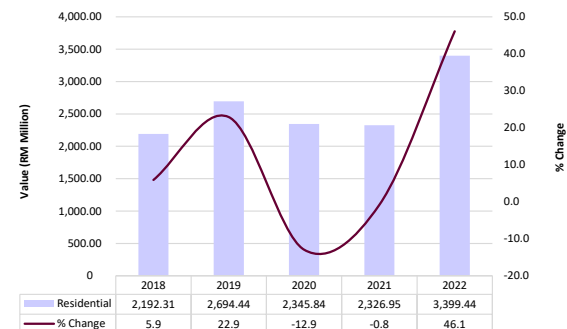


Chart 9.6

Value of Residential Property Transactions 2018 – 2022



## Pelancaran Baharu

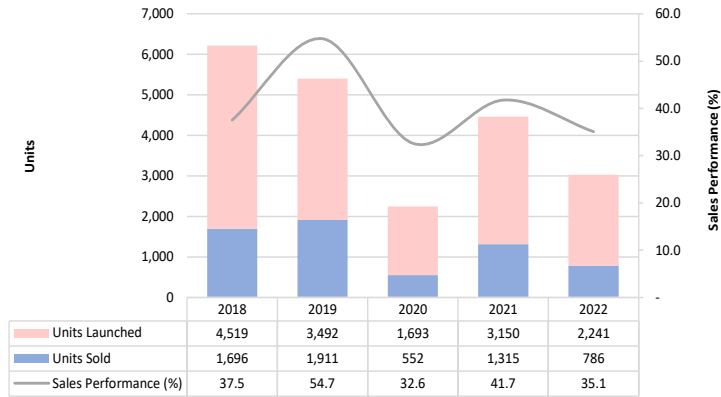
Prestasi pelancaran baharu di pasaran utama menurun 28.9% pada tahun kajian. Terdapat 2,241 unit dilancarkan berbanding 3,150 unit pada 2021. Prestasi jualan direkodkan lebih rendah pada 35.1% berbanding 2021 (41.7%). Teres dua tingkat membentuk sebahagian besar daripada pelancaran baharu, menyumbang 49.6% (1,111 unit) daripada keseluruhan.

## New Launches

The performance of new launches in the primary market decreased by 28.9% in the review period. There were 2,241 units launched as compared to 3,150 units in 2021. Sales performance was recorded lower at 35.1% compared to 2021 (41.7%). Double storey terraces formed the bulk of the new launches, accounting for 49.6% (1,111 units) of the total.

Chart 9.7

New Launches and Sales Performance 2018 – 2022



**Status Pasaran**

Unit kediaman siap dibina dan belum terjual memperlihatkan trend bercampur-campur. Siap dibina tidak terjual meningkat 14.8%, manakala dalam pembinaan belum terjual dan belum dibina belum terjual menyaksikan penurunan dalam tempoh kajian masing-masing 10.6% dan 56.8%.

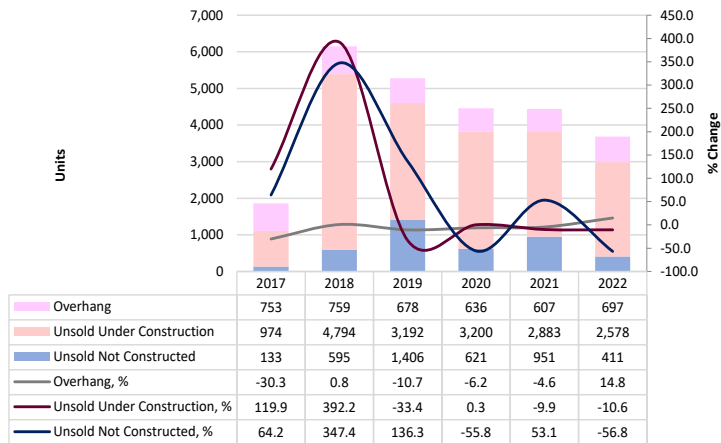
**Market Status**

Mixed trend was seen in residential overhang and unsold. Overhang increased by 14.8%, while unsold under construction and unsold not constructed witnessed less number in the review period of 10.6% and 56.8% respectively.

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Chart 9.8

Residential Market Status 2018 – 2022



**Aktiviti Pembinaan**

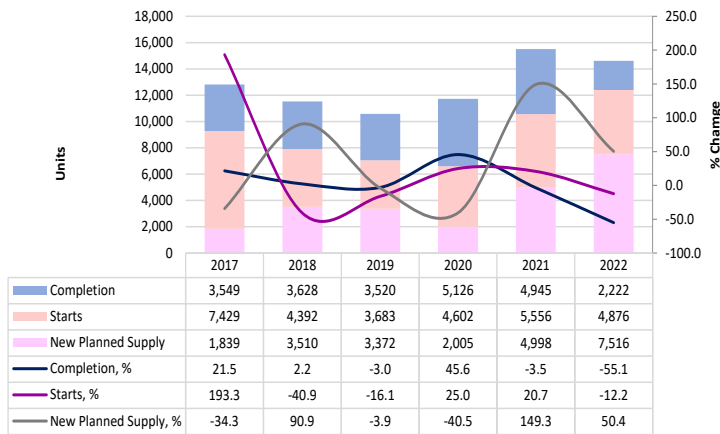
Segmen ini menyaksikan pergerakan bercampur-campur dalam aktiviti pembinaan. Sehingga akhir 2022, terdapat 212,841 unit kediaman sedia ada dengan 22,341 unit lagi dalam penawaran akan datang dan 14,968 unit dalam penawaran yang dirancang.

**Construction Activity**

The segment saw mixed movements in construction activity. As at end-2022, there were 212,841 existing residential units with another 22,341 units in the incoming supply and 14,968 units in the planned supply.

Chart 9.9

Residential Construction Activity 2018 – 2022



### Harga dan Sewa

Harga harta tanah kediaman merekodkan pergerakan bercampur-campur di seluruh negeri. Teres satu tingkat di Taman Krubong Indah, Taman Merdeka dan Taman Pahlawan Sungai Udang di Melaka Tengah serta Taman Mayang Lestari di Jasin mencatatkan pertumbuhan dua angka disebabkan oleh lokasi yang strategik. Sementara itu, beberapa skim kediaman strata di Melaka Tengah juga mencatat pertumbuhan modal antara 2.6% hingga 9.4%.

Indeks Harga Semua Rumah bagi negeri ini adalah 201.2 mata pada tahun 2022<sup>P</sup>, naik 5.1% daripada 191.4 mata pada tahun 2021. Pada tahun 2022<sup>P</sup>, purata Harga Semua Rumah bagi negeri ini adalah pada RM221,867, meningkat daripada RM211,101 pada tahun 2021.

Pasaran sewa secara amnya stabil dengan pergerakan menaik direkodkan di lokasi yang baik. Purata pulangan sewa kediaman berada dalam lingkungan antara 2.0% dan 9.4%.

### Price and Rental

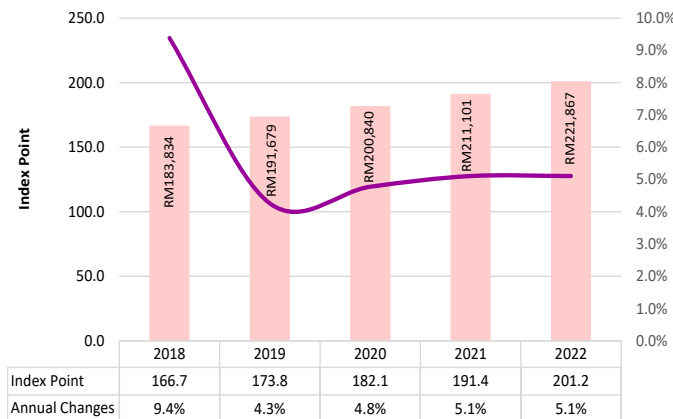
Residential property prices recorded mixed movements across the board. Single storey terraces in Taman Krubong Indah, Taman Merdeka and Taman Pahlawan Sungai Udang in Melaka Tengah as well as Taman Mayang Lestari in Jasin registered a double-digit growth due to their strategic locations. Meanwhile several stratified schemes in Melaka Tengah also registered capital gains 2.6% to 9.4%.

The All House Price Index for the state stood at 201.2 points on 2022<sup>P</sup>, up by 5.1% from 191.4 points in 2021. In 2022<sup>P</sup>, the average All House Price for the state stood at RM221,867, increased from RM211,101 in 2021.

The rental market was generally stable with upward movements recorded in favourable locations. The average gross yields for residential is in the range of 2.0% and 9.4%.

Chart 9.10

All House Price Index Annual Changes 2018 – 2022



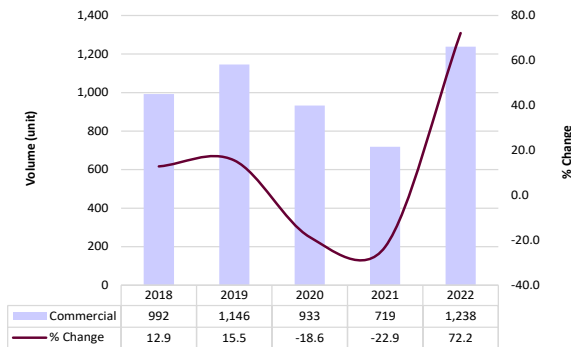
## HARTA TANAH PERDAGANGAN

### Transaksi

Subsektor perdagangan mencatatkan 1,238 transaksi bernilai RM1.05 billion dalam tempoh kajian, meningkat 72.2% dalam bilangan dan 47.4% dalam nilai berbanding 2021 (719 transaksi bernilai RM714.81 juta).

Chart 9.11

Volume of Commercial Property Transactions 2018 – 2022



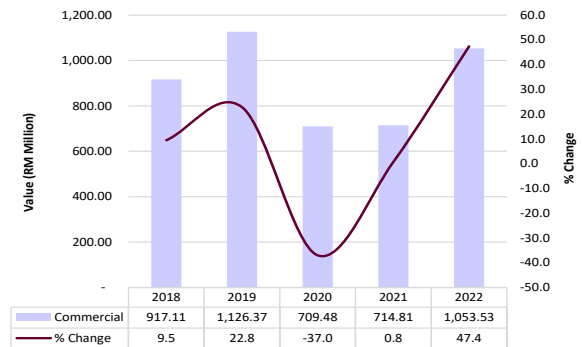
## COMMERCIAL PROPERTY

### Transaction

The commercial sub-sector recorded 1,238 transactions worth RM1.05 billion in the review period, increased by 72.2% in volume and 47.4% in value as compared to 2021 (719 transactions worth RM714.81 million).

Chart 9.12

Value of Commercial Property Transactions 2018 – 2022



128 Shop

### Shop

#### Transaksi

Segmen kedai mencatat aktiviti pasaran yang kukuh pada 2022 dengan 710 transaksi bernilai RM395.64 juta (2021: 428 transaksi bernilai RM214.35 juta). Berbanding tahun 2021, bilangan dan nilai transaksi masing-masing meningkat 65.9% dan 84.6%. Transaksi kedai dua hingga dua setengah tingkat mendominasi 70.3% (499 unit) harta tanah kedai.

#### Status Pasaran

Situasi kedai siap dibina tidak terjual dan kedai dalam pembinaan belum terjual menyaksikan peningkatan bilangan, manakala negeri ini tidak dibebani dengan mana-mana unit kedai belum dibina belum terjual pada tahun 2022.

### Shop

#### Transaction

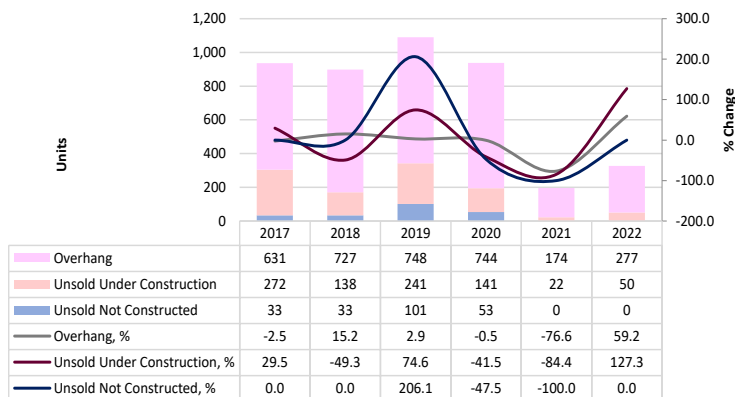
Shop segment recorded strengthen performance in 2022 with 710 transactions worth RM395.64 million (2021: 428 transactions worth RM214.35 million). In comparison to 2021, volume and value of transactions increased by 65.9% and 84.6% respectively. Two to two and a-half storey shops dominated 70.3% (499 units) of the total shop transactions.

#### Market Status

The situation of overhang and unsold under construction witnessed an increasing in numbers, while the state was unencumbered with any unsold not constructed shop in 2022.

Chart 9.13

Shop Market Status Trend 2018 – 2022

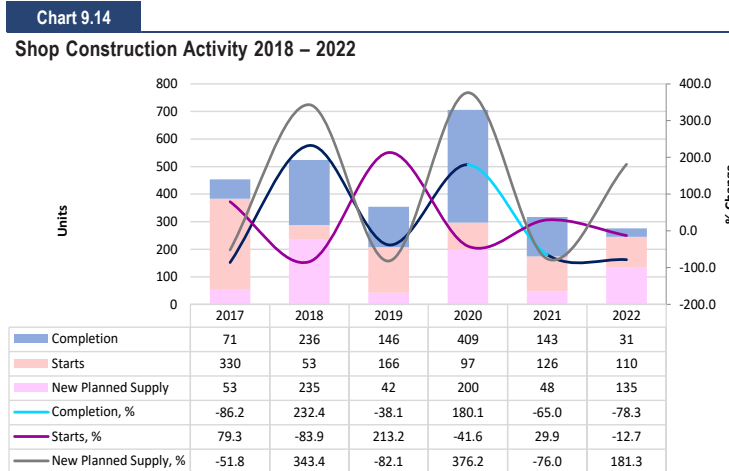


## Aktiviti Pembinaan

Segmen ini menyaksikan pergerakan bercampur-campur dalam aktiviti pembinaan. Sehingga akhir 2022, terdapat 23,211 unit kedai sedia ada dengan 1,235 unit lagi dalam penawaran akan datang dan 1,258 unit dalam penawaran yang dirancang.

## Construction Activity

The segment saw mixed movements in construction activity. As at end-2022, there were 23,211 existing shop units with another 1,235 units in the incoming supply and 1,258 units in the planned supply.



## Kompleks Perniagaan

### Transaksi

Segmen kompleks membeli-belah menunjukkan satu transaksi utama pada tahun 2022 iaitu MYDIN Hypermarket di Jalan MiTC Mukim Bukit Katil dengan balasan sebanyak RM142.00 juta.

## Shopping Complex

### Transaction

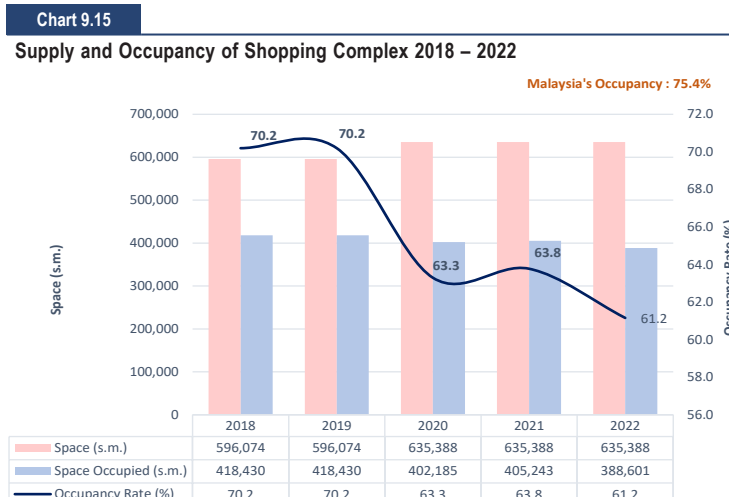
The shopping complex segment saw one prominent transaction in 2022 namely MYDIN Hypermarket in Jalan MiTC Mukim of Bukit Katil with a consideration of RM142.00 million.

### Penghunian dan Ketersediaan Ruang

Prestasi keseluruhan kompleks membeli-belah kekal sederhana, mencatat kadar penghunian 61.3%, menurun sedikit dari 63.8% pada 2021. Ambilan tahunan menurun pada 16,642 m.p.

### Occupancy and Space Availability

The overall performance of shopping complex remain moderated, recording an occupancy rate of 61.3%, decreased marginally from 63.8% in 2021. The annual take-up dropped at 16,642 s.m.





## Aktiviti Pembinaan

Tiada aktiviti pembinaan baharu direkodkan dalam tempoh kajian. Sehingga akhir 2022, terdapat 31 kompleks perniagaan sedia ada (635,388 m.p.) dengan dua kompleks lagi (57,245 m.p.) dalam penawaran akan datang.

## Sewa

Secara amnya, sewa ruang niaga adalah stabil secara keseluruhannya dengan peningkatan dicatatkan di Mahkota Parade, Bandar Hilir (aras basement) pada 4.5%. Sewa tertinggi subsektor direkodkan di aras bawah Lotus's Melaka Cheng daripada RM390.87 s.m.p. hingga RM498.54 s.m.p.

## Pejabat Binaan Khas

### Penghunian dan Ketersediaan Ruang

Prestasi pejabat binaan khas tetap teguh dengan purata kadar penghunian 84.5% dengan ambilan tahunan meningkat pada 10,971 m.p.

## Construction Activity

There was no new construction activity recorded in the review period. As at end-2022, there were 31 existing shopping complexes (635,388 s.m.) with another two complexes (57,245 s.m.) in the incoming supply.

## Rental

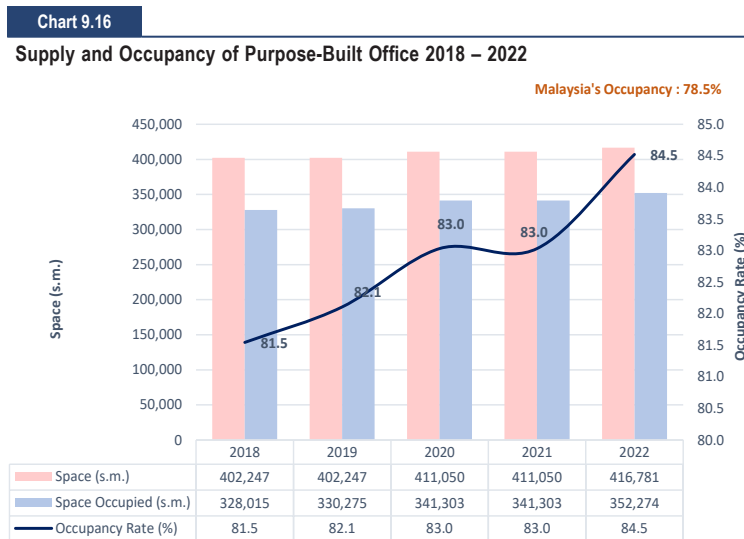
Generally, rental of retail space was stable across the board with increases recorded in Mahkota Parade, Bandar Hilir (basement) at 4.5%. Highest rental in the sub-sector was recorded at ground level Lotus's Melaka Cheng from RM390.87 p.s.m. to as high as RM498.54 p.s.m.

## Purpose-Built Office

### Occupancy and Space Availability

The performance of purpose-built office remained firm with an average occupancy rate of 84.5% with annual take-up increased at 10,971 s.m.

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## Aktiviti Pembinaan

Tiada aktiviti pembinaan baharu direkodkan dalam tempoh kajian. Sehingga akhir 2022, terdapat 82 bangunan pejabat sedia ada (416,781 m.p.) manakala tiada penawaran akan datang dan penawaran yang dirancang.

## Sewa

Sewa pasaran pejabat adalah stabil. Pusat Transformasi Bandar UTC di Jalan Hang Tuah mengekalkan keunggulannya, mencapai sewa tertinggi pada kadar RM49.50 s.m.p.

## Construction Activity

There was no new construction activity recorded in the review period. As at end-2022, there were 82 existing purpose-built office buildings (416,781 s.m.) while there is no incoming supply and no planned supply.

## Rental

The office rental market was largely stable. Pusat Transformasi Bandar UTC di Jalan Hang Tuah sustained its prominence, fetching the highest rental at RM49.50 p.s.m.

## Riadah

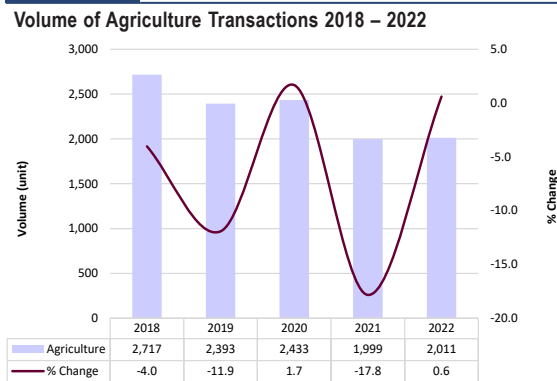
Tiada hotel siap dibina direkodkan dalam tempoh kajian. Sehingga akhir 2022, terdapat 176 hotel (18,055 bilik) sedia ada dengan dua hotel (432 bilik) dalam penawaran akan datang dan lima hotel (1,558 bilik) dalam penawaran yang dirancang.

## HARTA TANAH PERTANIAN

### Transaksi

Subsektor pertanian merupakan penyumbang ketiga kepada transaksi hartanah keseluruhan. Terdapat 2,011 transaksi bernilai RM360.80 juta, mencakupi 11.6% daripada jumlah urus niaga hartanah. Aktiviti pasarannya menunjukkan peningkatan sebanyak 0.6% dalam bilangan dan 13.2% dalam nilai berbanding dengan 2021 (1,999 transaksi bernilai RM318.74 juta).

Chart 9.17



### Harga

Harga harta tanah pertanian merekodkan penurunan bagi tanah kosong di Off Kampung Belimbing dan tanah getah di Rancangan Tanah Pinggir Bukit Gondol masing-masing 4.9% dan 3.9%. Manakala peningkatan 5.9% direkodkan di Off Batu 20 Jalan Machap – Tebong.

## Leisure

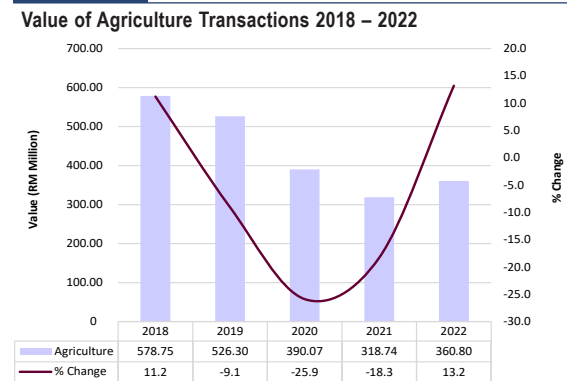
There was no completion hotel recorded in the review period. As at end-2022, there were 176 hotels (18,055 rooms) in the existing supply with another two hotels (432 rooms) in the incoming supply and five hotels (1,558 rooms) in planned supply.

## AGRICULTURE PROPERTY

### Transaction

The agriculture sub-sector was the second highest contributor to overall property transactions. There were 2,011 transactions worth RM360.80 million, accounting for 11.6% of the total property transactions. Its market activity increased by 0.6% in volume and 13.2% in value in comparison with 2021 (1,999 transactions worth RM318.74 million).

Chart 9.18



### Price

Prices of agriculture property recorded a decrease for vacant land in Off Kampung Belimbing and rubber in Rancangan Tanah Pinggir Bukit Gondol by 4.9% and 3.9% respectively. While an increase of 5.9% was recorded at Off Batu 20 Jalan Machap - Tebong.

## 2023 OUTLOOK

Pasaran harta tanah negeri ini dijangka meneruskan momentum pertumbuhannya pada 2023. Projek pembangunan yang dilaksanakan akan terus menyokong pasaran harta tanah. Antara pembangunan yang dijangka memberi kesan positif ke atas pasaran harta tanah adalah:

*The state' property market is expected to continue its growth momentum in 2023. The developments projects implemented would continue to support the property market. Among the developments that are expected to create positive impact on the state's property market are:*

### Infrastructure Development

**Table 9.2: Infrastructure Projects**

| No. | Infrastructure Project                                     | Descriptions  | Current Development Status |
|-----|--|---|----------------------------|
| 1.  | Treated water infrastructure upgrading projects            | <ul style="list-style-type: none"> <li>• Developer: Pengurusan Aset Air Berhad (PAAB) and to be managed by Syarikat Air Melaka Berhad (SAMB)</li> <li>• Estimated cost: RM420 million</li> <li>• Project status: Phase 2 is 60% completed</li> <li>• Descriptions: <ul style="list-style-type: none"> <li>○ Project has commenced on 2021</li> <li>○ More than 12 projects involving the upgrading of treated water infrastructure to ensure the residents of Melaka enjoy sufficient clean water supply</li> <li>○ Amongst the projects were upgrading of the Merlimau, Jus and Air Jernih water treatment plants.</li> <li>○ The project is expected to be complete in 2024.</li> </ul> </li> </ul> | Incoming                   |
| 2.  | Solok Ayer Limau - Kampung Jeram Masjid Tanah road project | <ul style="list-style-type: none"> <li>• Construction of a new road from Solok Ayer Limau to Kampung Jeram Masjid Tanah</li> <li>• Total length: 3 kilometres</li> <li>• Estimated cost: RM36.0 million</li> <li>• Developer: Jabatan Kerja Raya (JKR) Malaysia</li> <li>• Project has commenced on 2021 and expected to be complete in 2023.</li> </ul>  | Under Construction         |
| 3.  | Flood Mitigation and upgrading Projects                    | <ul style="list-style-type: none"> <li>• Involving 109 flood mitigation projects and 62 projects including the construction of riverbank and exit ditches as well as upgrading of ditch embankments.</li> <li>• Total allocation: RM21.6 million</li> <li>• Project expected to be completed in 2023.</li> </ul>  | Under construction.        |

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### Mega Project

**Table 9.3: Development Project**

| No. | Development Projects                    | Descriptions   | Current Development Status |
|-----|---|--|----------------------------|
| 1.  | Melaka Waterfront Economic Zone (M-WEZ) | <ul style="list-style-type: none"> <li>• The project has an area of 25,000 acres along 33 kilometers (17,500 acres: Development Zone and 7,500 acres: Control Zone)</li> <li>• The development composition of this project consists of five major developments. <ol style="list-style-type: none"> <li>a. Melaka Harbourfront <ol style="list-style-type: none"> <li>ii. Ports</li> <li>iii. Trade</li> <li>iv. Hydropiant Center</li> </ol> </li> <li>b. Smart Logistic Nucleus <ol style="list-style-type: none"> <li>i. Logistics Hub</li> <li>ii. Container and Cargo Management Office</li> </ol> </li> <li>c. Digital Satellite Township <ol style="list-style-type: none"> <li>i. M-WEZ Tower</li> <li>ii. Hotels and Offices</li> <li>iii. Housing and Business</li> </ol> </li> <li>d. Central Eco Business Park <ol style="list-style-type: none"> <li>i. Free Trade Zone</li> <li>ii. CIQ complex</li> <li>iii. Customs and Immigration Management Office</li> </ol> </li> <li>e. Trade Nucleus New Township <ol style="list-style-type: none"> <li>i. Mixed Trade Hub</li> <li>ii. Maritime Activities</li> <li>iii. Research Development Center (R&amp;D Center)</li> </ol> </li> </ol> </li> </ul> | Planning Stage             |

**Table 9.3: Development Project**

| No. | Development Projects       | Descriptions   | Current Development Status |
|-----|----------------------------|--|----------------------------|
| 2.  | The Sail Melaka            | <ul style="list-style-type: none"> <li>• Location: Kota Laksamana, Malacca</li> <li>• Land area: 245 acres</li> <li>• Developer: Sheng Tai International Sdn Bhd</li> <li>• Estimated cost: RM6.5 billion</li> <li>• The development (Nine linked towers with a total built-up of 991,096 square meter) consists of:                             <ul style="list-style-type: none"> <li>○ 3,259 units of high-end condotels; Unit area is 344 sq ft, 422 sq ft and 604 sq ft, and price per unit is starting from RM800,000 and above</li> <li>○ 61-storey hotel towers; 5 and 6 star with a total of 2,584 units;</li> <li>○ 65 shop lots;</li> <li>○ 1215 units Business suite;</li> <li>○ shopping mall;</li> <li>○ Convention and exhibition centre;</li> </ul> </li> <li>• The project is expected to be complete in 2024</li> </ul>  | Under Construction         |
| 3.  | Ion Forte Green City       | <ul style="list-style-type: none"> <li>• Location: KM 14.5, Jalan Tasik, Ayer Keroh, Melaka. It is within the first and oldest golf course in Melaka</li> <li>• Land area: 9.2 hectares</li> <li>• Developer: Collaboration between NCT Group of Companies (NCT Group) and Ayer Keroh Country Club (AKCC)</li> <li>• Descriptions:                             <ul style="list-style-type: none"> <li>○ Precinct 1: Club House, Commercial complexes, Service Apartment, Condotel and commercial lot</li> <li>○ Precinct 2: Service Suite and commercial lot</li> <li>○ Precinct 3: Condotel and commercial lot</li> <li>○ Precinct 4: Health Suite, commercial lot and Retirement Villa</li> <li>○ Precinct 5: Service Suite, commercial lot and Water Theme Park</li> </ul> </li> <li>• The first phase of development expected to be completed by 2024</li> </ul>   | Under Construction         |
| 4.  | Scientex 2, Durian Tunggal | <ul style="list-style-type: none"> <li>• Location: Mukim Durian Tunggal which can be reached via Jalan Durian Tunggal - Simpang Gading</li> <li>• Land area: 65.82 hectares</li> <li>• The development consists of:                             <ul style="list-style-type: none"> <li>○ 2 storey terrace - 467 units</li> <li>○ 2 storey RMM - 651 units</li> <li>○ 2 storey terrace Low Cost - 15 units</li> <li>○ 2 storey terrace Medium Cost - 212 units</li> </ul> </li> <li>• The project is expected to be complete in 2023</li> </ul>   | Under Construction         |
| 5.  | Scientex Bandar Jasin      | <ul style="list-style-type: none"> <li>• Location: Mukim Jasin Tunggal which can be reached via Jalan Muar - Melaka</li> <li>• Land area: 46.67 hectares</li> <li>• The development consists of:                             <ul style="list-style-type: none"> <li>i. Phase 1                                     <ul style="list-style-type: none"> <li>○ 2 storey terrace house – 354 units</li> <li>○ 2 storey affordable house – 673 units</li> <li>○ 2 storey medium cost house – 159 units</li> </ul> </li> <li>ii. Phase 2                                     <ul style="list-style-type: none"> <li>○ 2 storey terrace house – 472 units</li> </ul> </li> <li>iii. Phase 3                                     <ul style="list-style-type: none"> <li>○ 2 storey shop office – 143 units</li> <li>○ 2 storey affordable shop office – 15 units</li> <li>○ 2 storey shop office ( strata ) – 2 units</li> </ul> </li> </ul> </li> </ul> | Under Construction         |
| 6.  | Scientex Jasin             | <ul style="list-style-type: none"> <li>• Location: Mukim Ayer Panas which can be reached via Jalan Jasin - Melaka</li> <li>• Land area: 63.87 hectares</li> <li>• The development consists of:                             <ul style="list-style-type: none"> <li>i. Phase 1                                     <ul style="list-style-type: none"> <li>○ 2 storey terrace house – 522 units</li> <li>○ 2 storey Low Cost house – 211 units</li> <li>○ 2 storey affordable house – 627 units</li> </ul> </li> <li>ii. Phase 2                                     <ul style="list-style-type: none"> <li>○ 2 storey terrace house – 505 units</li> <li>○ 2 storey medium cost terrace – 206 units</li> </ul> </li> <li>iii. Phase 3                                     <ul style="list-style-type: none"> <li>○ 2 storey shop office – 80 units</li> <li>○ 2 storey shop office (Srata) – 10 units</li> </ul> </li> </ul> </li> </ul>           | Under Construction         |

**Table 9.3: Development Project**

| No. | Development Projects      | Descriptions   | Current Development Status            |
|-----|---------------------------|--|---------------------------------------|
| 7.  | Harbour City              | <ul style="list-style-type: none"> <li>• Location: Taman Pulau Melaka, Mukim of Kawasan Bandar Melaka, Seksyen 43, District of Melaka Tengah</li> <li>• The development consists of:                             <ul style="list-style-type: none"> <li>○ Indoor and outdoor theme park with total area 500,000 sq ft</li> <li>○ Shopping mall with a total of 1,831 retail units</li> <li>○ hotel and resort suites with 648 units and 637 units respectively</li> </ul> </li> </ul>  | Under Construction                    |
| 8.  | Molek Residence           | <ul style="list-style-type: none"> <li>• Location: Ayer Molek which can be reached via Jalan Tun Kudu.</li> <li>• The development consists of:                             <ul style="list-style-type: none"> <li>○ Phase 1: 2 storey terrace house - 126 units</li> <li>○ Phase 2: 2 storey terrace house - 152 unit</li> <li>○ Phase 3 – 15: (Future development)                                     <ul style="list-style-type: none"> <li>- 2 storey terrace house</li> <li>- 2 storey semi detached</li> <li>- 2 storey detached</li> <li>- 2 storey shop office</li> <li>- 1 unit commercial.</li> </ul> </li> </ul> </li> <li>• The project is expected to be complete in 2030</li> </ul>  | Under Construction (Phase 1& 2)       |
| 9.  | Taman Impiana Kesang      | <ul style="list-style-type: none"> <li>• Location: Mukim of Ayer Panas which can be reached via Jalan Tangkak – Durian Tunggal.</li> <li>• Total development area : 46.94 hectar</li> <li>• The development consists of:                             <ul style="list-style-type: none"> <li>○ 1 Storey terrace - 201 units</li> <li>○ 1 Storey medium cost Terrace - 116 units</li> <li>○ 1 Storey low cost Terrace - 116 units</li> </ul> </li> </ul>   |                                       |
| 10. | Taman Anjung Sungai Petai | <ul style="list-style-type: none"> <li>• Location: Mukim of Sungai Petai which can be reached via Lebu AMJ</li> <li>• Total development area : 57.55 hectar</li> <li>• The development consists of:                             <ol style="list-style-type: none"> <li>i. Phase 1                                     <ul style="list-style-type: none"> <li>○ 1 Storey terrace - 140 units</li> <li>○ 1 storey semi detached – 52 units</li> <li>○ 1 Storey RMM - 56 units</li> <li>○ 1 storey low cost terrace – 152 units</li> </ul> </li> <li>ii. Phase 2                                     <ul style="list-style-type: none"> <li>○ 2 Storey shop office – 24 units</li> <li>○ 1 Storey Terrace - 138 units</li> <li>○ 1 Storey RMM - 69 units</li> <li>○ 1 storey low cost terrace – 98 units</li> </ul> </li> <li>iii. Phase 3                                     <ul style="list-style-type: none"> <li>○ 2 Storey shop office – 16 units</li> <li>○ 2 Storey terrace - 57 units</li> <li>○ 1 Storey terrace - 293 units</li> <li>○ 2 storey semi detached – 32 units</li> <li>○ 1 storey semi detached – 70 units</li> <li>○ 1 storey detached – 1 unit</li> <li>○ 1 Storey RMM - 50 units</li> </ul> </li> <li>iv. Phase 4                                     <ul style="list-style-type: none"> <li>○ 2 Storey shop office – 11 units</li> <li>○ 1 storey affordable shop office – 12 units</li> <li>○ 1 Storey terrace - 110 units</li> <li>○ 1 Storey RMM - 49 units</li> </ul> </li> </ol> </li> </ul> | Dalam pembinaan 30% bagi Fasa 1 (RMM) |

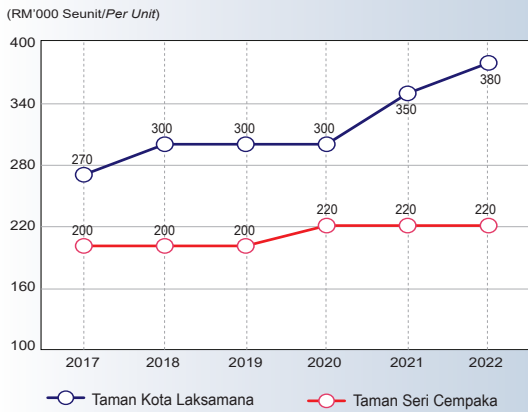
## State Government Policy and Initiative

Table 9.4: State Government Policy

| No. | Policy   | Details  |
|-----|--|--|
| 1.  | Determining the Malay Ownership Quota Policy for the Development of Land Other than Malacca Customary Land | <ul style="list-style-type: none"> <li>Was approved on 1st October 2022</li> <li>As a guide and reference for land use development planning in the state of Malacca</li> <li>This circular outlines the conditions and restrictions in interest for the ownership of Orang Melayu for the purpose of land development other than Malacca Customary Land (MCL)</li> </ul>   |
| 2.  | Melaka State Housing Policy (DRN Melaka) for Development Other than Malacca Customary Land                 | <ul style="list-style-type: none"> <li>Was approved on 1st October 2022</li> <li>to realize the idea of "Melakaku Maju Jaya" by ensuring that every citizen or family has a home with comfortable and safe facilities through sustainable and livable township planning "Rakyat Bahagia" as well as being the focus of investors and tourists (local and foreign) "Menggarit Dunia"</li> <li>This circular outlines: <ul style="list-style-type: none"> <li>Adjustment with the Melaka State land use development composition guidelines;</li> <li>Control and solution methods to issues encountered in the planning, development, sales and enforcement process; and</li> <li>Determination of housing, commercial and industrial building specifications in accordance with Melaka State Planning Guidelines and Standards</li> </ul> </li> </ul> |
| 3.  | Amendment to the Malacca Land Rules 1966 Through the Malacca Land Rules (Amendment) (No 1) 2022            | <ul style="list-style-type: none"> <li>Was approved on 1st October 2022</li> <li>This amendment involves the following: <ul style="list-style-type: none"> <li>Office Fees</li> <li>Premium for land conversion</li> <li>Permit for Agricultural land</li> <li>temporary occupational license</li> <li>compound</li> <li>Added new rules</li> <li>Added to other rules</li> </ul> </li> </ul>  |
| 4.  | Program Perumahan Rakyat (PPR)   | <ul style="list-style-type: none"> <li>13 PPR projects will be built involving 13 areas throughout Melaka with an area of 36.26 hectares that will maintain the Rent to Own concept.</li> <li>The locations to be built are in Lendu, Machap, Lesung Batu, Bukit Katil, Tun Kudu, Pondok Batang, Nyalas, Asahan, Masjid Baru, Paya Rumput, Sungai Udang, Durian Tunggal and Sungai Rambai.</li> <li>The PPR that has been completed includes the Sungai Putat PPR comprising 336 units, the Tehel PPR involving the construction of 500 units while the Krubong PPR offers 600 units. PPR Klebang and PPR Tangga Batu which offer 225 units and 120 units respectively are expected to be completed 2023.</li> </ul>   |
| 5.  | Melaka Rumahku Programs  | <ul style="list-style-type: none"> <li>This program is under the corporate social responsibility (CSR) of the Melaka Housing Authority (LPM) and it is given priority to the the needy group (asnaf and others).</li> <li>This program offers the construction of a house unit estimated cost at RM50,000 per unit.</li> </ul>   |
| 6.  | Tourist Attraction Projects and Programs   | <ul style="list-style-type: none"> <li>The State Government is committed to continue tourism and cultural initiatives as follows: <ul style="list-style-type: none"> <li>Care Tourism which is an incentive for small tourism entrepreneurs in the form of a 200 thousand ringgit grant which is a capital aid grant. In addition, small tourism entrepreneurs are also eligible to receive grants worth RM1,000.00.</li> <li>Facilitation of tax relief and reduction policies for tourism centers that offer premium packages for the T20 category.</li> </ul> </li> </ul>   |

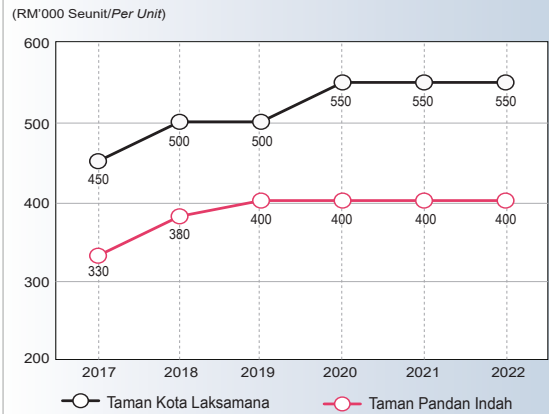
### MELAKA 9.1

Pergerakan Harga Purata Rumah Teres Satu Tingkat di Melaka  
Average Price Movements of Single Storey Terraced Houses in Melaka



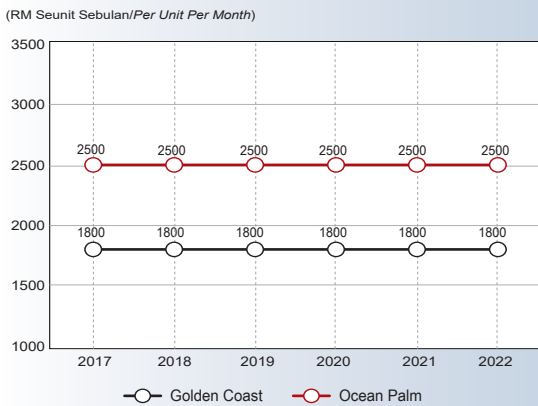
### MELAKA 9.2

Pergerakan Harga Purata Rumah Teres Dua Tingkat di Melaka  
Average Price Movements of Double Storey Terraced Houses in Melaka



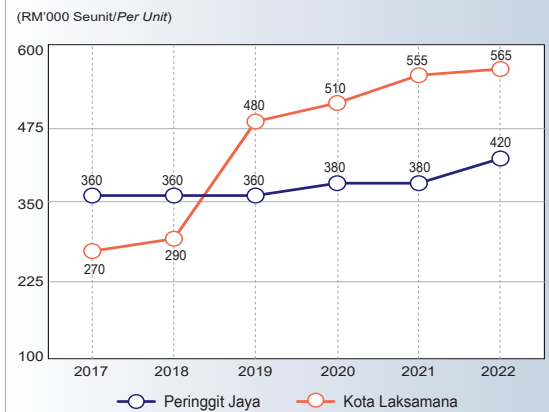
### MELAKA 9.3

Pergerakan Sewaan Purata Kondominium di Melaka  
Average Rental Movements of Condominium in Melaka



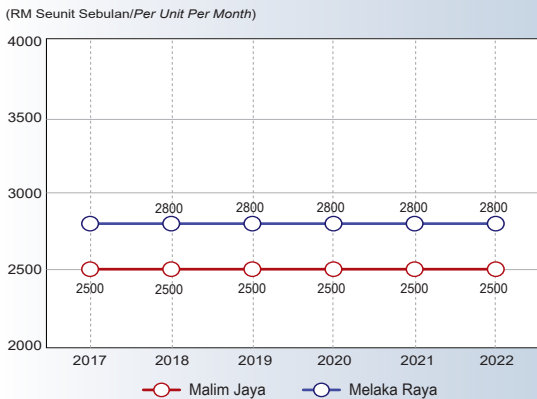
### MELAKA 9.4

Pergerakan Harga Purata Kedai Dua Tingkat di Melaka  
Average Price Movements of Double Storey Shop in Melaka



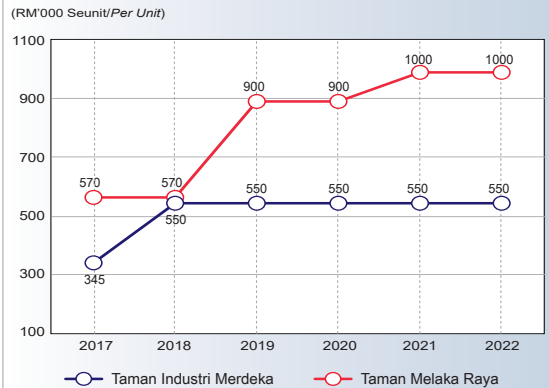
### MELAKA 9.5

Pergerakan Sewaan Purata Kedai Dua Tingkat di Melaka  
Average Rental Movements of Double Storey Shop in Melaka



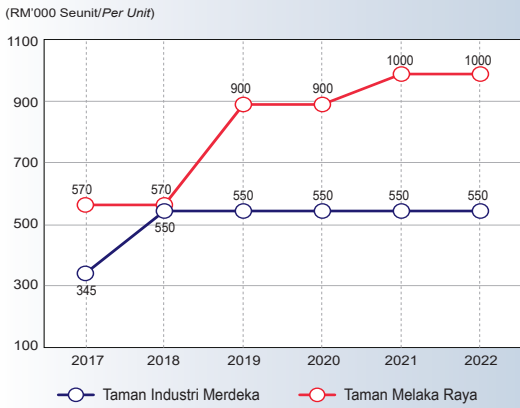
### MELAKA 9.6

Pergerakan Harga Purata Kedai Tiga Tingkat di Melaka  
Average Price Movements of Three Storey Shop in Melaka



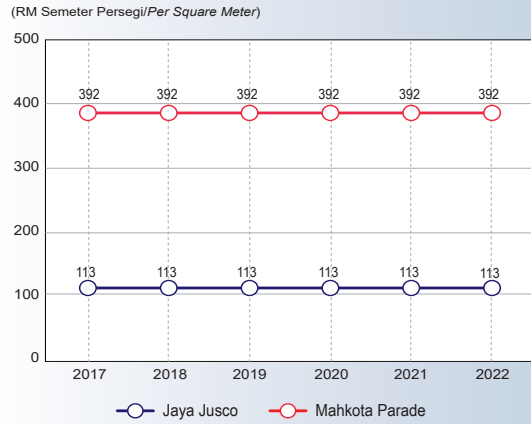
### MELAKA 9.6

Pergerakan Harga Purata Kedai Tiga Tingkat di Melaka  
Average Price Movements of Three Storey Shop in Melaka



### MELAKA 9.8

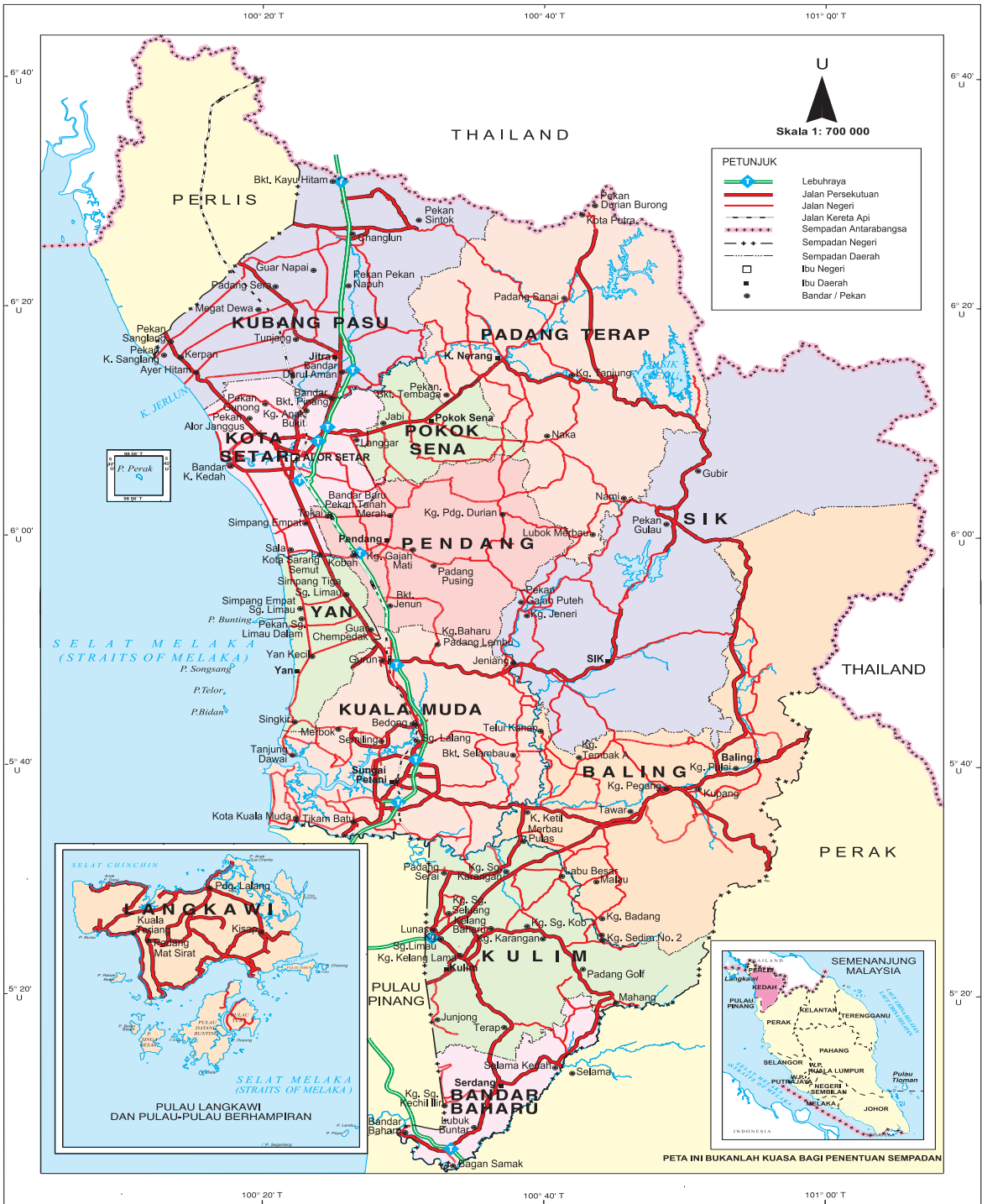
Pergerakan Sewaan Purata Ruang Niaga di Kompleks Membeli-belah di Melaka  
Average Rental Movements of Retail Space in Shopping Complexes in Melaka







# KEDAH



# KEDAH

## GAMBARAN KESELURUHAN

Prestasi pasaran harta tanah negeri ini bertambah baik pada 2022. Tempoh kajian mencatatkan 32,114 transaksi dengan jumlah nilai RM7.39 bilion, iaitu naik 28.1% dalam bilangan dan 23.7% dalam nilai berbanding 2021 (25,077 transaksi bernilai RM5.97 bilion). Subsektor pertanian mengekalkan syer pasaran terbesar dengan 43.8%, sementara subsektor kediaman, tanah pembangunan dan lain, perdagangan dan industri masing masing menyumbang baki syer sebanyak 41.8%, 8.4%, 4.1% dan 1.9%

Pergerakan pasaran bagi semua subsektor berada pada aliran meningkat dimana subsektor industri mendahului peningkatan sebanyak 217.7%, diikuti oleh subsektor perdagangan (65.4%), pertanian (34.4%), tanah pembangunan & lain (29.6%) dan kediaman (16.3%). Dari segi nilai, semua subsektor turut mencatat aliran menaik.

## OVERVIEW

The performance of state's property market improved in 2022. The review period registered 32,114 transactions with a total value of RM7.39 billion, rose by 28.1% in volume and 23.7% in value against 2021 (25,077 transactions worth RM5.97 billion). Agriculture sub-sector retained its largest share with 43.8% whilst residential, development land and others, commercial and industrial subsectors took up another 41.8%, 8.4%, 4.1% and 1.9%.

Market movements across all sub-sectors were on the uptrend where industrial sub-sector led the increase with 217.7%, followed by commercial (65.4%), agriculture (34.4%), development land & others (29.6%) and residential (16.3%). In term of value, all subsectors also recorded upward trend.

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Chart 10.1

Volume of Property Transactions 2018 – 2022

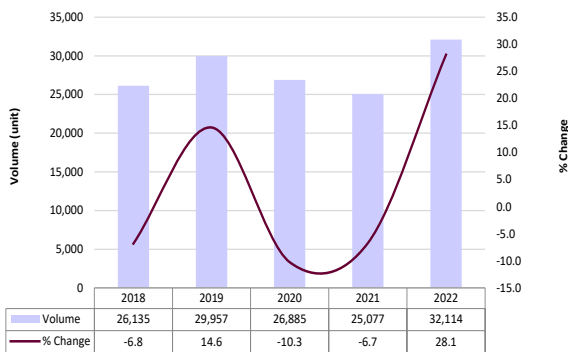


Chart 10.2

Value of Property Transactions 2018 – 2022

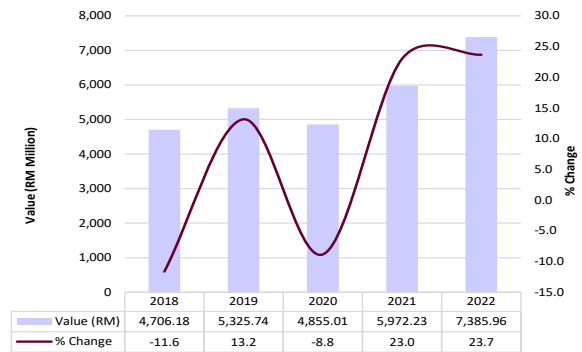


Chart 10.3

Sub-sector Contribution to Volume 2018 – 2022

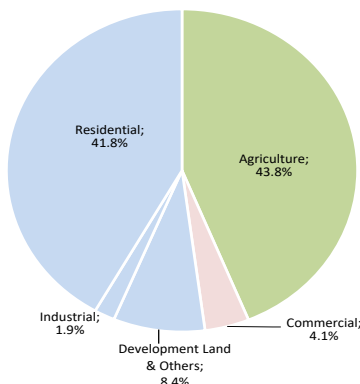
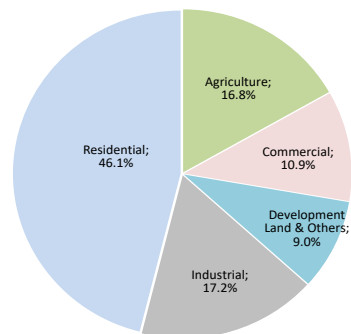


Chart 10.4

Sub-sector Contribution to Value 2018 – 2022



## PROMINENT SALE

Table 10.1

Summary of Prominent Sales Recorded in 2022

| No. | Property  | Location  | Transaction Year | Consideration Price |
|-----|---|---|------------------|---------------------|
| 1.  | Tanjung Rhu Resort (Hotel)                            | Jalan Tanjung Rhu, Langkawi                               | 2020             | RM123,000,000       |
| 2.  | Detached Factory / Warehouse (Industrial)             | Tapak Perindustrian Kulim                                 | 2021             | RM133,000,000       |
| 3.  | Industrial Land (317,300 square metres)               | Jalan Sungai Petani - Gurun dan Jalan Perwaja, Kuala Muda | 2022             | RM30,800,000        |
| 4.  | Development Land (Industrial) (353,292 square metres) | Jalan Kulim – Mahang, Kulim                               | 2022             | RM28,517,000        |

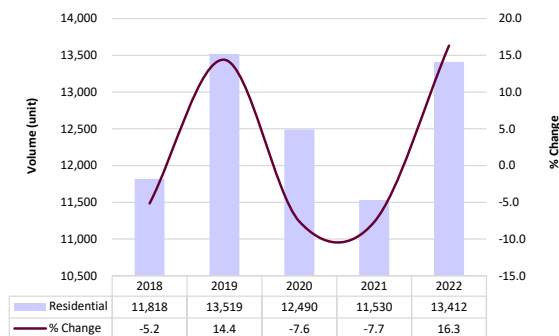
## HARTA TANAH KEDIAMAN

### Transaksi

Aktiviti pasaran berkembang pada 2022 dengan 13,412 transaksi bernilai RM3.4 bilion, menunjukkan peningkatan 16.3% dalam bilangan dan 13.1% dalam nilai berbanding tahun lepas.

Chart 10.5

Volume of Residential Transactions 2018 – 2022



### Pelancaran Baharu

Pasaran utama mencatatkan peningkatan dalam pelancaran baharu dengan 612 unit dilancar, naik 36.6% berbanding 2021. Prestasi jualan menurun kepada 46.7%.

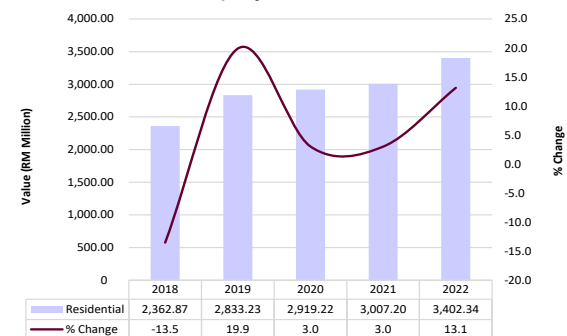
## RESIDENTIAL PROPERTY

### Transaction

Market activity expands in 2022 with 13,412 transactions worth RM3.4 billion, increased by 16.3% in volume and 13.1% in value as compared to previous year.

Chart 10.6

Value of Residential Property Transactions 2018 – 2022



### New Launches

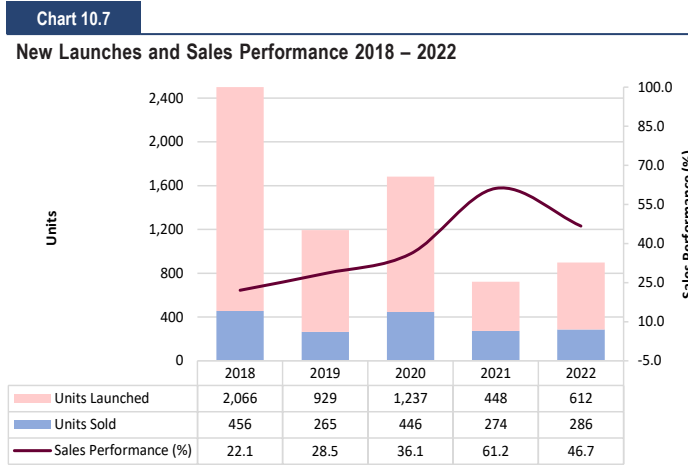
The primary market recorded an increase in new launches with 612 units launched, up 36.6% compared to 2021. Sales performance decreased to 46.7%.

## Pelancaran Baharu

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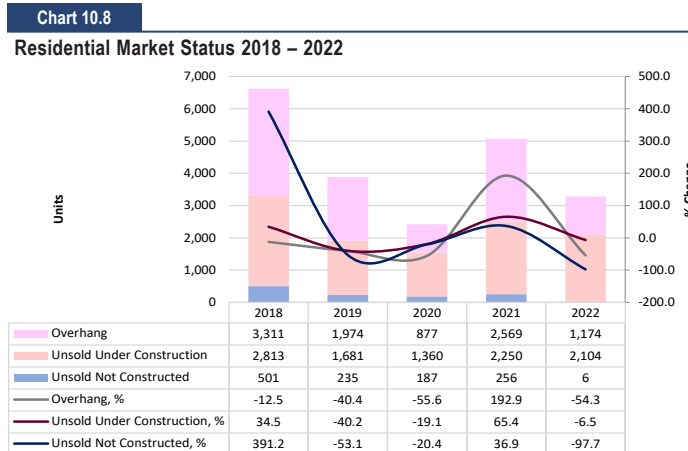


## Status Pasaran

142 Situasi kediaman siap dibina tidak terjual adalah menggalakkan. Terdapat 1,174 unit siap dibina tidak terjual bernilai RM414.15 juta pada 2022, menurun 54.3% dalam bilangan dan 43.5% dalam nilai. Dalam perkembangan yang sama, unit dalam pembinaan belum terjual dan unit belum dibina belum terjual masing-masing menurun 6.5% dan 97.7%.

## Market Status

The residential overhang situation was encouraging. There were 1,174 overhang units worth RM414.15 million in 2022, down 54.3% in volume and 43.5% in value. On similar note, the unsold under construction and unsold not constructed decreased 6.5% and 97.7% respectively.



## Aktiviti Pembinaan

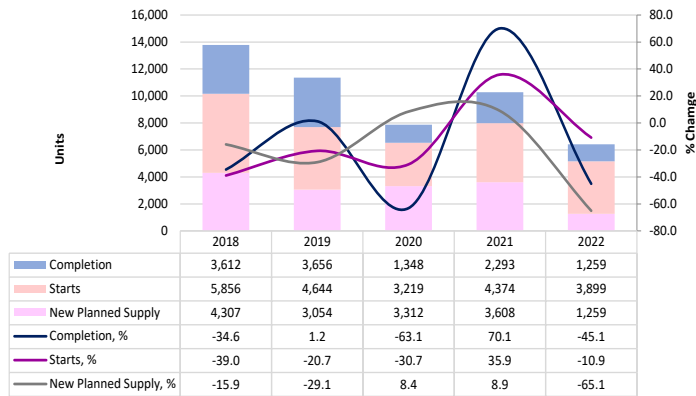
Berbeza dengan status pasaran, aktiviti pembinaan adalah kurang aktif dalam tempoh kajian. Siap dibina dan mula dibina masing-masing telah menurun 45.1% dan 10.9%. Selain itu, penawaran baharu dirancang juga menurun ke 1,259 unit. Sehingga akhir 2022, terdapat 346,127 unit kediaman sedia ada dengan 19,589 unit lagi dalam penawaran akan datang dan 10,883 unit dalam penawaran dirancang.

## Construction Activity

In contrast with market status, the construction activities were less active in the review period. Both completion and start down by 45.1% and 10.9%. Besides, new planned supply also decreased to 1,259 units. As at end-2022, there were 346,127 existing residential units with another 19,589 units in the incoming supply and 10,883 units in the planned supply.

Chart 10.9

Residential Construction Activity 2018 – 2022



### Harga dan Sewa

Harga harta kediaman secara keseluruhan menyaksikan prestasi bercampur-campur. Di Kota Setar, rumah teres dua tingkat di Taman Sri Ampang dan Taman Berjaya telah meningkat 4.1% - 4.7%.

Indeks Harga Semua Rumah 2022<sup>P</sup> untuk negeri ini berada pada 210.2 mata, naik 6.5% daripada 197.4 mata pada 2021. Pada 2022<sup>P</sup> purata Harga Semua Rumah untuk negeri ini berada pada RM273,218 meningkat daripada RM256,552 pada 2021.

Pasaran sewa kediaman adalah pada trend yang stabil dengan beberapa kenaikan dicatatkan di lokasi pilihan. Sewa tertinggi bagi rumah teres dua tingkat direkodkan di Taman Simfoni, Langkawi dengan sewa RM2,000 – RM2,500 sebulan.

### Price and Rental

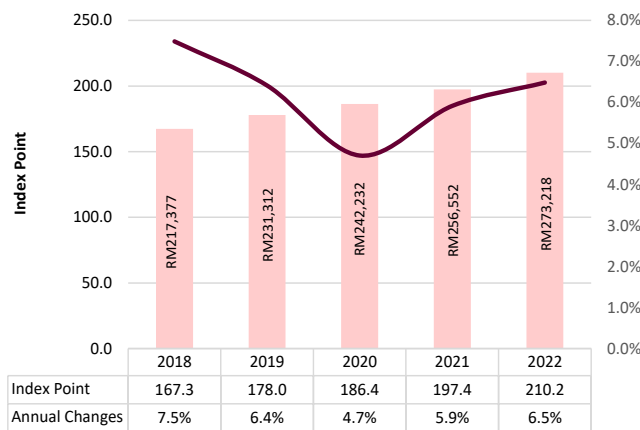
Prices of residential property witnessed mixed performance across the board. At Kota Setar, double storey terraced house at Taman Sri Ampang and Taman Berjaya increased by 4.1% - 4.7%.

The 2022<sup>P</sup> All House Price Index for the state stood at 210.2 points, up by 6.5% from 197.4 points in 2021. In 2022<sup>P</sup> the average All House Price for the state stood at RM273,218 increased from RM256,552 in 2021.

The residential rental market was on stable trend with several increases recorded in selected locations. Highest rental for double storey terraced house recorded at Taman Simfoni, Langkawi with the rental of RM2,000 – RM2,500 per month.

Chart 10.10

All House Price Index Annual Changes 2018 – 2022



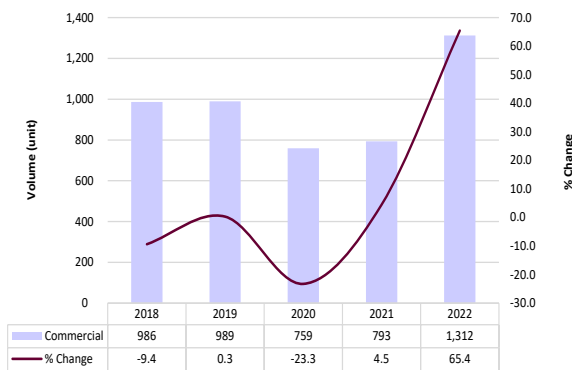
## HARTA TANAH PERDAGANGAN

### Transaksi

Aktiviti pasaran subsektor perdagangan bertambah baik dalam tempoh kajian. Terdapat 1,312 transaksi bernilai RM806.01 juta direkodkan, peningkatan sebanyak 65.4% dalam bilangan dan penurunan sebanyak 27.9% dalam nilai berbanding 2021 (793 transaksi bernilai RM1.12 bilion). Nilai transaksi bagi tahun 2022 adalah lebih rendah berbanding tahun 2021 disebabkan oleh pindah milik kompleks beli - belah Aman Central yang bernilai RM750 juta yang membentuk sebahagian besar nilai transaksi bagi tahun 2021.

Chart 10.11

Volume of Commercial Property Transactions 2018 – 2022



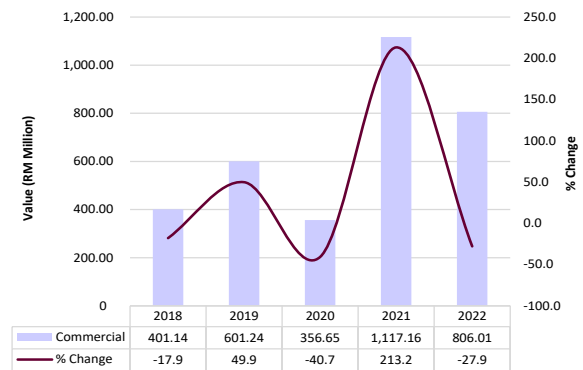
## COMMERCIAL PROPERTY

### Transaction

The commercial sub-sector market activity improved in the review period. There were 1,312 transactions worth RM806.01 million recorded, an increase of 65.4% in volume and a decrease of 27.9% in value compared to 2021 (793 transactions worth RM1.12 billion). The value of transactions for 2022 is lower than 2021 due to the transaction of Aman Central Shopping Complex worth RM750 million which makes up a large part of the transaction value for the year 2021.

Chart 10.12

Value of Commercial Property Transactions 2018 – 2022



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## Kedai

### Transaksi

Segmen kedai mencatat 1,013 transaksi bernilai RM453.22 juta pada 2022, menyumbang 77.2% daripada transaksi harta tanah perdagangan dan 56.2% daripada jumlah nilai. Aktiviti pasaran kedai telah meningkat 49.0% dalam bilangan dan 56.3% dalam nilai berbanding tahun lepas.

### Status Pasaran

Segmen kedai mencatat 314 unit siap dibina tidak terjual dalam tempoh kajian, iaitu penurunan 1.6% berbanding 2021. Walau bagaimanapun, unit dalam pembinaan belum terjual telah meningkat 54.2% ke 182 unit. Selain itu, tiada unit kedai belum dibina belum terjual pada 2022.

## Shop

### Transaction

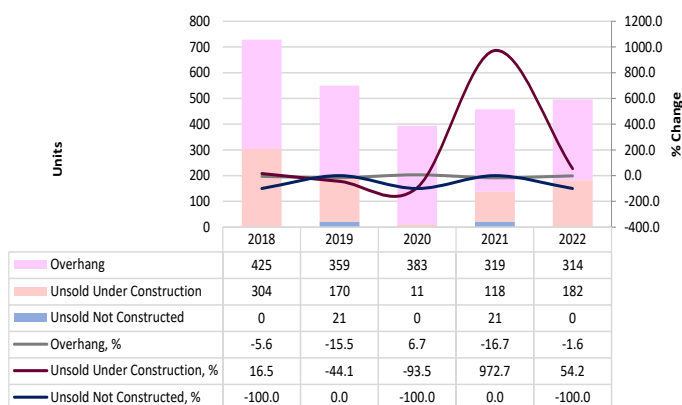
The shop segment recorded 1,013 transactions worth RM453.22 million in 2022, accounting for 77.2% of the commercial property transactions and 56.2% of the total value. Market activity increased by 49.0% in volume and 56.3% in value as compared to previous year.

### Market Status

The shop segment recorded 314 overhang units in the review period, equivalent to decline of 1.6% compared to 2021. Nevertheless, unsold under construction increase 54.2% to 182 units. Besides, no units unsold not constructed in 2022.

Chart 10.13

Shop Market Status 2018 – 2022



### Aktiviti Pembinaan

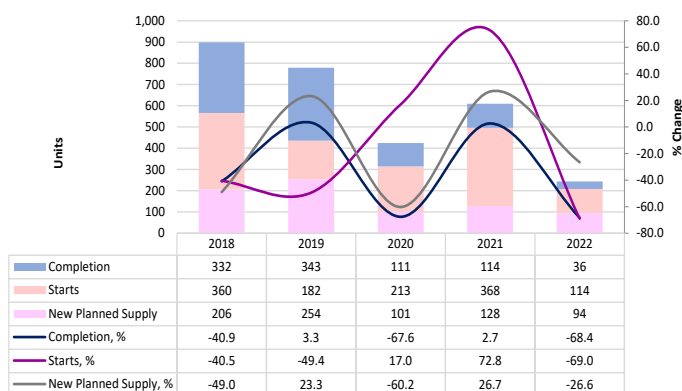
Tempoh kajian ini menyaksikan penurunan aktiviti pembinaan. Siap dibina, mula dibina dan penawaran baharu dirancang masing-masing menurun 68.4%, 69.0% dan 26.6%.

### Construction Activity

The review period witnessed a declined in construction activities. Completion, starts and new planned supply decreased 68.4%, 69.0% and 26.6% respectively.

Chart 10.14

Shop Construction Activity 2018 – 2022



### Riadah

Di segmen riadah, tiada hotel baharu siap dibina yang direkodkan dalam tempoh kajian. Sehingga akhir 2022, terdapat 176 hotel (13,251 bilik) sedia ada dengan 4 hotel (539 bilik) dalam penawaran akan datang dan 3 hotel (252 bilik) dalam penawaran yang dirancang.

### Leisure

In the leisure segment, no completions were recorded in the review period. As at end of 2022, there were 176 hotels (13,251 rooms) in the existing supply with another 4 hotels (539 rooms) in the incoming supply and 3 hotels (252 rooms) in planned supply.

### HARTA TANAH PERTANIAN

### AGRICULTURE PROPERTY

#### Transaksi

#### Transaction

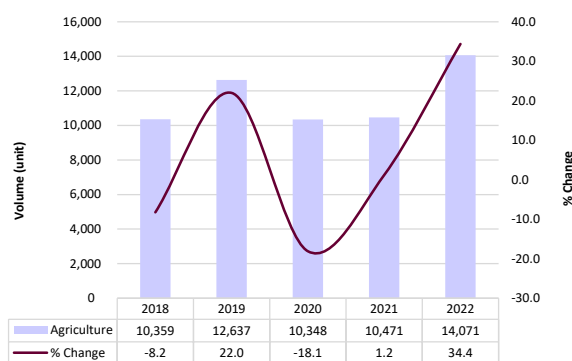
Subsektor pertanian merekodkan 14,071 transaksi bernilai RM1.24 bilion, mencakupi 43.8% daripada bilangan pindah milik harta tanah. Aktiviti pasarannya menunjukkan peningkatan 34.4% dalam bilangan dan 26.7% dalam nilai berbanding dengan 2021 (10,471 transaksi bernilai RM979.74 juta).

The agriculture sub-sector recorded 14,071 transactions worth RM1.24 billion, accounting for 43.8% of the total property transactions. Its market activity indicated an increment of 34.4% in volume and 26.7% in value as compared to 2021 (10,471 transactions worth RM979.74).



Chart 10.15

## Volume of Agriculture Transactions 2018 – 2022

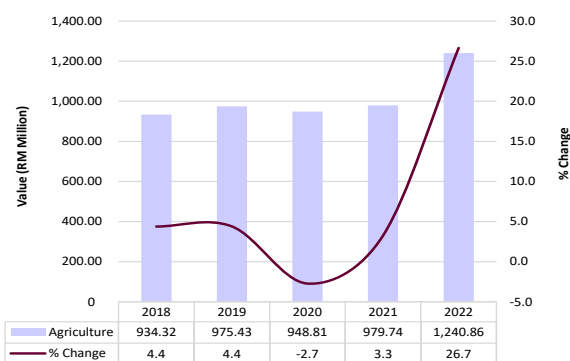


## Harga

Harga harta tanah pertanian stabil secara keseluruhannya. Di Pokok Sena, tanah getah terletak di Jalan Kampung Panchor telah meningkat 4.0% ke RM109,000 sehektar. Walau bagaimanapun, harta tanah yang serupa di Jalan Kuala Nerang - Kampung Perik, Padang Terap telah menurun 6.0% ke RM106,000 sehektar.

Chart 10.16

## Value of Agriculture Transactions 2018 – 2022



## Price

Prices of agriculture property were mainly stable. At Pokok Sena, rubber land located at Jalan Kampung Panchor increased by 4.0% to RM109,000 per hectare. However, similar property located at Kuala Nerang – Kampung Perik, Padang Terap dropped by 6.0% to RM106,000 per hectare.

## 146 PROSPEK 2023

Pasaran harta tanah negeri ini dijangka berkembang pada 2023 disokong oleh beberapa projek infrastruktur dan pembangunan akan datang dan sedang dalam pembinaan.

Selain itu, Belanjawan Kedah 2023 yang sebanyak RM1.059 bilion juga telah diumumkan bagi tujuan memastikan pembangunan seimbang ke seluruh negeri.

## 2023 OUTLOOK

The state's property market is expected to grow in 2023 supported by several incoming and on-going infrastructure and development projects.

Besides, Kedah state 2023 budget amounting RM1.059 billion was announced for to ensure balanced development throughout the state.

## Infrastructure Development State

Table 10.2: Infrastructure Projects

| No. | Infrastructure           | Description   | Current Development Status |
|-----|--------------------------|---|----------------------------|
| 1.  | Hospital Pendang         | <ul style="list-style-type: none"> <li>- Location: Kampung Manggol Pauh, Pendang, Kedah</li> <li>- Project cost/ Estimating Cost: RM210 million</li> <li>- Descriptions: Spanning across 17 hectares of land with capacity of 126 beds.</li> </ul>  | Completed                  |
| 2.  | Jeniang Transfer Project | <ul style="list-style-type: none"> <li>- Location: <ul style="list-style-type: none"> <li>(i) Mukim Jeneri, Daerah Sik</li> <li>(ii) Mukim Ayer Putih, Padang Pusing / Padang Peliang, Guar Kepayang Daerah Pendang</li> <li>(iii) Mukim Gurun, Daerah Kuala Muda</li> </ul> </li> <li>- Land area: 1,563.32 hectares</li> <li>- Gross Development Value: RM960 million</li> <li>- Developer: The Northern Corridor Implementation Authority (NCIA)</li> <li>- Descriptions: <ul style="list-style-type: none"> <li>(i) Barrage &amp; Intake</li> <li>(ii) Transfer Canal</li> <li>(iii) Conveyence Canal</li> <li>(iv) Naok Dam &amp; Reservoir</li> </ul> </li> </ul> | Completed                  |

**Table 10.2: Infrastructure Projects**

| No. | Infrastructure  | Description   | Current Development Status                                   |
|-----|---|---|--|
| 3.  | By Pass from Pelubang Water Treatment Plant (Piping)                                | <ul style="list-style-type: none"> <li>- Location: Pelubang, Kubang Pasu</li> <li>- Connecting areas: LRA Pelubang to Kuala Kedah (Kampung Tepi Laut, Kampung Tengku Laksamana, Taman Bersatu, Pekan Kuala Kedah and other residential schemes.</li> <li>- Project cost/ Estimating Cost: RM431 million</li> <li>- Descriptions: Part of upgrading Pelubang Water (Treatment Plant)</li> </ul>  | Under construction and expected to be completed in H1 2023   |
| 4.  | Northern Corridor Highway   | <p><u>Phase 1A:</u></p> <ul style="list-style-type: none"> <li>- Location: District covered Kuala Muda, Kulim and Bandar Baharu</li> <li>- Connecting areas: Sungai Petani – Kulim – Bandar Baharu – Serdang</li> <li>- Length: 77 kilometers</li> </ul> <p><u>Phase 1B:</u></p> <ul style="list-style-type: none"> <li>- Location: District covered Bandar Baharu and Seberang Perai Selatan</li> <li>- Connecting areas: Serdang – Batu Kawan</li> <li>- Length: 25.5 kilometres</li> </ul> <p><u>Phase 2:</u></p> <ul style="list-style-type: none"> <li>- Location: District covered Bandar Baharu, Larut, Matang and Selama</li> <li>- Connecting areas: Serdang – Changkat Jering</li> <li>- Length: 37 kilometres</li> </ul> <p>- Descriptions (Phase 1A, 1B &amp; 2): NCH connects the West Coast Expressway (WCE) and PLUS Expressway. It is also expected to improve inter-city connectivity, reduce congestion on the PLUS Expressway as well as catalyzed the growth of less developed areas, especially in hinterland Kedah and Perak.</p> | Proposed Development   |
| 5.  | Bukit Selambau Water Treatment Plant Upgrading Project                              | <ul style="list-style-type: none"> <li>- Location: Kuala Muda District</li> <li>- Land area: 9.054 hectare (Bukit Lembu) &amp; 0.512 hectare (Merbok)</li> <li>- Gross Development Value: RM129.4 million</li> <li>- Descriptions: From 30 MLd to 70.0 MLd</li> </ul>   | Under Construction and expected to be completed in Q4 2023   |
| 6.  | Sidam Logistics, Aerospace & Manufacturing Hub (Slam) Development Project           | <ul style="list-style-type: none"> <li>- Location: Mukim Sidam Kiri, Kedah</li> <li>- Land area: 1,300 acre</li> <li>- Developer: The Northern Corridor Implementation Authority (NCIA)</li> <li>- Descriptions: Components: Logistic, Aerospace, and Manufacturing</li> </ul>  | Proposed Development   |
| 7.  | Construction of a Regional Sewage Treatment Plant and Sewage Pipeline in Kota Setar | <ul style="list-style-type: none"> <li>- Location: Daerah Kota Setar</li> <li>- Gross Development Value: RM 225 million</li> <li>- Contactor : UCM Construction Sdn. Bhd.</li> <li>- Descriptions: <ul style="list-style-type: none"> <li>(i) Design &amp; Build</li> <li>(ii) Physical Components <ul style="list-style-type: none"> <li>- Sewerage Network</li> <li>- Centralized Sewage Treatment Plant (CSTP)</li> </ul> </li> </ul> </li> </ul>  | Completed  |
| 8.  | Proposal to build Tanah Merah / Guar Kepayang Road in Pendang District              | <ul style="list-style-type: none"> <li>- Location: Pendang District</li> <li>- Road Length: 3.5 kilometers</li> <li>- Gross Development Value: RM 60 million</li> <li>- Agency : Ministry of Agriculture and Food Security of Malaysia</li> <li>- Descriptions: Components : Road and Bridge</li> </ul>   | Proposed development and expected to be completed in Q4 2024 |

## Mega Project

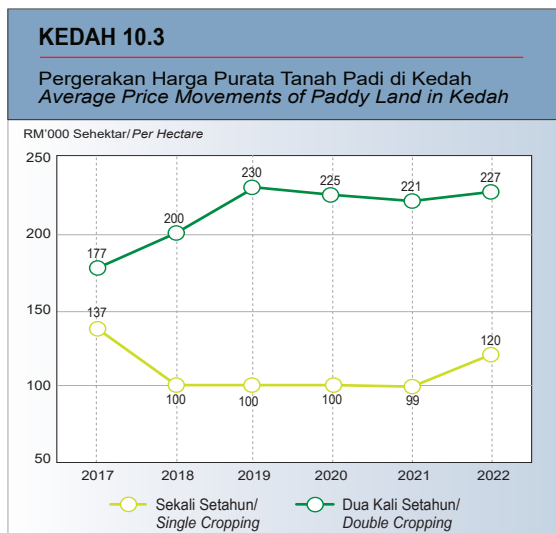
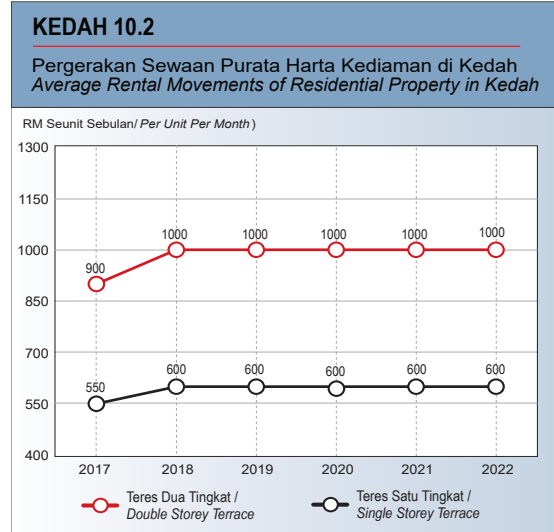
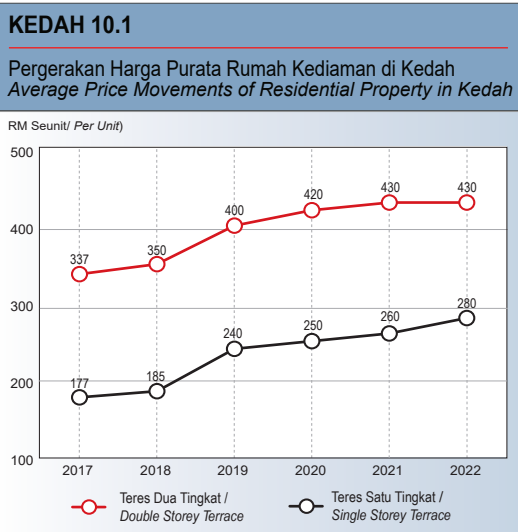
**Table 10.3: Development Projects**

| No. | Development                  | Description   | Current Development Status   |
|-----|------------------------------|---|--|
| 1.  | Langkawi Premium Outlet      | <ul style="list-style-type: none"> <li>- Location: Padang Mat Sirat, next to Langkawi Airport</li> <li>- Land area: 17.40 hectares</li> <li>- Developer: Bina Darulaman Bhd (BDB)</li> <li>- Descriptions:                             <ul style="list-style-type: none"> <li>(i) 38 units shops/outlets</li> <li>(ii) Other facilities</li> </ul> </li> </ul>  | <p><u>Phase 1</u><br/>Under Construction and expected to be completed in October 2022</p> <p><u>Phase 2</u><br/>Expected to be completed by 2024</p> |
| 2.  | G Residence                  | <ul style="list-style-type: none"> <li>- Location: PT 2620, Mukim Ayer Putih, Kedah</li> <li>- Land area: 17 hectares</li> <li>- Gross Development Value: RM210 million</li> <li>- Developer: GPC Development Sdn Bhd</li> <li>- Descriptions:                             <ul style="list-style-type: none"> <li>• 24 storeys service apartment</li> <li>• 3 commercials area</li> <li>• 293 units of serviced apartment</li> </ul> </li> </ul>  | Land acquisition in progress   |
| 3.  | Lavanya Residence and Resort | <ul style="list-style-type: none"> <li>- Location: Lot 2032, Jalan Telok Baru</li> <li>- Land area: 3.7 Hectares</li> <li>- Gross Development Value: 200 Million</li> <li>- Developer: LD Global Sdn Bhd</li> <li>- Descriptions:                             <ul style="list-style-type: none"> <li>• Phase 1 – Villa Service, 17 units of terrace house, 4 units of semi - detach house and 16 units of detach house</li> <li>• Phase 2 – 223 units of service apartment</li> </ul> </li> </ul>   | <p><u>Phase 1</u><br/>Completed</p> <p><u>Phase 2</u><br/>Under Construction</p>   |
| 4.  | Kedah Motor Sports Complex   | <ul style="list-style-type: none"> <li>- Location: Amanjaya City, Kuala Muda District.</li> <li>- Land area: 50 acres (Phase 1)</li> <li>- Gross Development Value: RM 7.4 million (Phase 1)<br/>RM 20.2 million (Phase 2)</li> <li>- Developer: BDB Synergy Sdn. Bhd. Project Manager : Kedah Public Works Department (JKR)</li> </ul>   | Proposed Development   |
| 5.  | Darulaman Lagenda            | <ul style="list-style-type: none"> <li>- Location: Persiaran Amanjaya</li> <li>- Land Area: 233.43 acres</li> <li>- Developer: BDB Lagenda Sdn Bhd.</li> <li>- Descriptions:                             <ul style="list-style-type: none"> <li>Phase 1:                                     <ul style="list-style-type: none"> <li>(i) Single storey terrace house</li> <li>(ii) 282 units</li> <li>(iii) Price: From RM198,000.00</li> <li>(iv) Sales Performance : 80%</li> </ul> </li> <li>Phase 2:                                     <ul style="list-style-type: none"> <li>(i) Single storey terrace house</li> <li>(ii) 959 units</li> <li>(iii) Price: From RM256,100.00</li> </ul> </li> <li>Phase 3:                                     <ul style="list-style-type: none"> <li>(i) Single storey Cluster</li> <li>(ii) 172 units</li> <li>(iii) Price: From RM284,600.00</li> </ul> </li> </ul> </li> <li>- Construction in process with 20% completed.</li> </ul> | Under construction   |
| 6.  | Jazz Park                    | <ul style="list-style-type: none"> <li>- Location: Kulim City</li> <li>- Land area: 28 hectares</li> <li>- Gross Development Value: RM1.2 billion</li> <li>- Developer: Laman Exotika Sdn. Bhd. Laman Exotika Sdn. Bhd.</li> <li>- Descriptions:                             <ul style="list-style-type: none"> <li>• Affordable housing, Apartment, Commercial, and Infrastructure.</li> <li>• 8 phase: Expected to be completed by 2027</li> <li>• Phase 1 and Phase 2 : 360 Apartment units and Commercial lots. Expected to complete within 3 years.</li> <li>• Price: From RM492,888.00 – RM730,888.00</li> </ul> </li> <li>- Construction in process with 55% completed.</li> </ul>   |  |

## State Government Policy and Initiatives

**Table 10.4 State Government Policy and Initiatives**

| No. | Policy   | Description  |
|-----|--|--|
| 1.  | Payment Exemption/Rebate & Moratorium Incentives | <ul style="list-style-type: none"> <li>- The incentives were included in 2022 state budget to ease the burden of tenants and operators who are affected by the lockdown.</li> <li>- The incentives are as follows: -                             <ul style="list-style-type: none"> <li>o 7.5% entertainment tax to theme park operators at Langkawi starting 1<sup>st</sup> June 2021, for the period of 2 years;</li> <li>o Rental exemption for canteen operators within premises owned by state government;</li> <li>o Rebate on entertainment licensing fee for entertainment business's operators based on application;</li> <li>o Rental exemption for premises under category of shop owned by state government;</li> <li>o 50% rental rebate for premises managed by Kedah State Agriculture Department.</li> </ul> </li> </ul> |





# PAHANG



# PAHANG

## GAMBARAN KESELURUHAN

Prestasi pasaran harta tanah Pahang sederhana dalam tempoh kajian. Sebanyak 21,361 transaksi bernilai RM7.01 bilion dicatatkan, masing-masing meningkat 33.6% dalam bilangan dan 28.1% dalam nilai. Subsektor kediaman menerajui keseluruhan pasaran harta tanah dengan 60.7% syer, diikuti oleh subsektor pertanian dengan 28.1%, tanah pembangunan (4.7%), perdagangan (5.5%) dan industri (1.0%).

Aktiviti pasaran menyaksikan pergerakan menaik bagi kesemua subsektor. Subsektor perdagangan meningkat 59.6% diikuti tanah pembangunan (56.2%), pertanian (51.7%), industri (41.0%) dan kediaman (23.5%). Dari segi nilai transaksi menyaksikan aktiviti pasaran untuk semua subsektor juga mengalami pergerakan menaik kecuali subsektor perdagangan. Subsektor pertanian mencatatkan peningkatan tertinggi iaitu 86.5% dan perdagangan merekodkan penguncupan sebanyak 20.3%.

## OVERVIEW

*Pahang's property market performance moderated in the review period. A total of 21,361 transactions worth RM7.01 billion were recorded, increasing by 33.6% in volume and 28.1% in value respectively. Residential sub-sector spearheaded the overall property market with 60.7% share, followed by agriculture with 28.1%, development land (4.7%), commercial (5.5%) and industrial (1.0%) sub-sectors.*

*Market activity witnessed upward movements across all sub-sectors. Sub-sector commercial increased 59.6% followed by development land 56.2%, agriculture (51.7%), industrial (41.0%) and residential (23.5%) sub-sectors. In terms of transaction value, market activity saw increasing movement for all sub-sectors except commercial. The agricultural sub-sector recorded the highest increase of 86.5% and the commercial recorded a contraction of 20.3%.*

152 Chart 11.1 Volume of Property Transactions 2018 – 2022

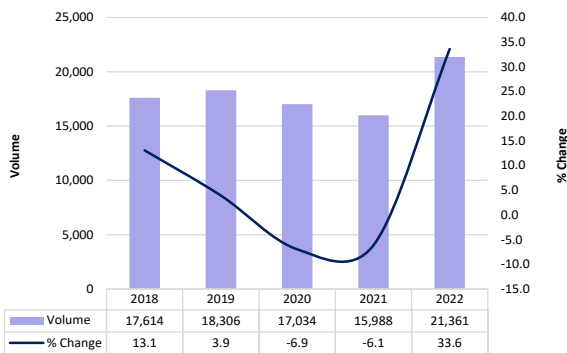


Chart 11.2 Value of Property Transactions 2018 – 2022

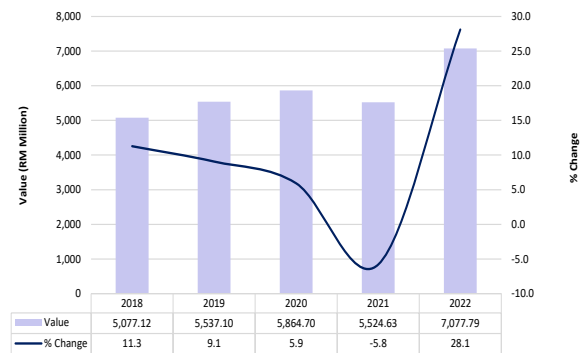


Chart 11.3 Contribution to Transaction Volume by Sub-sector 2022

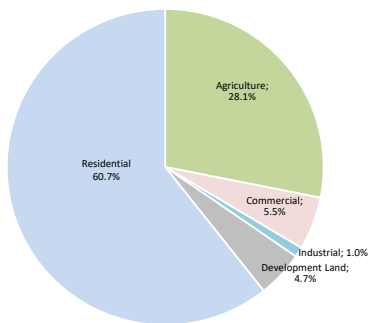
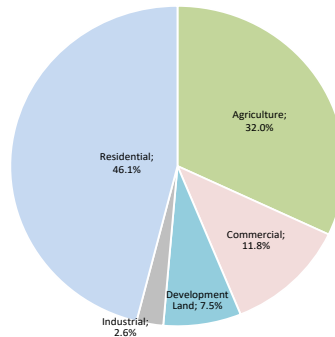


Chart 11.4 Contribution to Transaction Value by Sub-sector 2022



## PROMINENT SALES

Table 11.1

Summary of Prominent Sales in 2022 :

| No.                               | Property                                    | Location   | Transaction Year | Consideration Price |
|-----------------------------------|---|--|------------------|---------------------|
| <b>PURPOSE-BUILT OFFICE (PBO)</b> |   |  |                  |                     |
| 1.                                | Bangunan UMNO Temerloh                      | Jalan Dato Awang Ngah, Temerloh                          | 2020             | RM1,500,000         |
| <b>DEVELOPMENT LAND</b>           |   |  |                  |                     |
| 2.                                | Industrial Development Land (23,550 s.m.)   | Batu 3, 3 ¼ Jalan Kuala Lumpur, Pahang                   | 2022             | RM12,000,000        |
| 3.                                | Residential Development Land (680,075 s.m.) | Bukit Tinggi Resort, Bentong, Pahang                     | 2021             | RM62,200,000        |
| 4.                                | Commercial Development Land (8,090 s.m.)    | Jalan Teluk Cempedak, Pahang                             | 2021             | RM90,000,000        |
| 5.                                | Commercial Development Land (8,090 s.m.)    | Genting View Permai, Bentong, Pahang                     | 2020             | RM11,500,000        |
| <b>ESTATE</b>                     |   |  |                  |                     |
| 6.                                | Estate Land (1,626.04 hectares)             | Ladang ACE, Jalan Keratong – Bahau, Pahang               | 2022             | RM158,800,000       |
| 7.                                | Estate Land (80.960 hectares)               | Jalan Karak Manchis, Bentong, Pahang                     | 2022             | RM44,000,000        |
| 8.                                | Estate Land (5,666.52 hectares)             | Jalan Kuala Tembeling - Mela, Jerantut, Pahang           | 2021             | RM93,000,000        |
| 9.                                | Estate Land (2,428.10 hectares)             | Jalan Kuala Tembeling - Mela, Jerantut, Pahang           | 2021             | RM192,000,000       |
| 10.                               | Estate Land (116.80 hectares)               | Ladang Cheroh, Jalan Cheroh - Batu Malim, Raub, Pahang   | 2021             | RM11,265,000        |
| 11.                               | Estate Land (50.59 hectares)                | Sungai Petri, Off Jalan Dong - Sega, Raub, Pahang        | 2021             | RM12,500,000        |
| 12.                               | Estate Land (176.91 hectares)               | Teras, Off Jalan Sungai Chetang - Sang Lee, Raub, Pahang | 2021             | RM58,995,000        |
| 13.                               | Estate Land (82.63 hectares)                | Sang Lee, Raub, Pahang                                   | 2021             | RM9,000,000         |
| <b>OTHERS</b>                     |   |  |                  |                     |
| 14.                               | Agriculture Land (20.22 hectares)           | Off Jalan Bentong – Tras, Bentong, Pahang                | 2021             | RM10,990,000        |
| 15.                               | Orchard Land (28.03 hectares)               | Jalan Mengkuang – Triang, Bera, Pahang                   | 2022             | RM8,170,000         |

## HARTA TANAH KEDIAMAN

### Transaksi

Terdapat 12,962 transaksi bernilai RM3.26 bilion dicatatkan dalam tempoh kajian, bertambah 23.5% dalam bilangan dan 23.6% dalam nilai. Transaksi rumah teres menguasai syer pasaran tertinggi, menyumbang 43.8% (5,677 unit) daripada transaksi harta kediaman iaitu teres setingkat (4,200 unit) dan teres dua tingkat (1,477 unit).

## RESIDENTIAL PROPERTY

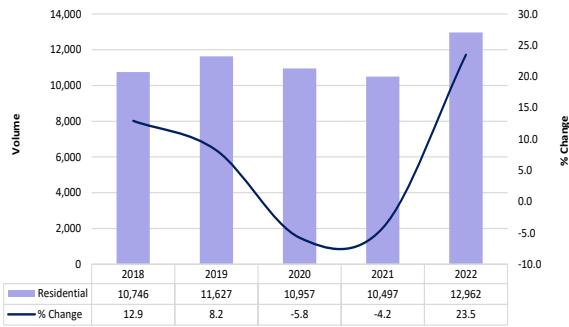
### Transaction

There were 12,962 transactions worth RM3.26 billion recorded in the review period, increased 23.5% in volume and 23.6% in value. Terrace house transactions dominated the highest market share, contributed 43.8% (5,677 units) of the residential property transactions attributed to single storey terraces (4,200 units) and double storey terraces (1,477 units).



Chart 11.5

Volume of Residential Property Transactions 2018 – 2022

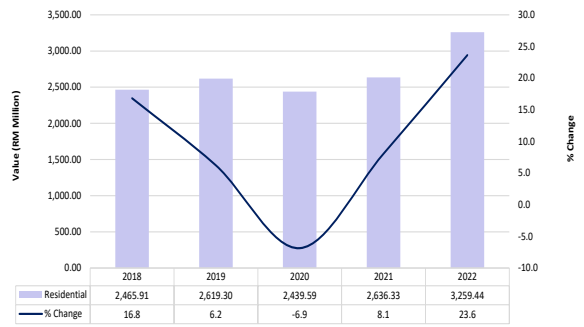


**Pelancaran Baharu**

Pasaran utama merekodkan peningkatan dalam pelancaran baharu. Walaubagaimana pun, permintaan pasaran menunjukkan sedikit turun berbanding tahun sebelumnya.

Chart 11.6

Value of Residential Property Transactions 2018 – 2022

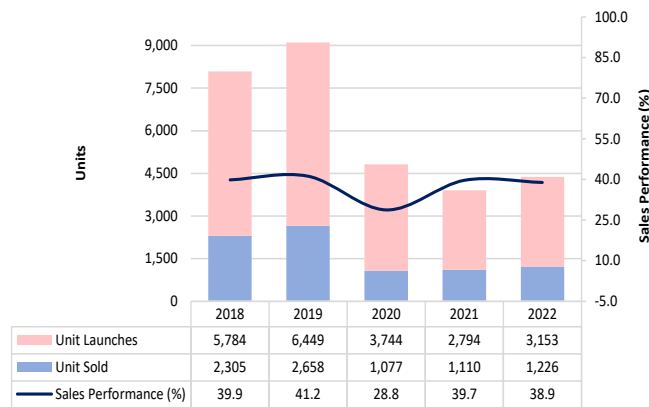


**New Launches**

The primary market recorded an increase in new launches. However, market demand showed a slight decrease over the previous year.

Chart 11.7

New Launches and Sales Performance 2018 – 2022



**Status Pasaran**

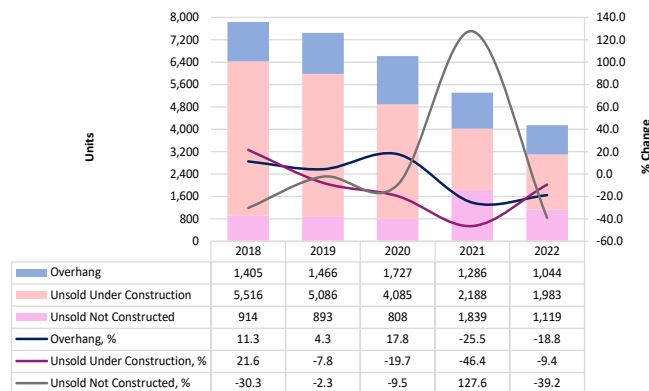
Unit kediaman tidak terjual merekodkan prestasi yang baik dalam tempoh kajian apabila terdapat pengurangan daripada unit yang tidak terjual tahun 2021. Trend ditunjukkan dalam Carta 11.8.

**Market Status**

The residential unsold units recorded a good performance in the review period when there was a reduction from unsold units in 2021. The trend is shown in Chart 11.8.

Chart 11.8

Residential Market Status 2018 – 2022

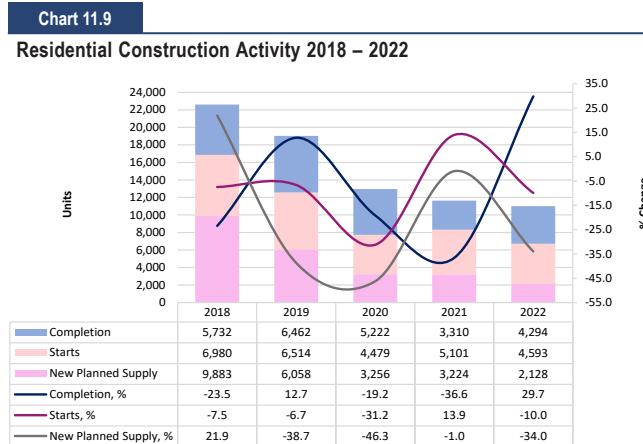


## Aktiviti Pembinaan

Aktiviti pembinaan subsektor kediaman berada pada mod perlahan. Pada akhir 2022, terdapat 299,156 unit kediaman sedia ada dengan 15,884 unit lagi dalam penawaran akan datang dan 33,035 unit dalam penawaran dirancang.

## Construction Activity

The residential sub-sector's construction activity was on a low mode. As at end-2022, there were 299,156 existing residential units with another 15,884 units in the incoming supply and 33,035 units in the planned supply.



## Harga dan Sewa

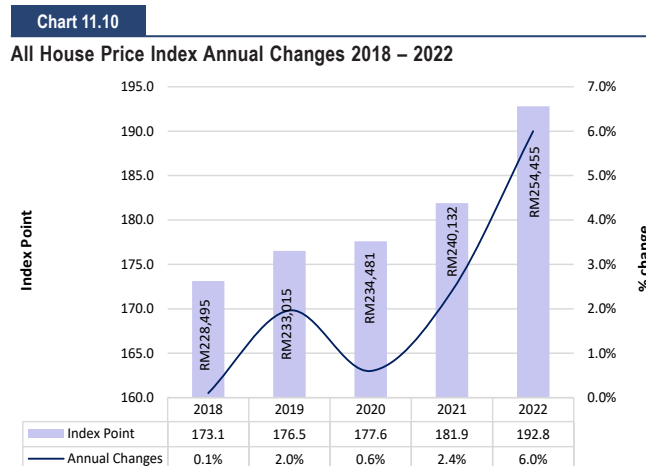
Trend harga harta kediaman adalah bercampur dengan pergerakan perubahan harga marginal tidak melebihi 12%. Pergerakan penurunan harga di beberapa tempat di lihat terutama di skim perumahan Daerah Kuantan dan Jerantut seperti rumah teres satu tingkat di Inderapura, Kuantan dan rumah teres satu tingkat kos sederhana di Taman Saujana Putra, Jerantut yang disebabkan kesan daripada musibah banjir yang telah melanda negeri ini.

## Price and Rental

The residential price trend was mixed with marginal price change does not exceed 12%. The downward movement of prices in several places is seen mainly in housing schemes in Kuantan and Jerantut Districts such as single-storey terraced houses in Inderapura, Kuantan and single-storey medium-cost terraced houses in Taman Saujana Putra, Jerantut due to the effects of the flood disaster that hit the state.

Indeks Harga Semua Rumah untuk negeri berada pada 192.8 mata pada 2022<sup>P</sup>, naik 6.0% daripada 181.9 mata pada 2021. Pada 2022<sup>P</sup>, harga purata semua rumah untuk negeri berada pada RM254,455 meningkat daripada RM240,132 pada 2021. Pasaran sewa harta kediaman secara keseluruhannya adalah stabil dengan sedikit peningkatan dan data sewaan unit baru bagi skim yang terpilih.

The All House Price Index for the state stood at 192.8 points in 2022<sup>P</sup>, up by 6.0% from 181.9 points in 2021. In 2022<sup>P</sup>, the average all house price for the state stood at RM254,455, increased from RM240,132 in 2021. The residential rental market is stable with slight increases and new unit rental data for selected schemes.



## HARTA TANAH PERDAGANGAN

### Transaksi

Subsektor perdagangan terus sederhana. Terdapat 1,160 transaksi direkodkan bernilai RM836.59 juta, menunjukkan peningkatan 59.6% dalam bilangan dan penurunan 20.3% dalam nilai (2021: 727 transaksi bernilai RM1,049.41 juta).

### Kedai

#### Transaksi

Segmen kedai mencatatkan 733 transaksi bernilai RM509.99 juta dalam tempoh kajian (2021: 479 transaksi bernilai RM335.86 juta). Bilangan dan nilai masing-masing bertambah 53.0% dan 51.9% berbanding 2021.

#### Status Pasaran

Situasi kedai tidak terjual adalah bercampur-campur dalam tempoh kajian. Walau bagaimanapun, unit siap dibina tidak terjual dan pembinaan belum terjual adalah lebih baik kerana jumlahnya berkurang. Trend ini ditunjukkan di Carta 11.13.

## COMMERCIAL PROPERTY

### Transaction

The commercial sub-sector continued to soften. There were 1,160 transactions recorded worth RM836.59 million, indicating an increase of 59.6% in volume and a decline 20.3% in value (2021: 727 transactions worth RM1,049.41 million).

### Shop

#### Transaction

Shop segment recorded 733 transactions worth RM509.99 million in the review period (2021: 479 transactions worth RM335.86 million). The volume and value increased by 53.0% and 51.9% respectively compared to 2021.

#### Market Status

The shop overhang was mixed in the review period. However, the overhang and unsold under construction units is better because the numbers is reduced. The trend is shown in Chart 11.13.

156

Chart 11.11

Volume of Commercial Property Transactions 2018 – 2022

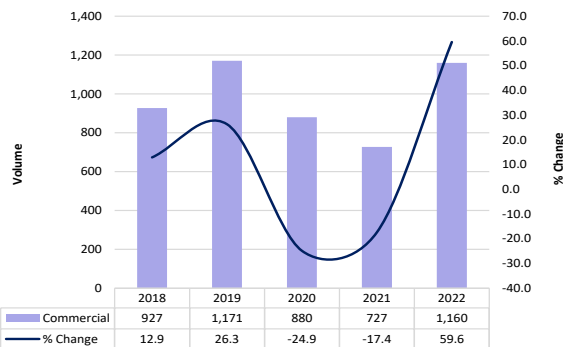


Chart 11.12

Value of Commercial Property Transactions 2018 – 2022

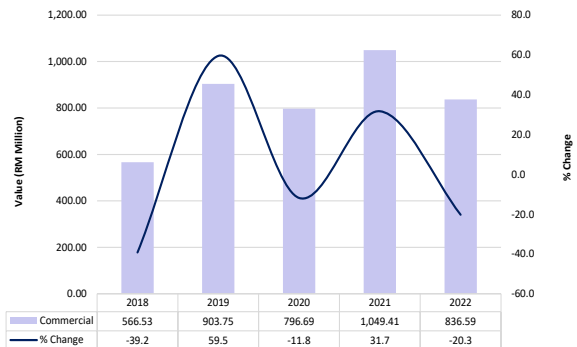
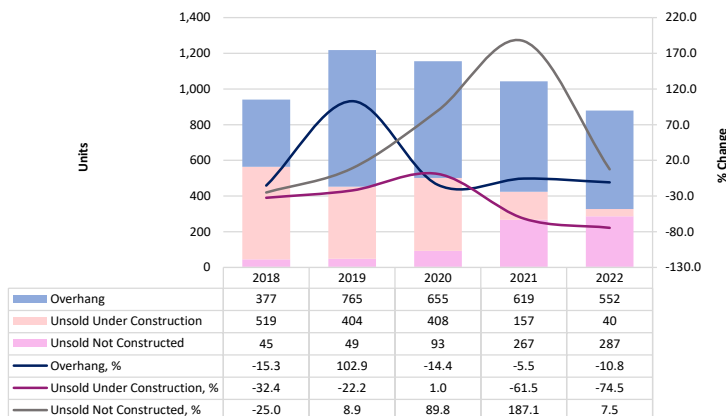


Chart 11.13

Shop Market Status 2018 – 2022



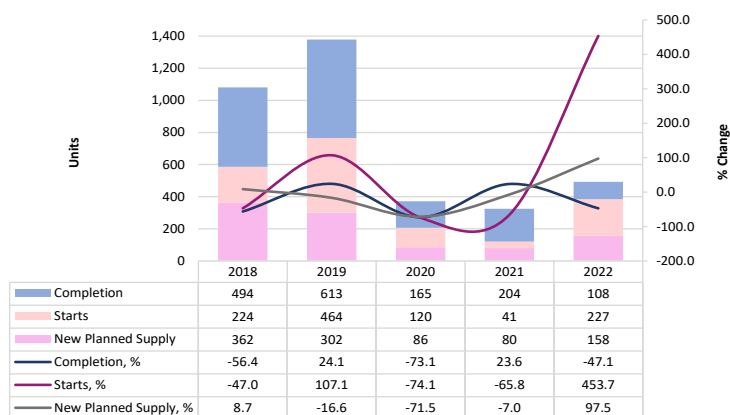
## Aktiviti Pembinaan

Seiring dengan aktiviti pasaran yang semakin baik, aktiviti pembinaan menunjukkan pergerakan yang positif kecuali bagi siap dibina. Pada akhir 2022, terdapat 25,865 unit kedai sedia ada dengan 1,221 unit lagi dalam penawaran akan datang dan 3,447 unit dalam penawaran dirancang.

## Construction Activity

*In tandem with improved market activity, construction activity showed positive movement except for completion. As at end-2022, there were 25,865 existing shop units with another 1,221 units in the incoming supply and 3,447 units in the planned supply.*

**Chart 11.14**  
Shop Market Activity 2018 – 2022



## Kompleks Perniagaan

### Penghujian dan Ketersediaan Ruang

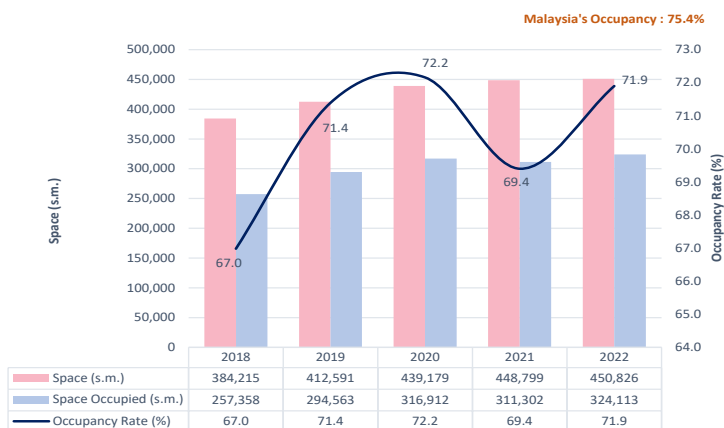
Segmen niaga menunjukkan prestasi sedikit menaik dengan kadar penghujian keseluruhan 71.9% berbanding 69.4% pada 2021. Ambilan tahunan adalah positif pada 12,811 m.p. lebih tinggi daripada 5,610 m.p. yang direkodkan tahun lepas.

## Shopping Complex

### Occupancy and Space Availability

*The retail segment showed a slightly increase with an overall occupancy rate of 71.9% as compared to 69.4% in 2021. The annual take-up was positive at 12,811 s.m. lower than 5,610 s.m. recorded last year.*

**Chart 11.15**  
Supply and Occupancy of Shopping Complex 2018 – 2022



## Aktiviti Pembinaan

Segmen niaga menyaksikan tiada bangunan yang siap dibina pada tempoh kajian. Pada akhir 2022, terdapat 44 kompleks membeli-belah sedia ada (450,826 m.p.) dengan satu bangunan dalam penawaran akan datang (9,894 m.p.) dan dua bangunan dalam penawaran yang dirancang (15,373 m.p.).

## Sewa

Sewa ruang niaga stabil bagi kebanyakan kompleks membeli-belah dengan beberapa pengecualian. Tingkat 2 bagi unit berkeluasan di antara 137 - 339 m.p. di East Coast Mall (Capitamall), Jalan Lim Hoe Lek dan Berjaya Megamall, Jalan Tun Ismail di Kuantan masing-masing mencatatkan pergerakan sewa menurun yang tertinggi sebanyak 9% dan 7.6% disebabkan pembaharuan sewaan serta untuk mengekalkan penyewa sedia ada.

## Pejabat Binaan Khas

### Penghunian dan Ketersediaan Ruang

158 Segmen pejabat binaan khas menyaksikan prestasi yang stabil. Manakala, ambilan tahunan adalah negatif pada 705 m.p. (2021: -3,948 m.p.).

## Construction Activity

The retail segment witnessed no buildings completed in review period. By the end of 2022, there were 44 existing shopping complexes (450,826 s.m.) with one building in the incoming supply (9,894 s.m.) and two buildings in the planned supply (15,373 s.m.).

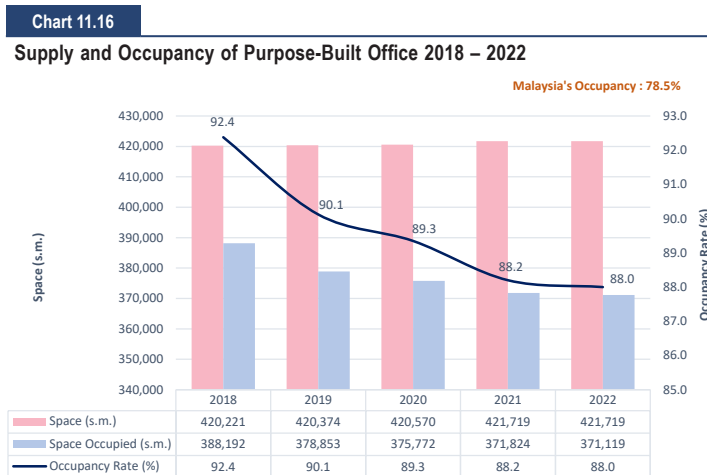
## Rental

Rental of retail space were largely stable for most shopping complexes with few exceptions. Second floor for units with an area between 137 - 339 s.m. at East Coast Mall (Capitamall), Lim Hoe Lek Road and Berjaya Megamall, Tun Ismail Road in Kuantan recorded the highest declining rental movements by 9% and 7.6% respectively due to rental renewals as well as to retain existing tenants.

## Purpose-Built Office

### Occupancy and Space Availability

The purpose-built office segment was in stable performance. While, the annual take-up was negative at 705 s.m. (2020: -3,948 s.m.).



## Aktiviti Pembinaan

Tiada aktiviti pembinaan baharu direkodkan dalam tempoh kajian. Pada akhir 2022, terdapat 154 pejabat binaan khas sedia ada (421,719 m.p.) dengan satu kompleks (36,375 m.p.) dalam penawaran akan datang dan satu lagi (4,911 m.p.) dalam penawaran dirancang.

## Sewa

Segmen pejabat binaan khas menyaksikan trend sewa yang stabil bagi kesemua bangunan terpilih.

## Construction Activity

No new construction activity was recorded in the review period. As at end-2022, there were 154 existing purpose-built office (421,719 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 segment saw a stable rental trend for all selected buildings.

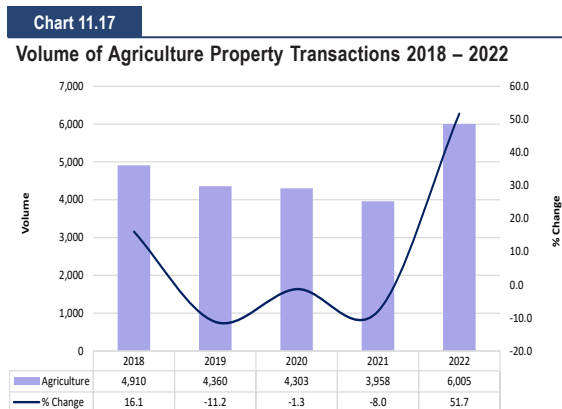
## Riadah

Segmen riadah menyaksikan tiada bangunan yang siap dibina dalam tempoh kajian. Pada akhir 2022, terdapat 302 hotel (25,601 bilik) dalam penawaran sedia ada dan enam hotel (696 bilik) dalam penawaran yang dirancang. Manakala tiada hotel dalam penawaran akan datang.

## HARTA TANAH PERTANIAN

### Transaksi

Terdapat 6,005 transaksi bernilai RM2.27 bilion, menunjukkan peningkatan marginal 51.7% dalam bilangan dan 86.5% dalam nilai (2021: 3,958 transaksi bernilai RM1.22 bilion).



### Harga

Harga harta pertanian adalah stabil di seluruh daerah dengan beberapa pengecualian. Tanah kosong di Sungai Puteri, Off Jalan Pekan di Rompin memperoleh perubahan harga yang tertinggi sebanyak 11.7% disebabkan lokasi yang strategik iaitu berhampiran dengan kemudahan infra seperti Kolej Komuniti Rompin, sekolah, masjid dan skim perumahan PRIMA Sungai Puteri dan PAKR Sungai Puteri.

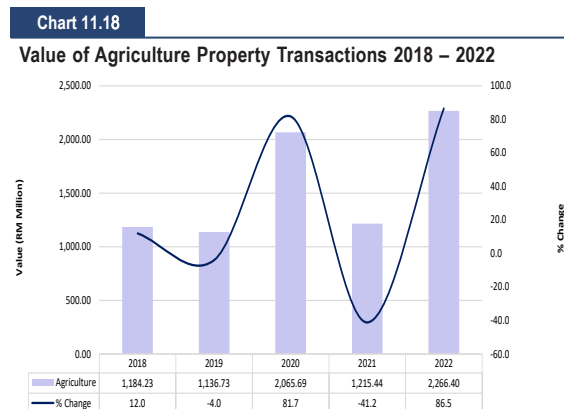
## Leisure

The leisure segment witnesses no completed building during the review period. As at end-2022, there were 302 hotels (25,601 rooms) in the existing supply and six hotels (696 rooms) in the planned supply. While no hotel in the incoming supply

## AGRICULTURE PROPERTY

### Transaction

There were 6,005 transactions worth RM2.27 billion, indicating a marginal increase of 51.7% in volume and 86.5% in value (2021: 3,958 transactions worth RM1.22 billion).



### Price

Prices of agriculture property were mainly stable across the districts with some exceptions. Vacant land in Sungai Puteri, Off Jalan Pekan in Rompin achieved the highest price change of 11.7% due to its strategic location which is close to infrastructure facilities such as Rompin Community College, schools, mosques and PRIMA Sungai Puteri and the PAKR Sungai Puteri housing scheme.

## PROSPEK 2023

Ekonomi Pahang diunjur pulih secara beransur-ansur dengan mempergiatkan aktiviti pelancongan domestik dan hotel, pertanian, perladangan, perlombongan dan pertumbuhan seimbang sektor perindustrian. Merujuk kepada Bajet 2023 bertemakan “Negeri Stabil Rakyat Sejahtera”, di sasarkan kutipan hasil negeri mencecah RM1.083 bilion iaitu peningkatan sebanyak 4.5% berbanding belanjawan tahun 2022.

Anggaran perbelanjaan mengurus diperuntukan sebanyak RM1.071 bilion daripada jumlah tersebut, manakala perbelanjaan pembangunan sebanyak RM318.83 juta yang melibatkan projek infrastruktur RM143.53 juta dengan pembiayaan langsung dan RM175.30 juta daripada pinjaman untuk membiayai projek bekalan air. Beberapa program dan projek akan diteruskan pada 2023 yang turut memberi impak positif kepada sektor harta tanah dan infrastruktur.

## 2023 OUTLOOK

*Pahang’s economy is projected to recover gradually by intensifying domestic tourism and hotel activities, agriculture, plantation, mining and the balanced growth of the industrial sector. Based to the 2023 Budget “Negeri Stabil Rakyat Sejahtera”, State revenue collection is targeted to reach RM1.083 billion, which is an increase of 4.5% compared to the 2022 budget.*

*Estimated operating expenses are allocated as much as RM1.071 billion of that amounts, while development expenses totaling RM318.83 million involve infrastructure projects of RM143.53 million with direct financing and RM175.30 million from loans to finance water supply projects. Several programs and projects will continue in 2023 that also have a positive impact on the property and infrastructure sectors.*

## Infrastructure Development

Table 11.2: Infrastructure Projects

| No. | Infrastructure Project                                   | Description  | Current Development Status   |
|-----|--|--|--|
| 1.  | East Coast Rail Line (ECRL)                              | <ul style="list-style-type: none"> <li>- Location: Port Klang to Kota Bharu</li> <li>- Total length: 665 kilometres double-track, standard gauge railway link.</li> <li>- Link the East Coast and the West Coast of Peninsular Malaysia by connecting Kota Bharu in Kelantan to Port Klang in Selangor.</li> <li>- Estimating cost: RM50.27 billion</li> <li>- Comprise total of 20 stations, including 14 passenger stations, 5 combined passenger and freight stations, and 1 freight station.</li> <li>- Seven stations will be in Pahang namely, Bentong Station, Temerloh Station, Maran Station, Paya Besar Station, KotaSAS Station, Kuantan Port City Station and Cherating Station.</li> <li>- ECRL project has involved the acquisition of 1,782 lots of land throughout the state</li> <li>- Project status: 52% completed in Pahang</li> </ul> | <p>Under construction</p> <p>Expected to be completed in 2026.</p> <p>(Land acquisition process has been started. Hearing and inquiry are ongoing and some acquisition completed).</p> |
| 2.  | Sultan Ahmad Shah Administrative Center (PPSAS), KotaSAS | <ul style="list-style-type: none"> <li>- Location: KotaSAS, Kuantan</li> <li>- Total land area: 105.70 acres</li> <li>- Total built-up area: 57,777 sqm</li> <li>- Estimating Project Cost: RM415.5 juta</li> <li>- Development Components: <ul style="list-style-type: none"> <li>➢ 4 storey Dewan Undangan Negeri</li> <li>➢ 7 Storey Menteri Besar and State Secretary Office</li> <li>➢ 7-Storey State Building Offices</li> <li>➢ 7-Storey Federal Building Offices, Banquet Hall, Gallery, Auditorium,</li> <li>➢ 1,213 car parks etc.</li> </ul> </li> <li>- Pusat Pentadbiran Sultan Ahmad Shah (PPSAS) will replaced Wisma Sri Pahang and Wisma Persekutuan located at Jalan Gambut, Kuantan</li> <li>- Project status: 90% completed</li> </ul>  | Under Construction   |



**Table 11.2: Infrastructure Projects**

| No. | Infrastructure Project   | Description   | Current Development Status  |
|-----|--|---|---|
| 3.  | Central Spine Road Highway (CSR) FT 34 Kota Bharu – Simpang Pelangai, Bentong                  | <ul style="list-style-type: none"> <li>- Four lane dual-carriageway highway.</li> <li>- Comprising six phases and 30 sub-packages</li> <li>- Total length: 347.00 kilometres</li> <li>- Involved four packages with 19 sub-packages.</li> <li>- Distance: 240 kilometres</li> <li>- Package 4A – Kampung Relong to Raub</li> <li>- Package 4B – Kampung Relong to Raub</li> <li>- Package 4C – Sega Lama to Kuala Dong (5.8 kilometres).</li> <li>- Package 4C – Kampung Relong to Raub</li> <li>- Package 4D – Kuala Dong to Tanah Berchangkul (13.6 kilometres).</li> <li>- Package 5A: Raub to Bentong, Pahang</li> </ul>  | <p>Package 4C (Sega Lama to Kuala Dong), 4D &amp; 5A under construction.</p> <p>Package 4C (Kampung Relong to Raub), 4B &amp; 4A - Land acquisition process</p> |
| 4.  | Tanah Putih Intersection Flyover to Tanjung Lumpur Second Bridge                               | <ul style="list-style-type: none"> <li>- To overcome the problem of traffic congestion on Federal Road (FT 002)</li> <li>- Involves an allocation amount of 47 million ringgit which has been approved by the Federal Government</li> </ul>   | Under construction  |
| 5.  | Kuantan Skytrain   | <ul style="list-style-type: none"> <li>- The memorandum of understanding (MoU) was signed on 11/10/2022 by the state government</li> <li>- Involving the total development cost of RM18.28 billion where the construction will involve 2 phases of development covering a distance of 54.5 kilometres with 3 alignments.</li> <li>- Phase 1: involves the construction of 2 lines which is from Menara Kuantan 188 to KotaSAS with a distance of 12.5 kilometres and from Menara Kuantan 188 to Teluk Cempedak with a distance of 10 kilometres.</li> <li>- Phase 2: Estimating the development cost is RM10.9 billion involves the third alignment from KotaSAS to Kuantan International Airport with a distance of 32 kilometres. It will be implemented in phases</li> </ul> | Proposal stage (MoU signed)   |
| 6.  | Road Upgrading Project From Felda Terapai, Pekan to Felda Mayam, Bera, Pahang                  | <ul style="list-style-type: none"> <li>- Involves upgrading a 13.65 kilometers long road worth RM85 million</li> <li>- This project was started on 14/02/2022 and is expected to be completed within 3 years which is on 13/02/2025</li> </ul>  | Under construction  |
| 7.  | Road Upgrading Project from Kampung Rebus to Kampung Doja via Sipang Retang, Jerantut District | <ul style="list-style-type: none"> <li>- Land acquisition process involving 34 individual lots</li> </ul>   | Land acquisition process has been started. Hearing and inquiry are ongoing  |

**Mega Project**

**Table 11.3: Development Projects**

| No. | Development Project                                  | Description  | Current Development Status   |
|-----|--|--|--|
| 1.  | Kuantan International Airport, Pahang Aerospace City | <ul style="list-style-type: none"> <li>- Location: Gebeng, Pahang</li> <li>- Land area: 12,459.05 acres (5,042 hectares)</li> <li>- Project estimating Cost: RM50 billion (RM2 billion for Airport)</li> <li>- The project would also have an international airport and world class aircraft maintenance, repair and overhaul (MRO) services.</li> <li>- It is a mix development project of 70% for MRO and 30% Airport. This project will relocate the existing airport to a new area and subsequently support the 3rd National Physical Plan as a national integrated transit development (air, land and sea).</li> <li>- Developers: Gading Group Berhad, AVIC Intl and Syabas Seribumi Sdn Bhd.</li> </ul> | <p>Proposal Stage (MoU signed stage)</p> <p>Estimated completion in year 2026.</p> |
| 2.  | Lotus's Hypermarket                                  | <ul style="list-style-type: none"> <li>- Location: Bandar Indera Mahkota, Pahang.</li> <li>- Land area: approximately 27,295 s.m.</li> <li>- It was built to replace the KIP Mall project in Bandar Indera Mahkota.</li> <li>- Project status: 90% completed</li> </ul>  | Under construction   |



## Mega Project

**Table 11.3: Development Projects**

| No. | Development Project                             | Description  | Current Development Status |
|-----|---|--|----------------------------|
| 3   | Kuantan Waterfront Resort City (KWRC) – Phase 2 | <ul style="list-style-type: none"> <li>- Location: Pesisiran Pantai Tanjung Lumpur Mukim, Kuantan, Pahang</li> <li>- Land area: 4.32 acres</li> <li>- Gross Development Value: RM200 millions</li> <li>- Developer: 70:30 joint venture between Bina Puri and Newston International Group Sdn Bhd</li> <li>- Development component:               <ul style="list-style-type: none"> <li>➢ 2 tower service apartments as high as 21 levels and 31 levels that offer 456 serviced apartment units</li> <li>➢ 17 units of two -storey shops facing the sea will also be built in Phase 2.</li> </ul> </li> </ul> | Proposal stage             |

## State Government Policy

**Table 11.4: State Government Policy**

The State Government approved several policies and incentives to investors who are interested in investing in Pahang. Among the policies and incentives are as follows: -

| No.                       | Policy/ incentives  | Details  |          |         |                           |   |                     |   |          |         |                     |   |                          |   |
|---------------------------|---|--|----------|---------|---------------------------|---|---------------------|---|----------|---------|---------------------|---|--------------------------|---|
| 1.                        | Sustainability Fees   | <ul style="list-style-type: none"> <li>- An effort to promote tourism activities in Pahang</li> <li>- Sustainability fee of RM3 per night will be charged for each hotel room in Pahang. It has started to be charged in 2022 and will continue for year 2023</li> </ul>   |          |         |                           |   |                     |   |          |         |                     |   |                          |   |
| 2.                        | Gebeng Development Plan   | <ul style="list-style-type: none"> <li>- Gebeng Subdistrict will be classified as an east cost transit hub that included air, land and water logistic needs. For this purposed, 3 main initiatives that will be focused area:               <ul style="list-style-type: none"> <li>➢ The proposed construction of Kuantan International Airport worth RM2 billion</li> <li>➢ The development of a 9 acres workers' quarters facility in the Gebeng Industrial Park involves an allocation of RM25 million</li> <li>➢ The construction of new port along the ECRL line and the strengthening of the function of existing Kuantan Port.</li> </ul> </li> </ul>   |          |         |                           |   |                     |   |          |         |                     |   |                          |   |
| 3.                        | Housing Facilities Initiatives  | <ul style="list-style-type: none"> <li>- In order to guarantee the well-being of the people throught housing facilities, the state government has drawn up several initiatives including:               <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">Programs</th> <th style="width: 50%;">Details</th> </tr> </thead> <tbody> <tr> <td>Rumah Rakyat Pahang (RRP)</td> <td> <ul style="list-style-type: none"> <li>• It is given free of charge to the people of Pahang based on the following criteria :                   <ul style="list-style-type: none"> <li>a) Unable to buy a house to low income</li> <li>b) Belongs to the poor category</li> <li>c) Not eligible to make a housing loan</li> </ul> </li> </ul> </td> </tr> <tr> <td>PR1MA Negeri Pahang</td> <td> <ul style="list-style-type: none"> <li>• For low and middle income groups</li> <li>• The state government plans to build 1,000 units for the year 2023</li> </ul> </td> </tr> </tbody> </table> <br/> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">Programs</th> <th style="width: 50%;">Details</th> </tr> </thead> <tbody> <tr> <td>Rumah Makmur Pahang</td> <td> <ul style="list-style-type: none"> <li>• For the needs of low-income people</li> <li>• House price RM80,000.00 per unit</li> <li>• For household income less than RM5,000/- and still don't own a house</li> <li>• The state government is targeting a total of 483 units to be completed in 2023.</li> <li>• using loan</li> </ul> </td> </tr> <tr> <td>Rumah Mesra Pahang (RMP)</td> <td> <ul style="list-style-type: none"> <li>• Inspired by the concept of Rumah Mesra Rakyat</li> <li>• Offering a 20% discount from the price of a house worth RM75,000.00</li> <li>• For the year 2023, 500 units will be developed at a total cost of RM7.5 million</li> </ul> </td> </tr> </tbody> </table> </li> </ul> | Programs | Details | Rumah Rakyat Pahang (RRP) | <ul style="list-style-type: none"> <li>• It is given free of charge to the people of Pahang based on the following criteria :                   <ul style="list-style-type: none"> <li>a) Unable to buy a house to low income</li> <li>b) Belongs to the poor category</li> <li>c) Not eligible to make a housing loan</li> </ul> </li> </ul> | PR1MA Negeri Pahang | <ul style="list-style-type: none"> <li>• For low and middle income groups</li> <li>• The state government plans to build 1,000 units for the year 2023</li> </ul> | Programs | Details | Rumah Makmur Pahang | <ul style="list-style-type: none"> <li>• For the needs of low-income people</li> <li>• House price RM80,000.00 per unit</li> <li>• For household income less than RM5,000/- and still don't own a house</li> <li>• The state government is targeting a total of 483 units to be completed in 2023.</li> <li>• using loan</li> </ul> | Rumah Mesra Pahang (RMP) | <ul style="list-style-type: none"> <li>• Inspired by the concept of Rumah Mesra Rakyat</li> <li>• Offering a 20% discount from the price of a house worth RM75,000.00</li> <li>• For the year 2023, 500 units will be developed at a total cost of RM7.5 million</li> </ul> |
| Programs                  | Details   |  |          |         |                           |   |                     |   |          |         |                     |   |                          |   |
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| Programs                  | Details   |  |          |         |                           |   |                     |   |          |         |                     |   |                          |   |
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## State Government Policy

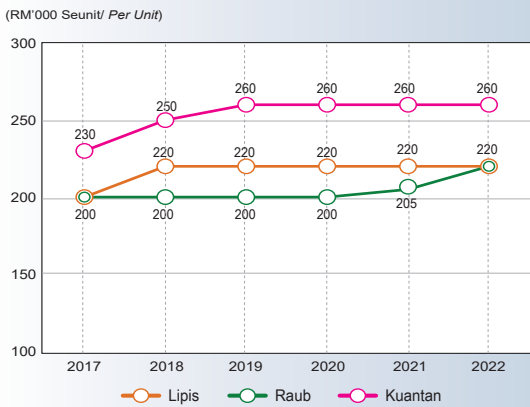
**Table 11.4: State Government Policy**

The State Government approved several policies and incentives to investors who are interested in investing in Pahang. Among the policies and incentives are as follows: -

| No.                              | Policy/<br>incentives   | Details   |          |         |                          |   |                                  |  |
|----------------------------------|---|---|----------|---------|--------------------------|---|----------------------------------|--|
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| Programs                         | Details   |   |          |         |                          |   |                                  |  |
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| 4.                               | Development of the West Pahang Economic Region Plus   | <ul style="list-style-type: none"> <li>- To ensure that the development agenda is balanced throughout the state and not only concentrated in some area only</li> <li>- The Pahang Barat Plus Economic Region Development Council was established to increase investment and economic development for 5 main industry clusters namely tourism, agriculture, timber, minerals and services.</li> <li>- Involving 6 district which are Bentong, Cameron Highlands, Lipis, Raub, Jerantut and Bera with a total area of 1.98 million hectares</li> </ul>  |          |         |                          |   |                                  |  |
| 5.                               | Road Upgrading  | <ul style="list-style-type: none"> <li>- Under RMK 12, the state government has applied for an allocation of RM7.8 billion involving project under MARRIS, the proposed Benta Link and One Way Loop projects in Kea Farm, Cameron Highlands</li> <li>- There are 137 proposed road upgrading projects have been applied to the Ministry of Works (KKR) with an estimated allocation of RM35.69 million and a total of 77 proposed road projects have been applied to the Ministry of Rural Development (KPLB) with an estimated allocation of RM2.54 billion.</li> </ul>  |          |         |                          |   |                                  |  |
| 6.                               | Irrigation and Drainage Facilities Upgrading  | <ul style="list-style-type: none"> <li>- The Federal Government has allocated RM2 billion for the implementation of 10 flood mitigation projects throughout the state in stages involving the Flood Mitigation Plan of Lipis, Bentong and Temerloh Districts.</li> </ul>  |          |         |                          |   |                                  |  |

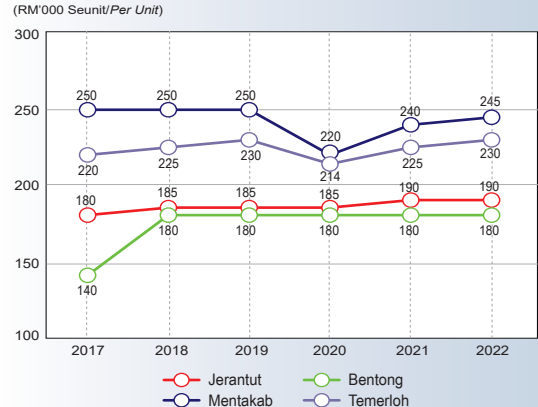
### PAHANG 11.1

Pergerakan Harga Purata Rumah Teres Satu Tingkat di Bandar-bandar Utama, Pahang  
 Average Price Movements of Single Storey Terraced Houses in Major Towns, Pahang



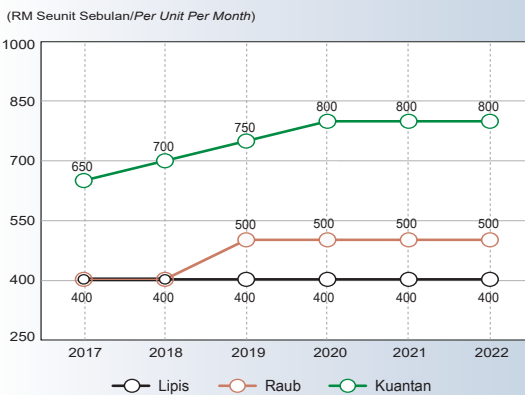
### PAHANG 11.2

Pergerakan Harga Purata Rumah Teres Satu Tingkat di Bandar-bandar Utama, Pahang  
 Average Price Movements of Single Storey Terraced Houses in Major Towns, Pahang



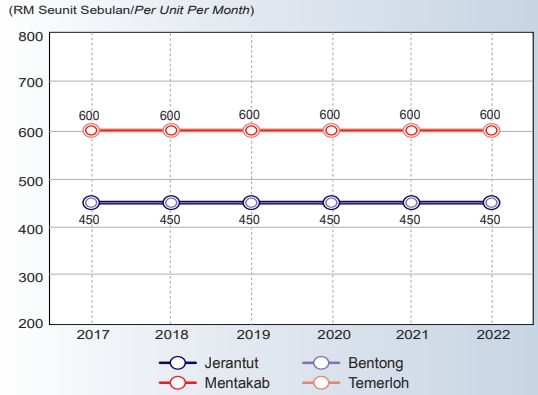
### PAHANG 11.3

Pergerakan Sewaan Purata Rumah Teres Satu Tingkat di Bandar-bandar Utama, Pahang  
 Average Rental Movements of Single Storey Terraced Houses in Major Towns, Pahang



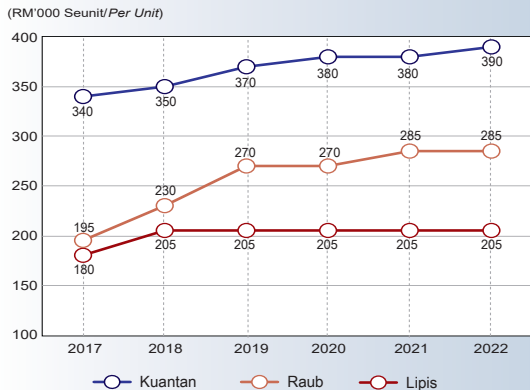
### PAHANG 11.4

Pergerakan Sewaan Purata Rumah Teres Satu Tingkat di Bandar-bandar Utama, Pahang  
 Average Rental Movements of Single Storey Terraced Houses in Major Towns, Pahang



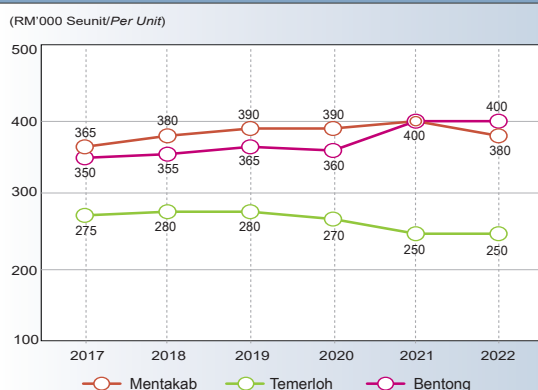
### PAHANG 11.5

Pergerakan Harga Purata Rumah Teres Dua Tingkat di Bandar-bandar Utama, Pahang  
 Average Price Movements of Double Storey Terraced Houses in Major Towns, Pahang



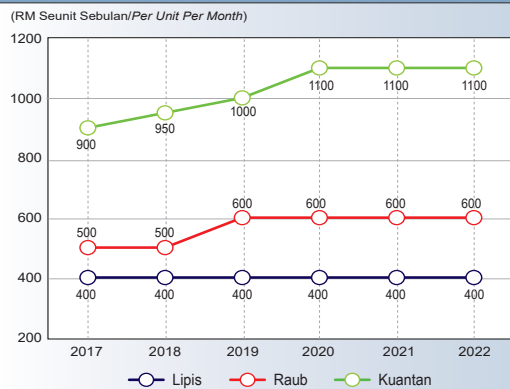
### PAHANG 11.6

Pergerakan Harga Purata Rumah Teres Dua Tingkat di Bandar-bandar Utama, Pahang  
 Average Price Movements of Double Storey Terraced Houses in Major Towns, Pahang



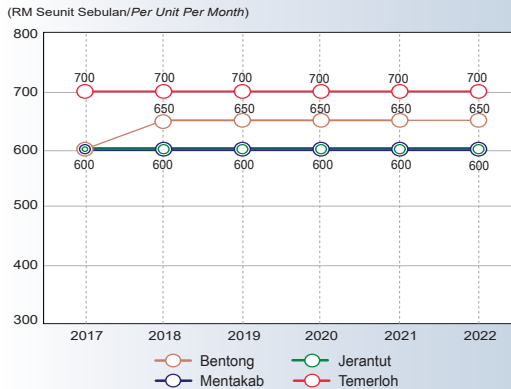
### PAHANG 11.7

Pergerakan Sewaan Purata Rumah Teres Dua Tingkat di Bandar-bandar Utama, Pahang  
Average Rental Movements of Double Storey Terraced Houses in Major Towns, Pahang



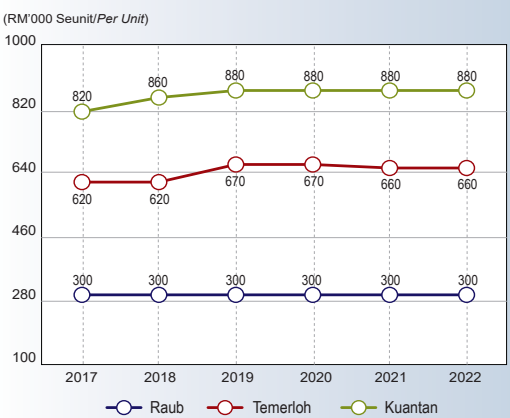
### PAHANG 11.8

Pergerakan Sewaan Purata Rumah Teres Dua Tingkat di Bandar-bandar Utama, Pahang  
Average Rental Movements of Double Storey Terraced Houses in Major Towns, Pahang



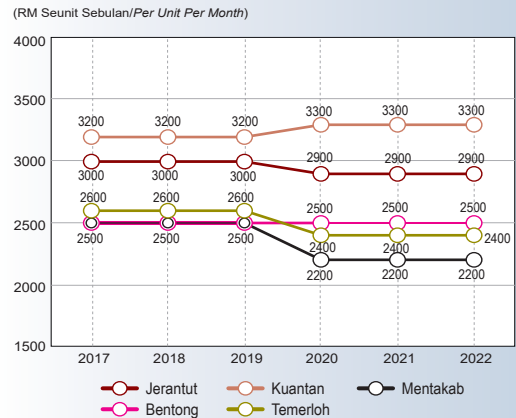
### PAHANG 11.9

Pergerakan Harga Purata Kedai Dua Tingkat di Bandar-bandar Utama, Pahang  
Average Price Movements of Double Storey Shop in Major Towns, Pahang



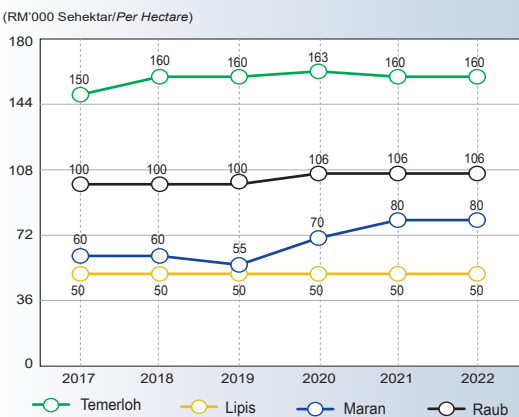
### PAHANG 11.10

Pergerakan Sewaan Purata Tingkat Bawah Kedai di Bandar-bandar Utama, Pahang  
Average Rental Movements of Ground Floor Shop in Major Towns, Pahang



### PAHANG 11.11

Pergerakan Harga Purata Tanah Getah di Pahang  
Average Price Movements of Rubber Cultivation in Pahang





# TERENGGANU



# TERENGGANU

## GAMBARAN KESELURUHAN

Pasaran harta tanah negeri menunjukkan prestasi yang lebih baik pada 2022. Terdapat 23,666 transaksi bernilai RM3.13 bilion dicatatkan, menunjukkan peningkatan 36.6% dalam bilangan dan 21.9% dalam nilai (2021: 17,323 transaksi bernilai RM2.56 bilion). Subsektor kediaman mengekalkan bahagian pasaran utama, menyumbang 68.6% daripada bilangan syer harta tanah negeri, diikuti oleh subsektor tanah pembangunan (15.0%), pertanian (14.2%), perdagangan (2.0%) dan industri (0.2%).

Pergerakan aktiviti pasaran semua subsektor menunjukkan peningkatan. Manakala dari segi nilai, hanya subsektor industri merekodkan penurunan sebanyak 78.7% iaitu RM57.37 juta berbanding RM268.88 juta pada tahun 2021.

## OVERVIEW

The state's property market saw a better performance in 2022. There were 23,666 transactions worth RM3.13 billion recorded increasing of 36.6% in volume and 21.9% in value (2021: 17,323 transactions worth RM2.56 billion). Residential sub-sector retained its major market share, contributed 68.6% of the state's property market volume, followed by the development land (15.0%), agriculture (14.2%), commercial (2.0%) and industrial (0.2%) sub-sectors.

The movement of market activity in all subsectors shows an increase. While in terms of value, only the industrial subsector recorded a decrease of 78.7% which is RM57.37 million from RM268.88 million in 2021.

Chart 12.1

Volume of Property Transactions 2018 – 2022

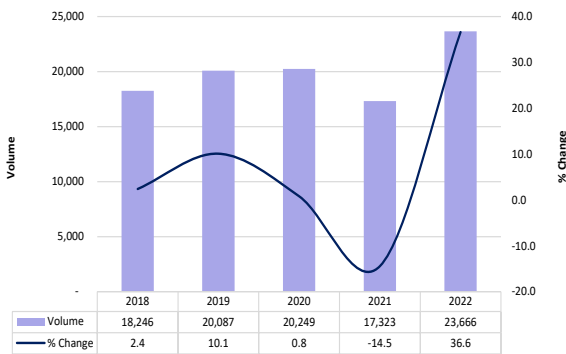


Chart 12.2

Value of Property Transactions 2018 – 2022

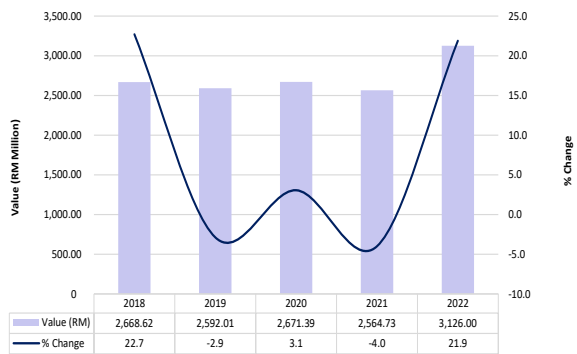


Chart 12.3

Contribution to Transaction Volume by Sub-sector 2022

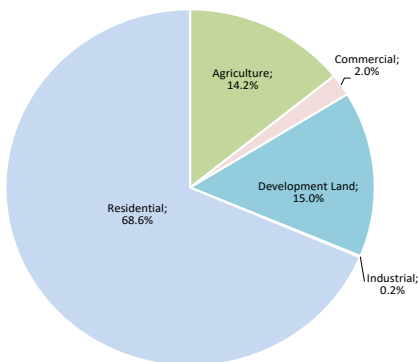
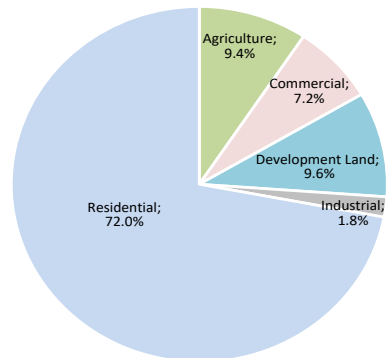


Chart 12.4

Contribution to Transaction Value by Sub-sector 2022



## PROMINENT SALES

Table 12.1

### Summary of Prominent Sales Recorded in 2022

| No.                     | Property                                     | Location  | Transaction Year | Consideration Price |
|-------------------------|--|---|------------------|---------------------|
| <b>INDUSTRIAL</b>       |  |   |                  |                     |
| 1.                      | Detached Factory / Warehouse                 | Perusahaan Cenering, Jalan Rajawali I (KT 343), Kuala Terengganu      | 2022             | RM10,500,000        |
| 2.                      | Detached Factory / Warehouse                 | Industri Gong Badak, Jalan Kuala Terengganu - Batu Rakit, Kuala Nerus | 2021             | RM6,700,000         |
| 3.                      | Industrial Land                              | Perusahaan Cenering, Kuala Terengganu                                 | 2021             | RM6,200,000         |
| <b>DEVELOPMENT LAND</b> |  |   |                  |                     |
| 4.                      | Tourism Development Land (34,486.90 s.m.)    | Pulau Gemia, Marang, Terengganu                                       | 2022             | RM5,000,000         |
| 5.                      | Residential Potential Land (108,800.00 s.m.) | Jalan Air Putih, Binjai, Kemaman                                      | 2022             | RM8,570,000         |
| <b>ESTATE</b>           |  |   |                  |                     |
| 6.                      | Estate Land (150.70 hectares)                | Kawasan Lubuk Bayas, Off Jerangau / Jabor, Dungun, Terengganu         | 2021             | RM6,300,000         |

## HARTA TANAH KEDIAMAN

### Transaksi

Terdapat 16,237 transaksi bernilai RM2.25 bilion dicatatkan pada tempoh kajian, prestasi pindahmilik mencatatkan peningkatan 36.3% dalam bilangan dan 32.2% dalam nilai. Transaksi plot kosong menguasai 69.9% pindahmilik harta kediaman.

## RESIDENTIAL PROPERTY

### Transaction

There were 16,237 transactions worth RM2.25 billion recorded in the review period, transactions performance recorded an upward by 36.3% in volume and 32.2% in value. Vacant plot transactions dominated 69.9% of the residential property transactions.

Chart 12.5

### Volume of Residential Property Transactions 2018 – 2022

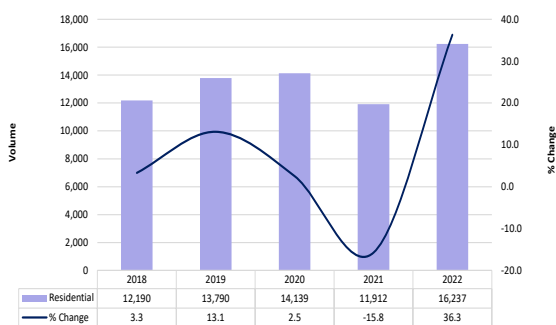


Chart 12.6

### Value of Residential Property Transactions 2018 – 2022



## Pelancaran Baharu

Pasaran utama menyaksikan peningkatan dalam pelancaran baharu berbanding tahun sebelumnya. Rumah teres satu tingkat membentuk sebahagian besar pelancaran baharu, merangkumi 58.4% (233 unit) dari jumlah keseluruhan. Trend ini ditunjukkan di Carta 12.7.

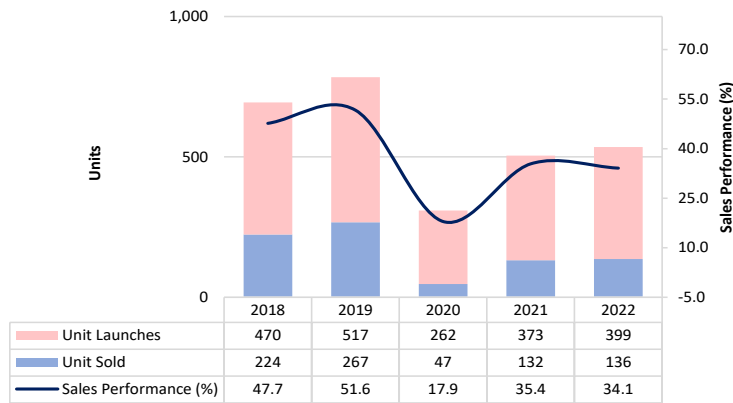
## New Launches

The primary market saw improvement new launches as compared to previous year. Single storey terrace houses formed the bulk of the new launches, accounting for 58.4% (233 units) of the total. The trend is shown in Chart 12.7.



Chart 12.7

New Launches Trend 2018 – 2022



**Status Pasaran**

Trend bercampur-campur dilihat pada prestasi pasaran kediaman. Unit-unit dalam pembinaan belum terjual dan belum dibina belum terjual menunjukkan prestasi menurun berdasarkan bilangannya yang bertambah dalam tempoh kajian. Trend ini ditunjukkan dalam Carta 12.8.

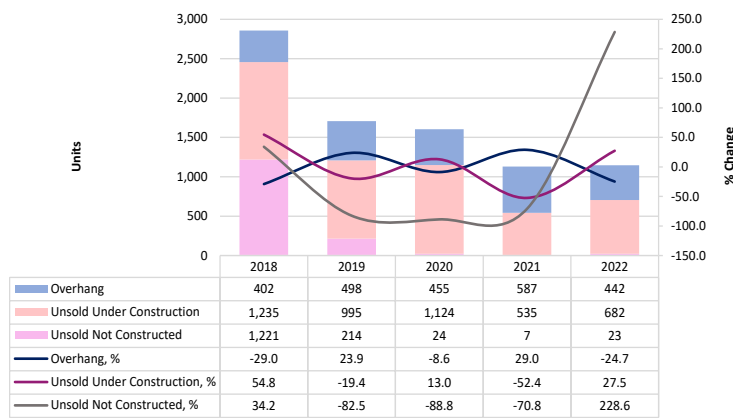
**Market Status**

Mixed trend was seen in residential market performance. Unsold under construction and unsold not constructed units isaw down trend performance as the numbers increase in the review period. The trend is shown in Chart 12.8.

170

Chart 12.8

Residential Market Status Trend 2018 – 2022



**Aktiviti Pembinaan**

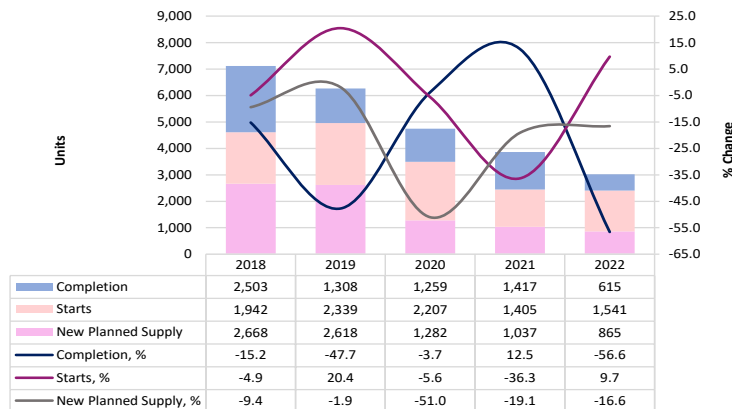
Seiring dengan aktiviti pasaran yang sederhana, aktiviti pembinaan juga perlahan. Siap dibina dan penawaran baru dirancang berkurang manakala mula dibina mencatatkan pertambahan berbanding tahun sebelumnya. Pada akhir 2022, terdapat 107,717 unit kediaman sedia ada dengan 17,915 unit lagi dalam penawaran akan datang dan 9,620 unit dalam penawaran dirancang.

**Construction Activity**

In tandem with moderating market activity, the construction activity also softened. Completion and new planned supply decreased, while starts recorded increased as compared to previous year. As at end-2022, there were 107,717 existing residential units with another 17,915 units in the incoming supply and 9,620 units in the planned supply.

Chart 12.9

Residential Market Activity Trend 2018 – 2022



### Harga dan Sewa

Pergerakan harga harta tanah kediaman berbeza-beza sepanjang tempoh kajian. Lokasi yang strategik, kemudahan serta infrastruktur yang baik sangat mempengaruhi nilai. Penurunan harga maginal direkodkan bagi rumah teres dua tingkat kos rendah di Padang Nenas, Kuala Nerus kepada RM135,000 (2021: RM150,000) disebabkan oleh terdapat banyak projek pembangunan baru yang sedang dijalankan di kawasan sekitar dan lebih tertumpu kepada permintaan skim baru yang ditawarkan.

Indeks Harga Semua Rumah untuk negeri berada pada 182.2 mata pada 2022<sup>P</sup>, naik 3.3% daripada 176.3 mata pada 2021. Harga purata semua rumah untuk negeri berada pada RM287,075 meningkat daripada RM277,892 pada 2021.

Pasaran sewa kediaman umumnya stabil di kebanyakan kawasan dengan kenaikan minima dicatatkan di lokasi terpilih.

### Price and Rental

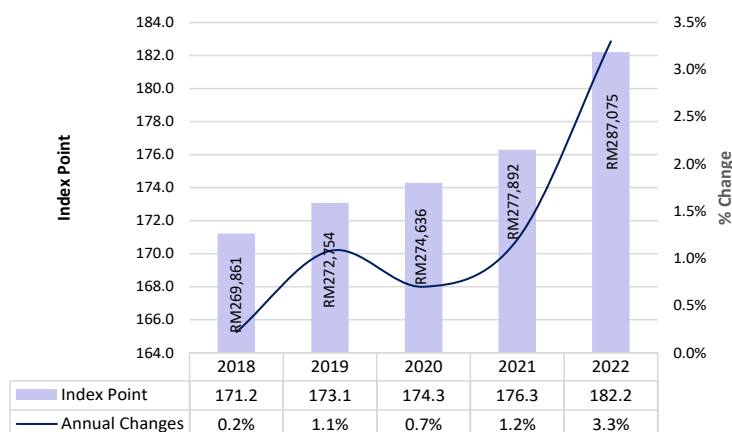
Price movements of residential properties varied during the review period. Strategic location, accessibility as well as good infrastructure greatly influence the value. A slight price decrease was recorded for a low-cost two-storey terraced house in Padang Nenas, Kuala Nerus to RM135,000 (2021: RM150,000) due to many new development projects being carried out in the surrounding area and more focus on demand for new schemes on offer.

The All House Price Index for the state stood at 182.2 points in 2022<sup>P</sup>, increased 3.3% from 176.3 points in 2021. The average all house price for the state stood at RM287,075 increased from RM277,892 in 2021.

The residential rental market was generally stable in most areas with minimal increases noted in selected locations.

Chart 12.10

All House Price Index 2018 – 2022



## HARTA TANAH PERDAGANGAN

### Transaksi

Terdapat 475 transaksi direkodkan pada 2022 dengan jumlah nilai RM225.11 juta, meningkat 48.9% dalam bilangan dan 50.3% dalam nilai (2021: 319 transaksi bernilai RM149.75 juta).

Chart 12.11

Volume of Commercial Property Transactions 2018 – 2022



### Kedai

172

### Transaksi

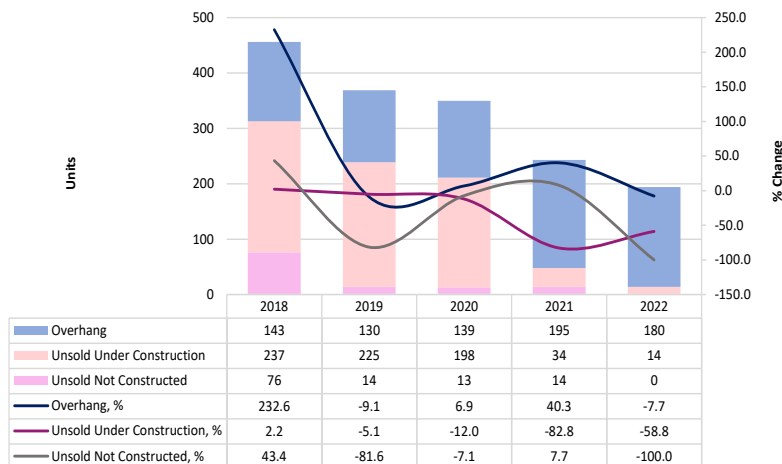
Segmen kedai merekodkan 293 transaksi bernilai RM194.27 juta dalam tempoh kajian (2021: 195 transaksi bernilai RM120.88 juta). Bilangan transaksi bertambah 50.3% manakala nilai 60.7% berbanding 2021.

### Status Pasaran

Situasi segmen kedai menunjukkan prestasi yang lebih baik dimana semua unit di setiap peringkat pembinaan menunjukkan penurunan. Trend ini ditunjukkan di Carta 12.13.

Chart 12.13

Shop Market Status Trend 2018 – 2022



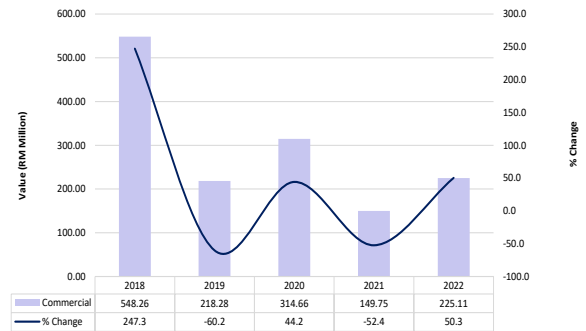
## COMMERCIAL PROPERTY

### Transaction

There were 475 transactions recorded in 2022 with total value of RM225.11 million, increase by 48.9% in volume and 50.3% in value (2021: 319 transactions worth RM149.75 million)

Chart 12.12

Value of Commercial Property Transactions 2018 – 2022



### Shop

### Transaction

Shop segment recorded 293 transactions worth RM194.27 million in the review period (2021: 195 transactions worth RM120.88 million). The volume of transactions increased 50.3% meanwhile value 60.7% as compared to 2021.

### Market Status

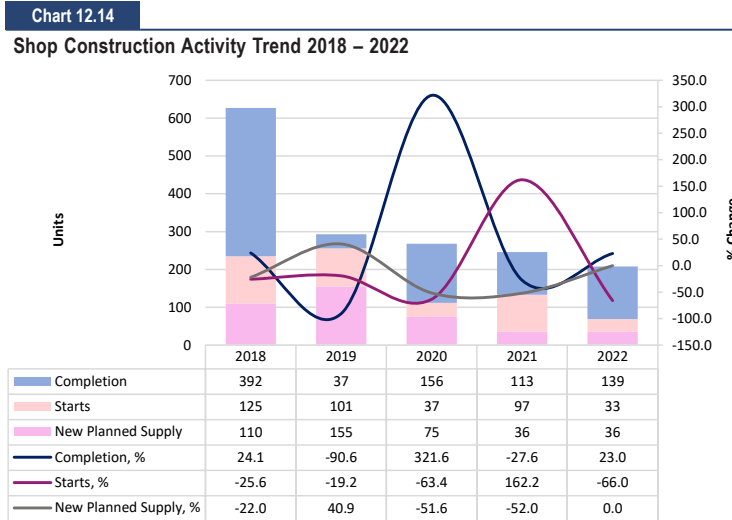
The shop segment situation showed a better performance where all units in every stage of development showed a decrease. The trend is shown in Chart 12.13.

## Aktiviti Pembinaan

Segmen kedai menyaksikan pergerakan yang perlahan dalam aktiviti pembinaan. Pada akhir 2022, terdapat 8,640 unit kedai sedia ada dengan 956 unit lagi dalam penawaran akan datang dan 706 unit dalam penawaran dirancang. Trend ini ditunjukkan di Carta 12.14.

## Construction Activity

The shop segment saw slowed movements in construction activity. As at end-2022, there were 8,640 existing shop units with another 956 units in the incoming supply and 706 units in the planned supply. The trend is shown in Chart 12.14.



## Kompleks Perniagaan

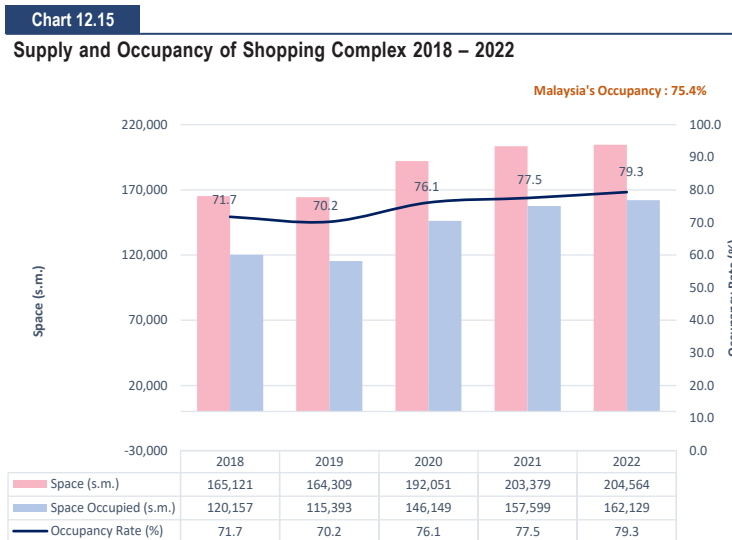
### Penghunan dan Ketersediaan Ruang

Segmen niaga mencatatkan purata kadar penghunan sedikit lebih tinggi berbanding tahun sebelumnya. Manakala, ambilan tahunan adalah lebih rendah pada 4,530 m.p.

## Shopping Complex

### Occupancy and Space Availability

The retail segment recorded slightly higher average occupancy rate as compared to previous year. Meanwhile, the annual take-up was lower at 4,530 s.m.



## Aktiviti Pembinaan

Segmen niaga menyaksikan pada akhir 2022, terdapat 40 kompleks beli-belah sedia ada (204,564 m.p.) dengan tiga kompleks dalam penawaran akan datang (126,520 m.p.).

## Sewa

Sewaan kompleks membeli-belah secara keseluruhannya adalah stabil di seluruh negeri dengan beberapa pengecualian. Terdapat beberapa penurunan sewa yang ketara bagi Bazar MAIDAM, Jalan Masjid Abidin disebabkan bangunan ini telah di sewa pajak secara keseluruhan kepada Maidam Property dan kadar sewaan/ pajakan di jalankan secara pukal.

## Pejabat Binaan Khas

### Penghunian dan Ketersediaan Ruang

Segmen pejabat binaan khas menyaksikan prestasi lebih baik kerana purata kadar penghunian menaik berbanding tahun lepas. Begitu juga, ambilan tahunan meningkat sebanyak 66,095 m.p., lebih tinggi daripada yang direkodkan pada 2021.

## Construction Activity

The retail segment witnessed as at end-2022, there were 40 existing shopping complexes (204,564 s.m.) with three in the incoming supply complexes (126,520 s.m.).

## Rental

Rental of shopping complexes were stable across the board with few exceptions. There is a significant decrease in rent at Bazar MAIDAM, Jalan Masjid Abidin because this building has been fully leased to Maidam Property and the rental/ lease rate is carried out in bulk.

## Purpose-Built Office

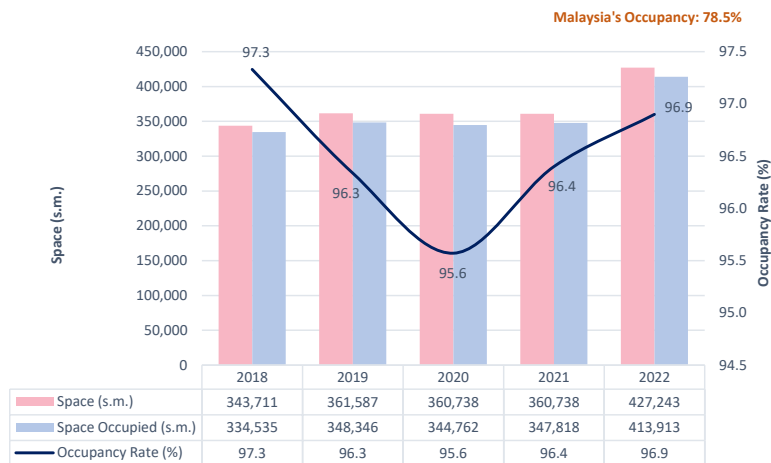
### Occupancy and Space Availability

The purpose-built office segment saw a better performance as its average occupancy rate increased as compared to last year. Likewise, the annual take-up an increased by 66,095 s.m., higher than recorded in 2021.

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Chart 12.16

Supply and Occupancy of Purpose-Built Office 2018 – 2022



## Aktiviti Pembinaan

Tempoh kajian mencatatkan bangunan Kompleks Pentadbiran Majlis Bandaraya Kuala Terengganu, Jalan Sultan Zainal Abidin, Kuala Terengganu siap dibina yang menyuntik sejumlah 63,767 m.p. ruang pejabat ke dalam pasaran. Pada akhir 2022, terdapat 124 pejabat binaan khas sedia ada (427,243 m.p.) dengan satu bangunan (9,704 m.p.) dalam penawaran akan datang dan satu lagi bangunan (31,760 m.p.) dalam penawaran dirancang.

## Construction Activity

The review period registered the completion of Kuala Terengganu City Council Administrative Complex, Jalan Sultan Zainal Abidin, Kuala Terengganu which injected a total of 63,767 s.m. office space into the market. As at end-2022, there were 124 existing purpose-built office (427,243 s.m.) with one building (9,704 s.m.) in the incoming supply and another one building (31,760 s.m.) in the planned supply.

## Sewa

Secara amnya, sewaan ruang pejabat adalah stabil. Pergerakan kenaikan sewa dicatatkan di pejabat binaan khas terpilih iaitu Bangunan Wisma Serangkai kerana lokasi nya yang strategik di pusat bandar dan berhampiran dengan kemudahan seperti Tabung Haji, Agensi Kerajaan dan Insitusi pengajian tinggi.

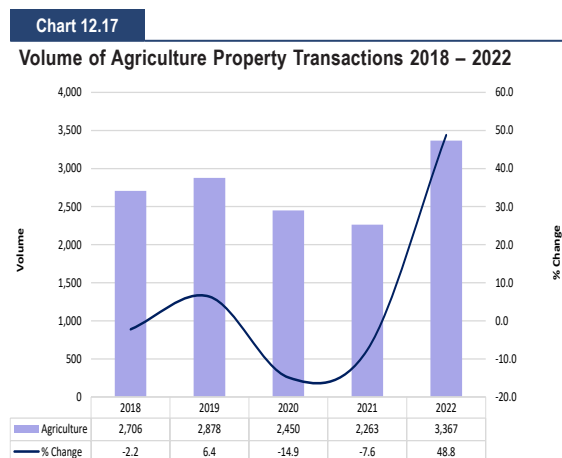
## Riadah

Tiada hotel baharu siap dibina dalam tempoh kajian. Pada akhir 2022, terdapat 245 hotel (10,809 bilik) dalam penawaran sedia ada dengan lima hotel (640 bilik) dalam penawaran akan datang dan empat hotel (752 bilik) dalam penawaran dirancang.

## HARTA TANAH PERTANIAN

### Transaksi

Terdapat 3,367 transaksi bernilai RM292.80 juta, masing-masing menunjukkan peningkatan 48.8% dan 53.4% dalam bilangan dan nilai (2021: 2,263 transaksi bernilai RM190.84 juta).



### Harga

Harga secara keseluruhannya stabil dengan beberapa pengecualian. Kenaikan harga tertinggi dicatatkan bagi tanah kosong di Betong Padang Pulut, Jalan Padang Pulut, Daerah Dungun sebanyak 12.5% dengan keluasan tanah 0.28 hektar.

## Rental

Generally, rentals of office space remained stable. Upward rental movements were recorded in selected purpose-built office which is Bangunan Wisma Serangkai because of its strategic location in the city center and close to facilities such as Tabung Haji, Government Agencies and Higher Education Institutions.

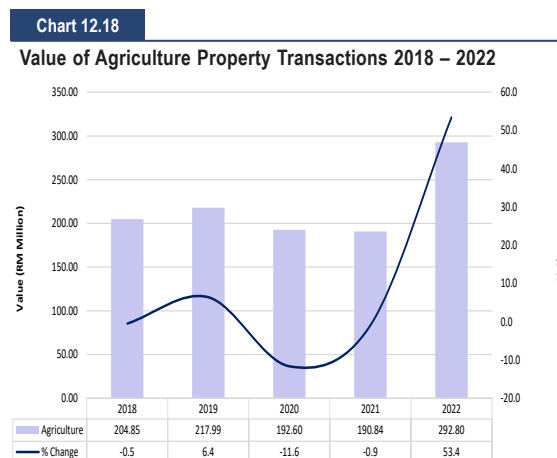
## Leisure

There was no hotel completion in the review period. As at end-2022, there are 245 hotels (10,809 rooms) in the existing supply with five hotels (640 rooms) in the incoming supply and four hotels (752 rooms) in the planned supply.

## AGRICULTURE PROPERTY

### Transaction

There were 3,367 transactions worth RM292.80 million, indicating a contraction of 48.8% and 53.4% in volume and value respectively (2021: 2,263 transactions worth RM190.84 million).



### Price

Prices are generally stable with a few exceptions. The highest price increase was recorded for vacant land in Betong Padang Pulut, Jalan Padang Pulut, Dungun District by 12.5% with a land area of 0.28 hectares.

**PROSPEK 2023**

Pasaran hartanah Terengganu dijangka bertambah baik disokong oleh pelan pemulihan ekonomi yang dirancang dengan peruntukan RM1.991 bilion berbanding RM1.657 bilion pada tahun sebelumnya. Prospek positif ini turut disokong oleh prestasi kewangan negara yang semakin baik. Merujuk kepada Bajet Terengganu 2023 yang bertemakan ‘Memacu Terengganu Berdaya Tahan’, beberapa program dan projek akan diteruskan pada 2023 yang turut memberi impak positif kepada sektor harta tanah dan infrastruktur.

**2023 OUTLOOK**

*The Terengganu property market is expected to improve supported by the planned economic recovery with an allocation of RM1.991 billion compared to RM1.657 billion in the previous year. This positive prospect is also supported by the country’s improved financial performance. Based on the Terengganu Budget 2023 themed ‘Memacu Terengganu Berdaya Tahan’, several programs and projects will be continued in 2023 which will also have a positive impact on the property and infrastructure sector.*

**Infrastructure Development**

**Table 12.2: Infrastructure Projects**

| No. | Infrastructure Project  | Description   | Current Development Status                                     |
|-----|---|---|--|
| 1.  | East Coast Rail Line (ECRL)   | <ul style="list-style-type: none"> <li>- Distance: 262 kilometres</li> <li>- Land Involved: 6,200 individual lots</li> <li>- Six stations will be in Terengganu namely Chukai Station, Kemasik Station, Dungun Station, Kuala Terengganu Station, Bandar Permaisuri Station and Jerleh Station with one future station namely Pengkalan Berangan Station</li> <li>- Expected to be completed in 2026</li> <li>- Project status: 48% completed</li> </ul>                                      | Under construction   |
| 2.  | Upgrading Marang River Bridge project   | <ul style="list-style-type: none"> <li>- Location: Marang, Terengganu</li> <li>- Connecting Kuala Terengganu – Marang – Kuantan.</li> <li>- Length: 1.5 kilometres</li> <li>- Project cost/ Estimating Cost: RM435.8 million</li> <li>- Project is expected to be completed and fully operational by October 2025</li> <li>- Project status: 20% completed</li> </ul>   | Under construction   |
| 3.  | Coastal erosion control project in Kuala Nerus  | <ul style="list-style-type: none"> <li>- Location: Pantai Tok Jembal, Pantai Mengabang Telipot dan Pengkalan Maras, Kuala Nerus Terengganu.</li> <li>- Estimating Cost: RM90.00 million</li> <li>- The project is expected to be completed in January 2025.</li> </ul>  | Tender stage   |
| 4.  | Bukit Payung Flood Mitigation Plan  | <ul style="list-style-type: none"> <li>- Location: Bukit Payung, Marang, Terengganu</li> <li>- Estimating Cost: RM60.00 million</li> </ul>  | Design stage   |
| 5.  | Road Construction Project from Kampung Pecah Rotan - Kampung Mengabang Lekor              | <ul style="list-style-type: none"> <li>- Location: Mukim Batu Rakit in Kuala Nerus District</li> <li>- Length: 3.55 kilometres</li> <li>- Land involved: 76 individual lots</li> <li>- Concession company: Contracts Fiscal Site Sdn Bhd</li> </ul>   | Completed  |
| 6.  | New bridge construction project from Kampung Pasir Akar - Kampung Durian Telor Hulu Besut | <ul style="list-style-type: none"> <li>- Location: Mukim Pasir Akar in Besut District</li> <li>- Land area: 0.4484 hectares</li> <li>- Length: 140 metre</li> <li>- Estimating Cost: RM19.90 million</li> <li>- Concession company: INNOSEVEN Sdn Bhd</li> </ul>  | Completed  |
| 7.  | Federal Road FT237 Upgrading Project from Exit LPT2, Cukai To FT 003, Kemaman             | <ul style="list-style-type: none"> <li>- Location: Federal Highway Cukai Exit – FT003, Kemaman</li> <li>- Length: 14 kilometres</li> <li>- Project status: 85% completed</li> <li>- Project cost: RM84 million</li> </ul>   | Under construction   |
| 8.  | Kemaman River Integrated River Basin Development Project                                  | <ul style="list-style-type: none"> <li>- Location: Kemaman River in Kemaman</li> <li>- Length and composition of the project:                             <ul style="list-style-type: none"> <li>➢ Phase 1: Floodway from Paman to Tasik Bungkus – 8 kilometres</li> <li>➢ Phase 2: Binjai Ban from Paman to Bukit Kuang – 10 kilometres</li> <li>➢ Phase 3: Left and Right Ban for Kemaman river and reservoir – 30 kilometres</li> </ul> </li> <li>- Project cost: RM300 million</li> </ul> | Phase 1: Under Construction<br><br>Phase 2 and 3: Tender stage |

**Table 12.2: Infrastructure Projects**

| No. | Infrastructure Project                   | Description  | Current Development Status |
|-----|--|--|----------------------------|
| 9.  | Sungai Paka Estuary Conservation Project | <ul style="list-style-type: none"> <li>- Location: Paka river in Dungun District</li> <li>- Estimations Length: 2.86 kilometres</li> <li>- Project status: 90% and expected completion in May 2022</li> <li>- Project cost: RM132.35 million</li> <li>- Excavation works of cruise routes that suffer from critical sandstone and shallows.</li> <li>- solved the problem of shallow river estuaries and narrow shipping lanes that disrupted the jobs of 600 fishermen to get to sea.</li> <li>- Project involved constructions of breakwater structures and T-Groyne breakwater fortifications.</li> </ul> | Under construction         |

**Mega Project**

**Table 12.3: Development Projects**

| No. | Development Project  | Description  | Current Development Status |
|-----|--|--|----------------------------|
| 1.  | Mayang Mall, Kuala Terengganu                                      | <ul style="list-style-type: none"> <li>- Location: Adjacent of Kuala Terengganu Drawbridge</li> <li>- Components of the project: <ul style="list-style-type: none"> <li>➢ 1 block of 8 storey shopping mall together with multi-purpose hall and 1 level of basement</li> <li>➢ Another buildings will be built at the top of the Mall are; <ul style="list-style-type: none"> <li>a) Phase 1: 15 storey service apartments</li> <li>b) Phase 2: 16 storey hotels</li> </ul> </li> </ul> </li> <li>- Land area: 43,746 square metres</li> <li>- Project status: 90% completed</li> <li>- Estimated gross development value: RM860 million</li> <li>- Developer: Pelaburan Hartanah Berhad</li> </ul> | Under construction         |
| 2.  | Kuala Terengganu City Council Administrative Complex Tower         | <ul style="list-style-type: none"> <li>- Location: Adjacent of Kuala Terengganu Drawbridge</li> <li>- Components of the project: <ul style="list-style-type: none"> <li>➢ 1 block of 31 storey Purpose Built Office</li> </ul> </li> <li>- Land area: 2.2 hectares</li> <li>- Project starts: 23 September 2013</li> <li>- Gross development value: RM180 million</li> </ul>   | Completed                  |
| 3.  | Besut Polytechnic Construction Project                             | <ul style="list-style-type: none"> <li>- Location: Bukit Keluang in Besut, Terengganu</li> <li>- Land area: 28.0 hectares</li> <li>- Project starts: Year 2018</li> <li>- Estimated gross development value: RM169 million</li> <li>- Developer: Blackfox Engineering Sdn Bhd</li> <li>- This eco-friendly polytechnic provides a variety of learning facilities and can accommodate up to 2,000 students.</li> </ul>  | Completed                  |
| 4.  | Mara Junior Science College (MJSC) Dungun Construction Project     | <ul style="list-style-type: none"> <li>- Location: Bukit Keluang in Besut, Terengganu</li> <li>- Project area: 28.0 hectares</li> <li>- Project starts: Year 2018</li> <li>- Project status: 98.0% completed</li> <li>- Estimated gross development value: RM97.4 million</li> <li>- Developer: Blackfox Engineering Sdn Bhd</li> </ul>  | Under construction         |
| 5.  | New office of Mineral and Geoscience Department Terengganu Project | <ul style="list-style-type: none"> <li>- Location: Pusat Pentadbiran Bukit Besar, Kuala Terengganu, Terengganu</li> <li>- Land Area: 1.99 hectares</li> <li>- Estimating Cost: RM25,295,605.00</li> <li>- The project consists of a 4 storey office building, a chain building block, heavy vehicle covered garage and others,</li> <li>- Expected completed: August 2023</li> <li>- Project status: 10% completed</li> </ul>  | Under construction         |



## Mega Project

Table 12.3: Development Projects

| No. | Development Project                                    | Description   | Current Development Status |
|-----|--|---|----------------------------|
| 6.  | Tenaga Nasional Berhad Terengganu Headquarters Project | <ul style="list-style-type: none"> <li>- Location: Kuala Terengganu, Terengganu.</li> <li>- Land area: 0.96 hectares</li> <li>- Consists of 19-story purpose build office with net floor area of 9,704 square meter</li> <li>- Project status: 25% completed</li> </ul>   | Under construction         |
| 7.  | Cukai Sentral (Kompleks Pasar Dan Terminal Bas)        | <ul style="list-style-type: none"> <li>- Location: Cukai, Terengganu.</li> <li>➤ Consists of an Integrated Bus &amp; Taxi Terminal, Government Building Complex, Market &amp; Kiosk, Jetty and Waterfront</li> <li>- Project status: 35% completed</li> </ul>   | Under construction         |
| 8.  | Residensi Bayas Project                                | <ul style="list-style-type: none"> <li>- Location: Bukit Bayas is located 7.5 kilometres from Kuala Terengganu via Jalan Gong Tok Nasek</li> <li>- Land area: 4.30 hectares</li> <li>- Components of the project include: <ul style="list-style-type: none"> <li>• 55 units of double storey terrace house with price range of RM380,000 – RM400,000</li> </ul> </li> <li>- Project starts: 4 November 2019</li> <li>- Project status: 90% completed</li> <li>- Developer: P-Excell Management Sdn Bhd</li> </ul>   | Under construction         |
| 9.  | Budiman Village Park Project                           | <ul style="list-style-type: none"> <li>- Location: Taman Desa Budiman is located 4.5 kilometres from Kuala Terengganu City Center via Jalan Sultan Mahmud.</li> <li>- Land area: 0.705 hectares</li> <li>- Components of the project include: <ul style="list-style-type: none"> <li>• 12 units of two storey semi-detached house with price range of RM515,000 – RM562,000</li> <li>• 8 units of single storey semi-detached house with price range of RM385,000 – RM426,000</li> </ul> </li> <li>- Project starts: 18 October 2020</li> <li>- Project status: 80% completed</li> <li>- Developer: Selayang Teguh Sdn Bhd (Leisure Genius Sdn Bhd)</li> </ul>          | Under construction         |
| 10. | Gelugur Murni Village Park Project                     | <ul style="list-style-type: none"> <li>- Location: Taman Desa Gelugur Murni is located 11 kilometres from Kuala Terengganu City Center via Jalan Kuala Berang</li> <li>- Land area: 1.1557 hectares</li> <li>- Components of the project include: <ul style="list-style-type: none"> <li>• 16 units of single storey semi-detached house with price range of RM285,000 – RM330,000</li> <li>• 1 units of single storey detached house with price range of RM385,000 – RM420,000</li> </ul> </li> <li>- Project starts: 31 October 2020</li> <li>- Project status: 80% completed</li> <li>- Developer: Faktor Murni Development Sdn Bhd</li> </ul>                       | Under construction         |
| 11. | Muara Marang Residence Project (Taman Muara Indah)     | <ul style="list-style-type: none"> <li>- Location: In Mukim Pulau Kerengga about 38 kilometres from Kuala Terengganu City Center via Federal Road number 3/AH18</li> <li>- Land area: 4.98 hectares</li> <li>- Components of the project include: <ul style="list-style-type: none"> <li>• 41 units of two storey terrace house with a price range between RM410,000 – RM500,000</li> <li>• 60 units of two storey shop house with a price RM630,000</li> <li>• 8 units of three storey shop house with a price RM1,350,000</li> </ul> </li> <li>- Project starts: 1 July 2017</li> <li>- Project status: 80% completed</li> <li>- Developer: Udaran Sdn Bhd</li> </ul> | Under construction         |

## Mega Project

**Table 12.3: Development Projects**

| No. | Development Project                                | Description   | Current Development Status |
|-----|--|---|----------------------------|
| 12. | Tok Jembal Affordable Flats, Kuala Nerus           | <ul style="list-style-type: none"> <li>- Location: Kuala Nerus, Kuala Terengganu</li> <li>- Land area: 1.7 hectares</li> <li>- Components of the project include:                             <ul style="list-style-type: none"> <li>• 5 blocks of four storey affordable flats (160 units with a building area of 74 square meter)</li> <li>• Price per unit: RM68,000</li> <li>• Multi-purpose hall</li> <li>• Kinder garden</li> <li>• Prayer place</li> <li>• Play ground</li> </ul> </li> <li>- Project starts: 24 July 2019</li> <li>- Project status: 90% completed</li> <li>- Project cost: RM 26 million</li> <li>- Developer: CCP Builders Sdn Bhd</li> </ul>                               | Under construction         |
| 13. | Kampung Tajin Affordable Housing, Kuala Berang     | <ul style="list-style-type: none"> <li>- Location: Near Sekolah Menengah Sains Hulu Terengganu</li> <li>- Land area: 10 hectares</li> <li>- Composition of development is including:                             <ul style="list-style-type: none"> <li>• 250 units of affordable house with price of RM68,000</li> <li>• 14 units single storey shop house</li> <li>• Multi-purpose hall</li> <li>• Kinder garden</li> <li>• Surau</li> <li>• Play ground</li> </ul> </li> <li>- Project status: 95% completed</li> <li>- Developer: Syarikat GPQ Sdn Bhd</li> </ul>   | Under construction         |
| 14. | My Beautiful New Home (MYBNHOME)                   | <ul style="list-style-type: none"> <li>- Location: Kawasan Mak Kemas off Bukit Payong Road, Kuala Berang</li> <li>- Land area: 7.45 hectares</li> <li>- Composition of development is including:                             <ul style="list-style-type: none"> <li>• 50 units of single storey semi-detached house with a price RM68,000</li> </ul> </li> <li>- Project status: 70% completed</li> <li>- Developer: Perbadanan Memajukan Iktisad Negeri Terengganu (PMINT)</li> </ul>  | Under construction         |
| 15. | Kampung Cina Affordable Housing Scheme, Pasir Akar | <ul style="list-style-type: none"> <li>- Location: Kampung Cina in Pasir Akar, Besut</li> <li>- Land area: 27.12 acre</li> <li>- Composition of development is including:                             <ul style="list-style-type: none"> <li>• Single storey affordable terraced house                                     <ul style="list-style-type: none"> <li>➢ Type A: 174 units</li> <li>➢ Type B: 188 units</li> </ul> </li> <li>• 8 units of two storey shop house</li> </ul> </li> <li>- Project launch: 25 September 2019</li> <li>- Project status: 20% completed</li> <li>- Developer: Wanland Metro Sdn Bhd</li> </ul>   | Under construction         |
| 16. | Rumah Sejahtera, Bukit Payung                      | <ul style="list-style-type: none"> <li>- Location: Kawasan Mak Kemas, Bukit Payung - Kuala Berang Road, Marang</li> <li>- Land area: 7.543 hectares</li> <li>- Composition of development is including:                             <ul style="list-style-type: none"> <li>• 50 units of single storey semi-detached house</li> </ul> </li> <li>- The payment term of the sale price is on a rental basis of RM250 per month for a period of 30 years</li> <li>- Target group: B40 family/ group and registered under E-Kasih</li> <li>- Project starts: 1 July 2019</li> <li>- Project status: 65% completed</li> <li>- Developer: Perbadanan Memajukan Iktisad Negeri Terengganu (PMINT)</li> </ul> | Under construction         |

## Mega Project

**Table 12.3: Development Projects**

| No. | Development Project   | Description   | Current Development Status |
|-----|---|---|----------------------------|
| 17. | Taman Desa Baroh Affordable Terrace House, Tanjung Damai          | <ul style="list-style-type: none"> <li>- Location: Gong Badak, Kuala Nerus, Jalan Gong Badak, Terengganu.</li> <li>- Land area: 1.7 hectares</li> <li>- Developer: Tanjong Developer Sdn. Bhd.</li> <li>- Composition of development including:</li> <li>- 40 units of single-story terrace with selling price RM68,000.00.</li> <li>- Launch date 1<sup>st</sup> May 2022.</li> </ul>  | Completed                  |
| 18. | Projek Penempatan Semula Nelayan (PSN), Beting Lintang, Besut     | <ul style="list-style-type: none"> <li>- Location: Beting Lintang, Besut Terengganu.</li> <li>- Land area: 6.17 hectares</li> <li>- Developer: Kerajaan Negeri Terengganu &amp; Lembaga Kemajuan Ikan Malaysia (LKIM).</li> <li>- Composition of development including:</li> <li>- 50 units single storey terrace house with a price RM68,000.00 to RM80,000.00.</li> <li>- Project status: 51% completed</li> </ul>                                      | Under construction         |
| 19. | Kampung Tempinis Affordable House, Kerandang, Besut               | <ul style="list-style-type: none"> <li>- Location: Kamung Tempinis, Kerandang, Besut</li> <li>- Land area: 3.85 hectares</li> <li>- Developer Perbadanan Memajukan Iktisad Negeri Terengganu (PMINT)</li> <li>- Composition of development including:</li> <li>- 100 units single storey terrace house with a price range from RM68,000.00 to RM80,000.00.</li> <li>- Project status: 95% completed</li> </ul>  | Under construction         |
| 20. | Perumahan Kos Rendah Gong Chengal Fasa II, Mukim Kemasik, Kemaman | <ul style="list-style-type: none"> <li>- Location: Gong Chengal, Mukim Kemasik, Kemaman, Terengganu.</li> <li>- Developer Pejabat Setiausaha Kerajaan Negeri Terengganu (Bahagian Perumahan)</li> <li>- Composition of development including: <ul style="list-style-type: none"> <li>➢ 200 units single storey low-cost terrace house with a price range from RM68,000.00 to RM80,000.00.</li> </ul> </li> <li>- Project status: 35% completed</li> </ul> | Under construction         |

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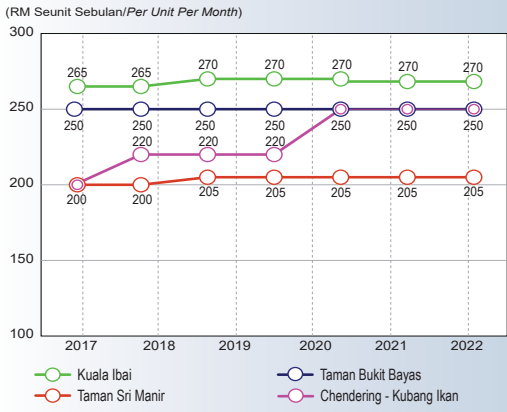
## State Government Policy

**Table 12.4: State Government Policy**

| The State Government approved several policies and incentives to investors who are interested in investing in Terengganu. Among the incentives are as follows: - |  |  |
|--|--|--|
| No   | Policy/ incentives                             | Details  |
| 1.   | Kaedah Caj Pemajuan (Terengganu) 2020          | - Has been approved by the State Authority and gazetted in the Terengganu State government gazette on 17 December 2020 and effective June 1, 2021  |
| 2.   | Bandar Baharu Lestari                          | - Bukit Seraya has been selected as a pilot location for sustainable urban development based on the principles of Islamic sustainable urban development  |
| 3.   | Affordable House                               | <ul style="list-style-type: none"> <li>- The State Government has allocated RM24.4 million for continue construction of Rumah Mampu Milik (RMM) Pulau Redang, Bukit Gasing II, Gong Chengal II and Tajin as well as Rumah Pangsa Mampu Milik (RPMM) Tok Jembal and Banggol Pauh.</li> <li>- 825 housing units were completed this year and are ready for distribution which is PPR Kuala Nerus (500 units), RMM Seri Bandi (220 units) and Lamanda Seri Iman (105 units).</li> <li>- Another 670 housing units will be completed on 2022 which is RMM Tajin (250 units), RPMM Tok Jembal (160 units), RPMM Pulau Redang (160 units) and RMM Tempinis (100 units).</li> </ul> |
| 4.   | Terengganu Housing Financing Scheme (i-RAHMAN) | - The State Government has also created Terengganu Housing Financing Scheme (i-RAHMAN) with an allocation of RM30 million to provide access financing to build or buy a house to the people of the state.  |

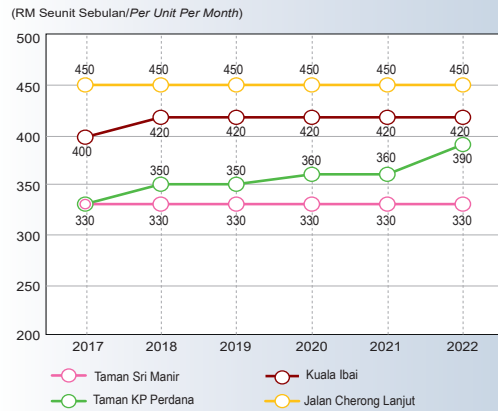
### TERENGGANU 12.1

Pergerakan Harga Purata Rumah Teres Satu Tingkat di Kuala Terengganu  
Average Price Movements of Single Storey Terraced Houses in Kuala Terengganu



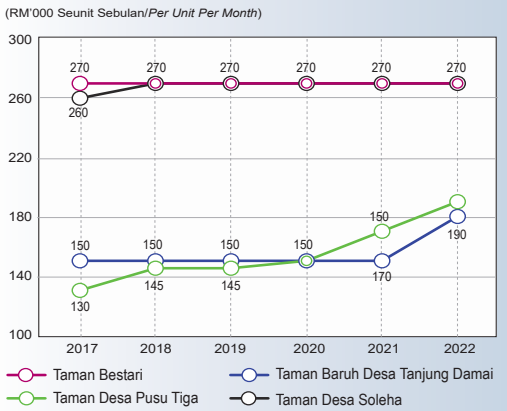
### TERENGGANU 12.2

Pergerakan Harga Purata Rumah Teres Dua Tingkat di Kuala Terengganu  
Average Price Movements of Double Storey Terraced Houses in Kuala Terengganu



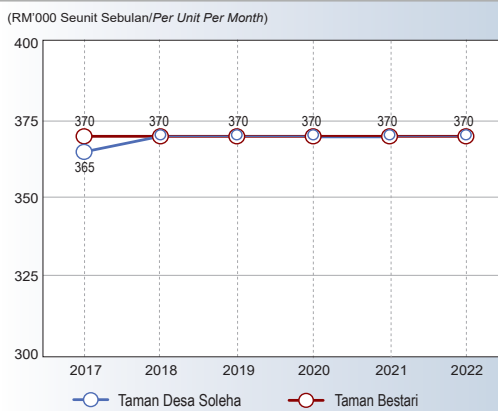
### TERENGGANU 12.3

Pergerakan Harga Purata Rumah Teres Satu Tingkat di Kuala Nerus  
Average Price Movements of Single Storey Terraced Houses in Kuala Nerus



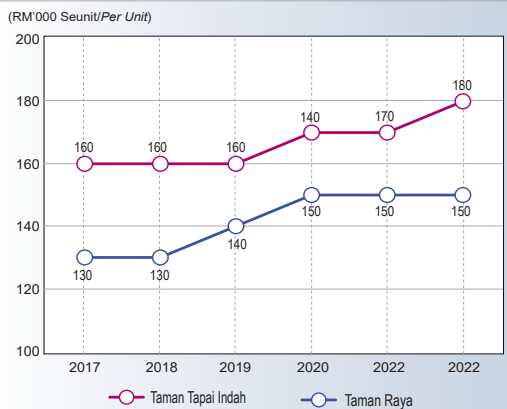
### TERENGGANU 12.4

Pergerakan Harga Purata Rumah Teres Dua Tingkat Di Kuala Nerus  
Average Price Movements of Double Storey Terraced in Kuala Nerus



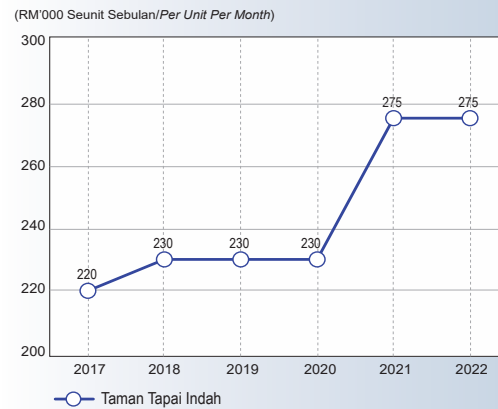
### TERENGGANU 12.5

Pergerakan Harga Purata Rumah Teres Satu Tingkat di Jalan Bukit Payung-Kuala Berang  
Average Price Movements of Single Storey Terraced Houses in Jalan Bukit Payung-Kuala Berang



### TERENGGANU 12.6

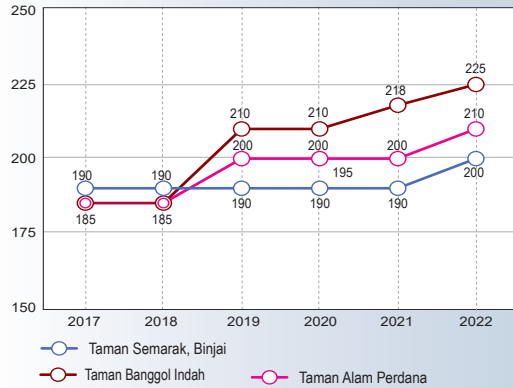
Pergerakan Harga Purata Rumah Teres Dua Tingkat di Jalan Bukit Payung-Kuala Berang  
Average Rental Movements of Double Storey Terraced Houses in Jalan Bukit Payung-Kuala Berang



### TERENGGANU 12.7

Pergerakan Harga Purata Rumah Teres Satu Tingkat di Kemaman  
Average Price Movements of Single Storey Terraced in Kemaman

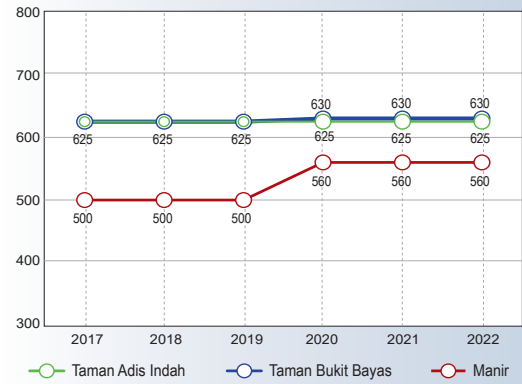
(RM'000 Seunit Sebulan/Per Unit Per Month)



### TERENGGANU 12.10

Pergerakan Sewaan Purata Rumah Teres Setingkat Di Kuala Terengganu  
Average Rental Movements of Single Storey Terraced Houses in Kuala Terengganu

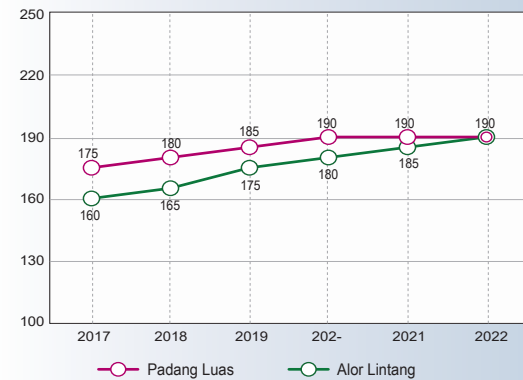
(RM Seunit/Per Unit)



### TERENGGANU 12.9

Pergerakan Sewaan Purata Rumah Teres Satu Tingkat di Besut  
Average Rental Movements of Double Storey Terraced Houses in Besut

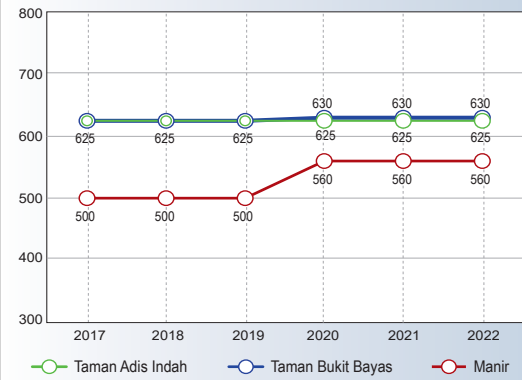
(RM'000 Seunit Sebulan/Per Unit Per Month)



### TERENGGANU 12.10

Pergerakan Sewaan Purata Rumah Teres Setingkat Di Kuala Terengganu  
Average Rental Movements of Single Storey Terraced Houses in Kuala Terengganu

(RM Seunit/Per Unit)

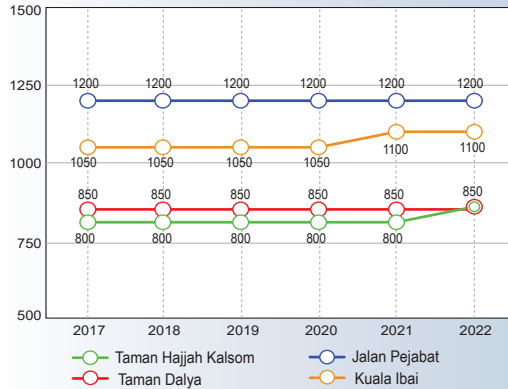


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### TERENGGANU 12.11

Pergerakan Sewaan Purata Rumah Teres Dua Tingkat Di Kuala Terengganu  
Average Rental Movements of Double Storey Terraced Houses in Kuala Terengganu

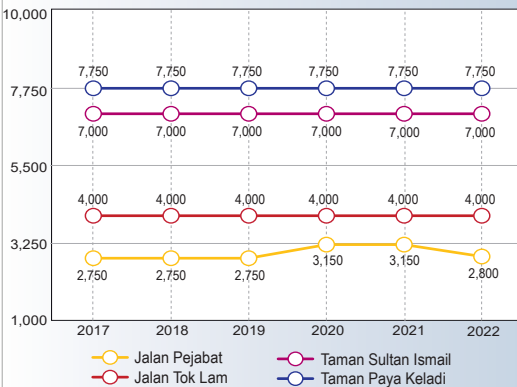
(RM Seunit Sebulan/Per Unit Per Month)



### TERENGGANU 12.12

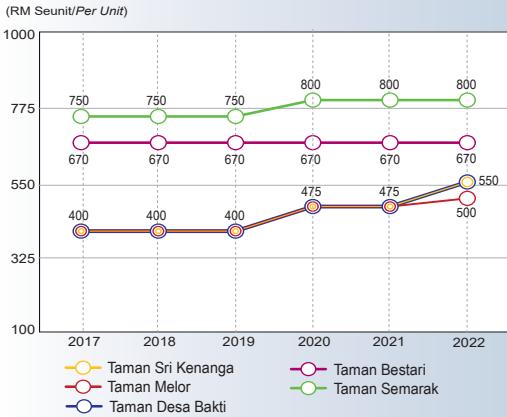
Pergerakan Harga Purata Kedai Tingkat Bawah Di Kuala Terengganu  
Average Price Movements of Ground Floor Shop in Kuala Terengganu

(RM Seunit/Per Unit)



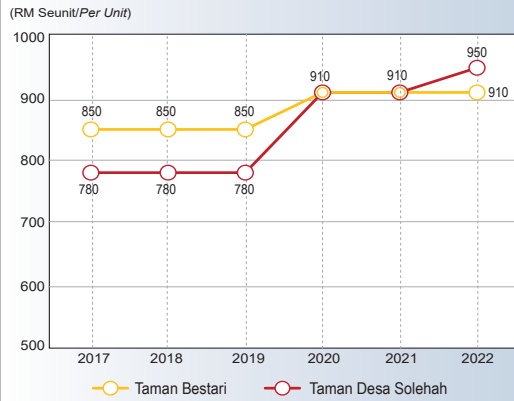
### TERENGGANU 12.13

Pergerakan Sewaan Purata Rumah Teres Setingkat Di Kuala Nerus  
Average Rental Movements of Single Storey Terraced in Kuala Nerus



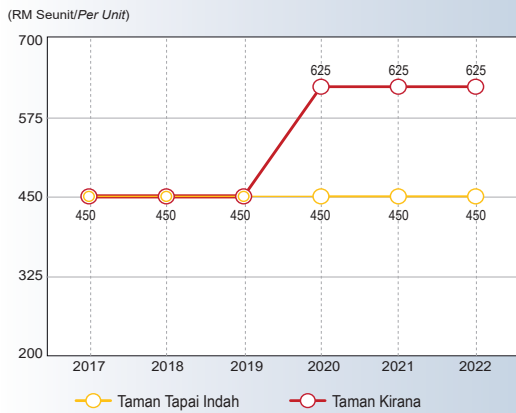
### TERENGGANU 12.14

Pergerakan Sewaan Purata Rumah Teres Dua Tingkat Di Kuala Nerus  
Average Rental Movements of Double Storey Terraced in Kuala Nerus



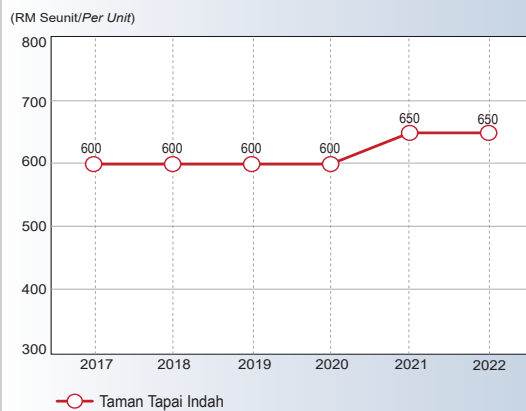
### TERENGGANU 12.15

Pergerakan Sewa Purata Rumah Teres Satu Tingkat di Jalan Bukit Payung-Kuala Berang  
Average Rental Movements of Single Storey Terraced in Bukit Payung-Kuala Berang



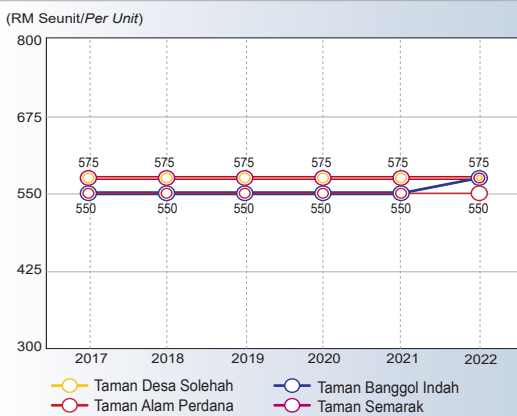
### TERENGGANU 12.16

Pergerakan Sewa Purata Rumah Teres Dua Tingkat di Jalan Bukit Payung-Kuala Berang  
Average Rental Movements of Double Storey Terraced in Jalan Bukit Payung-Kuala Berang



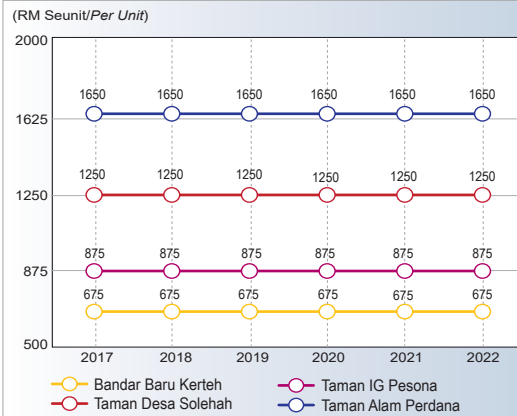
### TERENGGANU 12.17

Pergerakan Sewaan Purata Rumah Teres Satu Tingkat Di Kemaman  
Average Rental Movements of Single Storey Terraced in Kemaman



### TERENGGANU 12.18

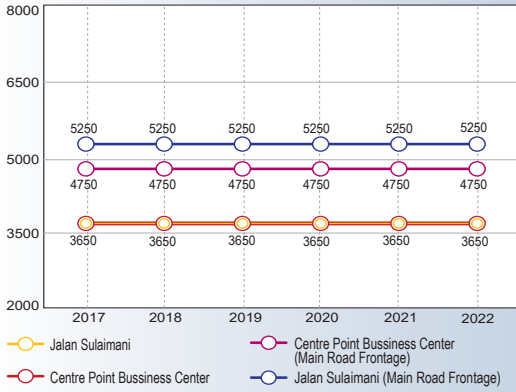
Pergerakan Sewaan Purata Rumah Teres Dua Tingkat di Kemaman  
Average Rental Movements of Double Storey Terraced in Kemaman



### TERENGGANU 12.19

Pergerakan Sewaan Purata Tingkat Bawah Rumah Kedai Di Chukai  
*Average Rental Movements of Ground Floor Shophouse in Chukai*

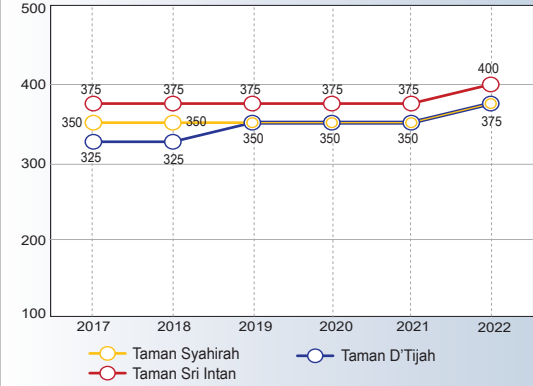
(RM Seunit/Per Unit)



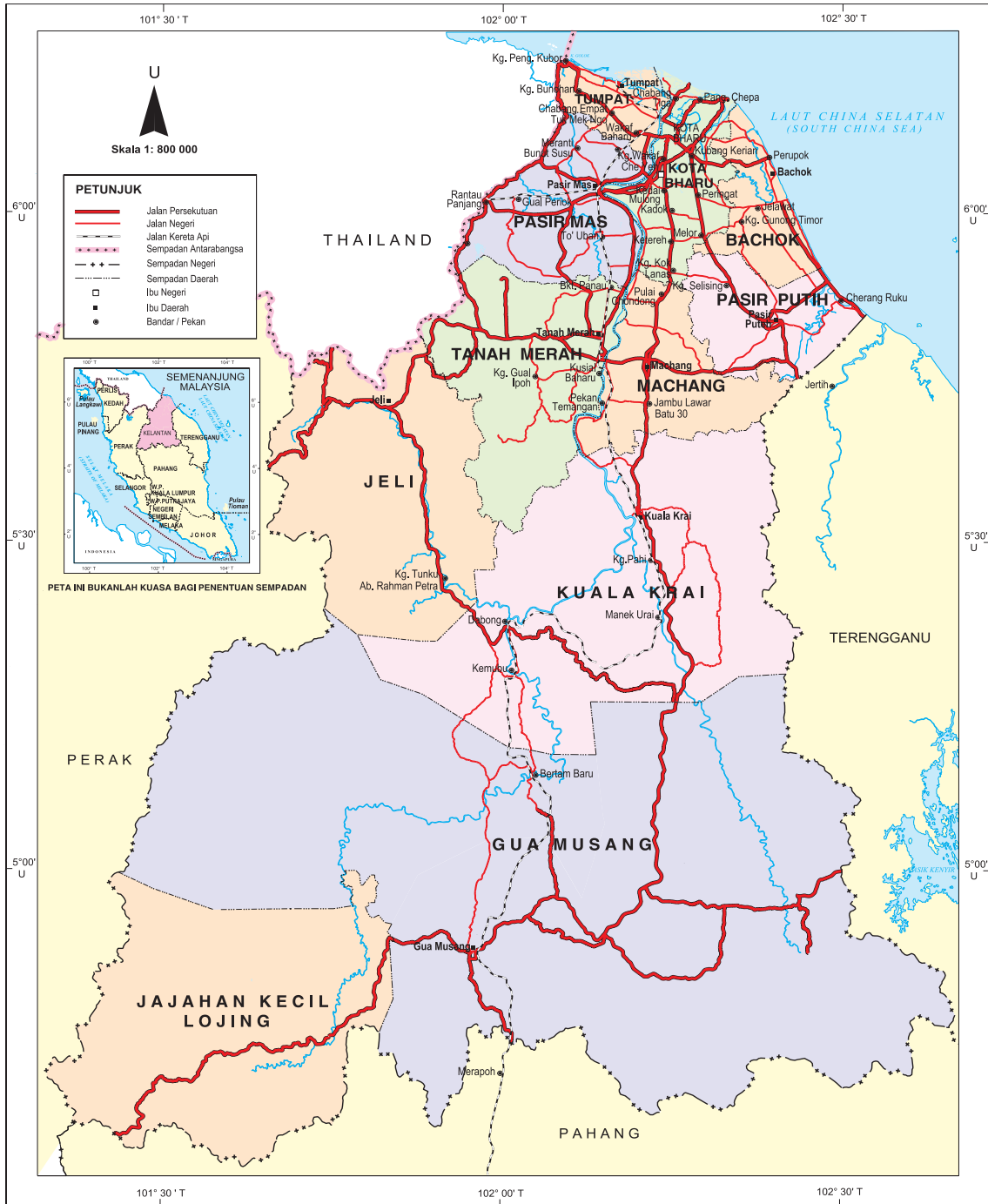
### TERENGGANU 12.20

Pergerakan Sewaan Purata Rumah Teres Satu Tingkat di Besut  
*Average Rental Movements of Single Storey Terraced in Besut*

(RM Seunit/Per Unit)



# KELANTAN





# KELANTAN

## GAMBARAN KESELURUHAN

Pasaran harta tanah negeri meningkat pada 2022. Terdapat 13,807 transaksi bernilai RM1.87 bilion dicatatkan dalam tempoh kajian, meningkat 23.1% dalam bilangan dan 4.4% dalam nilai. Subsektor kediaman menerajui pasaran harta tanah dengan menyumbang 48.4% daripada keseluruhan aktiviti pasaran. Subsektor pertanian menjadi penyumbang kedua dengan 41.3% syer pasaran, diikuti subsektor tanah pembangunan (7.4%), perdagangan (2.7%) dan industri (0.2%).

Aktiviti pasaran subsektor majoriti menyaksikan pergerakan bercampur-campur. Dari segi bilangan, subsektor industri mencatatkan perbezaan kenaikan tertinggi sebanyak 26 unit (2022) daripada 12 unit (2021). Manakala subsektor perdagangan pula mencatatkan penurunan sebanyak 27.1%. Dari segi nilai transaksi, subsektor industri menyaksikan kenaikan tertinggi 88.8% dan subsektor perdagangan pula mencatatkan penurunan tertinggi 24.2%.

## OVERVIEW

The state's property market increased in 2022. There were 13,807 transactions worth RM1.87 billion recorded in the review period, increased by 23.1% in volume and 4.4% in value. The residential sub-sector spearheaded the property market, contributed 48.4% of the total market activity. Agriculture sub-sector was ranked second contributor with 41.3% market share, followed by development land (7.4%), commercial (2.7%) and industrial (0.2%) sub-sectors.

Market activity of the majority sub-sectors saw mixed movement. In terms of numbers, the industrial sub-sector recorded the highest increase by 26 units (2022) from 12 units (2021). While the commercial sub-sector recorded a decline of 27.1%. In terms of transaction value, the industri sub-sector recorded the highest increase of 88.8% and the commercial sub -sector recorded the highest decline of 24.2%.

Chart 13.1

Volume of Property Transactions 2018 – 2022

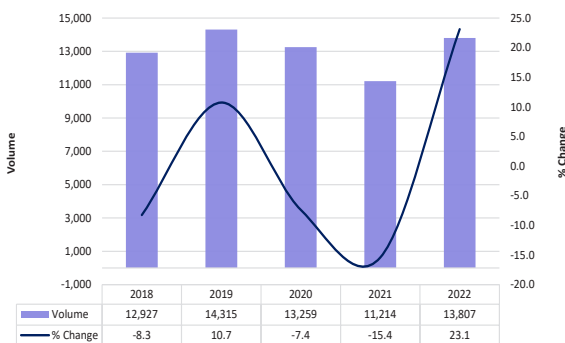


Chart 13.2

Value of Property Transactions 2018 – 2022

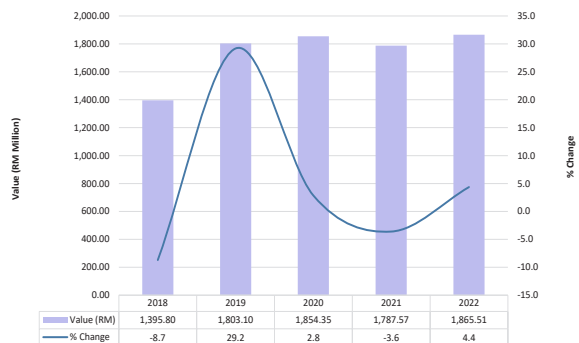


Chart 13.3

Contribution to Transaction Volume by Sub-sector 2022

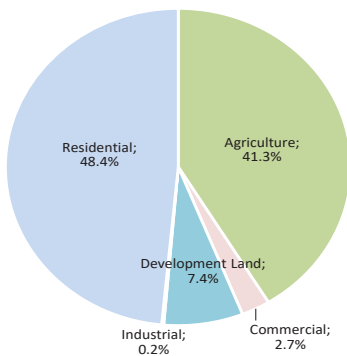
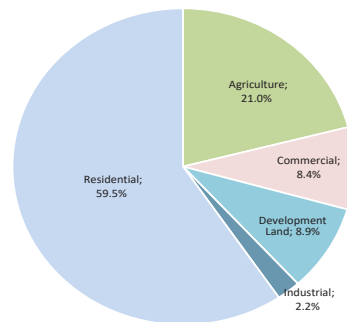


Chart 13.4

Contribution to Transaction Value by Sub-sector 2022



## PROMINENT SALES

Table 13.1

### Summary of Prominent Sales Recorded in 2022

| No.           | Property                             | Location                                       | Transaction Year | Consideration Price |
|---------------|--------------------------------------|--|------------------|---------------------|
| <b>ESTATE</b> |                                      |  |                  |                     |
| 1.            | Estate Land<br>(414.37 hectares)     | Lojing Kecil, Kelantan                         | 2021             | RM13,000,000        |
| <b>OTHERS</b> |                                      |  |                  |                     |
| 2.            | Development Land<br>(25.01 hectares) | Kampung Bukit Merbau.<br>Pasir Puteh, Kelantan | 2020             | RM21,094,000        |

## HARTA TANAH KEDIAMAN

### Transaksi

Terdapat 6,691 transaksi bernilai RM1,135.96 juta (2021: 5,839 transaksi bernilai RM970.23 juta). Ini menunjukkan kenaikan 14.6% dalam bilangan dan 17.1% dalam nilai. Plot kosong mendominasi syer pasaran, menyumbang 56.5% (3,779 plot) dari transaksi harta tanah kediaman.

## RESIDENTIAL PROPERTY

### Transaction

There were 6,691 transactions worth RM1,135.96 million (2021: 5,839 transactions worth RM970.23 million). This indicated an increased of 14.6% in volume and 17.1% in value. Vacant plots dominated the market share, contributing 56.5% (3,779 plots) of the residential property transactions.

Chart 13.5

### Volume of Residential Property Transactions 2018 – 2022

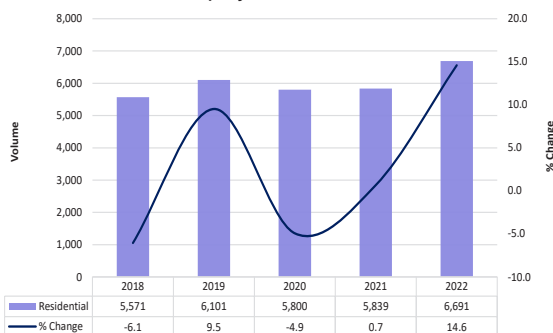
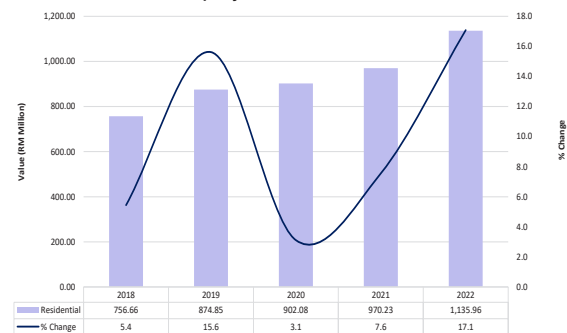


Chart 13.6

### Value of Residential Property Transactions 2018 – 2022



## Pelancaran Baharu

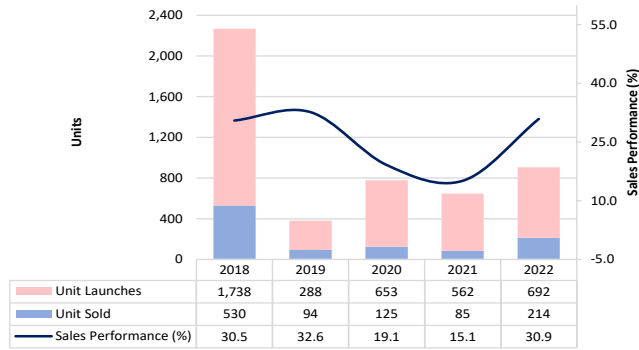
Pasaran utama menyaksikan jumlah unit pelancaran baharu telah bertambah sebanyak kepada 692 unit berbanding 562 unit, tahun 2021. Kebanyakan unit baharu ini adalah teres 1 tingkat yang mendominasi 56.9% (394 unit) daripada jumlah keseluruhan. Trend ini ditunjukkan di Carta 13.7.

## New Launches

The primary market saw the number of new launch units increase by 692 units compared 562 units, 2021. Most of these new units were single storey terraced, dominating for 56.9% (394 units) of the total. The trend is shown in Chart 13.7.

Chart 13.7

New Launches and Sales Performance 2018 – 2022



**Status Pasaran**

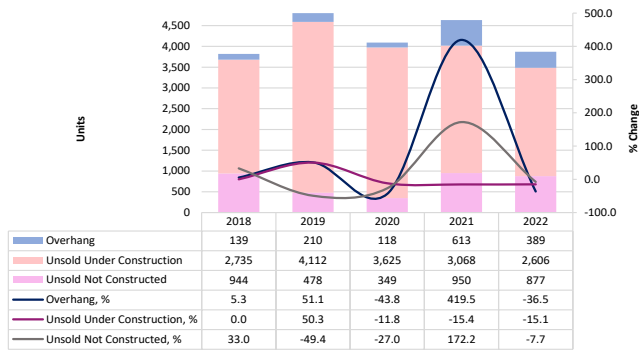
Situasi unit-unit kediaman tidak terjual agak memberangsangkan kerana jumlahnya telah berkurangan dalam tempoh kajian. Trend ditunjukkan dalam Carta 13.8.

**Market Status**

The residential unsold units situation was encouraging as the number had decreased during the review period. The trend is shown in Chart 13.8.

Chart 13.8

Residential Market Status 2018 – 2022



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**Aktiviti Pembinaan**

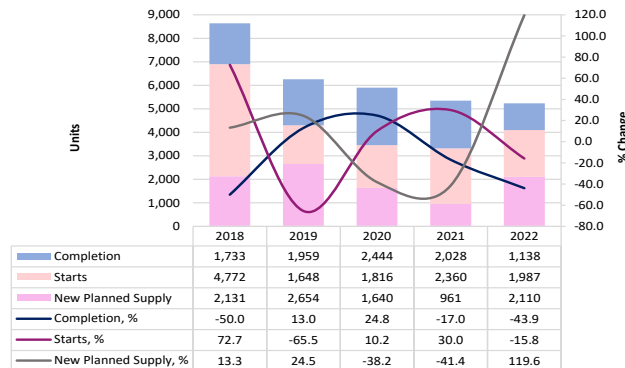
Aktiviti pembinaan harta kediaman menyaksikan pergerakan bercampur-campur dalam tempoh kajian. Pada akhir 2022, terdapat 1,138 unit kediaman siap dibina dengan 1,987 unit lagi dalam pembinaan dan 2,110 unit dalam penawaran baru dirancang.

**Construction Activity**

The residential construction activity witnessed mixed movement in the review period. As at end-2022, there were 1,138 completion units with another 1,987 units in starts and 2,110 units in the new planned supply.

Chart 13.9

Residential Construction Activity 2018 – 2022



## Harga dan Sewa

Harga subsektor kediaman sebahagian besarnya stabil dengan beberapa pergerakan direkodkan di kawasan strategik dengan aksesibiliti yang baik. Rumah teres satu tingkat di Taman Sri Mahir, Jajahan Tanah Merah mencatatkan kenaikan marginal, dipindahmilik kepada RM190,000 seunit. Begitu juga, rumah teres dua tingkat di Taman Yanie, Jajahan Kuala Krai dan rumah kluster satu tingkat di Taman Kurnia Jaya, Jajahan Kota Bharu menyaksikan kenaikan 11.0% disebabkan berhampiran dengan kemudahan fasiliti sekitarnya seperti hospital dan lapangan terbang.

Indeks Harga Semua Rumah untuk negeri berada pada 217.6 mata pada 2022<sup>P</sup>, naik 8.3% daripada 201.0 mata pada 2021. Harga purata semua rumah untuk negeri berada pada RM249,058 meningkat daripada RM230,020 pada 2021.

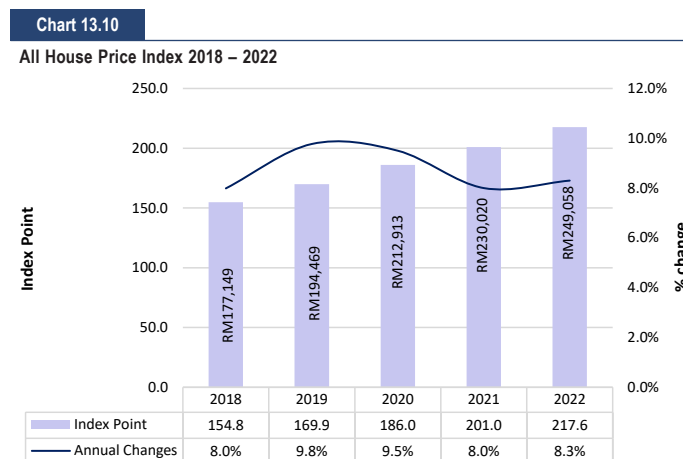
Pasaran sewa stabil dengan pergerakan menaik direkodkan di beberapa kawasan terutama bagi rumah satu tingkat seperti teres kos rendah, kos sederhana, teres, berkembar dan sesebuah serta flat kos rendah. Sewa rumah teres kos rendah satu tingkat di Taman Adabi, Jajahan Tanah Merah dan flat kos rendah di Taman Sri Guchil menunjukkan kenaikan tertinggi sebanyak 18.0% disebabkan lokasi yang strategik.

## Price and Rental

Prices of residential sub-sector were largely stable with several movements recorded in strategic areas served with good accessibility. Single storey terraced houses in Taman Sri Mahir, Jajahan Tanah Merah witnessed marginal growth, transacted to RM190,000 per unit. Similarly, double storey terraced houses in Taman Yanie, Jajahan Kuala Krai and single storey cluster in Taman Kurnia Jaya, Jajahan Kota Bharu recorded an increase of 11.0% due to proximity to facilities such as hospital and airport.

The All House Price Index for the state stood at 217.6 points in 2022<sup>P</sup>, up by 8.3% from 201.0 points in 2021. The average all house price for the state stood at RM249,058, increased from RM230,020 in 2021.

The rental market was stable with upward movements recorded in some areas especially for single storey houses such as low-cost, medium-cost, terraced, semi-detached and detached houses and also low-cost flats. Rent of low-cost single-storey terrace houses in Taman Adabi, Jajahan Tanah Merah and low-cost flats in Taman Sri Guchil showed the highest increase of 18.0% due to strategic location.



## HARTA TANAH PERDAGANGAN

### Transaksi

Subsektor perdagangan merekodkan 369 transaksi bernilai RM159.99 juta (2021: 506 transaksi bernilai RM211.19 juta). Bilangan dan nilai menurun sebanyak 27.1% dan 24.2% masing-masing berbanding 2021.

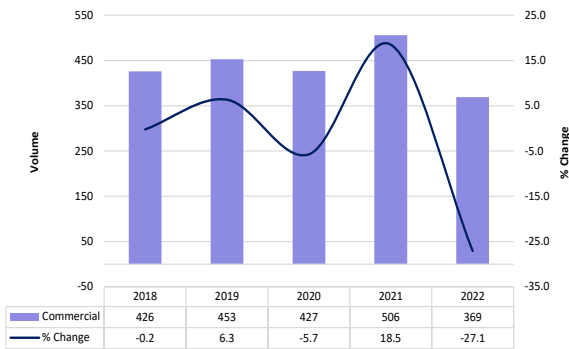
## COMMERCIAL PROPERTY

### Transaction

The commercial sub-sector recorded 369 transactions worth RM159.99 million (2021: 506 transactions worth RM211.19 million). The volume and value decreased by 27.1% and 24.2% respectively as compared to 2021.

Chart 13.11

Volume of Commercial Property Transactions 2018 – 2022



**Kedai**

**Transaksi**

Segmen kedai menyaksikan penurunan dalam tempoh kajian kepada 171 transaksi bernilai RM108.18 juta (2021: 179 transaksi bernilai RM131.93 juta). Aktiviti pasaran menurun 4.47% dalam bilangan dan 18.0% dalam nilai.

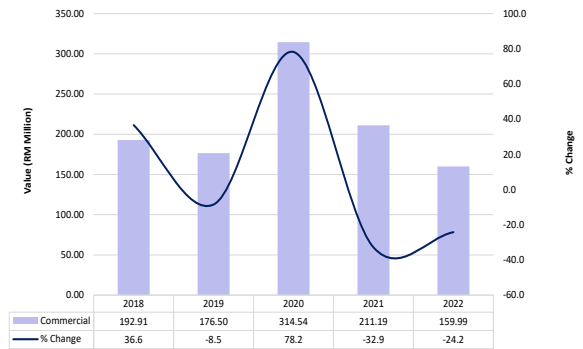
**Status Pasaran**

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Prestasi kedai tidak terjual bergerak secara perlahan dalam tempoh kajian. Status belum dibina belum dijual dan siap dibina belum dijual masing-masing meningkat 36.4% dan 20.0%. Manakala sedang dibina belum dijual menurun sebanyak 91.7%. Trend ditunjukkan di Carta 13.13.

Chart 13.12

Value of Commercial Property Transactions 2018 – 2022



**Shop**

**Transaction**

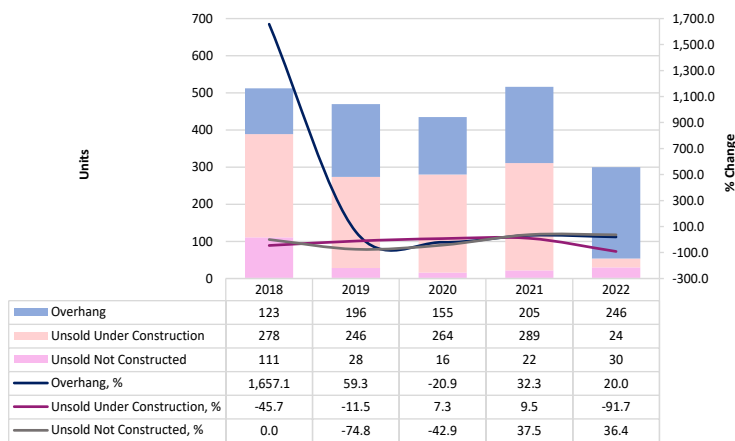
The shop segment saw a decrease in the review period to 171 transactions worth RM108.18 million (2021: 179 transactions worth RM131.93 million). The market activity also declined 4.47% in volume and 18.0% in value.

**Market Status**

The shop unsold performance moved slowly in the review period. Unsold not constructed and overhang status an increase by 36.4% and 20.0% respectively. While unsold under construction decreased 91.7%. The trend is shown in Chart 13.13.

Chart 13.13

Shop Market Status 2018 – 2022



**Aktiviti Pembinaan**

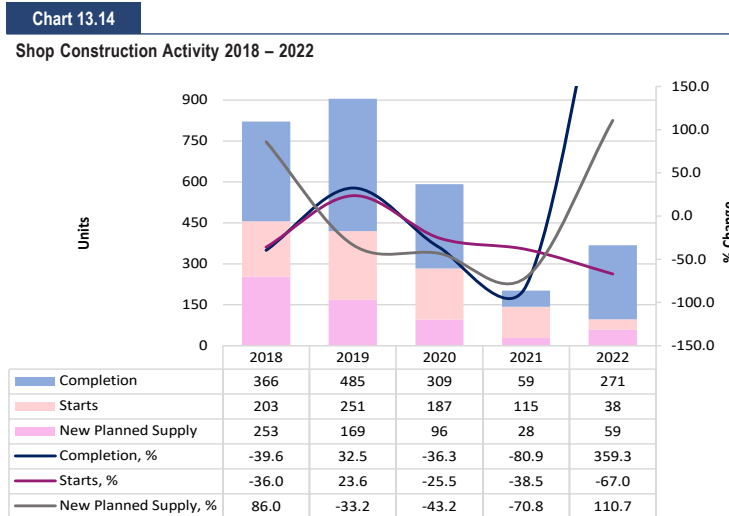
Aktiviti pembinaan segmen kedai menunjukkan prestasi semakin baik. Peningkatan bagi jumlah unit siap dan penawaran perancangan baharu masing-masing telah meningkat kepada 271 unit (2021: 59 unit) dan 59 unit (2021: 28 unit). Manakala mula dibina mengalami

**Construction Activity**

The shop segment construction activity was shown a better performance. The increase in the number of completion and new planned supply to 271 units (2021: 59 units) and 59 units (2021: 28 units) respectively. While starts was a decrease of 38 units (2021: 115 units). As

penyusutan 38 unit (2021: 115 unit). Pada akhir 2022, terdapat 14,380 unit kedai sedia ada dengan 1,016 unit lagi dalam penawaran akan datang dan 742 unit dalam penawaran dirancang.

at end-2022, there were 14,380 existing shop units with another 1,016 units in the incoming supply and 742 units in the planned supply.



## Kompleks Perniagaan

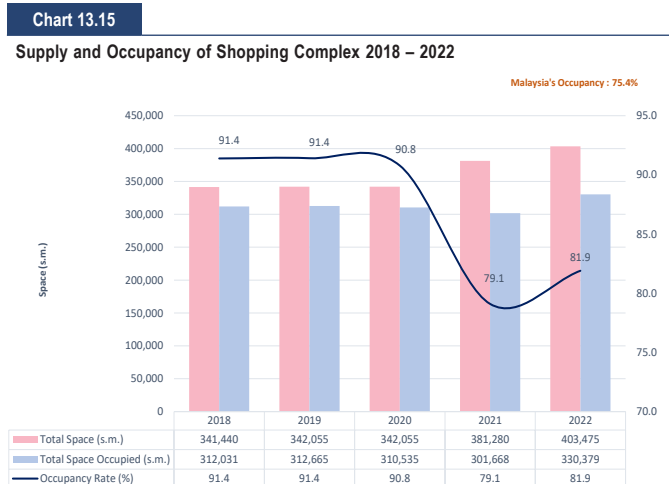
## Shopping Complex

### Penghunan dan Ketersediaan Ruang

### Occupancy and Space Availability

Subsektor niaga menyaksikan prestasi yang baik dengan purata kadar penghunan meningkat kepada 81.9% pada 2022 berbanding 79.1% pada 2021. Selari itu, ambilan tahunan juga meningkat sebanyak 28,711 m.p.

The retail sub-sector shown a good performance with average occupancy rate an increase to 81.9% in 2022 as compared to 79.1% in 2021. In parallel, the annual take-up also increased by 28,711 s.m.



## Aktiviti Pembinaan

## Construction Activity

Terdapat satu kompleks siap dibina direkodkan dalam tempoh kajian iaitu Mydin Hyper Tunjong di Jalan Kuala Krai, Kota Bharu dengan keluasan 22,195 m.p dan menawarkan penghunan sebanyak 20,565 m.p. Pada akhir 2022, terdapat 30 kompleks membeli-belah sedia ada (403,475 m.p.).

There was one completed complex recorded in the review period namely Mydin Hyper Tunjong in Kuala Krai Road, Kota Bharu with an area of 22,195 m.p and 20,565 m.p for an occupancy space offered. As at end-2022, there were 30 existing shopping complexes (403,475 s.m.).

## Sewa

Secara amnya, sewa ruang niaga stabil bagi semua kompleks membeli-belah. Mydin Hyper Tunjong di Jajahan Kota Bharu merupakan sebuah kompleks beli-belah yang baru di lancarkan pada 10 Mac 2022 dan menyediakan sewaan ruang niaga kepada para peniaga dan secara tidak langsung dapat meningkatkan ekonomi di negeri ini.

## Pejabat Binaan Khas

### Penghunian dan Ketersediaan Ruang

Segmen pejabat binaan khas menunjukkan prestasi yang baik dengan kadar penghunian yang meningkat kepada 94.3% berbanding 93.5% yang dicatatkan pada 2021. Selari dengan itu, ambilan tahunan adalah positif pada 3,068 m.p.

## Rental

Generally, rental of retail space were stable for all shopping complexes. Mydin Hyper Tunjong in Jajahan Kota Bharu is a shopping complex that was just launched on 10 March 2022 and provides business space rental to traders and can indirectly boost the economy in the state.

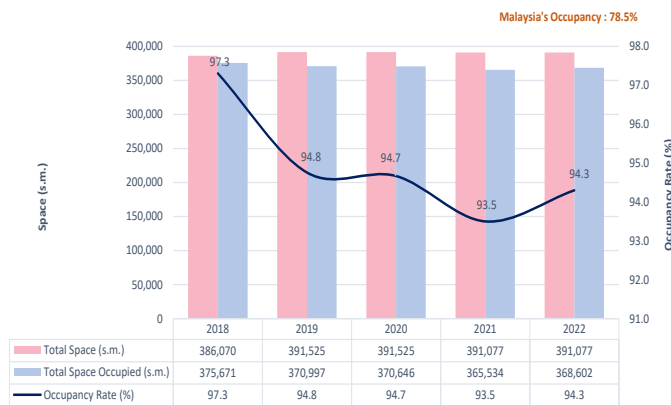
## Purpose-Built Office

### Occupancy and Space Availability

The purpose-built office segment shown well with occupancy rate increasing to 94.3% as compared to 93.5% recorded in 2021. Correspondingly, the annual take-up was positive at 3,068 s.m.

Chart 13.16

Supply and Occupancy of Purpose-Built Office 2018 – 2022



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## Aktiviti Pembinaan

Tiada aktiviti pembinaan baharu direkodkan dalam tempoh kajian. Pada akhir 2022, terdapat 289 pejabat binaan khas sedia ada (391,077 m.p.). Manakala penawaran akan datang dan penawaran dirancang kekal tiada.

## Sewa

Pasaran sewa pejabat binaan khas bagi kebanyakan bangunan adalah stabil pada tempoh kajian.

## Riadah

Tiada siap dibina baharu direkodkan dalam tempoh kajian. Pada akhir 2022, catatan rekod masih sama seperti tahun 2021 dengan 91 hotel (4,360 bilik) dalam penawaran sedia ada dan satu hotel (144 bilik) dalam penawaran akan datang.

## Construction Activity

There was no new construction activity recorded in the review period. As at end-2021, there were 289 existing purpose-built office (391,077 s.m.). Whereas, incoming supply and planned supply remained nil.

## Rental

The rental market for purpose-built offices for most buildings is stable throughout the review period.

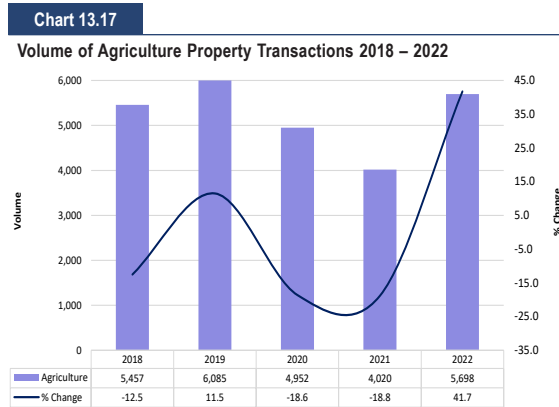
## Leisure

No new completion was recorded in the review period. At the end of 2022, the record is still the same as in 2021 with 91 hotels (4,360 rooms) in existing supply and one hotel (144 rooms) in the incoming supply.

## HARTA TANAH PERTANIAN

### Transaksi

Terdapat 5,698 transaksi bernilai RM400.71 juta dalam tempoh kajian iaitu bilangan meningkat 41.7%, manakala nilai menurun sebanyak 19.3% (2021: 4,020 transaksi bernilai RM496.53 juta).



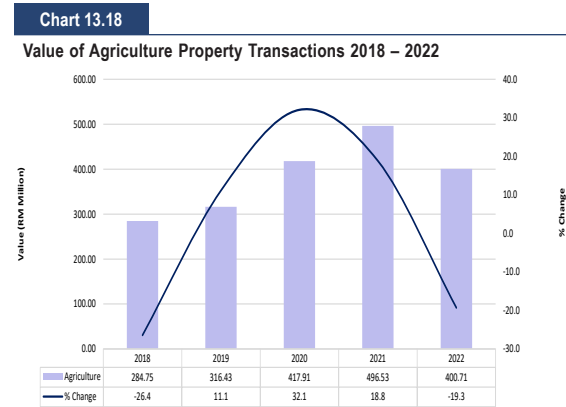
### Harga

Harga harta tanah pertanian menyaksikan pertumbuhan positif di seluruh negeri kecuali penurunan 5.0% bagi harga tanah tanaman getah di Kampung Jelakong, Jajahan Tanah Merah. Harga tanah dusun mencatatkan harga tertinggi berbanding harga tanah tanaman pertanian yang lain bagi semua Jajahan negeri terutama di Jajahan Kota Bharu dengan nilai pindahmilik antara RM515,000 hingga RM566,000 sehektar.

## AGRICULTURE PROPERTY

### Transaction

There were 5,698 transactions worth RM400.71 million in the review period as increased by 41.7% in volume, whereas value declined by 19.3% (2021: 4,020 transactions worth RM496.53 million).



### Price

Prices of agriculture property witnessed positive growth throughout the state except for a slight decrease of 5.0% in the price of rubber plantations land in Kampung Jelakong, Jajahan Tanah Merah. The price of orchard land recorded the highest price compared to the price of other agricultural land for all state colonies, especially in the Kota Bharu with a transfer value between RM515,000 to RM566,000 per hectare.



**PROSPEK 2023**

Pasaran hartanah dijangka bertambah baik disokong oleh pemulihan ekonomi yang berdaya tahan, makmur dan mampan. Prospek positif ini turut disokong oleh prestasi kewangan negara yang baik. Berdasarkan Bajet Kelantan 2023 yang bertemakan “Kelantan Maju, Rakyat Sejahtera”, beberapa program dan projek akan diteruskan pada 2023 yang turut memberi impak positif kepada sektor hartanah dan infrastruktur negeri Kelantan.

**2023 OUTLOOK**

*The property market is expected to improve supported by a resilient, prosperous and sustainable economic recovery. This positive outlook is also supported by the country’s better financial performance. Based on the Kelantan Budget 2023 themed “Kelantan Maju, Rakyat Sejahtera”, several programs and projects will be continued in 2023 which will also bring positive impact on the real estate and infrastructure sector for Kelantan.*

**Infrastructure Development**

**Table 13.2: Infrastructure Projects**

| No. | Infrastructure Project                                      | Location   | Current Development Status  |
|-----|---|--|---|
| 1.  | East Coast Rail Line (ECRL) Project                         | <ul style="list-style-type: none"> <li>- The alignment for this project Startsss from Pasir Puteh to Kota Bharu</li> <li>- Length: 56 kilometres involving 2 main stations that will build in Pasir Puteh and Tunjung, Kota Bahru.</li> <li>- Project area: 304.9001 hectares (including private and government land)</li> <li>- Project cost: RM50.27 billion (total cost of the project)</li> </ul>  | <p>Under construction.</p> <p>For Second Phase (Pasir Putih) of Land Acquisition has been gazetted under Section 8 on 25/8/2022.</p>  |
| 2.  | FT209 and FT131 Road Upgrading Project                      | <ul style="list-style-type: none"> <li>- Location: From Pasir Hor Interchange to Panchor, Kota Bharu, Kelantan</li> <li>- Project area: 16.1921 hectares</li> <li>- Project cost: RM191 million</li> </ul>   | Has been gazetted under Section 8, Land Acquisition Act 1960 on 26 Mei 2022. The project is still under hearing process.  |
| 3.  | Palekbang - Kota Bharu Bridge Construction Project          | <ul style="list-style-type: none"> <li>- Location: Palekbang, Tumpat to Penambang, Kota Bharu</li> <li>- Project cost: RM440 million</li> </ul>  | Under construction  |
| 4.  | Sultan Ismail Petra Airport Expansion and Upgrading Project | <ul style="list-style-type: none"> <li>- Location: Kota Bharu</li> <li>- Project cost: RM2 million</li> </ul>  | Under construction  |
| 5.  | Proposed Construction of Kota Bharu to Kuala Krai Highway   | <ul style="list-style-type: none"> <li>- Location: Kota Bharu to Kuala Kerai</li> <li>- Project package development:                             <ul style="list-style-type: none"> <li>a) Package 2C Kok Lanas to Machang and 3A Machang to Bukit Tiu                                     <ul style="list-style-type: none"> <li>➢ Location: Kok Lanas to Machang and Machang to Kok Lanas/ Machang to Bukit Tiu and Bukit Tiu to Machang</li> <li>➢ Project area: 256.69 hectares</li> <li>➢ Length: 18.45 kilometres</li> <li>➢ Project cost: RM389.5 million</li> </ul> </li> <li>b) Package 3B Kg Berangan Mek Nab ke Keroh                                     <ul style="list-style-type: none"> <li>➢ Location: Kg Berangan Mek Nab to Keroh dan Keroh to Kg Berangan Mek Nab</li> <li>➢ Length: 9.78 kilometres</li> <li>➢ Project cost: RM244.2 million</li> </ul> </li> <li>c) Package 3C: Keroh To Kuala Krai                                     <ul style="list-style-type: none"> <li>➢ Location: Kota Bharu Kuala Krai and Keroh to Kuala Krai</li> <li>➢ Project area: 95.6874 hectares</li> <li>➢ Length: 8.6 kilometres</li> <li>➢ Project cost: RM244.3 million</li> </ul> </li> </ul> </li> </ul> | <p>Package 2C: Has been gazetted under Sec. 8, Land Acquisition Act 1960 on 13 Oktober 2022</p> <p>Package 3A and 3B: Application for Section 8, pending approval by the State Authority</p> <p>Package 3C: Preparation of land reports and state exco papers</p> |

Table 13.2: Infrastructure Projects

| No. | Infrastructure Project  | Location  | Current Development Status  |
|-----|---|---|---|
| 6.  | Sungai Golok Integrated River Basin Development Project: Phase 1              | <ul style="list-style-type: none"> <li>- Location: Tumpat and Pasir Mas</li> <li>- Length: <ul style="list-style-type: none"> <li>➢ Sungai Golok Flood Bann: 26.2 kilometres</li> <li>➢ Sungai Lemal Lancang Bann: 19.84 kilometres</li> <li>➢ Sungai Mentua Bunding Bann: 8.1 kilometres</li> </ul> </li> <li>- Project cost: RM501 million</li> <li>- <u>Phase 1:</u><br/>Expected to be completed in August 2024 <ul style="list-style-type: none"> <li>a) Sungai Golok Integrated River Basin Development Project (PLSB) Phase 1-Flood Bund-C (LA1-LA25), Pasir Mas District <ul style="list-style-type: none"> <li>➢ Project area: 30.5883 hectares</li> </ul> </li> <li>b) Sungai Golok Integrated River Basin Development Project (PLSB) Phase 1 - Flood Bund D- (LA2 -LA 25), Tumpat District <ul style="list-style-type: none"> <li>➢ Project area: 28.3304 hectares</li> </ul> </li> <li>c) Sungai Golok Integrated River Basin Development Project (PLSB) Phase 1 - Sungai Lanchang Lemal, Pasir Mas District <ul style="list-style-type: none"> <li>➢ Project area: 90.7618 hectares</li> </ul> </li> <li>d) Sungai Golok Integrated River Basin Development Project (PLSB) Phase 1 - Sungai Lanchang Lemal additional, Pasir Mas District <ul style="list-style-type: none"> <li>➢ Project area: 0.8271 hectares</li> </ul> </li> <li>e) Sungai Golok Integrated River Basin Development Project (PLSB) Phase 1 - Bund D, Pasir Mas District <ul style="list-style-type: none"> <li>➢ Project area: 0.7259 hectares</li> </ul> </li> <li>f) Sungai Golok Integrated River Basin Development Project (PLSB) Phase 1 - Sungai Mentua, Tumpat District <ul style="list-style-type: none"> <li>➢ Project area: 14.0879 hectares</li> </ul> </li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>Preparation a written award by Land Administrator and JPS to any interested person.</li> <li>Section 8 has been approved and will be issue in a Government Gazette</li> <li>Notice of Possession (Form K) of the land involved has been issued</li> <li>Notice of Possession (Form K) of the land involved has been issued</li> <li>Notice of Possession (Form K) of the land involved has been issued</li> <li>Has been gazetted under Section 8, Land Acquisition Act 1960 on 20 October 2022</li> </ul> |
| 7.  | Kuala Nal - Pasir Kelang Bridge Construction Project                          | <ul style="list-style-type: none"> <li>- Location: Kuala Krai</li> <li>- Length: 100 meter</li> <li>- Project area: 5.3154 hectares</li> <li>- Project cost: RM29.7 million</li> </ul>  | Under construction  |
| 8.  | Central Spine Road Highway (CSR) FT 34 Kota Bharu – Simpang Pelangai, Bentong | <ul style="list-style-type: none"> <li>- Involved two packages with 11 sub-packages.</li> <li>a) <b>Package 1: Kuala Krai to Lakit River Bridge</b> <ul style="list-style-type: none"> <li>- Length: 47.00 kilometres</li> <li>i) Section 1C: Kg Laloh to FT66 <ul style="list-style-type: none"> <li>➢ Project area: 41.257 hectares</li> <li>➢ Project cost: RM185.40 million</li> </ul> </li> </ul> </li> <li>b) <b>Package 2: Lakit River Bridge to Gua Musang</b> <ul style="list-style-type: none"> <li>- Total length: 59.00 kilometres</li> <li>i) Section 2B: Paloh 2 to Bukit Sejuk <ul style="list-style-type: none"> <li>➢ Project cost: RM365.80 million</li> </ul> </li> <li>ii) Section 2C: Bukit Sejuk to Bandar Baru Gua Musang <ul style="list-style-type: none"> <li>➢ Project cost: RM371.50 million</li> </ul> </li> </ul> </li> </ul>   | Preparation of Survey Application   |
| 9.  | Ulu Nenggiri Hydroelectric Project  | <ul style="list-style-type: none"> <li>- Location: Ulu Nenggiri, Gua Musang</li> <li>- Project cost: 5.00 billion</li> </ul>  | In construction and preparation for the site  |
| 10. | Bangunan Gunasama Persekutuan Kota Bharu                                      | <ul style="list-style-type: none"> <li>- Location: Tunjang, Kelantan</li> <li>- Project cost: 576.00 million</li> <li>- Project consists of four eight-storey office blocks, an auditorium, a multi-purpose hall, food court, nursery and kindergarten, security block and multi-storey parking.</li> </ul>   | Under construction and is expected to be completed by July 2024.  |

**Table 13.2: Infrastructure Projects**

| No. | Infrastructure Project  | Location   | Current Development Status   |
|-----|---|--|--|
| 11. | Construction of Urban Drainage, Bandar Baru Tunjong Under Integrated River Basin Project (PLSB) Phase 1 (Scope of Manual Saliran Mesra Alam (MSMA) Bandar Baru Tunjong) | <ul style="list-style-type: none"> <li>- Location: Padang Enggang, Kota, Pendek, Tiong</li> <li>- Project area: 64.76 hectares</li> <li>- Project cost: RM51.00 million</li> </ul> | Has been gazetted under Section 8, Land Acquisition Act 1960 on 14 April 2022. Still under land acquisition process. |

**Mega Project**

**Table 13.3: Development Project**

| No. | Development Project   | Description   | Current Development Status   |
|-----|---|---|--|
| 1.  | Tok Bali Industrial Park  | <ul style="list-style-type: none"> <li>- Location: Tok Bali Industrial Park in Mukim Gong Kulim, Pasir Puteh District</li> <li>- Consist of heavy industries (oil &amp; gas) as well as small and medium industries including Halal Industries</li> <li>- Gross development value: RM200 million</li> <li>- <u>Phase 1:</u> <ul style="list-style-type: none"> <li>➢ Project area: 40.47 hectares</li> <li>➢ Number of lots: 81 lot</li> </ul> </li> <li>- <u>Phase 2:</u> <ul style="list-style-type: none"> <li>➢ Project area: 33.5 hectares</li> <li>➢ Number of lots: 48 lot</li> </ul> </li> </ul>  | <p>Plans have been approved but not yet construct.</p> <p>Under land acquisition process</p> |
| 2.  | New Complex Development Project for the Malaysian Maritime Enforcement Agency, Tok Bali | <ul style="list-style-type: none"> <li>- Location: Tok Bali, Kelantan</li> <li>- Land area: 14 hectares</li> <li>- Gross development value: RM250 million</li> </ul>  | Under construction   |
| 3.  | Residensi Prima @ Kubang Kerian   | <ul style="list-style-type: none"> <li>- Location: Kubang Kerian, Kelantan, about 7 kilometres from Hospital University Kubang Kerian (HUSM) and 11 kilometres from Kota Bharu City Center.</li> <li>- Land area: 10.11 hectares</li> <li>- Erected on Lot 15306 in Mukim Mentuan, Kota Bharu District</li> <li>- Two blocks Apartment with 632 units with the composition of development: <ul style="list-style-type: none"> <li>• Built -up area: <ul style="list-style-type: none"> <li>Type A - 850sqft @ 78.97sqm</li> <li>Type B - 950sqft @ 88.26sqm</li> <li>Type C1 &amp; C2 - 1050sqft @ 97.55sqm</li> </ul> </li> <li>• Price from RM245,000.00 - RM321,000.00</li> <li>• Facilities: <ul style="list-style-type: none"> <li>➢ Children's playground, Nursery &amp; Kindergarten, Multipurpose hall, Prayer room's, Swimming pool</li> </ul> </li> </ul> </li> <li>- Expected completion: 1 Februari 2024</li> <li>- Developer: AUEI Teras Holdings Sdn Bhd</li> </ul> | Under construction   |

**Table 13.3: Development Project**

| No. | Development Project        | Description   | Current Development Status            |
|-----|----------------------------|---|---------------------------------------|
| 4.  | Residensi Platinum @ Bayam | <ul style="list-style-type: none"> <li>- Location: Kota Bharu City Center, about 2 kilometres from Hospital Raja Perempuan Zainab II and 2 kilometres from downtown of Kota Bharu City.</li> <li>- Land area: 0.75 hectares (on Lot 11850 in Mukim Padang Garong, Kota Bharu)</li> <li>- Two blocks apartment with 272 units with the composition of development:               <ul style="list-style-type: none"> <li>• Built -up area:                   <ul style="list-style-type: none"> <li>Type A - 828sqft @ 76.92sqm</li> <li>Type B - 823sqft @ 76.46sqm</li> <li>Type C - 818sqft @ 75.99sqm</li> </ul> </li> <li>• Price from RM345,600.00 - RM384,210.00</li> <li>• Facilities:                   <ul style="list-style-type: none"> <li>➤ Children's playground, Nursery &amp; Kindergarten, Prayer room's, Swimming pool, Gymnasium, 24 hours security</li> </ul> </li> </ul> </li> <li>- Expected completion: 1 Januari 2025</li> <li>- Developer: BBGM Wangsa Development Sdn Bhd</li> </ul>   | Undeveloped yet and still vacant land |
| 5.  | PPA1M Sireh Residence      | <ul style="list-style-type: none"> <li>- Location: Mukim Kampong Sireh, Kota Bharu District, nearby Aeon Mall and Lotus's Hypermarket, Educational Institute, Integrated Transport Terminal and recreational areas along the river.</li> <li>- Land area: 9.37 hectares (on Lot PT 90, PT 91 and 123 more lot)</li> <li>- Eight blocks apartment with 2,160 units with the components of development:               <ul style="list-style-type: none"> <li>• Built -up area:                   <ul style="list-style-type: none"> <li>Type A - 1,058.32sqft @ 98.32sqm</li> <li>Type B - 1,154.00sqft @ 107.20sqm</li> </ul> </li> <li>• Price from RM 274,600.00 – RM 299,500.00</li> <li>• Facilities:                   <ul style="list-style-type: none"> <li>➤ Children's playground, Nursery &amp; Kindergarten, Prayer room's, Swimming pool, Gymnasium, 24 hours security, Convenience Store, Multipurpose Hal</li> </ul> </li> </ul> </li> <li>- Expected completion: 1 Januari 2024</li> <li>- Developer: Liziz Standaco Sdn Bhd</li> </ul> | Under construction                    |
| 6.  | PRIMA Tok Bali             | <ul style="list-style-type: none"> <li>- Location: Off Pasir Puteh – Tok Bali Road in Mukim Gong Kulim and Semerak, Pasir Puteh</li> <li>- Land area: 15.312 hectares (on Lot 701,447,446,445,650, 651,2193,2195,1563,1656,1657)</li> <li>- Providing a total of 359 units of single storey terraced and 141 units of double storey terraced with the composition of development:</li> <li>- 2 blocks apartment with 272 units with the composition of development:               <ul style="list-style-type: none"> <li>• Built -up area:                   <ul style="list-style-type: none"> <li>Single Storey - 950sqft</li> <li>Double Storey – 1,400sqft</li> </ul> </li> <li>• Price                   <ul style="list-style-type: none"> <li>Single Storey – from RM 149,400 – RM 174,000</li> <li>Double Storey – from RM 229,500 – RM 269,000</li> </ul> </li> </ul> </li> <li>- Expected completion: 30 November 2022 (Phase 1) but for now still under construction</li> <li>- Developer: BBGM Tok Bali Development Sdn Bhd</li> </ul>    | Under construction                    |

**Table 13.3: Development Project**

| No. | Development Project                               | Description  | Current Development Status            |
|-----|---|--|---------------------------------------|
| 7.  | Saujana Harmoni Fasa 2                            | <ul style="list-style-type: none"> <li>- Developed on Lot PT 7117 - PT 7354, Mukim Pulau, District of Gua Musang</li> <li>- Located near to the Jalan Merapoh – Gua Musang and 8 km to Gua Musang City Centre</li> <li>- Total units: 238 units (1-storey Terrace Houses)</li> <li>- Land area: 135 square meters</li> <li>- Built-up area: 102 square meters</li> <li>- Price from RM 250,000 – RM 330,000 per unit</li> <li>- Expected Completion Date: January 2024</li> <li>- Developer: ML Synergy Sdn. Bhd.</li> </ul>   | Under construction                    |
| 8.  | Arika Kubang Kerian                               | <ul style="list-style-type: none"> <li>- Location: Off Jalan Sultan Yahya Petra, Mukim Kenali, Kota Bharu</li> <li>- Land area: 4291 square meters (on Lot 1910)</li> <li>- 2 Blocks of serviced apartments with 668 units with the composition of development: <ul style="list-style-type: none"> <li>• Built-up area: <ul style="list-style-type: none"> <li>Type A - 260sqft @ 24.15sqm</li> <li>Type A1 - 364sqft @ 33.82sqm</li> <li>Type A2 - 300sqft @ 27.87sqm</li> <li>Type B, B4, B5, C - 520sqft @ 48.31sqm</li> <li>Type B1 - 590sqft @ 54.81sqm</li> <li>Type B2 - 599sqft @ 55.65sqm</li> <li>Type B3 - 679sqft @ 63.08sqm</li> <li>Type C1 - 555sqft @ 51.56sqm</li> <li>Type D, E - 798sqft @ 74.13sqm</li> <li>Type F - 1040sqft @ 96.62sqm</li> <li>Type G - 357sqft @ 33.17sqm</li> </ul> </li> </ul> </li> <li>- Price from RM229,000.00 – RM1,305,000.00</li> <li>- Developer: Seruan Mewah Sdn Bhd</li> </ul>  | Undeveloped yet and still vacant land |
| 9.  | Kota Seribong Fasa 2B                             | <ul style="list-style-type: none"> <li>- Developed on Lot PT 1641 - PT 1666 and PT 1783 - PT 1830, Mukim Tiong, Section 67, Daerah Pendek, and PT 1831- PT 1856 &amp; PT 1950 – PT 1961, Mukim Padang Enggang, Section 62, Daerah Kota, Kota Bharu</li> <li>- Located near to the Kota Bharu – Kuala Krai Highway and 4.3 miles to Kota Bharu City Centre</li> <li>- Total units: 112 units (2-storey Terrace Houses)</li> <li>- Land area: 1300 square feet (120 square meters)</li> <li>- Built-up area: 137.86 square meters – 140.46 square meters</li> <li>- Price from RM 440,000 – RM 550,000 per unite</li> <li>- Expected Completion Date: August 2022</li> <li>- Developer: SENSEA TIMUR Sdn. Bhd.</li> </ul>  | Under construction                    |
| 10. | Desa Wira Jaya Phase 2B and 3, Pasir Mas Kelantan | <ul style="list-style-type: none"> <li>- Desa Wira Jaya is a Housing Scheme located at Mukim Apam, Pasir Mas District (Main Lot PT 8228). It is nearby Desa Wira Jaya Phase I and Residensi Pr1ma, Land's Owner by Perbadanan Kemajuan Iktisad Negeri Kelantan (PKINK) while the Developer for Desa Wira Jaya is ATM Development Sdn Bhd, The scheme can be reached via Federal Route 3.</li> <li>- There are 2 new phases to be developed in the Scheme which are: - <ul style="list-style-type: none"> <li>a) Phase 2B » Single Storey Terrace – 124 Units</li> <li>» Single Storey Detach - 24 Units</li> <li>b) Phase 3 » Single Storey Terrace – 198 Units</li> </ul> </li> <li>- Among the facilities available in the vicinity of this scheme are: - » Mosque » Kaksu Mart » Tengku Anis Recreational Park » Pantai Timur Supermarket » Land and Colonial Office of Pasir Mas, » Pasir Mas District Council Office » MARA College of Higher Skills » Pasir Mas police station</li> <li>- Located near to the main road of Pasir Mas - Rantau Panjang and 9.8 miles to Pasir Mas, 12 miles to Rantau Panjang, 29 miles to Kota Bharu and 31 miles to Tanah Merah.</li> </ul> | Undeveloped yet and still vacant land |

## State Government Policy

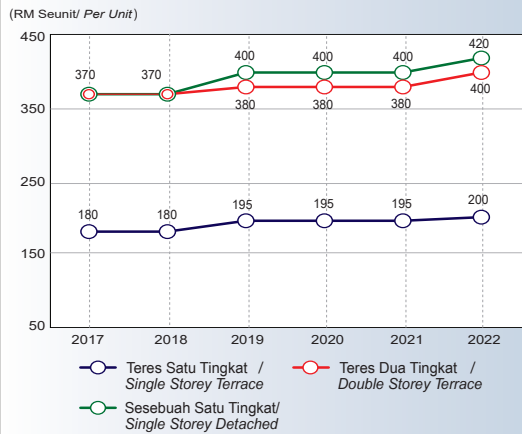
**Table 13.4: State Government Policy**

The State Government approved several policies and incentives to investors who are interested in investing in Kelantan. Among the incentives are as follows: -

| No. | Policy/ incentives  | Details   |
|-----|---|---|
| 1.  | Kelantan Affordable Housing Policy (RMMK)                                   | <ul style="list-style-type: none"> <li>- The main objective of the Kelantan Affordable Housing Policy is to provide and offer types of houses that are affordable, adequate, quality, liveable and based on Islamic characteristics for the comfort and well-being of the Kelantan people.</li> <li>- The purpose of RMMK is as a guideline set by the State Authority (PBN), Local Authority (PBT), technical agencies and developers in planning and controlling the development of Affordable Housing development projects in the state of Kelantan as well as, as the basis for the implementation of the Kelantan Affordable Housing Program (RMMK).</li> <li>- The target of this project is to provide facilities to the target group (for each type of house set by the government) to own the first house according to the conditions that have been set.</li> </ul> |
| 2.  | Urban land density flexibility control policy                               | <ul style="list-style-type: none"> <li>- Provide flexibility control of density for land in urban areas to be more viable by developers.</li> </ul>   |
| 3.  | State government incentives on land tax, land premium and issuance of title | <ul style="list-style-type: none"> <li>- Quit rent reduction of 50% within two years (in line with the express conditions of development).</li> <li>- Reduction of application fees in Local Authorities according to components, namely 50% Improvement Service Fund (ISF) and 50% assessment tax for the first year after CCC.</li> <li>- Flexibility of payment of land premium and conversion premium by instalments.</li> <li>- Accelerate the issuance of land titles for the housing and real estate sector not exceeding 8 months from the date of application.</li> </ul>  |

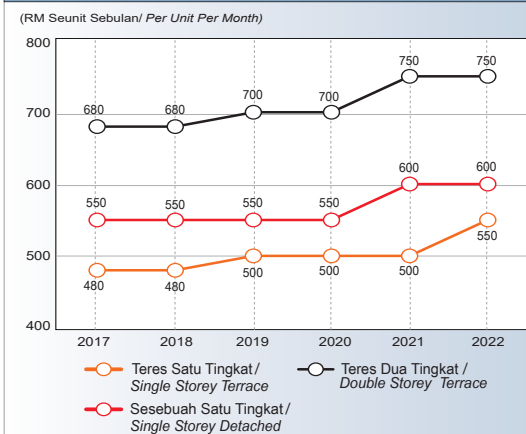
### KELANTAN 13.1

Pergerakan Harga Purata Rumah Teres dan Sesebuah di Kelantan  
Average Price Movements of Terraced and Detached Houses in Kelantan



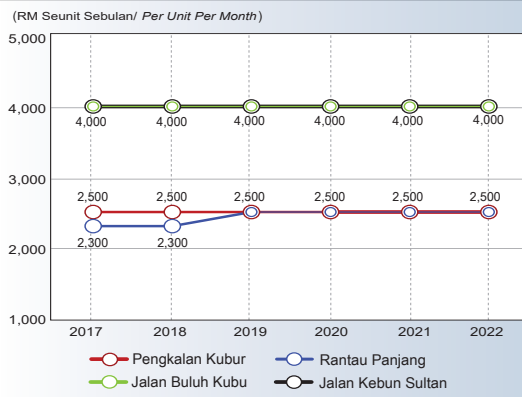
### KELANTAN 13.2

Pergerakan Sewaan Purata Rumah Teres dan Sesebuah di Kelantan  
Average Rental Movements of Terraced and Detached Houses in Kelantan



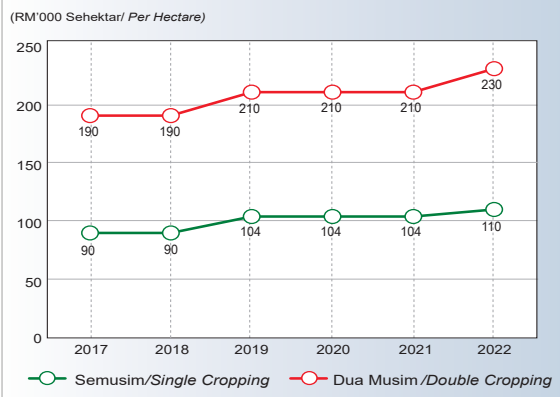
### KELANTAN 13.3

Pergerakan Sewaan Purata Tingkat Bawah Kedai di Kelantan  
Average Rental Movements of Ground Floor Shop in Kelantan



### KELANTAN 13.4

Pergerakan Harga Purata Tanah Padi di Kelantan  
Average Price Movements of Paddy Land in Kelantan



# PERLIS





# PERLIS

## GAMBARAN KESELURUHAN

Aktiviti pasaran negeri ini menyaksikan peningkatan yang memberangsangkan pada tahun 2022. Tempoh kajian mencatat 4,034 transaksi dengan jumlah nilai RM605.54 juta, iaitu peningkatan 46.3% dalam bilangan dan 49.2% dalam nilai transaksi berbanding dengan tahun 2021.

Subsektor pertanian terus mendahului transaksi keseluruhan dengan 52.3%, diikuti oleh subsektor kediaman (33.6%), tanah pembangunan dan lain (8.7%), perdagangan (4.8%) dan industri (0.6%). Aktiviti pasaran menunjukkan trend menaik bagi keseluruhan negeri. Subsektor industri mengalami pertumbuhan yang paling ketara (283.3%), diikuti tanah pembangunan dan lain (76.8%), perdagangan (66.7%), kediaman (55.7%) dan pertanian (34.7%). Sejalan dengan itu, trend yang hampir sama juga dilihat dari segi nilai.

## OVERVIEW

The state's property market activity saw an encouraging increase in 2022. The review period registered 4,034 transactions with a total value of RM605.54 million, increased by 46.3% in volume and 49.2% in value as compared to 2021.

Agriculture sub-sector continued to dominate the overall transactions with 52.3%, followed by residential (33.6%), development land and others (8.7%), commercial (4.8%) and industrial (0.6%) sub-sectors. Market activity shows an upward trend across the entire state. Industrial subsector experienced highest growth (283.3%), followed by development land and others (76.8%), commercial (66.7%), residential (55.7%) and agriculture (34.7%). Correspondingly, similar trend was observed in terms of value.

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Chart 14.1

Volume of Property Transactions 2018 – 2022

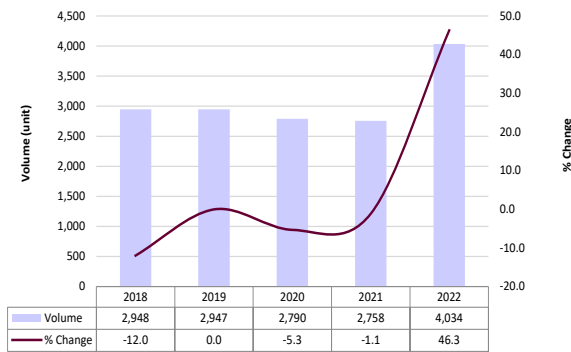


Chart 14.2

Value of Property Transactions 2018 – 2022

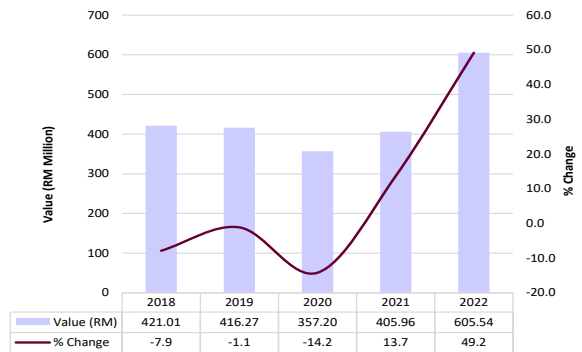


Chart 14.3

Contribution to Volume by Sub-sector 2022

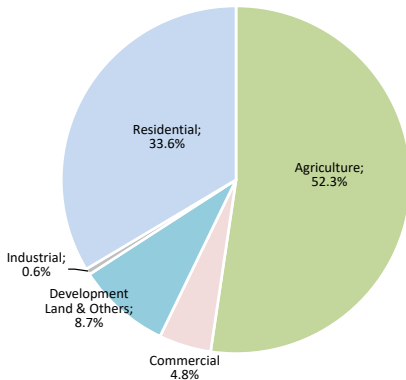
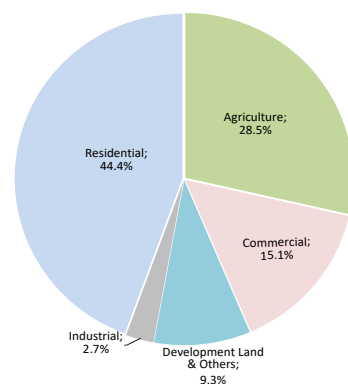


Chart 14.4

Contribution to Value by Sub-sector 2022



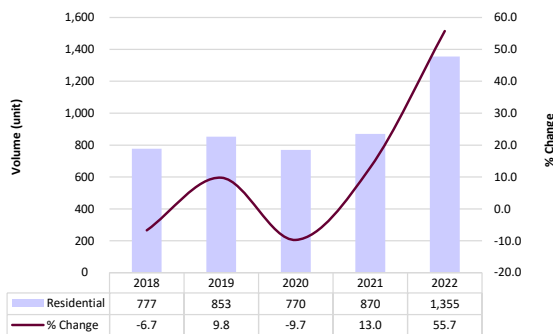
## HARTA TANAH KEDIAMAN

### Transaksi

Terdapat 1,355 transaksi bernilai RM269.03 juta, menunjukkan peningkatan 55.7% dan 30.4% dalam bilangan dan nilai berbanding 2021 (870 transaksi bernilai RM206.37 juta). Rumah teres kekal sebagai kediaman paling popular dan menguasai 37.0% daripada jumlah transaksi kediaman.

Chart 14.5

Volume of Residential Transactions 2018 – 2022



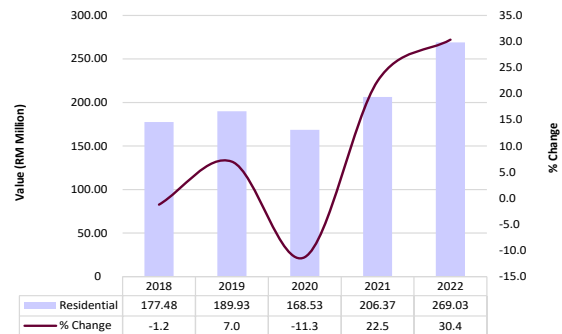
## RESIDENTIAL PROPERTY

### Transaction

There were 1,355 transactions worth RM269.03 million, indicating an increase of 55.7% and 30.4% in volume and value respectively in comparison with 2021 (870 transactions worth RM206.37 million). Terraced houses remained most popular residences, representing 37.0% of the total residential transactions.

Chart 14.6

Value of Residential Transactions 2018 – 2022



### Pelancaran Baharu

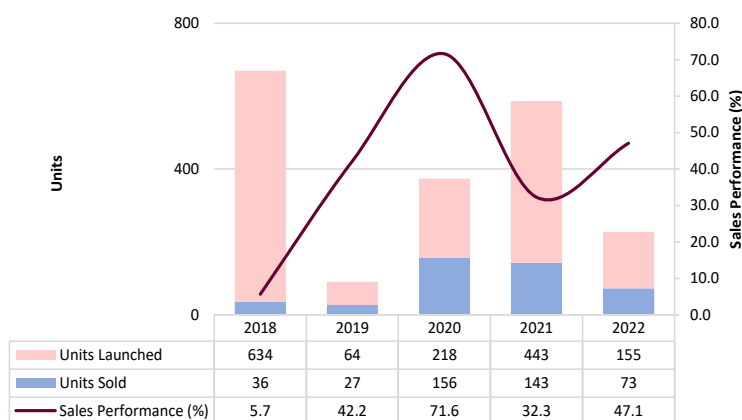
Pasaran utama mencatatkan pelancaran baharu yang lebih rendah dengan 155 unit, menurun 65.0% berbanding 2021. Walau bagaimanapun, prestasi jualan telah meningkat ke 47.1%.

### New Launches

The primary market recorded lesser number of new launches with 155 units, decreased by 65.0% as compared 2021. However, the sales performance raised to 47.1%.

Chart 14.7

New Launches and Sales Performance 2018 – 2022



## Status Pasaran

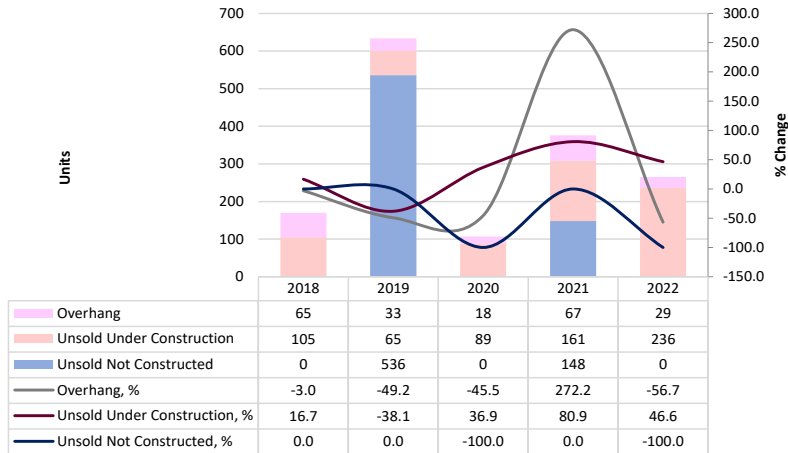
Kediaman siap dibina tidak terjual merekodkan penurunan bilangan. Terdapat 29 unit siap dibina tidak terjual bernilai RM3.01 juta pada tempoh kajian iaitu penurunan 56.7% dalam bilangan berbanding 2021. Begitu juga unit dalam pembinaan belum terjual meningkat 46.6% kepada 236 unit dan unit belum dibina belum terjual daripada 148 unit menurun ke sifar.

## Market Status

The residential overhang recorded decreasing numbers. There were 29 units worth RM3.01 million recorded in review period, equivalent to a decrease of 56.7% units compared to 2021. Similarly, the unsold under construction increased by 46.6% to 236 units and unsold not constructed decreased from 148 units to nil.

Chart 14.8

Residential Market Status 2018 – 2022



204

## Aktiviti Pembinaan

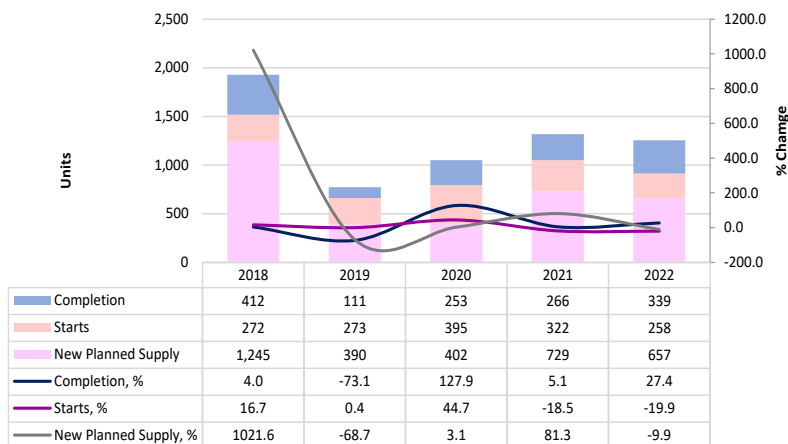
Aktiviti pembinaan subsektor menyaksikan pergerakan bercampur dalam tempoh kajian. Siap dibina mencatatkan peningkatan 27.4% kepada 339 unit. Walaubagaimanapun, penawaran baharu dirancang menurun 9.9% ke 657 unit. Selain itu, mula dibina turut menurun 19.9% kepada 258 unit.

## Construction Activity

The sub-sector's construction activities witnessed a mixed movement in the review period. Completion saw an increase of 27.4% to 339 units. However, new planned supply decreases by 9.9% to 657 units. Other than that, starts also reduced by 19.9% to 258 units.

Chart 14.9

Residential Construction Activity 2018 – 2022



## Harga dan Sewa

Harga harta kediaman adalah stabil di seluruh negeri dengan peningkatan direkodkan untuk rumah teres satu tingkat di Taman Sri Medan (21.4%), Taman 20 Fasa 2 (17.9%), Taman Sri Bakau 2 (17.4%), Taman Tengku Budriah (16.0%) dan Taman Perlis (13.7%). Kenaikan dua digit juga dilihat di rumah berkembar satu tingkat di Taman Jaya Diri. Pada 2022<sup>P</sup>, Indeks Harga Semua Rumah untuk negeri ini adalah 205.5 mata, naik 5.3% daripada 195.1 mata pada 2021. Purata Harga Semua Rumah untuk negeri ini berjumlah RM224,377, meningkat daripada RM213,033 pada 2021.

Pasaran sewa kediaman umumnya stabil dengan pergerakan positif direkodkan di beberapa kawasan. Pulangan purata sewa bagi kediaman dalam lingkungan 1.4% hingga 4.1%.

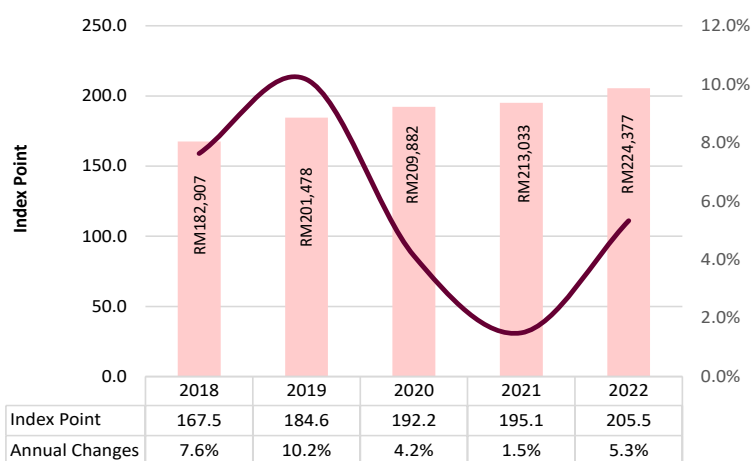
## Price and Rental

Prices of residential property were stable across the board with increases noted for single storey houses in Taman Sri Medan (21.4%), Taman 20 Fasa 2 (17.9%), Taman Sri Bakau 2 (17.4%), Taman Tengku Budriah (16.0%) and Taman Perlis (13.7%). Double digit growth was also seen for double storey semi-detached at Taman Jaya Diri. As at 2022<sup>P</sup>, the All House Price Index for the state stood at 205.5 points, up by 5.3% from 195.1 points in 2021. The average All House Price for the state stood at RM224,377, increased from RM213,033 in 2021.

The residential rental market was generally stable with positive movements recorded in several areas. Average rental yield for residential units in the range of 1.4% to 4.1%.

Chart 14.10

All House Price Index 2018 - 2022



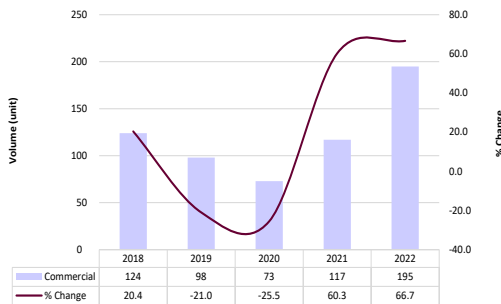
## HARTA TANAH PERDAGANGAN

### Transaksi

Terdapat 195 transaksi dicatatkan pada 2022 dengan jumlah nilai RM91.22 juta, menunjukkan kenaikan 66.7% dalam bilangan dan 50.7% bagi nilai berbanding tahun sebelumnya.

Chart 14.11

Volume of Commercial Property Transactions 2018 – 2022



### Kedai

206

### Transaksi

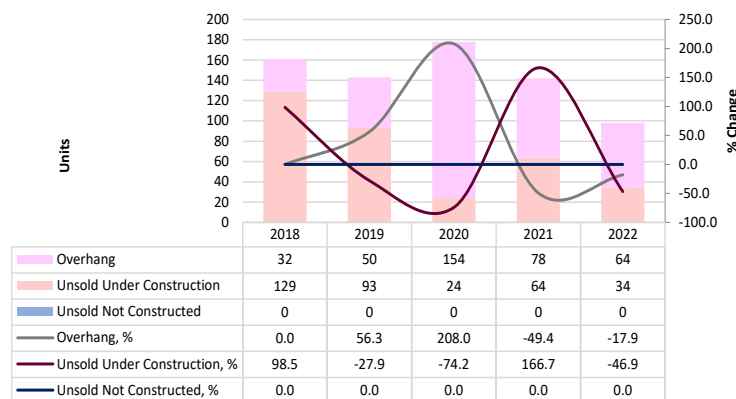
Segmen kedai mencatatkan 120 transaksi bernilai RM77.13 juta, meningkat 36.4% dan 48.9% bagi jumlah transaksi dan nilai masing-masing berbanding pada 2021 (88 transaksi bernilai RM51.81 juta). Segmen ini telah menyumbang 61.5% daripada jumlah transaksi harta perdagangan.

### Status Pasaran

Segmen kedai siap dibina tidak terjual menyusut di mana bilangannya berkurang 17.9% kepada 64 unit daripada 78 unit pada tahun lepas. Selain itu, dalam pembinaan belum terjual turut menurun 46.9% kepada 34 unit (2021: 64 unit). Tiada unit belum dibina belum terjual dicatatkan di negeri ini dalam tempoh kajian.

Chart 14.13

Shop Market Status 2018 – 2022



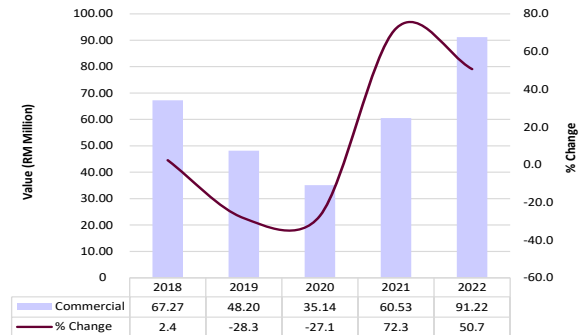
## COMMERCIAL PROPERTY

### Transaction

There were 195 transactions recorded in 2022 with a total value of RM91.22 million, indicating an increase of 66.7% in volume and 50.7% in value as compared to previous year.

Chart 14.12

Value of Commercial Property Transactions 2018 – 2022



### Shop

### Transaction

Shop segment recorded 120 transactions worth RM77.13 million, increased by 36.4% and 48.9% in volume and value respectively as compared to 2021 (88 transactions worth RM51.81 million). It contributed 61.5% of the total commercial property transactions volume.

### Market Status

The shop segment's overhang eased as the numbers decreased 17.9% to 64 units from 78 units in previous year. Other than that, unsold under construction also decreased 46.9% to 34 units (2021: 64 units). There was no unsold not constructed unit recorded in the state within the review period.

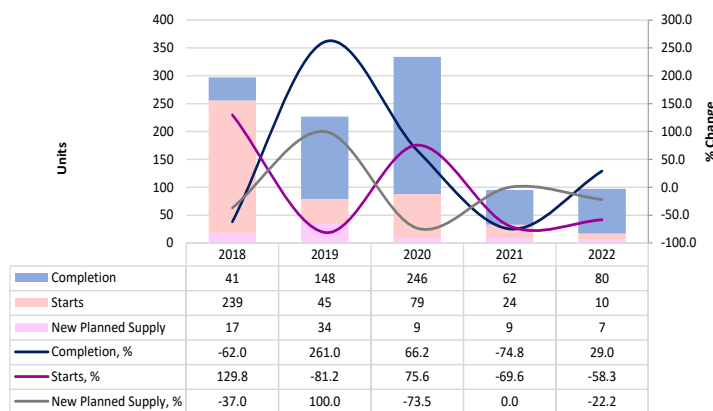
## Aktiviti Pembinaan

Aktiviti pembinaan bagi segmen kedai adalah perlahan. Siap dibina meningkat 29.0% kepada 80 unit (2021: 62 unit) manakala mula dibina menurun 58.3% kepada 10 unit (2021: 24 unit). Bilangan penawaran baharu dirancang menurun kepada tujuh unit dalam tempoh kajian.

## Construction Activity

Construction activities for shop's segment softened. Completion rose 29.0% to 80 units (2021: 62 unit) meanwhile starts dropped by 58.3% to 10 units (2021: 24 units). New planned supply dropped to seven units in the review period.

**Chart 14.14**  
Shop Construction Activity 2018 – 2022



## HARTA TANAH PERTANIAN

### Transaksi

Prestasi subsektor pertanian mencatatkan peningkatan. Terdapat 2,111 transaksi bernilai RM172.84 juta, mencakupi 52.3% daripada jumlah transaksi keseluruhan harta tanah. Aktiviti pasarannya menunjukkan peningkatan 34.7% dalam bilangan dan 42.2% dalam nilai berbanding 2021.

Mengikut jenis, tanah padi menguasai 63.9% daripada jumlah transaksi keseluruhan pertanian negeri ini, diikuti tanah kosong (24.2%), kebun getah (5.7%), tanah dusun (5.2%) dan lain-lain (1.0%).

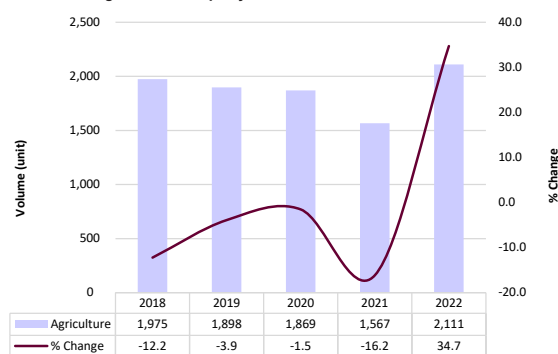
## AGRICULTURE PROPERTY

### Transaction

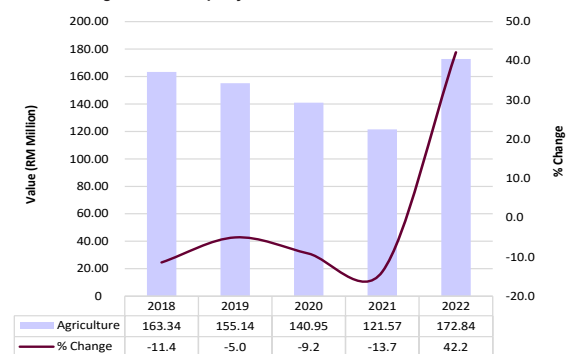
The agriculture sub-sector's performance recorded an improvement. There were 2,111 transactions worth RM172.84 million, accounting for 52.3% of the total property transactions. Its market activity indicated an increase of 34.7% in volume and 42.2% in value in comparison with 2021.

By type, paddy land dominated 63.9% of the state's total agriculture transactions, followed by vacant land (24.2%), rubber (5.7%), rubber (5.2%) and others (1.0%).

**Chart 14.15**  
Volume of Agriculture Property Transactions 2018 – 2022



**Chart 14.16**  
Value of Agriculture Property Transactions 2018 – 2022



## Harga

Harga harta pertanian secara keseluruhan stabil dengan pergerakan menaik direkodkan di beberapa kawasan. Pergerakan yang ketara dilihat bagi tanah padi di Jalan Guar Jentik (19.3%) dan Jalan Jejawi – Beseri (26.8%).

## Price

*Prices of agriculture subsector were overall stable with upward movements recorded in certain locations. Significant increments were observed for paddy land at Jalan Guar Jentik (19.3%) and Jalan Mata Jejawi – Beseri (26.8%).*

## PROSPEK 2023

Aktiviti pasaran negeri dijangka akan bertahan dengan pergerakan positif disokong oleh pelbagai inisiatif kerajaan dan projek pembangunan yang dilaksanakan.

## 2023 OUTLOOK

*The state's property market activity is expected to be resilient with positive movement backed by various government's initiatives and development projects implemented.*

## 14.1 Infrastructure Development

**Table 14.1: Infrastructure Projects**

| No. | Infrastructure                          | Description  | Current Development Status                                       |
|-----|---|--|--|
| 1.  | Perlis Inland Port – Bonded Road (CVIA) | <ul style="list-style-type: none"><li>- Location: Padang Besar/ Chuping, Perlis</li><li>- Land area: 2,482 acres</li><li>- Project cost/ Estimating Cost: RM103.82 million</li><li>- Developer: The Northern Implementation Authority (NCIA)</li><li>- Descriptions: Bonded Road and construction in process with 5% completed.</li></ul>  | Under construction and expected to be completed in February 2024 |
| 2.  | Sanglang Integrated Jetty               | <ul style="list-style-type: none"><li>- Location: Sanglang, Perlis</li><li>- Land area: 203 acres</li><li>- Project Cost/ Estimating Cost: RM1.8 billion.</li><li>- Developer: Mutiara Perlis Sdn. Bhd.</li><li>- Descriptions: Listed in the NCER Strategic Development Plan by Northern Corridor Implementation Authority.</li><li>- Components:<ul style="list-style-type: none"><li>• Cargo &amp; Container Terminal (Nucleus)</li><li>• Ships Repair and Overhaul (MRO) Maintenance Centre</li><li>• Cruise ship terminal</li><li>• Free Trade Zone (FTZ)</li></ul></li></ul> | Proposal Stage   |
| 3.  | Kangar Sentral                          | <ul style="list-style-type: none"><li>- Location: Seriab, Perlis</li><li>- Land area: 5.41 acres</li><li>- Project Cost/ Estimating Cost: RM32 million</li><li>- Descriptions: A new integrated bus terminal with facilities for the public such as food stalls, waiting area, public toilet and more. Construction in process with 20% completed.</li></ul>   | Under construction and expected to be completed in April 2023    |

## 14.2 Mega Project

**Table 14.2: Development Projects**

| No. | Infrastructure                              | Description  | Current Development Status                                    |
|-----|---|--|---|
| 1.  | Chuping Valley Industrial Area (CVIA)       | <ul style="list-style-type: none"> <li>- Location: Chuping, Perlis</li> <li>- Land area:</li> <li>- Phase 1: 440 acres (State lands)</li> <li>- Phase 2: 2,042 acres (State lands)</li> <li>- Development Cost: RM200.98 million (Phase 1)</li> <li>- Developer: The Northern Corridor Implementation Authority (NCIA)</li> <li>- Descriptions: Phase 1: 2 – new commercial plot, detached factory and green manufacturing. Construction in progress with 90% completion.</li> </ul> | Under construction  |
| 2.  | Pavilion Padang Besar                       | <ul style="list-style-type: none"> <li>- Location: Padang Besar, Perlis</li> <li>- Land area: 9.855 acres</li> <li>- Gross Development Value: RM30.3 million</li> <li>- Developer: PZS Development Sdn. Bhd.</li> <li>- Descriptions: The project comprises 11 blocks of building containing shop lots, food outlets and parking spaces. Construction in progress with 90% completion.</li> </ul>  | Under construction  |
| 3.  | Plazaria Padang Besar                       | <ul style="list-style-type: none"> <li>- Location: Padang Besar, Perlis</li> <li>- Land area: 0.577 acres</li> <li>- Gross Development Value: RM5.83 million</li> <li>- Developer: PENS Holding Sdn. Bhd.</li> <li>- Descriptions: The project comprises 88 units of shops and kiosk, pedestrian walkway, open space, toilet, surau, management office and public facilities. Construction in progress with 55% completion.</li> </ul>   | Under construction and expected to be completed in March 2023 |
| 4.  | Kangar Jaya Mall (C-Mart 3)                 | <ul style="list-style-type: none"> <li>- Location: Lot 20683, Mukim Seriab, Bandar Baru Kangar Jaya, Perlis.</li> <li>- Land area: 5.0818 Hektar</li> <li>- Developer: C-Mart 3 Sdn. Bhd.</li> <li>- Descriptions:</li> <li>- The construction of a 3 storey supermarket consisting of a multi-storey car park, a theatre, a multi-purpose hall and other facilities. Construction in progress with 20% completion.</li> </ul>   | Under construction  |
| 5.  | Chuping Agro Valley – Integrated Dairy Farm | <ul style="list-style-type: none"> <li>- Location: Chuping, Perlis</li> <li>- Land area: 3,258 hectares</li> <li>- Investment Value: RM2.0 billion</li> <li>- Developer: FGV Holdings Bhd &amp; FELCRA</li> <li>- Descriptions:</li> <li>- Consists of 2,800 hectares corn field, 300 hectares cattle farm and milking parlor and 30 hectares milk factory. Listed in the NCER Strategic Development Plan by Northern Corridor Implementation Authority</li> </ul>                   | Proposal  |

## 14.3 State Government Policy and Initiative

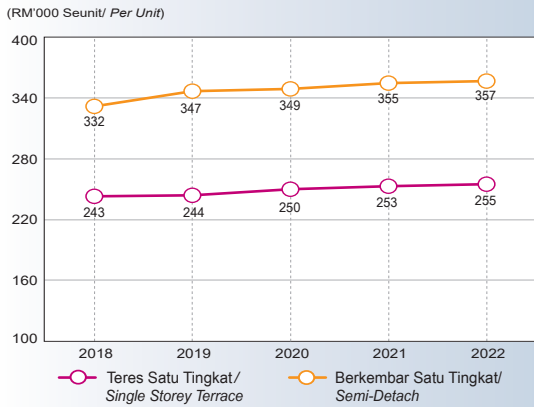
**Table 14.3: State Government Policy and Initiative**

| Nos. | Policy                                  | Details   |
|------|---|---|
| 1.   | Amendment of the Perlis Land Rules 1987 | Amendment of the Perlis Land Rules 1987 is in the process of revising rates and service fees in Perlis. |



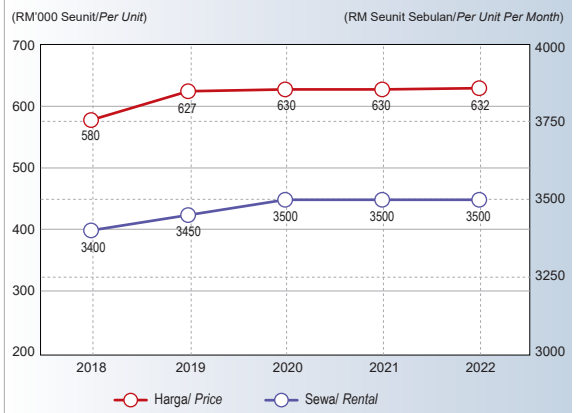
### PERLIS 14.1

Pergerakan Harga Purata Harta Kediaman di Kangar  
Average Price Movements of Residential Property in Kangar



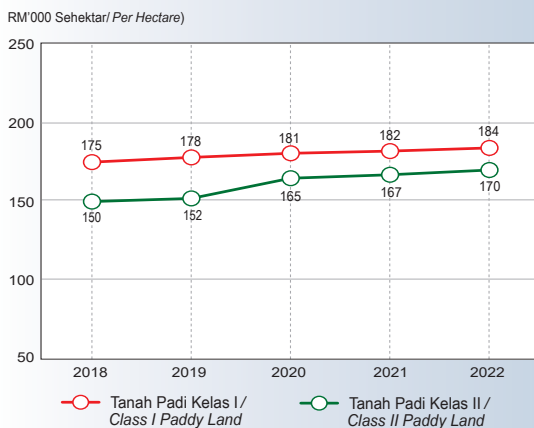
### PERLIS 14.2

Pergerakan Harga dan Sewa Purata Rumah Kedai Dua Tingkat di Kangar  
Average Price and Rental Movements of Double Storey Shop in Kangar



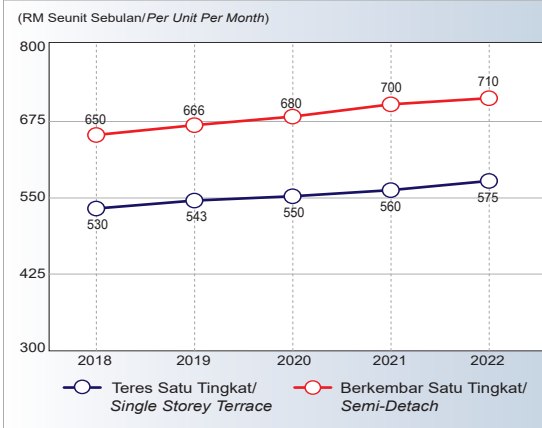
### PERLIS 14.3

Pergerakan Harga Purata Tanah Padi di Perlis  
Average Price Movements of Paddy Land in Perlis

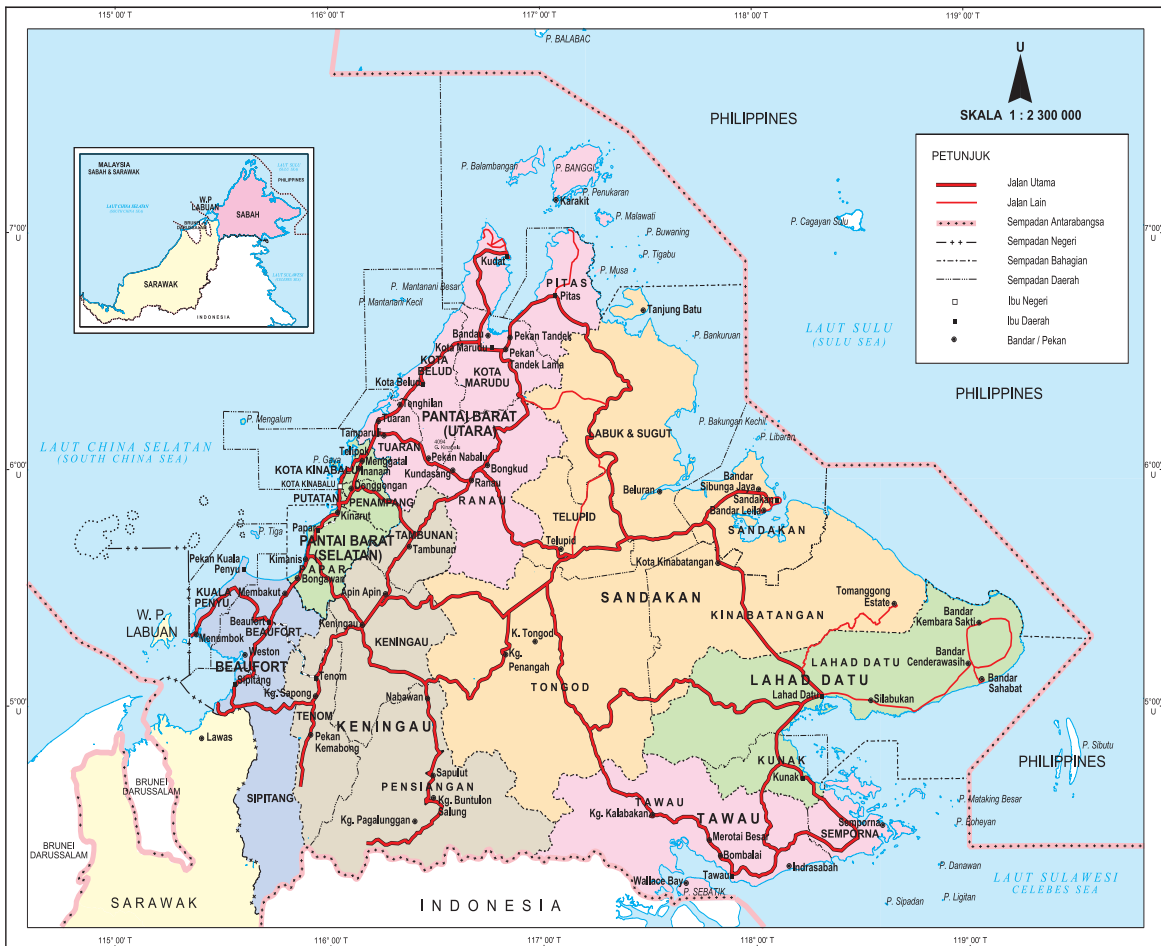


### PERLIS 14.4

Pergerakan Sewaan Purata Harta Kediaman di Kangar  
Average Rental Movements of Residential Property in Kangar



# SABAH



# SABAH

## GAMBARAN KESELURUHAN

Pasaran harta tanah negeri adalah memberangsangkan pada 2022 berdasarkan jumlah bilangan dan nilai transaksi yang tertinggi berbanding prestasi lima tahun lepas. Tempoh kajian mencatatkan 11,137 transaksi dengan jumlah nilai RM5.80 bilion, meningkat 39.5% dalam bilangan dan 37.5% dalam nilai (2021: 7,985 transaksi bernilai RM4.22 bilion). Subsektor kediaman terus mendahului pasaran keseluruhan, membentuk 52.0% daripada transaksi negeri, diikuti oleh subsektor pertanian (26.0%), perdagangan (11.3%), tanah pembangunan dan lain (7.3%) dan industri (3.3%).

Aktiviti pasaran bagi semua subsektor berada pada trend menaik. Subsektor pertanian mendahului kenaikan dengan 105.3% diikuti subsektor industri (62.1%), tanah pembangunan dan lain (45.3%), perdagangan (29.0%) dan kediaman (20.5%). Sejalan dengan itu, trend meningkat yang sama juga digambarkan dari segi nilai.

## OVERVIEW

The state's property market was encouraging in 2022 indicated by the highest volume and value of transaction as compared to last five year's performance. The review period registered 11,137 transactions with a total value of RM5.80 billion, increased by 39.5% in volume and 37.5% in value (2021: 7,985 transactions worth RM4.22 billion). Residential sub-sector continued to lead the overall market, accounting for 52.0% of the state's volume transactions, followed by agriculture (26.0%), commercial (11.3%), development land and others (7.3%) and industrial (3.3%) sub-sectors.

Market movements across all sub-sectors were on the uptrend. Agriculture sub-sector led the uptrend with 105.3% followed by industrial (62.1%), development land and others (45.3%), commercial (29.0%) and residential sub-sectors (20.5%). Correspondingly, similar upward trend was depicted in term of value.

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Chart 15.1

Volume of Property Transactions 2018 – 2022

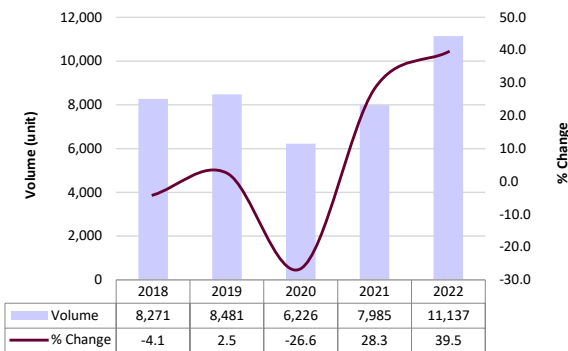


Chart 15.2

Value of Property Transactions 2018 – 2022

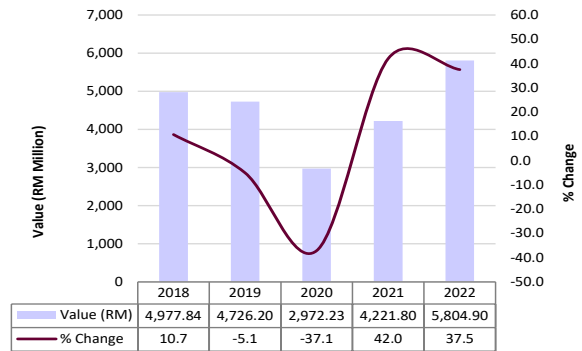


Chart 15.3

Contribution to Transaction Volume by Sub-sector 2022

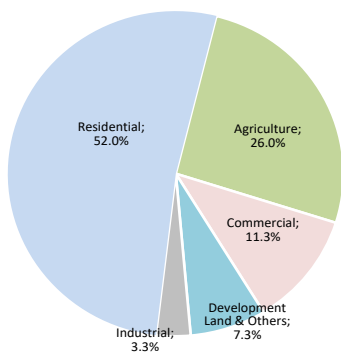
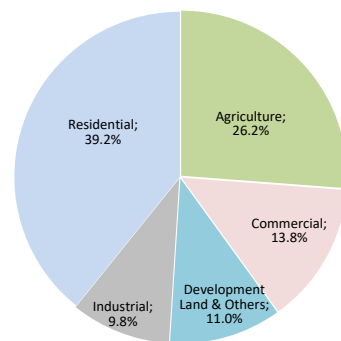


Chart 15.4

Contribution to Transaction Value by Sub-sector 2022



## PROMINENT SALES

**Table 15.1**

### Summary of Prominent Sales Recorded in 2022

| No.                     | Property                       | Location/Mukim   | Transaction Year | Consideration Price (RM) |
|-------------------------|--------------------------------|--|------------------|--------------------------|
| <b>HOTEL</b>            |                                |  |                  |                          |
| 1.                      | Hotel Sixty3                   | Jalan Gaya, Kota Kinabalu, Sabah                                     | 2022             | RM50,000,000             |
| <b>DEVELOPMENT LAND</b> |                                |  |                  |                          |
| 2.                      | Residential Land (40,470 s.m.) | Jalan Timur, Tawau, Sabah  | 2022             | RM12,000,000             |
| <b>ESTATE LAND</b>      |                                |  |                  |                          |
| 3.                      | Estate Land (49.89 hectares)   | Sungai Manjang, Batu 38, Off Jalan Labuk, Sandakan, Sabah            | 2022             | RM4,750,000              |
| 4.                      | Estate Land (98.30 hectares)   | Segaliud Lokan, Off Jalan Sandakan - Lahad Datu, Kinabatangan, Sabah | 2022             | RM6,070,000              |
| 5.                      | Estate Land (242.80 hectares)  | Sungai Lingkabau, Jalan Sapi Nangoh – Paitan, Labuk Sugut, Sabah     | 2022             | RM16,800,000             |
| 6.                      | Estate Land (787.80 hectares)  | Batu 90, Off Jalan Ranau – Telupid Labuk Sugut, Sabah                | 2022             | RM62,290,000             |
| 7.                      | Estate Land (76.40 hectares)   | Maraba, Jalan Beaufort – Weston, Beaufort, Sabah                     | 2022             | RM5,660,000              |
| 8.                      | Estate Land (80.50 hectares)   | Ulu Kalumpang, Off Jalan Kunak – Lahad Datu                          | 2022             | RM4,520,000              |
| 9.                      | Estate Land (123.80 hectares)  | Jeroco, Lahad Datu, Sabah  | 2022             | RM9,770,000              |
| 10.                     | Estate Land (87.54 hectares)   | Jeroco, Lahad Datu, Sabah  | 2022             | RM6,270,000              |
| 11.                     | Estate Land (396.50 hectares)  | Ulu Segama, Lahad Datu   | 2022             | RM31,350,000             |
| 12.                     | Estate Land (95.57 hectares)   | Kampung Rosob, Kota Marudu – Pitas, Pitas, Sabah                     | 2022             | RM2,330,000              |
| 13.                     | Estate Land (190.60 hectares)  | Ulu Tingkayu, Jalan Tawau - Lahad Datu, Kunak, Sabah                 | 2022             | RM11,300,000             |
| 14.                     | Estate Land (48.16 hectares)   | Kampung Pengkalan Abai, Kota Belud, Sabah                            | 2022             | RM950,000                |
| 15.                     | Estate Land (40.36 hectares)   | Tingkayu 4, Kunak  | 2022             | RM3,590,000              |
| 16.                     | Estate Land (203.10 hectares)  | Sungai Tungud, Off Jalan Sapi Nangoh - Paitan                        | 2022             | RM14,050,000             |
| 17.                     | Estate Land (41.12 hectares)   | Segama, Lahad Datu   | 2022             | RM3,657,000              |
| 18.                     | Estate Land (200.24 hectares)  | Segama, Off Jalan Lahad Datu - Sandakan                              | 2022             | RM18,307,000             |
| 19.                     | Estate Land (40.24 hectares)   | Kampung Purutan, Tambunan  | 2022             | RM2,187,000              |
| 20.                     | Estate Land (80.45 hectares)   | Kampung Purutan, Tambunan  | 2022             | RM4,373,000              |
| 21.                     | Estate Land (199.30 hectares)  | Jalan Purutan – Jalan Rompon, Tambunan                               | 2022             | RM3,938,000              |
| 22.                     | Estate Land (132.20 hectares)  | Brantian, Tawau  | 2022             | RM7,510,000              |
| 23.                     | Estate Land (75.66 hectares)   | Kalumpang, Tawau   | 2022             | RM5,982,000              |
| 24.                     | Estate Land (77.77 hectares)   | Kalumpang, Tawau   | 2022             | RM2,850,000              |
| 25.                     | Estate Land (40.41 hectares)   | Off Jalan Kunak – Lahad Datu   | 2022             | RM2,400,000              |

| No. | Property                       | Location/Mukim   | Transaction Year | Consideration Price (RM) |
|-----|--------------------------------|--|------------------|--------------------------|
| 26. | Estate Land (914.20 hectares)  | Kampung Sugiang Baru, Off Jalan Tenom - Kemabong               | 2022             | RM7,566,000              |
| 27. | Estate Land (101.08 hectares)  | Ulu Bongawan, Off Jalan Ulu Bongawan                           | 2022             | RM2,500,000              |
| 28. | Estate Land (40.49 hectares)   | Kampung Katalirus, Nabawan, Jalan Karamatol, Pensiangan        | 2022             | RM730,000                |
| 29. | Estate Land (202.55 hectares)  | Batu 32, Jalan Labuk   | 2022             | RM15,015,000             |
| 30. | Estate Land (56.53 hectares)   | KM 61, Segaliud, Off Jalan Sandakan - Lahad Datu               | 2022             | RM2,900,000              |
| 31. | Estate Land (148.93 hectares)  | Segaliud Lokan, Off Jalan Sandakan - Lahad Datu                | 2022             | RM14,067,000             |
| 32. | Estate Land (152.25 hectares)  | Segaliud Lokan, Off Jalan Sandakan - Lahad Datu                | 2022             | RM14,381,000             |
| 33. | Estate Land (130.00 hectares)  | Segaliud Lokan, Off Jalan Sandakan - Lahad Datu                | 2022             | RM8,840,000              |
| 34. | Estate Land (408.82 hectares)  | Ladang Sabdi, Pegagau  | 2022             | RM45,000,000             |
| 35. | Estate Land (623.88 hectares)  | Ladang Muul, Jalan Buit Quoin, Tawau                           | 2021             | RM84,925,000             |
| 36. | Estate Land (3007.30 hectares) | Segaliud Lokan, Off Jalan Sandakan - Lahad Datu                | 2021             | RM228,000,000            |
| 37. | Estate Land (80.94 hectares)   | Batu 53, Jalan Labuk, Off Jalan Sandakan - Telupid Labuk Sugut | 2021             | RM4,658,000              |
| 38. | Estate Land (809.40 hectares)  | Sungai Lingkabau, Jalan Paitan - Sapi Nangoh, Labuk Sugut      | 2021             | RM15,000,000             |

## HARTA TANAH KEDIAMAN

### Transaksi

Terdapat 5,792 transaksi bernilai RM2.28 bilion yang dicatat dalam tempoh kajian, meningkat sebanyak 20.5% dalam bilangan dan 17.3% dalam nilai berbanding dengan 2021 (4,805 transaksi bernilai RM1.94 bilion). Rumah teres kekal sebagai jenis harta tanah utama, membentuk 39.1% (2,265 unit) daripada jumlah transaksi kediaman

## RESIDENTIAL PROPERTY

### Transaction

There were 5,792 transactions worth RM2.28 billion recorded in the review period, increased by 20.5% in volume and 17.3% in value as compared to 2021 (4,805 transactions worth RM1.94 billion). Terraced houses remained the leading property type, accounting for 39.1% (2,265 units) of the total residential transactions.

Chart 15.5

Volume of Residential Property Transactions 2018 – 2022

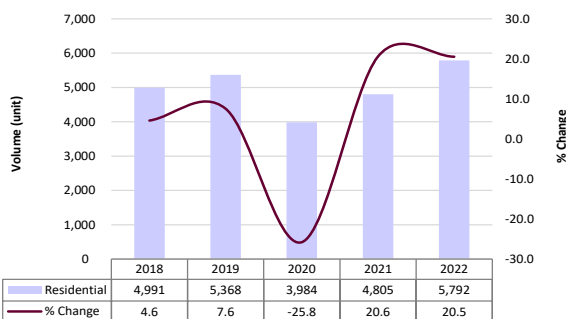
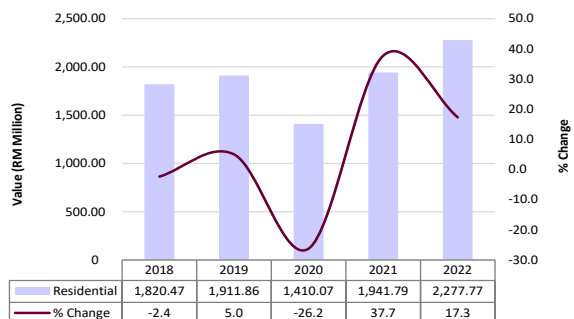


Chart 15.6

Value of Residential Property Transactions 2018 – 2022



## Pelancaran Baharu

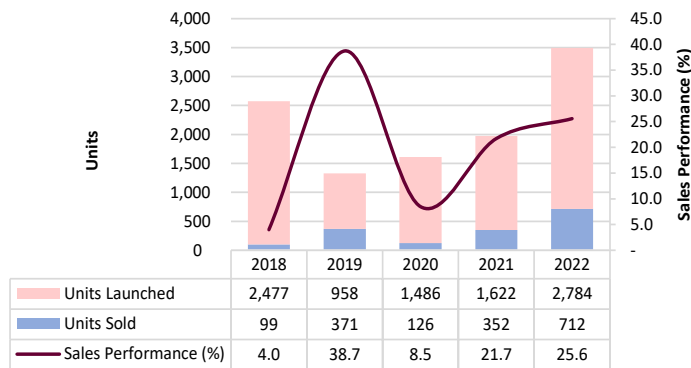
Pasaran utama menyaksikan lebih banyak pelancaran baharu dengan 2,784 unit, meningkat 71.6% berbanding 1,622 unit yang dilancarkan pada 2021. Prestasi penjualan untuk pelancaran baharu direkodkan lebih tinggi sedikit pada 25.6% berbanding 2021 (21.7%). Pangsapuri dan kondominium membentuk sebahagian besar daripada pelancaran baharu, menyumbang 55.7% (1,550 unit) daripada keseluruhan.

## New Launches

The primary market saw more number of new launches with 2,784 units, increased by 71.6% compared to 1,622 units launched in 2021. Sales performance for new launches recorded slightly higher at 25.6% compared to 2021 (21.7%). Apartments and condominiums formed the bulk of the new launches, accounting for 55.7% (1,550 units) of the total.

Chart 15.7

New Launches and Sales Performance 2018 – 2022



## Status Pasaran

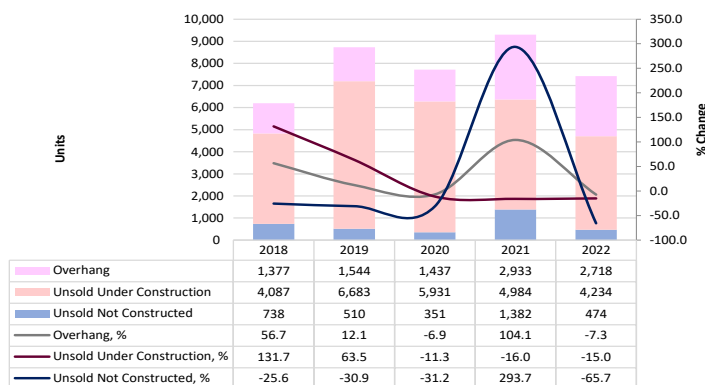
Situasi kediaman siap dibina tidak terjual dan belum terjual memberansangkan kerana penurunan unit direkodkan dalam tempoh kajian.

## Market Status

The residential overhang and unsold situation was encouraging as less units recorded in the review period.

Chart 15.8

Residential Market Status 2018 – 2022



## Aktiviti Pembinaan

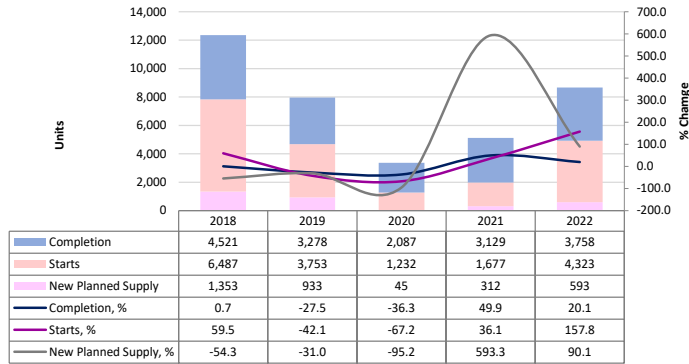
Segmen kediaman kekal aktif. Sehingga akhir tahun 2022, terdapat 235,195 unit kediaman sedia ada dengan 20,311 unit lagi dalam penawaran akan datang dan 26,871 unit dalam penawaran dirancang.

## Construction Activity

The residential segment remained active. As at end-2022, there were 235,195 existing residential units with another 20,311 units in the incoming supply and 26,871 units in the planned supply.

Chart 15.9

Residential Construction Activity 2018 – 2022



**Harga dan Sewa**

Harga harta tanah kediaman secara keseluruhan merekodkan pergerakan bercampur-campur. Mengikut jenis, rumah teres dua tingkat di beberapa skim di Kota Kinabalu meningkat antara 3.4% hingga 10.6%. Segmen bertingkat tinggi menyaksikan prestasi bercampur-campur secara keseluruhan. Sehingga 2022<sup>P</sup>, Indeks Harga Semua Rumah untuk negeri ini berada pada 191.3 mata, naik 4.4% daripada 183.3 mata pada 2021. Purata Harga Semua Rumah untuk negeri pada 2022<sup>P</sup> berada pada RM490,607, meningkat daripada RM469,970 pada 2021.

**Price and Rental**

Price of residential property recorded mixed movement across the board. By type, double storey terraced houses at several schemes in Kota Kinabalu increased between 3.4% and 10.6%. The high-rise segment witnessed mixed performance across the board. As at 2022<sup>P</sup>, the All House Price Index for the state stood at 191.3 points, increased by 4.4% from 183.3 points in 2021. The average All House Price for the state as at 2022<sup>P</sup> stood at RM490,607, increased from RM469,970 in 2021.

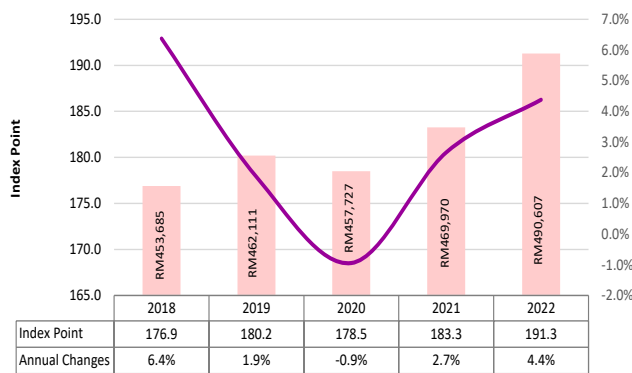
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Pasaran sewa secara amnya stabil dengan pergerakan menaik direkodkan di lokasi yang baik. Purata pulangan sewa kediaman berada dalam lingkungan antara 1.3% dan 8.0%.

The rental market was generally stable with upward movements recorded in favourable locations. The average gross yields for residential is in the range of 1.3% and 8.0%.

Chart 15.10

All House Price Index 2018 – 2022



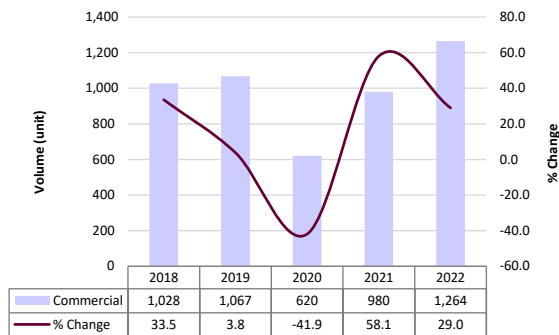
## HARTA TANAH PERDAGANGAN

### Transaksi

Prestasi subsektor perdagangan terus mengukuh pada 2022. Terdapat 1,264 transaksi direkodkan dengan jumlah nilai RM803.82 juta (2021: 980 transaksi bernilai RM671.50 juta). Aktiviti pasaran menaik 29.0% dan 19.7% masing-masing dalam bilangan dan nilai berbanding 2021.

Chart 15.11

Volume of Commercial Property Transactions 2018 – 2022



### Shop

#### Transaksi

Segmen kedai terus mencatat aktiviti pasaran yang kukuh pada 2022 dengan 679 transaksi bernilai RM460.43 juta (2021: 504 transaksi bernilai RM315.87 juta). Bilangan dan nilai transaksi masing-masing meningkat 34.7% dan 45.8%. Kedai dua hingga dua setengah tingkat menyumbang 54.9% (373 unit) daripada jumlah transaksi kedai.

#### Status Pasaran

Situasi kedai siap dibina tidak terjual kurang memberangsangkan dalam tempoh kajian. Bagaimanapun, unit kedai dalam pembinaan bertambah baik. Negeri ini tidak dibebankan dengan unit kedai belum dibina belum terjual pada 2022.

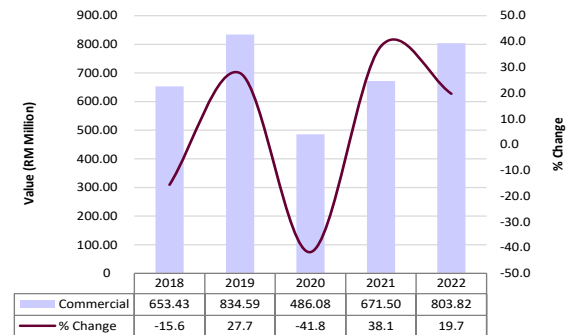
## COMMERCIAL PROPERTY

### Transaction

The performance of commercial sub-sector continued to strengthen in 2022. There were 1,264 transactions recorded with a total value of RM803.82 million (2021: 980 transactions worth RM671.50 million). This market activity increased by 29.0% and 19.7% in volume and value respectively as compared to 2021.

Chart 15.12

Value of Commercial Property Transactions 2018 – 2022



### Shop

#### Transaction

Shop segment continued to strengthen in 2022 with 679 transactions worth RM460.43 million (2021: 504 transactions worth RM315.87 million). Volume and value of transactions increased by 34.7% and 45.8% respectively. Two to two and a-half story shop contributed 54.9% (373 units) of the total shop transactions.

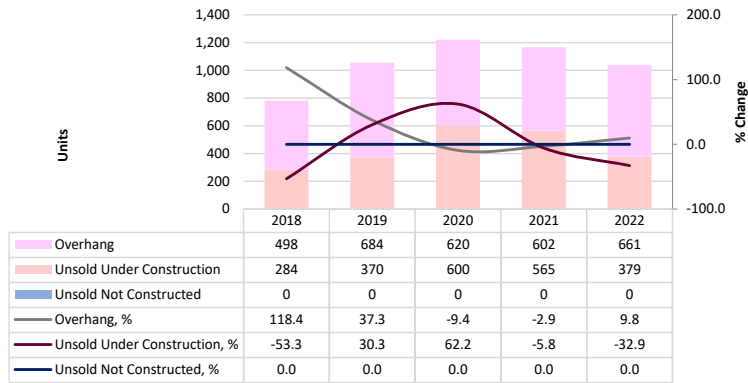
#### Market Status

The shop overhang situation was less promising in the review period. However, unsold under construction improved. The state was unencumbered with unsold not constructed shop units in 2022.



Chart 15.13

Shop Market Status 2018 – 2022



**Aktiviti Pembinaan**

Aktiviti pembinaan berada dalam mod rendah. Sehingga akhir 2022, terdapat 32,866 unit kedai sedia ada dengan 1,996 unit lagi dalam penawaran akan datang dan 2,366 unit dalam penawaran dirancang.

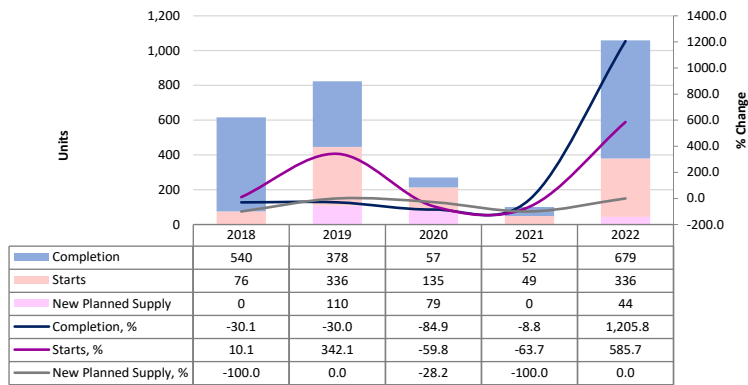
**Construction Activity**

Construction activities was on a low mode. As at end-2022, there were 32,866 units existing shops with another 1,996 units in the incoming supply and 2,366 units in the planned supply.

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Chart 15.14

Shop Construction Activity 2018 – 2022



**HARTA TANAH PERTANIAN**

**Transaksi**

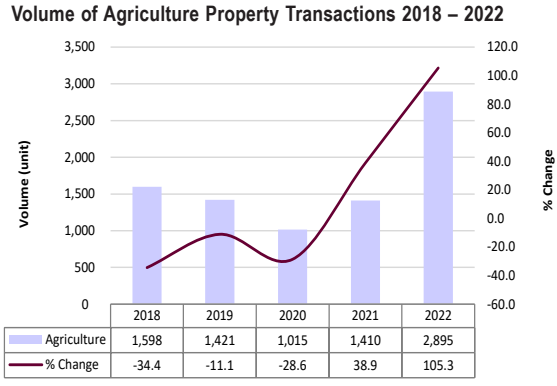
Subsektor pertanian mencatatkan kenaikan yang ketara pada 2022. Terdapat 2,895 transaksi direkodkan dengan jumlah nilai RM1.52 bilion (2021: 1,410 transaksi bernilai RM691.87 juta). Aktiviti pasaran ini masing-masing menunjukkan peningkatan lebih sekali ganda pada 105.3% dan 119.9% dalam bilangan dan nilai disebabkan pertambahan transaksi tanah ladang berbanding tahun 2021. Negeri ini merekodkan 36 transaksi tanah estet, yang merupakan bilangan tertinggi dalam negara.

**AGRICULTURE PROPERTY**

**Transaction**

Agriculture sub-sector recorded a significant increase in 2022. There were 2,895 transactions recorded with a total value of RM1.52 billion (2021: 1,410 transactions worth RM691.87 million). This market activity indicated more than one-fold increase of 105.3% and 119.9% in volume and value respectively due to the rising estate transactions compared to 2021. The state recorded 36 estate land transactions, the highest number in the country.

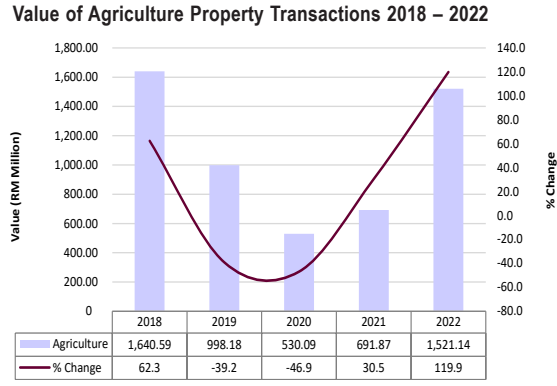
**Chart 15.15**



**Harga**

Harga harta tanah pertanian secara amnya stabil di seluruh negeri kecuali tanah kosong lapisan kedua di Jalan Keningau - Sook, Jalan Biah Tengah, Keningau yang menurun sebanyak 2.6%.

**Chart 15.16**



**Price**

*Prices of agriculture property were generally stable across the state except for second layer vacant land in Jalan Keningau - Sook, Jalan Biah Tengah, Keningau which decreased by 2.6%.*

## 2023 OUTLOOK

Pasaran harta tanah negeri ini dijangka mengekalkan prestasinya disokong oleh Pelan Pembangunan Sabah Maju Jaya (Pelan SMJ) 2021-2025. Tambahan pula, penyerahan kuasa untuk meluluskan semua projek Kerajaan Persekutuan di bawah RM50 juta untuk diputuskan oleh Kerajaan Negeri akan mengembangkan lagi pasaran hartanah tempatan.

*The state's property market is expected to sustain its performance backed by the Sabah Maju Jaya Development Plan (SMJ Plan) 2021-2025. Furthermore, handing over the authority to approve all Federal Government projects under RM50 million to decide by State Government will further boost the local property market.*

## Infrastructure Development

**Table 15.2: Infrastructure Projects**

| No. | Infrastructure Project   | Description  | Current Development Status  |
|-----|--|--|---|
| 1.  | Pan Borneo Highway Sabah                                       | <p><u>Phase 1</u></p> <ul style="list-style-type: none"> <li>➤ Connecting Sindumin - Kota Kinabalu - Kudat – Ranau - Mile 32 Sandakan - Tawau and upgrading two-lane coastal road from Tuaran to Kudat.</li> <li>➤ Total length: 706 kilometres</li> </ul> <p><u>Phase 2</u></p> <ul style="list-style-type: none"> <li>➤ Connecting Tamparuli and Ranau.</li> <li>➤ Total length: 98 kilometres</li> </ul> <p><u>Phase 3</u></p> <ul style="list-style-type: none"> <li>➤ Connecting Tawau – Kalabakan – Keningau – Kimanis.</li> <li>➤ Total length: 432 kilometres</li> </ul> <ul style="list-style-type: none"> <li>- Total packages: 35 work packages.</li> <li>- Project cost: RM15.272 billion</li> </ul> | <ol style="list-style-type: none"> <li>1) The project has recorded 71% progress of 12 ongoing work packages as at December 2022.</li> <li>2) Four others package namely WP15, WP28, WP29 and WP30 had started work on November 2021.</li> <li>3) The remaining 19 packages would be done via the implementation of the Private Finance Initiative (PFI) and financing through the issuance of sukuk/bonds by DanaInfra Nasional Berhad.</li> <li>4) The whole project is expected to be fully completed in stages by 2023.</li> </ol> |
| 2.  | Trans Borneo Highway (LTB)                                     | <ul style="list-style-type: none"> <li>- To upgrade the existing road network to two highways connecting Sarawak and Sabah with Brunei Darussalam</li> <li>- Total length: 96.3 kilometres</li> <li>- The project is divided into three sections including Miri Section (4.9 kilometres), Limbang Section (57.3 kilometres) and Lawas Section (34.1 kilometres)</li> </ul>   | Proposal  |
| 3.  | Upgrading Customs, Immigration, Quarantine and Security (CIQS) | <ul style="list-style-type: none"> <li>- The project involves the upgrading of infrastructure at CIQS complexes at the Sarawak and Sabah borders.</li> <li>- The approval was given following the relocation of Indonesia's capital to Nusantara, Kalimantan.</li> <li>- Project allocation: RM1 billion</li> </ul>  | Allocation approved   |
| 4.  | Sepanggar Bay Container Port Expansion Project                 | <ul style="list-style-type: none"> <li>- Location: Sepanggar</li> <li>- Project under the Sabah Development Corridor (SDC)</li> <li>- After completed, the existing 2 berths of the port can be expanded to 3 berths, and the throughput of Sepanggar Bay Container Port will be increased from 500,000 TEUs to 875,000 TEUs per year through backfilling land yard and related supporting measures.</li> <li>- The forward will increase to 1.25 million TEUs per year.</li> <li>- Estimated project cost: RM34.3 million.</li> </ul>   | Project has commenced on 31 October 2021 and is expected to be completed in February 2025.  |

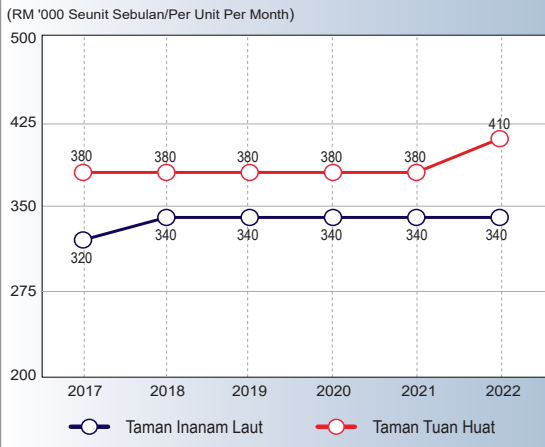
## Mega Project

**Table 15.3: Development Project**

| No. | Development Projects                          | Description   | Current Development Status   |
|-----|---|---|--|
| 1.  | Tanjung Aru Beach reclamation                 | <ul style="list-style-type: none"> <li>- The state government has approved the reclamation on its prime Tanjung Aru beach front.</li> <li>- 15-year contract to mine and dredge sand for reclamation in order to widen the beach.</li> <li>- Capacity: 153 million cubic metres of sand mined for bulk filling for reclamation projects and recreational beach.</li> </ul>  | The reclamation work started on 19 December 2022   |
| 2.  | Prince Philip Park Expansion                  | <ul style="list-style-type: none"> <li>- Location: Prince Philip Park, Kota Kinabalu</li> <li>- The size will be expanded to 100 acres, from presently 22 acres.</li> </ul>   | Proposal   |
| 3.  | SK Nexilis Copper Foil manufacturing facility | <ul style="list-style-type: none"> <li>- Location: Kota Kinabalu Industrial Park (KKIP)</li> <li>- The world's best copper foil production facilities in Malaysia.</li> <li>- Production capacity: 50,000 tons per year.</li> <li>- Land area: 40.4 hectares</li> <li>- Estimated project investment: RM4.2 billion</li> <li>- Expected to provide more than 400 job opportunities when the plant is operational.</li> </ul>  | The construction work started in 2021 and is expected to be completed in 2023  |
| 4.  | Integrated Green Steel Project                | <ul style="list-style-type: none"> <li>- Location: Sipitang Oil and Gas Industrial Park (SOGIP)</li> <li>- The plant will replace coke and coal with natural gas, and subsequently hydrogen in the future, as a reducing agent. The switch will see carbon emission drop by 70% initially and eventually by nearly 100%.</li> <li>- Land area: 180-hectares</li> <li>- Total project investment: RM19.6 billion (3 phases)</li> </ul> <p><b>Phase 1</b></p> <ul style="list-style-type: none"> <li>- Phase 1 covers multiple facilities such as an iron concentration plant, pelletising plant, hot briquetted iron (HBI) plant, as well as jetty and support facilities.</li> <li>- Capacity: 2.5 million tonnes per year of HBI.</li> <li>- Estimated project cost: RM5.77 billion</li> <li>- Expected to generate 1,752 jobs during the operation period and boosting another 8,000 in-direct job opportunities.</li> </ul> <p><b>Phase 2 &amp; Phase 3</b></p> <ul style="list-style-type: none"> <li>- Phase 2 &amp; Phase 3 will have another two sets of and direct reduced iron (DRI) and will include steelmaking, steel rolling, high-end steel processing and waste recycling, etc.</li> <li>- Capacity: 2.5 million tonnes per year</li> <li>- Phase 2 &amp; Phase 3 are expected to create 5,455 job opportunities during the operation period and boosting 30,000 in-direct job opportunities.</li> </ul> | <p>Phase 1 expected to start in the third quarter of 2023 and is expected to be completed by the last quarter of 2025.</p> <p>Upon completion of phase 1</p> |
| 5.  | Photovoltaic manufacturing plant              | <ul style="list-style-type: none"> <li>- Location: Kota Kinabalu Industrial Park (KKIP)</li> <li>- Land area: 52.7 hectares</li> <li>- Estimated project investment: RM2.0 billion</li> <li>- Expected to provide 1,800 job opportunities.</li> </ul>   | Proposal   |

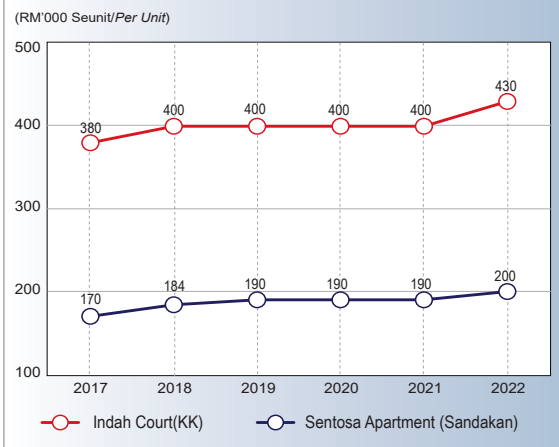
### SABAH 15.1

#### Pergerakan Harga Purata Rumah Teres di Sabah Average Price Movements of Terraced Houses in Sabah

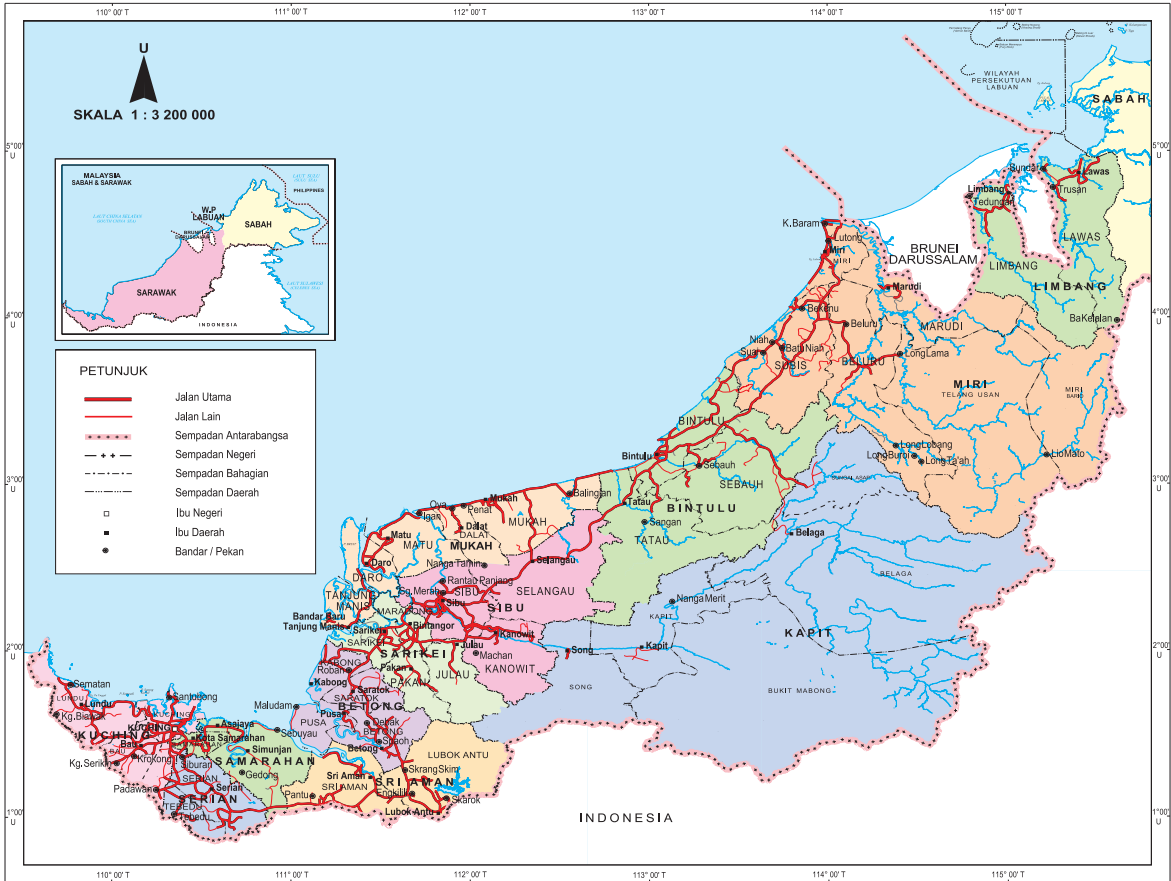


### SABAH 15.2

#### Pergerakan Harga Purata Pangsapuri di Sabah Average Price Movements of Apartment in Sabah



# SARAWAK



# SARAWAK

## GAMBARAN KESELURUHAN

Pasaran harta tanah negeri ini terus mengukuh dalam tempoh kajian ditunjukkan oleh pertumbuhan aktiviti pasaran. Aktiviti pasaran mencatat 29,520 transaksi bernilai RM9.23 bilion, meningkat 29.3% dalam bilangan dan 20.6% dalam nilai berbanding 2021 (22,828 transaksi bernilai RM7.65 bilion). Subsektor kediaman kekal sebagai subsektor utama, menguasai 42.9% bilangan daripada transaksi, diikuti dengan subsektor pertanian (37.6%), tanah pembangunan dan lain (8.8%), perdagangan (8.6%) dan subsektor industri (2.0%).

Pergerakan pasaran merentas semua subsektor berada pada trend menaik. Subsektor kediaman, perdagangan, industri, pertanian dan tanah pembangunan dan lain masing-masing meningkat 16.9%, 26.9%, 18.8%, 54.9% dan 12.7%. Sejarar dengan itu, trend meningkat yang sama juga digambarkan dari segi nilai.

## OVERVIEW

The state's property market continues to strengthen in the review period indicated by the growth in the market activity. The market activity recorded 29,520 transactions worth RM9.23 billion, increased by 29.3% in volume and 20.6% in value as compared to 2021 (22,828 transactions worth RM7.65 billion). Residential sub-sector remained the leading sub-sector, dominating 42.9% of the volume transactions, followed by the agriculture (37.6%), development land and others (8.8%), commercial (8.6%) and industrial (2.0%) sub-sectors.

Market movements across all sub-sectors were on the uptrend. Residential, commercial, industrial, agriculture and development land and others sub-sectors increased by 16.9%, 26.9%, 18.8%, 54.9% and 12.7% respectively. Correspondingly, similar upward trend was depicted in term of value.

Chart 16.1

Volume of Property Transactions 2018 – 2022

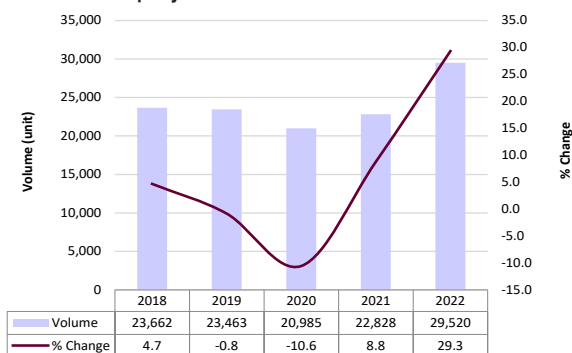


Chart 16.2

Value of Property Transactions 2018 – 2022

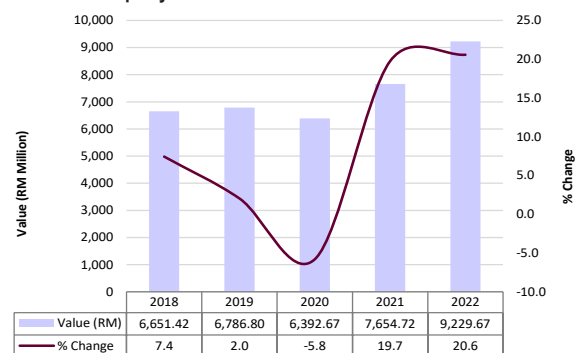


Chart 16.3

Contribution to Transaction Volume by Sub-sector 2022

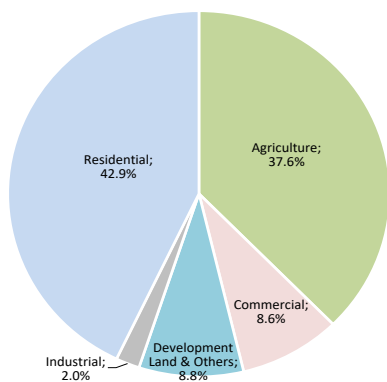
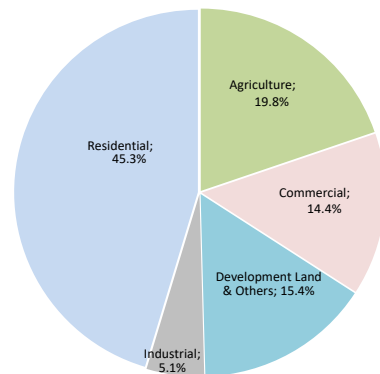


Chart 16.4

Contribution to Transaction Value by Sub-sector 2022



## PROMINENT SALES

Table 16.1

### Summary of Prominent Sales Recorded in 2022

| No.                               | Property                           | Location/Mukim   | Transaction Year | Consideration Price (RM) |
|-----------------------------------|------------------------------------|--|------------------|--------------------------|
| <b>SHOPPING COMPLEX (SC)</b>      |                                    |  |                  |                          |
| 1.                                | Aiman Mall                         | Aiman Commercial Centre, Samarahan                             | 2022             | RM30,000,000.00          |
| <b>PURPOSE-BUILT OFFICE (PBO)</b> |                                    |  |                  |                          |
| 2.                                | Wisma SEGO                         | Jalan Sultan Tengah, Kuching, Sarawak                          | 2022             | RM13,000,000             |
| <b>HOTEL</b>                      |                                    |  |                  |                          |
| 3.                                | Li Hua Hotel                       | Jalan Wawasam Sibul, Sarawak                                   | 2022             | RM8,500,000              |
| <b>DEVELOPMENT LAND</b>           |                                    |  |                  |                          |
| 4.                                | Commercial Land (59,330 s.m.)      | Batu 6, Jalan Penrissen, Kuching, Sarawak                      | 2022             | RM46,913,000             |
| 5.                                | Commercial Land (8,498 s.m.)       | Jalan Central Timur, Kuching, Sarawak                          | 2022             | RM16,000,000             |
| 6.                                | Residential Land (20,430 s.m.)     | Jalan Stephen Yong Link, Kuching, Sarawak                      | 2022             | RM10,000,000             |
| 7.                                | Residential Land (201,640 s.m.)    | Jalan Kampung Mambong, Padawan, Kuching, Sarawak               | 2022             | RM11,071,000             |
| 8.                                | Residential Land (269,660 s.m.)    | Jalan Kampung Mambong, Padawan, Kuching, Sarawak               | 2022             | RM12,661,000             |
| 9.                                | Mix Development Land (26,893 s.m.) | Off Jalan Singai, Bau, Kuching, Sarawak                        | 2022             | RM11,961,000             |
| 10.                               | Mix Development Land (88,870 s.m.) | Blok 26, Kuching-Samarahan Expressway, Muara Tong, Sarawak     | 2022             | RM30,000,000             |
| <b>ESTATE LAND</b>                |                                    |  |                  |                          |
| 11.                               | Estate Land (5,609.00 hectares)    | Batang Tinjar, Dulit   | 2022             | RM110,000,000            |
| 12.                               | Estate Land (1,094.90 hectares)    | Jalan Miri – Bintulu, Miri, Sarawak                            | 2021             | RM65,000,000             |
| 13.                               | Estate Land (2,338.00 hectares)    | Batang Lebaan, Off Jalan Sibul – Tanjung Manis, Sibul, Sarawak | 2021             | RM120,000,000            |

## HARTA TANAH KEDIAMAN

### Transaksi

Prestasi pasaran subsektor kediaman terus meningkat dalam tempoh kajian. Terdapat 12,664 transaksi bernilai RM4.19 bilion meningkat 16.9% dalam bilangan dan 19.4% dalam nilai transaksi berbanding 2021 (10,837 transaksi bernilai RM3.51 bilion). Rumah teres menyumbang 43.8% (5,542 unit) daripada bilangan transaksi kediaman.

## RESIDENTIAL PROPERTY

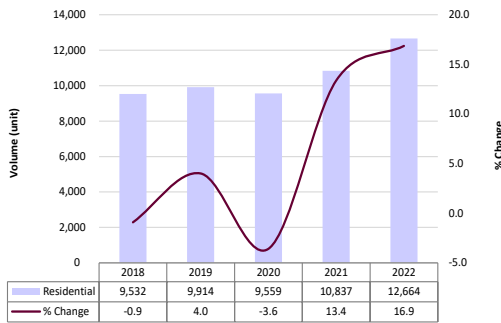
### Transaction

The residential sub-sector's market continued to improve in the review period. There were 12,664 transactions worth RM4.19 billion increased by 16.9% in volume and 19.4% in value as compared to 2021 (10,837 transactions worth RM3.51 billion). Terraced houses contributed 43.8% (5,542 units) of the total residential transactions.



Chart 16.5

Volume of Residential Property Transactions 2018 – 2022

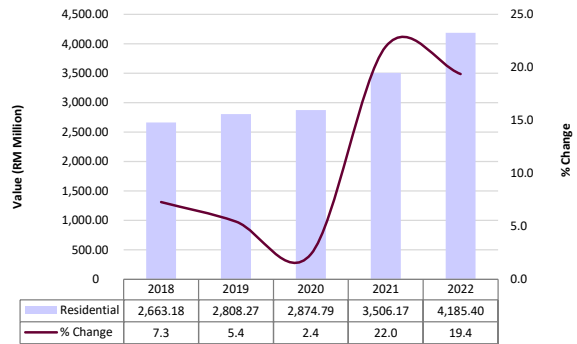


### Pelancaran Baharu

Prestasi pelancaran baharu di pasaran utama menurun sebanyak 39.0% pada tempoh kajian. Terdapat 1,372 unit dilancarkan berbanding 2,249 unit pada 2021. Rumah teres setingkat membentuk sebahagian besar daripada pelancaran baharu, menyumbang 31.4% (431 unit) daripada keseluruhan.

Chart 16.6

Value of Residential Property Transactions 2018 – 2022



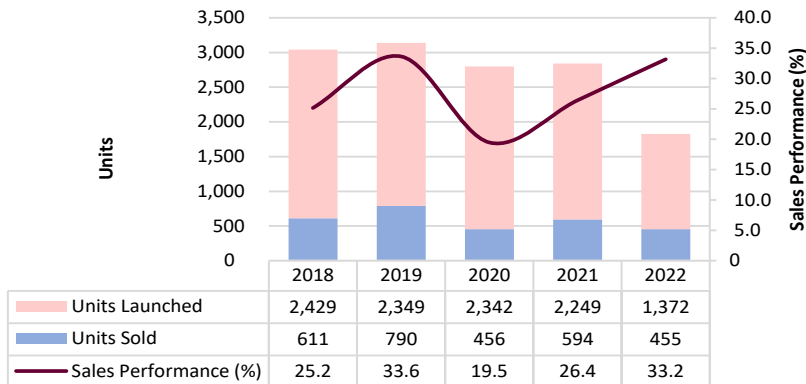
### New Launches

The performance of new launches in the primary market decreased by 39.0% in the review period. There were 1,372 units launched as compared to 2,249 units in 2021. Single Storey terraced houses formed the bulk of the new launches, accounting for 31.4% (431 units) of the total.

226

Chart 16.7

New Launches and Sales Performance 2018 – 2022



### Status Pasaran

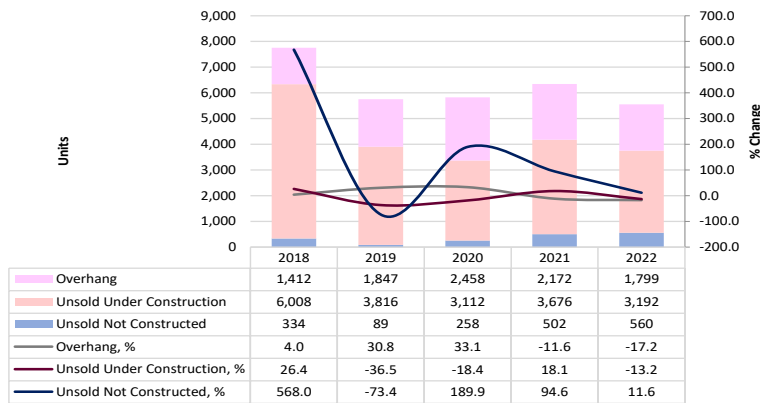
Kediaman siap dibina dan belum terjual memperlihatkan trend bercampur-campur. Situasi unit kediaman siap dibina tidak terjual dan dalam pembinaan belum terjual berkurang manakala belum dibina belum terjual bertambah dalam tempoh kajian.

### Market Status

Mixed trend was seen in residential overhang and unsold. The residential overhang and unsold under construction decreased whilst unsold not constructed increased in the review period.

Chart 16.8

Residential Market Status 2018 – 2022



### Aktiviti Pembinaan

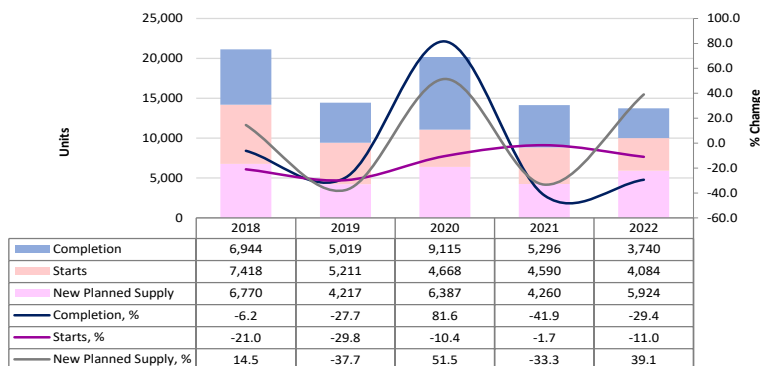
Aktiviti pembinaan terus perlahan ditunjukkan oleh penguncupan dalam siap dibina dan mula dibina. Sehingga akhir 2022, terdapat 284,085 unit kediaman sedia ada dengan 17,050 unit lagi dalam penawaran akan datang dan 7,524 unit dalam penawaran dirancang.

### Construction Activity

Construction activity continued to be slow indicated by the contraction in completion and starts. As at end-2022, there were 284,085 existing residential units with another 17,050 units in the incoming supply and 7,524 units in the planned supply.

Chart 16.9

Residential Construction Activity 2018 – 2022



### Harga dan Sewa

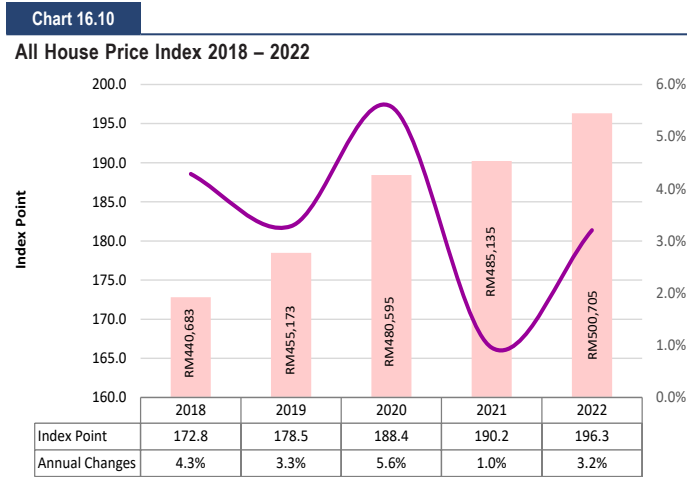
Harga harta tanah kediaman merekodkan pergerakan bercampur-campur di negeri ini. Beberapa skim rumah teres setingkat di Bahagian Kuching menikmati kenaikan modal antara 2.8% hingga 9.1% begitu juga beberapa skim teres dua tingkat di Bahagian Sibü juga mencatat pertumbuhan modal antara 2.8% hingga 11.3%. Sementara itu, pangsapuri dan kondominium juga mencatat kenaikan modal yang minima secara keseluruhan. Greenwich South dan Jazz Suites @ Vivacity (Type B) di Bahagian Kuching masing-masing menunjukkan kenaikan dua angka 12.9% dan 10.6%. Sehingga 2022<sup>P</sup>, Indeks Harga Semua Rumah untuk negeri ini berada pada 196.3 mata, naik 3.2% daripada 190.2 mata pada 2021. Purata Harga Semua Rumah pada 2022<sup>P</sup> berada pada RM500,705, meningkat daripada RM485,135 pada 2021.

### Price and Rental

Price of residential property recorded mixed movements across the board. Several single storey terraced houses schemes located in Bahagian Kuching enjoyed capital appreciation of 2.8% to 9.1% and several double storey terraced houses schemes in Bahagian Sibü also registered capital gains 2.8% to 11.3%. Meanwhile apartment and condominium units also recorded minimal capital gains across the board. Greenwich South and Jazz Suites @ Vivacity (Type B) in Bahagian Kuching recorded double digit growth by 12.9% and 10.6% respectively. As at 2022<sup>P</sup>, the All House Price Index for the state stood at 196.3 points, up by 3.2% from 190.2 points in 2021. The average All House Price for the state as at 2022<sup>P</sup> stood at RM500,705, increased from RM485,135 in 2021.

Pasaran sewa secara amnya stabil dengan pergerakan menaik ketara direkodkan di beberapa skim rumah teres setingkat dan skim teres dua tingkat di Bahagian Miri. Purata pulangan sewa kediaman berada dalam lingkungan 1.6% hingga 8.0%.

The rental market was generally stable with notable upward movements recorded in several single storey terraced houses schemes and double storey terraced houses schemes in Bahagian Miri. The average gross yields for residential was in the range of 1.6% to 8.0%.



**HARTA TANAH PERDAGANGAN**

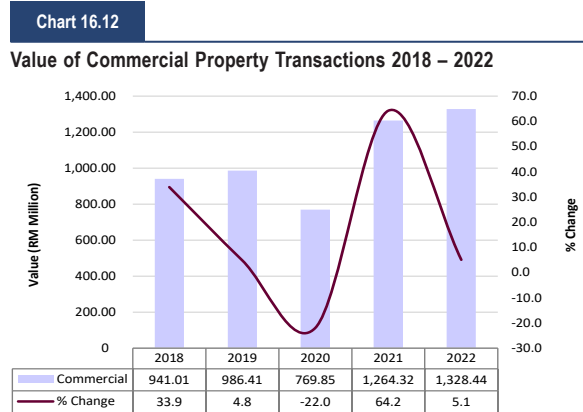
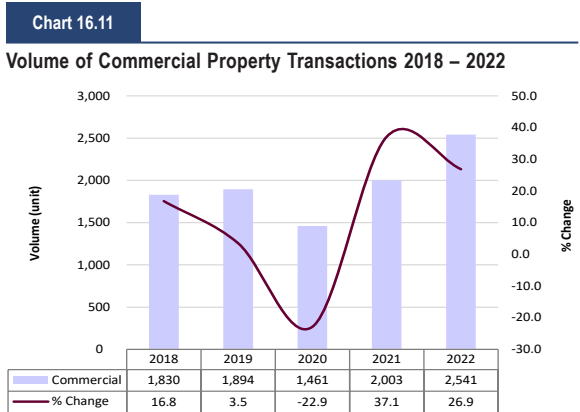
**COMMERCIAL PROPERTY**

228 **Transaksi**

**Transaction**

Subsektor perdagangan mencatat 2,541 transaksi dengan jumlah nilai RM1.33 bilion pada tahun 2022. Aktiviti pasaran ini menunjukkan peningkatan 26.9% dan 5.1% masing-masing dalam bilangan dan nilai disebabkan peningkatan bilangan jualan utama yang direkodkan berbanding 2021 (2,003 transaksi bernilai RM1.26 bilion).

The commercial sub-sector recorded 2,541 transactions with a total value of RM1.33 billion in 2022. This indicated an increase of 26.9% and 5.1% in volume and value respectively, attributed to a good number of prominent sales recorded as compared to 2021 (2,003 transactions worth RM1.26 billion).



**Kedai**

**Shop**

**Transaksi**

**Transaction**

Segmen kedai terus mencatat aktiviti pasaran yang kukuh pada 2022 dengan 2,222 transaksi bernilai RM1.11 bilion (2021: 1,720 transaksi bernilai RM904.47 juta). Bilangan dan nilai transaksi masing-masing meningkat 29.2%

Shop segment continued to strengthen in 2022 with 2,222 transactions worth RM1.11 billion (2021: 1,720 transactions worth RM904.47 million). Volume and value of transactions increased by 29.2% and 22.6%

dan 22.6%. Transaksi kedai tiga hingga tiga setengah tingkat menguasai 52.9% (1,176 unit) daripada jumlah transaksi kedai.

### Status Pasaran

Situasi unit kedai siap dibina tidak terjual dan dalam pembinaan belum terjual kurang memberangsangkan di mana lebih banyak unit direkodkan dalam tempoh kajian. Negeri ini tidak dibebankan dengan mana-mana unit kedai belum dibina belum terjual pada 2022.

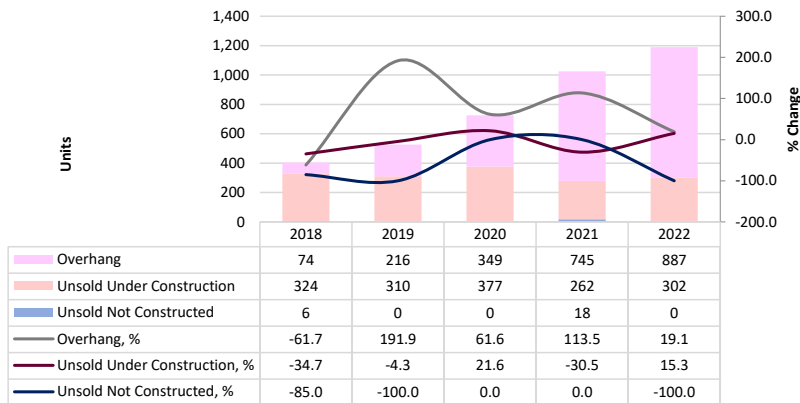
respectively. Three to three and a-half story shop transactions dominated 52.9% (1,176 units) of the total shop transactions.

### Market Status

The shop overhang and unsold under construction situations was less encouraging as more units recorded in the review period. The state was unencumbered with any unsold not constructed shop units in 2022.

Chart 16.13

Shop Market Status 2018 – 2022



### Aktiviti Pembinaan

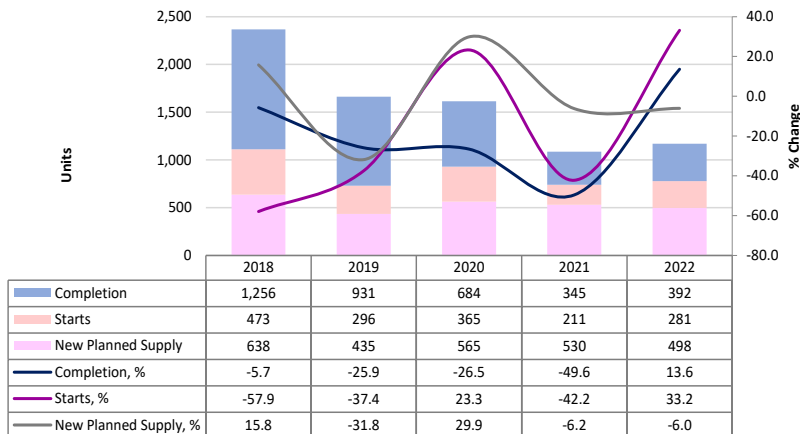
Aktiviti pembinaan berada pada mod bercampur. Sehingga akhir 2022, terdapat 37,371 unit kedai sedia ada dengan 1,222 unit lagi dalam penawaran akan datang dan 1,408 unit dalam penawaran dirancang.

### Construction Activity

The shop construction activity continued to be in mix mod. As at end-2022, there were 37,371 units existing shop with another 1,222 units in the incoming supply and 1,408 units in the planned supply.

Chart 16.14

Shop Construction Activity 2018 – 2022



## 2023 OUTLOOK

Pasaran harta tanah negeri ini dijangka akan meningkat secara beransur-ansur dan menjadi lebih kukuh dalam tahun 2023 disokong oleh pelbagai projek pembangunan yang sedang berjalan dan projek pembangunan akan datang. Projek infrastruktur pengangkutan kekal sebagai pemangkin kepada pembangunan fizikal, pewujudan peluang pekerjaan dan peningkatan sosio-ekonomi rakyat ke arah mencapai status negeri maju menjelang 2030. Tambahan pula, penyerahan semua projek Kerajaan Persekutuan di bawah RM50 juta untuk diputuskan oleh Kerajaan Negeri akan meningkatkan lagi pasaran hartanah tempatan.

*The state' property market is expected to gradually improve and become stronger for the rest of 2023 supported by various on-going and proposed development projects. Transportation infrastructure projects remains as the catalyst contribute to the physical development, creating employment opportunities and socio-economic enhancement of the people towards achieving a developed state status by 2030. Furthermore, the handling over all Federal Government projects under RM50 million to decide by State Government will further boost the local property market.*

### Infrastructure Development

**Table 16.2: Infrastructure Projects**

| No. | Infrastructure Project         | Description   | Current Development Status   |
|-----|--------------------------------|---|--|
| 1.  | Pan Borneo Highway Sarawak     | <ul style="list-style-type: none"> <li>- The highway covered 1,090 kilometer stretch in Sarawak</li> <li>- To upgrade federal roads from two to four lanes, the construction of 115 bridges, 25 elevated interchanges, three rest and service areas and six lay-bys.</li> <li>- The highway will also be connected to Simanggaris in Kalimantan (Indonesia) by the 3,901 kilometres Trans - Kalimantan Highway South.</li> <li>- <u>Phase 1</u> <ul style="list-style-type: none"> <li>➢ Connecting Telok Melano - Sematan - Miri.</li> <li>➢ Total packages: 11 work packages.</li> <li>➢ Total length: 786.41 kilometres</li> <li>➢ Project cost: RM16.117 billion.</li> </ul> </li> <li>- <u>Phase 2</u> <ul style="list-style-type: none"> <li>➢ Connecting Limbang and Lawas.</li> <li>➢ To facilitate travel between the two areas without passing Brunei.</li> <li>➢ The project will also include the construction of a 'missing link' from Kuala Baram to CIQ Sungai Tujoh and upgrading of existing road (red line).</li> </ul> </li> </ul> | <p><u>Phase 1</u><br/>Package from Telok Melano to Semantan has been completed in January 2019 while another 10 work packages from Sematan to Miri are being carried out with construction progress of 91% as at December 2022. It is expected to be ready by 2024.</p> <p><u>Phase 2</u><br/>Project will resume this year and is expected to be completed in 2028.</p> |
| 2.  | Sarawak-Sabah Link Road (SSLR) | <ul style="list-style-type: none"> <li>- The project brief is to create a network of roads connecting Sarawak and Sabah without going through Brunei.</li> <li>- The first phase consists of single carriageway with two-lane road will connect Lawas and Long Lopeng Crossroads.</li> <li>- Total length: 77 kilometres</li> <li>- Project cost: RM1.13 billion.</li> <li>- The road also will be connected to Ba Kelalan with another allocation of RM80 million.</li> <li>-</li> <li>- <u>Phase 1</u> <ul style="list-style-type: none"> <li>➢ Connecting Simpang Gelugus – Lon Lopeng, Lawas</li> <li>➢ Total length: 77 kilometres</li> <li>➢ Project cost: RM16.117 billion.</li> </ul> </li> </ul>   | <p>The project has commenced in 2021 and is expected to be completed in 2026.</p>  |

**Table 16.2: Infrastructure Projects**

| No. | Infrastructure Project   | Description   | Current Development Status  |
|-----|--|---|---|
|     |  | <ul style="list-style-type: none"> <li>- Phase 2 (Four work packages)                             <ul style="list-style-type: none"> <li>➢ Package 1: Mulu to Long Seridan (45 kilometres)</li> <li>➢ Package 2: Seridan Panjang to Nanga Medamit (71 kilometres)</li> <li>➢ Package 3: Long Lopeng to Long Komap (75 kilometres)</li> <li>➢ Package 4: Rumah Aling to Long Merarap (66 kilometres)</li> </ul> </li> </ul>  | Proposal  |
| 3.  | Trans Borneo Highway (LTB)                                     | <ul style="list-style-type: none"> <li>- To upgrade the existing road network to two highways connecting Sarawak and Sabah with Brunei Darussalam</li> <li>- Total length: 96.3 kilometres</li> <li>- The project is divided into three sections including Miri Section (4.9 kilometres), Limbang Section (57.3 kilometres) and Lawas Section (34.1 kilometres)</li> </ul>  | Proposal  |
| 4.  | Upgrading Customs, Immigration, Quarantine and Security (CIQS) | <ul style="list-style-type: none"> <li>- The project involves the upgrading of infrastructure at CIQS complexes at the Sarawak and Sabah borders.</li> <li>- The approval was given following the relocation of Indonesia's capital to Nusantara, Kalimantan.</li> <li>- Project allocation: RM1 billion</li> </ul>   | Allocation approved   |
| 5.  | Upgrading coastal road   | <ul style="list-style-type: none"> <li>- project consists of three main components:                             <ol style="list-style-type: none"> <li>1) Replacement of seven existing ferry crossings to main bridges;</li> <li>2) Construction of the 'missing link' road along the coastal area;</li> <li>3) Upgrading 331 kilometres of 896 kilometres existing coastal road.</li> </ol> </li> </ul>   | For the construction of bridges and roads. All 13 packages were awarded and expected to be completed by 2025. Six of the 14 packages were awarded and expected to be completed by 2025. |
| 6.  | Projek Jalan Masuk ke SRK Perangkaan – SRK Bugu – SRK Beruan   | <ul style="list-style-type: none"> <li>- Location: Serian, Sarawak</li> <li>- Total length: 8 kilometres</li> <li>- Project cost: RM22 million</li> </ul>   | Under construction and expected to be completed in January 2024   |
| 7.  | Projek Jalan Bukit Balau-Banting                               | <ul style="list-style-type: none"> <li>- Location: Sri Aman, Sarawak</li> <li>- The project included 1.5 kilometres JKR R3 standard road, 8.0 kilometres JKR R1 standard 'Spur Road' and a bridge.</li> <li>- Total length: 9.5 kilometres</li> <li>- Project cost: RM56 million</li> </ul>   | Under construction and expected to be completed in July 2023  |
| 8.  | Upgrading Route 8101 Jalan Datuk Mohd Musa, Kuching            | <ul style="list-style-type: none"> <li>- Location: Kuching, Sarawak</li> <li>- Includes four additional lanes, three new bridges, pedestrian walk and street lighting along Kota Samarahan Road.</li> <li>- Total length: 11.6 kilometres</li> <li>- Project cost: RM229 million</li> </ul>   | Under construction and expected to be completed in 2023.  |
| 9.  | Bebuling STOLport project                                      | <ul style="list-style-type: none"> <li>- Location: Spaoh, Betong, Sarawak</li> <li>- The project included:                             <ol style="list-style-type: none"> <li>i) 1,190 metres length runway and 1,370 metres runway strip;</li> <li>ii) a VIP lounge;</li> <li>iii) Security X-ray and Screening System;</li> <li>iv) Baggage check-in;</li> <li>v) Public and staff parking lot and other necessary facilities and equipment</li> </ol> </li> <li>- Project cost: RM250 million</li> </ul> | Under construction and expected to be completed in 2024   |

**Table 16.2: Infrastructure Projects**

| No. | Infrastructure Project           | Description   | Current Development Status                      |
|-----|----------------------------------|---|---|
| 10. | Lawas New Airport                | <ul style="list-style-type: none"> <li>- A game changer that could spur the economic activities in Sarawak's northernmost district.</li> <li>- To accommodate the influx of both business and leisure tourists to the town to participate in its economic and tourism activities.</li> <li>- A new airport with runway length of 1,500 metres which can accommodate ATR 72-500 aircraft.</li> </ul> | The construction work expected to start by 2023 |
| 11. | Program Grid Bekalan Air Sarawak | <ul style="list-style-type: none"> <li>- The project focused in low pressure area in the state via Alternatif Funding Initiative.</li> <li>- Project cost: RM900 million</li> </ul>   | Proposal  |

## Mega Project

**Table 16.3: Development Project**

| No. | Development Project                                       | Description  | Current Development Status   |
|-----|---|--|--|
| 1.  | Sarawak Methanol Project, Bintulu                         | <ul style="list-style-type: none"> <li>- Location: Tanjung Kidurong, Bintulu, Sarawak</li> <li>- The plant would complement the state government's aspiration to turn Bintulu into a downstream petrochemicals hub, and a catalyst for future growth of downstream derivatives.</li> <li>- Production capacity: 1.75 million tons per year</li> <li>- The project will also provide employment opportunities to 4,500 workers during its construction and 300 permanent staff when it is operational.</li> </ul>   | Under construction and expected to be completed in 2023                        |
| 2.  | Bintulu Additional Gas Sales Facility 2 (BAGSF-2) project | <ul style="list-style-type: none"> <li>- Location: Tanjung Kidurong, Bintulu, Sarawak</li> <li>- BAGSF-2 is a joint collaboration between Petroliam Nasional Bhd (PETRONAS) and SEDC Energy Sdn Bhd</li> <li>- BAGSF-2 will deliver 70 million standard cu. ft. of gas per day to Sarawak Energy besides supplying 168 million standard cu. ft. of gas per day to Sarawak Petchem.</li> <li>- Production capacity: 390 million cu. ft. per day of natural gas</li> <li>- Project cost: RM4.78 billion</li> </ul>   | Under construction and expected to be operational in the first quarter of 2024 |
| 3.  | 1,285 MW Baleh Hydroelectric Project (HEP)                | <ul style="list-style-type: none"> <li>- Location: Baleh River, Sarawak</li> <li>- The project set to meet the rising energy demands from energy-intensive industries within Sarawak Corridor of Renewable Energy (SCORE), supporting Sarawak's ambition of achieving a high-income and developed status by 2030.</li> <li>- The project comprises a 188m-high concrete faced rockfill dam (CFRD) approximately 225m above sea level, and a ground power plant equipped with five 257MW Francis turbines.</li> <li>- The dam will be designed to create a reservoir volume of up to 29,867 million cubic meters (mcm).</li> <li>- Developed by Sarawak Energy Berhad (SEB) Power, a subsidiary of state-owned Sarawak Energy.</li> <li>- Production capacity: 9,200-gigawatt hours (GWh) of electricity annually</li> <li>- Project cost: RM159 million</li> </ul> | Project started in 2018 and expected to be completed in 2027                   |
| 4.  | Sarawak Infectious Disease Centre (SIDC)                  | <ul style="list-style-type: none"> <li>- Location: Kota Samarahan, Sarawak</li> <li>- The centre will be equipped with Bio-Safety Level 3 (BSL-3) laboratories, meant to facilitate research and development (R&amp;D) works on BSL-3 infectious agents and subsequently, product-testing meant to ensure the commercialisation of the R&amp;D output.</li> <li>- Project allocation: RM200 million</li> </ul>   | Proposal   |

## State Government Policy

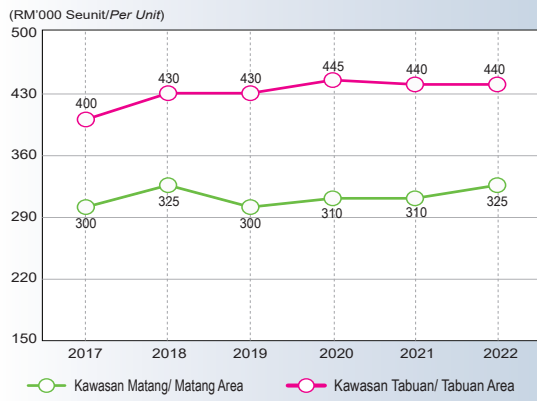
**Table 16.4: State Government Policy**

| No. | Policy                                  | Details  |
|-----|---|--|
| 1.  | Housing Deposit Assistant Scheme (HDAS) | <ul style="list-style-type: none"> <li>- Sarawak state government to offer HDAS where first-time homeowners under the B40 and M40 categories can receive an assistance of up to RM10,000 for the payment of housing deposits.</li> <li>- The scheme would be managed by Mutiara Mortgage &amp; Credit Sdn Bhd (Mutiara), a wholly-owned subsidiary of the Housing Development Corporation (HDC).</li> <li>- Mutiara will also be introducing the Rumah Spektra Mutiara Programme for those who wish to construct a house on their own land where the land ownership must be allocated by the Land and Survey Department under the Resettlement Scheme (SPS) and Village Expansion Scheme (SPK).</li> <li>- The construction cost is estimated to be between RM90,000 and RM160,000 will be funded by Mutiara through the Mutiara Dream Home Financing Scheme (MDHFS).</li> <li>- The house design will be based on a set standard design consisting of three bedrooms and two bathrooms with a minimum area of 750 square feet.</li> <li>- The state has allocated RM40 milion for the scheme in 2023 budget.</li> </ul> |



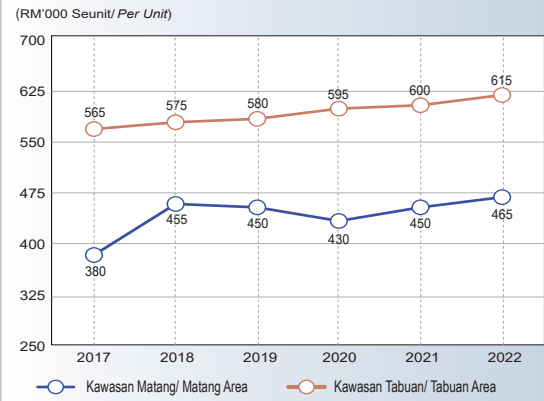
### SARAWAK 16.1

Pergerakan Harga Purata Rumah Teres Satu Tingkat di Kuching  
Average Price Movements of Single Storey Terraced Houses in Kuching



### SARAWAK 16.2

Pergerakan Harga Purata Rumah Teres Dua Tingkat di Kuching  
Average Price Movements of Double Storey Terraced Houses in Kuching



**CATATAN TEKNIKAL**  
***TECHNICAL NOTES***

**Catatan Teknikal**  
**Technical Notes**

Lampiran I

Appendix I

**LAPORAN PASARAN HARTA**  
**2022**

**PROPERTY MARKET REPORT**  
**2022**

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- |  |   |
|--|---|
| <p>1. <b>Tempoh Kajian</b><br/>Tempoh kajian Laporan Pasaran Harta ini adalah pada tahun 2022, iaitu Januari hingga Disember.</p> <p>2. <b>Data transaksi</b><br/>Data transaksi adalah tidak termasuk penjualan harta tanah daripada pemaju di pasaran primer yang hakmilik individu/hakmilik strata belum dikeluarkan.</p> <p>3. <b>Sektor Harta Tanah</b><br/>Pada amnya, kandungan laporan tertumpu kepada subsektor harta tanah berikut:</p> <ul style="list-style-type: none"> <li>(i) Kediaman</li> <li>(ii) Pejabat</li> <li>(iii) Kedai &amp; Kompleks Perniagaan</li> <li>(iv) Industri</li> <li>(v) Pertanian</li> <li>(vi) Tanah Pembangunan</li> <li>(vii) Harta Riadah</li> </ul> <p>Klasifikasi kegunaan tanah bagi setiap subsektor harta tanah dinyatakan di Lampiran II.</p> <p>4. <b>Stok</b><br/>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.</p> <p>5. <b>Definisi</b></p> <p>(i) Saiz Sampel = 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.</p> <p>(ii) Keluasan Purata Tanah = <math display="block">\frac{\text{Jumlah keluasan tanah bagi semua jualan untuk sesuatu lokasi}}{\text{Bilangan jualan terpilih di sesuatu lokasi}}</math></p> <p>(iii) Keluasan Purata Lantai/Plot = <math display="block">\frac{\text{Jumlah keluasan lantai/ plot bagi semua jualan/sewaan terpilih sesuatu lokasi}}{\text{Bilangan jualan terpilih di sesuatu lokasi}}</math></p> | <p>1. <b>Review Period</b><br/><i>The review period for this Property Market Report is the year of 2022 i.e. January to December.</i></p> <p>2. <b>Transaction Data</b><br/>The transaction data do not include the property sales from developers in the primary market for which individual title/strata title has yet been issued.</p> <p>3. <b>Property Sectors</b><br/><i>Generally, the report contents focus on the following property sub-sectors:</i></p> <ul style="list-style-type: none"> <li>(i) Residential</li> <li>(ii) Office</li> <li>(iii) Shop &amp; Shopping Complexes</li> <li>(iv) Industrial</li> <li>(v) Agriculture</li> <li>(vi) Development Land</li> <li>(vii) Leisure Property</li> </ul> <p><i>Land use classification for each property sub-sector is given in Appendix II.</i></p> <p>4. <b>Stock</b><br/><i>Stock refers to stock as defined in the Residential Property Stock Report, Commercial and Industrial 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.</i></p> <p>5. <b>Definition</b></p> <p>(i) Sample Size = <i>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.</i></p> <p>(ii) Average Land Area = <math display="block">\frac{\text{Total land area of all sales selected for the location}}{\text{Number of selected sales for the location}}</math></p> <p>(iii) Average Floor/Plot = <math display="block">\frac{\text{Total floor/plot area of all selected sales/ lettings for the location}}{\text{Number of selected sales/ lettings for the location}}</math></p> |
|--|---|

'Keluasan Lantai' untuk pelbagai jenis harta adalah sebagaimana takrif di dalam 'Uniform Method 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 Method 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 jualan/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.)** = 
$$\frac{\text{Sale Price/Rental (RM)}}{\text{Floor Area (s.m.)}}$$

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 (%)** = 
$$\left\{ \frac{\text{harga/ sewa purata 2021 bagi sesuatu lokasi}}{\text{harga/ sewa purata 2020 bagi sesuatu lokasi}} - 1 \right\} \times 100$$

vi) **Average Price/Rental Change (%)** = 
$$\left\{ \frac{\text{2021 average price/ rental for the location}}{\text{2020 average price/ rental for the location}} - 1 \right\} \times 100$$

vii) Huruf 'NA' menandakan keadaan di mana tiada bukti jualan/sewa pada 2020 yang boleh dibandingkan dengan sampel yang dipilih pada 2021.

vii) The letter 'NA' denotes that there are no sale/rental evidences available in 2020 which are comparable to the sample selected for 2021.

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 2022:

The following are the land use classifications used in the Property Market Report 2022:

| Perihal Harta                            | Catatan  | Property Description                   | Remarks   |  |
|--|--|--|---|--|
| <b>1. KEDIAMAN</b>                       |  | <b>1. RESIDENTIAL</b>                  |   |  |
| a. Rumah Teres                           |  | b. Terraced House                      |   |  |
| (i) Kos rendah satu tingkat }            |  | (i) Single storey low-cost }           |   |  |
| (ii) Satu tingkat }                      |  | (ii) Single storey }                   |   |  |
| (iii) Kos rendah dua tingkat }           | Mengikut bilangan tingkat dan kos pembinaan  | (iii) Double storey low-cost }         | Subdivided by reference to the number of storeys and cost of construction |  |
| (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 area  |   |  |
| (ii) Dua tingkat di kawasan perumahan    |  | (ii) Double storey within housing area |   |  |
| (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 Pembangunan Kediaman      | Tanah dengan kelulusan untuk perumahan sahaja  | e. Land For Residential development    | Land with permission for housing only                                     |  |
| 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
- c. Padi
- d. Kelapa
- e. Koko
- f. Nenas
- g. Dusun/Hortikultur
- h. Tanah Ladang } Tanah yang berkeluasan 40 hektar atau lebih dan ditanam dengan tanaman komersial seperti getah, kelapa sawit dan koko
- i. Perhutanan
- j. Tanah Kampung } 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

### 4. INDUSTRIAL

- a. Factory
  - (i) Terrace } Designed for general manufacturing process and normally is for sale/ letting OR purpose-built for specialised manufacturing process
  - (ii) Semi-detach }
  - (iii) 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 palm
- c. Paddy
- d. Coconut
- e. Cocoa
- f. Pineapple
- g. Orchard/Horticulture
- h. Estate Land } Land of 40 hectares or more and planted with commercial crops such as rubber, oil palm and cocoa
- i. Forestry
- j. Kampung Land } Smallholdings with rural residential and agriculture 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
  - b. Komersial
  - c. Industri
  - d. Campuran
- } Termasuk tanah yang  
} belum ditukar syarat atau  
} diluluskan untuk kegunaan  
} lebih tinggi atau telah  
} ditukar syarat tetapi belum  
} dipecah sempadan  
}

**6. HARTA RIADAH**

- a. Hotel
- b. Motel
- c. Tempat peranginan
- d. Taman rekreasi
- e. Padang golf
- f. Marina

**5. DEVELOPMENT LAND**

- a. Residential
  - b. Commercial
  - c. Industrial
  - d. Mixed
- } Include not converted  
} lands or approved for  
} higher use or converted  
} 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 suku tahun 2022 adalah seperti berikut:

Q1 : 1 Januari 2022 - 31 Mac 2022

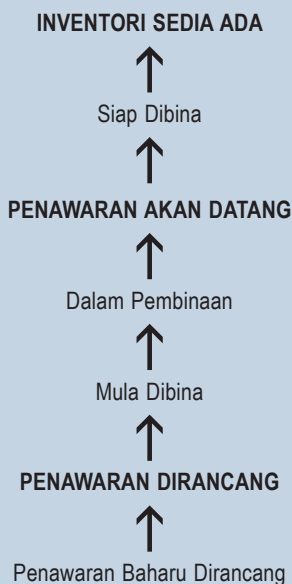
Q2 : 1 April 2022 - 30 Jun 2022

Q3 : 1 Julai 2022 - 30 September 2022

Q4 : 1 Oktober 2022 - 31 Disember 2022

**2. Peringkat Penyebaran**

Laporan terbahagi kepada 3 peringkat pembangunan utama dan subperingkat berpandukan jadual di bawah:

**i) Inventori Sedia Ada (Stok)**

Inventori sedia ada (stok) adalah unit yang telah memperoleh Sijil Penyiapan Dan Pematuhan (CCC), Sijil Layak Menduduki (CF) atau Sijil Layak Menduduki Sementara (TCF) sebelum tempoh kajian termasuk unit yang siap dibina dan memperoleh CCC/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.

**STOCK****1. Review Periods**

The quarters in the 2022 of the Property Stock Report are as follows:

Q1 : 1<sup>st</sup> January 2022 - 31<sup>st</sup> March 2022

Q2 : 1<sup>st</sup> April 2022 - 30<sup>th</sup> June 2022

Q3 : 1<sup>st</sup> July 2022 - 30<sup>th</sup> September 2022

Q4 : 1<sup>st</sup> October 2022 - 31<sup>st</sup> December 2022

**2. Stages of Dissemination**

Information at the 3 main stages of development and their sub-stages according to the chart below:

**i) Existing Inventory (Stock)**

Existing inventory (stock) are units that have been issued with the Certificate of Completion and Compliance (CCC), Certificate Of Fitness (CF) or Temporary Certificate Of Fitness (TCF) prior to the review period plus units completed and issued with CCC/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 CCC/CF/TCF serta sebarang perubahan yang berlaku dalam tempoh kajian. Perubahan termasuk:

- **Sebarang unit yang ditukar kategori kegunaan.**
- **Sebarang unit yang musnah/dibina semula (dan tidak terdapat dalam penawaran baharu dirancang).**
- **Sebarang perubahan dalam ruang yang dihuni.**

(iii) **Siap Dibina**

Siap dibina adalah terma yang digunakan bagi bangunan yang mana kerja pembinaan bangunan telah siap dan CCC/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.

(iv) **Penawaran Akan Datang**

Penawaran akan datang merangkumi unit yang mana kerja pembinaannya sedang dijalankan termasuk unit mula dibina dan CCC/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 CCC/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.**

(iii) **Completion**

*Completion is the term used when the building construction works are completed and a CCC/CF/TCF is issued within the review period. The figures under completion are not accumulated from previous quarter but represent only one review quarter.*

(iv) **Incoming Supply**

*Incoming supply comprises units where physical construction works are in progress including starts and CCC/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 Dirancang**

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

(vi) **Penawaran Baharu Dirancang**

Penawaran baharu dirancang merangkumi unit di mana kelulusan pelan bangunan telah diperolehi dari pihak berkuasa tempatan dalam suku kajian. Angka dalam peringkat penawaran baharu dirancang bukan merupakan angka terkumpul dan mewakili bangunan yang memperoleh kelulusan pelan bangunan dalam suku kajian sahaja.

3. **Penawaran masa depan** yang digunakan dalam laporan ini menunjukkan penawaran akan datang dan penawaran dirancang.

(iv) **Starts**

*Starts comprises buildings where:*

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

*The figures disseminated under starts are not accumulative and represents buildings that started within a review quarter.*

(v) **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.

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

#### 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 Baharu**  
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 dirancang dan seterusnya memasuki pelbagai peringkat pembinaannya.
- (ix) **Harga Jualan** unit adalah balasan yang dinyatakan semasa pindahmilik (Borang 14A Kanun Tanah Negara), yang menggambarkan nilai pasaran.
- (x) **Min** ialah purata mudah daripada harga jualan.

#### 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.
- (ix) **Sale Prices** of units are declared considerations stated on transfer (Form 14A of the National Land Code), which reflects market value.
- (x) **Mean** is a simple average of sales prices.

- (xi) **Median** ialah harga jualan di mana separuh daripada cerapan akan berada di atas paras harga jualan dan separuh daripada cerapan akan berada di bawahnya.
- (xii) **25 percentile** ialah harga jualan di mana 25% daripada cerapan berada di bawah paras tersebut.
- (xiii) **75 percentile** ialah harga jualan di mana 25% daripada cerapan berada di atas paras tersebut.
- (xiv) **Minimum** ialah harga yang paling rendah bagi beberapa cerapan yang diperolehi.
- (xv) **Maksimum** ialah harga yang paling tinggi bagi beberapa cerapan yang diperolehi.

- (xi) **Median** is the sales price for which one-half of the observations will lie above that price and one-half will lie below it.
- (xii) **25 percentile** is the sales price for which 25% of the observations fall below that price.
- (xiii) **75 percentile** is the sales price for which 25% of the observations fall above that price.
- (xiv) **Minimum** is the lowest price for a given number of observations.
- (xv) **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 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 komersial 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 Act 1966 (Control and Licensing) and (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 setinggan 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 Juruukur DiRaja 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 Royal 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 bowling, 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 shopping arcades 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.

**Purata Kadar 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 2021 berakhir pada **30 Jun 2021**.
2. Liputan kajian ini hanya merangkumi unit kediaman, komersial dan industri.
3. **Pelancaran Jualan Harta Tanah** adalah aktiviti untuk memulakan pemasaran unit harta tanah dalam sesuatu projek secara rasmi oleh pemaju. Pelancaran boleh dilakukan selepas mendapat permit iklan dan jualan daripada Kementerian Perumahan dan Kerajaan Tempatan.

Seciranya satu skim dilancarkan semula, tarikh baru pelancaran diambilkira. Pelancaran tidak rasmi (soft Launch) adalah peristiwa pemasaran bagi membekalkan maklumat mengenai projek sebelum kelulusan permit iklan dan jualan diperolehi. Tarikh tidak rasmi tidak diambilkira dalam pengumpulan data. Oleh itu, Tarikh pelancaran rasmi akan diambilkira sebagai Tarikh pelancaran.

4. **Pelancaran baharu** mengandungi harta tanah dalam skim perumahan yang telah dilancarkan pada separuh tahun pertama 2021.

**Prestasi jualan** merujuk kepada peratusan bilangan unit yang telah dijual atas jumlah unit yang dilancarkan bagi sesuatu jenis harta tanah dalam tempoh kajian. Dua jenis prestasi jualan telah dikira di dalam laporan ini iaitu prestasi jualan suku tahunan dan prestasi jualan terkumpul.

5. Mulai 1 Januari 2003, "harta tanah siap dibina tidak terjual" telah didefinisikan sebagai unit kediaman, komersial 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, komersial dan industri yang telah siap dibina dan mendapat Sijil Penyiapan dan Pematuhan/ Sijil Layak Menduduki/ Sijil Layak Menduduki Sementara 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.

## STATUS

1. **The review period** of this report covers first half of the year 2021 ending on **30<sup>th</sup> June 2021**.

2. The coverage of the survey was confined to residential, commercial and industrial units.

3. **Launch of Property Sales** is an activity to start marketing formally the property units of a project by the developer. The launch can be done after obtaining the advertisement and sales permit from the Ministry of Housing and Local Government.

If a scheme was re-launched, the new launch date is considered. The unofficial launch (soft Launch) is a marketing event to provide information about the project before the approval of advertisement and sales permit is obtained. The unofficial date is not considered in data collection. Therefore, the official launch date will be the date recorded.

4. **New launches** comprise properties in residential schemes launched in first half year 2021.

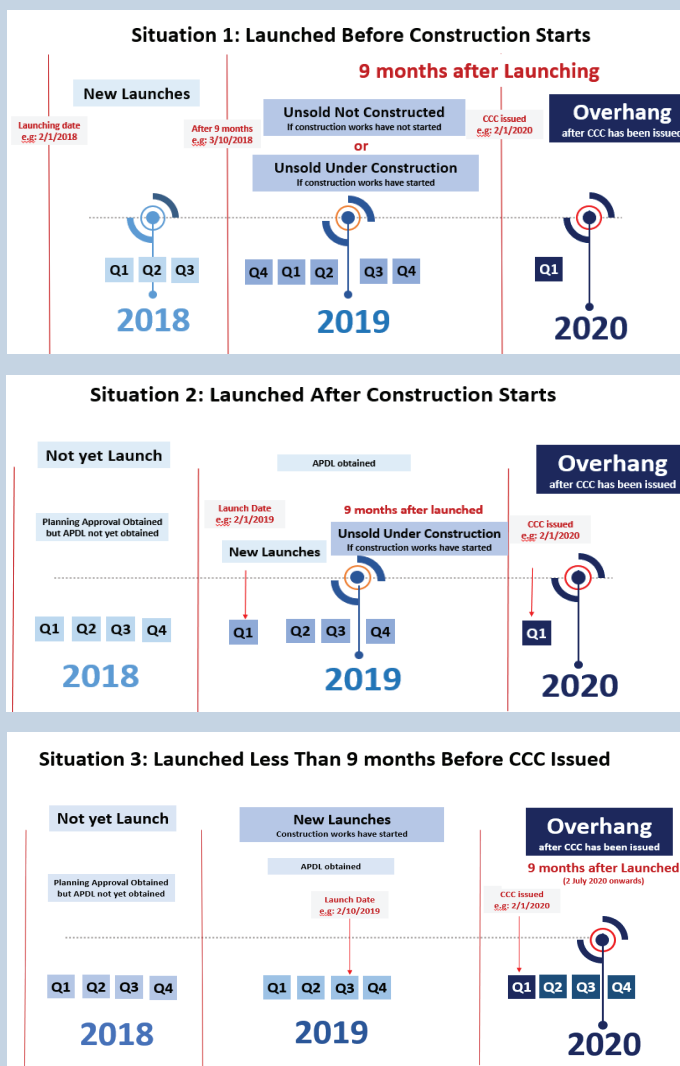
**Sales performance** refers to the percentage of number of units sold from the total units launched for a specific type of property in the review period. Two types of sales performance are computed in this publication namely quarterly sales performance and accumulated sales performance.

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

6. **Property overhang** comprises residential units, commercial units and industrial units that are completed with Certificate of Completion and Compliance/ Temporary Certificate of Fitness for Occupation in the review period. These units remained unsold for more than nine months from the date of launching or after 1st January 1997.

7. **The value** of overhang properties is derived from the average selling price for the particular type of property offered for sale by the developer multiplied by the number of overhang property at the end of the review period.

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8. **Harta tanah dalam pembinaan belum terjual** merangkumi unit kediaman, komersial dan industri yang sedang dalam pembinaan dan memperoleh kelulusan pelan bangunan. Unit ini tidak terjual melebihi tempoh sembilan bulan daripada tarikh dilancarkan untuk jualan atau selepas 1 Januari 1997.
8. **Unsold Under Construction property** comprises residential units, commercial units and industrial units with building plan approval that are under constructed. These Units remained unsold for more than nine months from the date of launch or after 1st January 1997.
9. **Harta tanah belum dibina belum terjual** merangkumi unit kediaman, komersial dan industri yang belum dibina dan belum memperoleh kelulusan pelan bangunan. Unit ini tidak terjual melebihi tempoh sembilan bulan daripada tarikh dilancarkan untuk jualan atau selepas 1 Januari 1997.
9. **Unsold not constructed property** comprises residential units, commercial units and industrial units with building plan approval that are not yet constructed. These units remained unsold for more than nine months from the date of launch or after 1st January 1997.
10. **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.
10. **A residential scheme** is a housing project comprised a minimum of five or more buildings mainly used for dwelling purposes. A residential scheme has one identity. It may be developed on a land with a single title or on lands with multiple titles and could be developed in phases. The developments can be mixed with buildings for other uses like retail, industrial or institutional.

**SENARAI CAWANGAN  
JABATAN PENILAIAN DAN PERKHIDMATAN HARTA**

Ketua Pengarah Penilaian  
Jabatan Penilaian dan Perkhidmatan Harta,  
Kementerian Kewangan Malaysia,  
Aras 9, Perbendaharaan 2,  
No. 7, Persiaran Perdana, Presint 2,  
**62592 Putrajaya**  
Tel. : 603 - 8886 9000  
Faks : 603 - 8886 9001

Pengarah  
Pusat Maklumat Harta Tanah Negara (NAPIC)  
Kementerian Kewangan Malaysia,  
Aras 7, Perbendaharaan 2,  
No. 7, Persiaran Perdana, Presint 2,  
Pusat Pentadbiran Kerajaan Persekutuan  
**62592 Putrajaya**  
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Pengarah Penilaian Negeri  
Jabatan Penilaian dan Perkhidmatan Harta,  
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Jalan Travers, Kuala Lumpur Sentral  
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Tel. : 603 - 2272 1797  
Faks : 603 - 2272 1795

Penilai Daerah Kuala Lumpur  
Jabatan Penilaian dan Perkhidmatan Harta,  
Tingkat 1, One Central,  
Jalan Travers, Kuala Lumpur Sentral  
**50470 Kuala Lumpur**  
Tel. : 603 - 2272 1797  
Faks : 603 - 2272 1795

Penilai Daerah Labuan  
Jabatan Penilaian dan Perkhidmatan Harta,  
No.4(A2), Tingkat 4, Blok 4 Kompleks Ujana Kewangan,  
Jalan Merdeka,  
**87007 Wilayah Persekutuan Labuan**  
Tel. : 087 - 416445  
Faks : 087 - 410337

Pengarah Penilaian Negeri  
Jabatan Penilaian dan Perkhidmatan Harta,  
Tingkat 8, Plaza Perangsang,  
Persiaran Perbandaran  
**40000 Shah Alam, Selangor**  
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**  
Tel. : 603 - 6186 1719  
Faks : 603 - 6186 1832

Penilai Daerah Klang  
Jabatan Penilaian dan Perkhidmatan Harta  
Tingkat 7, First Tower  
Jalan Meru  
**41050 Klang, Selangor**  
Tel. : 603 - 3344 1270  
Faks : 603 - 3344 1275

Penilai Daerah Sepang  
d/a Jabatan Penilaian dan Perkhidmatan Harta  
Institut Penilaian Negara (INSPEN)  
Jabatan Penilaian dan Perkhidmatan Harta  
Persiaran INSPEN  
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Pengarah Penilaian Johor  
Jabatan Penilaian dan Perkhidmatan Harta,  
Bangunan Jaro,  
No. 18, Jalan Sungai Chat,  
**80100 Johor Bahru, Johor**  
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Faks : 607 - 223 4266

Penilai Daerah Johor Bahru  
Jabatan Penilaian dan Perkhidmatan Harta,  
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Faks : 607 - 226 9711

Penilai Daerah Batu Pahat  
Jabatan Penilaian dan Perkhidmatan Harta,  
Tingkat 2, Bangunan Gunasama Persekutuan,  
Jalan Bakau Condong,  
**83000 Batu Pahat, Johor**  
Tel. : 607 - 434 3645  
Faks : 607 - 431 7026

Penilai Daerah Kluang  
Jabatan Penilaian dan Perkhidmatan Harta,  
Tingkat 3, Bangunan Gunasama Persekutuan,  
Jalan Batu Pahat,  
**86000 Kluang, Johor**  
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Faks : 607 - 774 3810

**SENARAI CAWANGAN  
JABATAN PENILAIAN DAN PERKHIDMATAN HARTA**

Penilai Daerah Muar  
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Bangunan Muar Trade Centre,  
Jalan Petrie,  
**84000 Muar, Johor**  
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Faks : 606 - 954 4499

Pengarah Penilaian Negeri  
Jabatan Penilaian dan Perkhidmatan Harta,  
Tingkat 41, Bangunan KOMTAR,  
**10593 Pulau Pinang**  
Tel. : 604 - 261 2607  
Faks : 604 - 261 5990

Penilai Daerah George Town  
Jabatan Penilaian dan Perkhidmatan Harta,  
Tingkat 41, Bangunan KOMTAR,  
**10593 Pulau Pinang**  
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Faks : 604 - 261 5990

Penilai Daerah Seberang Perai  
Jabatan Penilaian dan Perkhidmatan Harta,  
3-10, Kompleks Sempilai, Jalan Sempilai,  
**13700 Seberang Perai, Pulau Pinang**  
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Faks : 604 - 398 8533

Pengarah Penilaian Negeri  
Jabatan Penilaian dan Perkhidmatan Harta,  
Tingkat 9, Bangunan Yayasan Negeri,  
Jalan Yam Tuan,  
**70000 Seremban, Negeri Sembilan**  
Tel. : 606 - 763 8602  
Faks : 606 - 763 9306

Penilai Daerah Seremban  
Jabatan Penilaian dan Perkhidmatan Harta,  
Tingkat 8, Bangunan Yayasan Negeri,  
Jalan Yam Tuan,  
**70000 Seremban, Negeri Sembilan**  
Tel. : 606 - 763 8602  
Faks : 606 - 763 9306

Penilai Daerah Jempol  
Jabatan Penilaian dan Perkhidmatan Harta,  
NO. 18, 20 & 22, Jalan Ara 6,  
Pusat Perniagaan Ara, Bandar IOI Bahau,  
**72100 Bahau, Negeri Sembilan**  
Tel. : 606 - 454 6591  
Faks : 606 - 454 6597/ 606 - 454 6599

Penilai Daerah Alor Setar  
Jabatan Penilaian dan Perkhidmatan Harta,  
Aras 2, Zon C, Wisma Persekutuan  
Bandar Muadzam Shah, Anak Bukit  
**06550 Alor Setar, Kedah**  
Tel. : 604 - 700 1900  
Faks : 604 - 700 1905

Pengarah Penilaian Negeri  
Jabatan Penilaian dan Perkhidmatan Harta,  
Tingkat 8, Bangunan Sri Kinta,  
Jalan Sultan Idris Shah,  
**30593 Ipoh, Perak**  
Tel. : 605 - 241 4577  
Faks : 605 - 241 4658

Penilai Daerah Ipoh  
Jabatan Penilaian dan Perkhidmatan Harta,  
Tingkat 6, Bangunan Sri Kinta,  
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,  
Aras 7, Wisma Persekutuan,  
Jalan MITC, Hang Tuah Jaya,  
**75450 Melaka**  
Tel. : 606 - 232 8102  
Faks : 606 - 232 8202

Penilai Daerah Melaka  
Jabatan Penilaian dan Perkhidmatan Harta,  
Aras 7, Wisma Persekutuan,  
Jalan MITC, Hang Tuah Jaya,  
**75450 Melaka**  
Tel. : 606 - 232 8102  
Faks : 606 - 232 8103

Pengarah Penilaian Negeri  
Jabatan Penilaian dan Perkhidmatan Harta,  
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Bandar Muadzam Shah, Anak Bukit  
**06550 Alor Setar, Kedah**  
Tel. : 604 - 700 1900  
Faks : 604 - 700 1904

Penilai Daerah Sungai Petani  
Jabatan Penilaian dan Perkhidmatan Harta,  
Tingkat 3, Wisma Ria, Taman Ria  
**08000 Sungai Petani, Kedah**  
Tel. : 604 - 421 3024  
Faks : 604 - 422 0264

**SENARAI CAWANGAN  
JABATAN PENILAIAN DAN PERKHIDMATAN HARTA**

Penilai Daerah Langkawi  
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