Valuation & Property Services Department
Ministry of Finance Malaysia

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SIARAN MEDIA

PASARAN HARTA TANAH MALAYSIA

SEPARUH TAHUN PERTAMA 2021

AKTIVITI PASARAN HARTA TANAH

1. Prestasi pasaran harta tanah mencatatkan peningkatan yang ketara pada separuh pertama 2021 (H1 2021) berbanding tempoh yang sama tahun lalu (H1 2020).

2. Sebanyak 139,754 transaksi bernilai RM62.01 bilion dicatatkan, menunjukkan peningkatan jumlah 21.0% dan nilai 32.1% berbanding tempoh yang sama tahun lalu.

3. Jumlah transaksi di seluruh Subsektor menunjukkan pergerakan yang menaik. Subsektor tanah kediaman, perniagaan, industri, pertanian dan tanah pembangunan mencatatkan pertumbuhan tahun ke tahun msing-masing sebanyak 22.2%, 28.5%, 29.4%, 13.9% dan 21.3%.

4. Nilai transaksi bergerak seiring dengan subsektor tanah kediaman, komersial, industri, pertanian dan tanah pembangunan masing-masing mencatatkan pertumbuhan sebanyak 34.7%, 28.4%, 19.8%, 33.1% dan 40.6%.

HARTA TANAH KEDIAMAN

5. Terdapat 92,017 transaksi bernilai RM34.51 bilion yang dicatatkan dalam tempoh kajian, meningkat sebanyak 22.2% dalam bilangan dan 34.7% bagi nilai tahun ke tahun. Prestasi di seluruh negeri bertambah baik dalam tempoh kajian. Semua negeri mencatatkan jumlah pasaran yang lebih tinggi kecuali WP Putrajaya. Empat negeri utama iaitu WP Kuala Lumpur, Selangor, Johor dan Pulau Pinang membentuk sekitar 50% daripada jumlah kediaman nasional.

6. Dalam pasaran primer, bilangan pelancaran baharu terdapat 16,660 unit dilancarkan, menurun sebanyak 34.0% berbanding 25,227 unit (disemak semula) pada H1 2020. Berbanding H2 2020, pelancaran baharu lebih rendah sebanyak 24.1% (H2 2020: 21,951 unit)

7. Prestasi jualan pelancaran baharu mencatat 24.7%, lebih baik berbanding H1 2020 (disemak semula 12.9%) dan H2 2020 (17.0%). Peningkatan prestasi jualan berkemungkinan disebabkan oleh pelbagai langkah oleh kerajaan seperti insentif Kempen Pemilikan Rumah (diperkenalkan semula dari 1 Jun 2020 - 31 Dis 2021) dan kadar OPR yang rendah.

8. Selangor mencatatkan pelancaran baharu tertinggi di negara ini, menguasai hampir 24.7% (4,114 unit) daripada jumlah nasional dengan prestasi jualan 26.2%. WP Kuala Lumpur mencatatkan jumlah kedua tertinggi (3,651 unit, 21.9% syer) dengan prestasi jualan pada 3.5%. Johor di tempat ketiga (2,187 unit, 13.1% syer) dengan prestasi jualan 49.8%

9. Mengikut jenis, rumah teres mendominasi pelancaran baharu. Teres satu tingkat (2,624 unit) dan 2-3 tingkat (5,455 unit) secara kolektif menyumbang 48.5% daripada jumlah keseluruhan unit, diikuti oleh unit kondominium/pangsapuri dengan 41.4% syer (6,893 unit).

10. Kediaman siap dibina tidak terjual menunjukkan pertumbuhan yang sederhana. Sebanyak 31,112 unit siap dibina tidak terjual bernilai RM20.09 bilion dicatatkan, menunjukkan peningkatan 5.2% dan 6.2% dalam jumlah dan nilai masing-masing berbanding separuh tahun sebelumnya.

11. Aktiviti pembinaan kediaman mencatatkan peningkatan dalam siap dibina, mula dibina dan penawaran baru dirancang, masing-masing meningkat 8.7%, 35.3% dan 36.0% berbanding tempoh yang sama tahun lalu.

12. Indeks Harga Rumah Malaysia (IHRM) menyaksikan pertumbuhan negatif pada Q2 2021[P], setelah beberapa siri pertumbuhan harga yang perlahan sejak tahun 2018. IHRM berada pada 197.9 mata, turun 1.2% tahun ke tahun. Pergerakan suku tahunan menyaksikan penurunan 1.6%.

HARTA TANAH KOMERSIAL

13. Terdapat 10,433 transaksi bernilai RM10.93 bilion yang dicatatkan, meningkat sebanyak 28.5% dalam bilangan dan 28.4% dalam nilai berbanding tempoh yang sama pada tahun lalu Semua negeri mencatatkan lebih banyak aktiviti pasaran dalam tempoh kajian kecuali WP Putrajaya dan Pahang. Selangor menyumbang bilangan dan nilai tertinggi kepada syer pasaran nasional, dengan 26.3% (2,741 transaksi) dan 30.8% (RM3.37 bilion) daripada jumlah bilangan dan nilai; diikuti oleh WP Kuala Lumpur dengan 13.0% (1,359 transaksi) dan 28.2% (RM3.08 bilion) dan Johor dengan 13.5% (1,410 transaksi) dan 11.6% (RM1.27 bilion).

14. Subsektor pangsapuri khidmat merekodkan 1,912 transaksi bernilai RM1.21 bilion, membentuk 18.3% daripada jumlah transaksi harta tanah komersial dan 11.0% daripada nilai. Prestasi pasaran merekodkan peningkatan bilangan transaksi 33.4% dan nilai transaksi 23.7% berbanding dengan tempoh yang sama tahun lalu.

15. Subsektor pangsapuri khidmat mencatatkan 24,064 unit siap dibina tidak terjual dengan nilai RM20.41 bilion, menunjukkan kenaikan marginal bilangan 1.9%, tetapi nilainya menurun sebanyak 10.2% berbanding separuh sebelumnya. Dalam pembinaan belum terjual mencatat 42,358 unit, meningkat 20.1%.

16. Aktiviti pembinaan menyaksikan tren bercampur-campur dengan siap dibina menurun 8.3% kepada 4,030 unit, mula dibina meningkat 89.6% kepada 21,278 unit dan penawaran baru

dirancang meningkat sebanyak 33.7% kepada 7,339 unit berbanding separuh yang sama tahun lalu.

17. Prestasi kompleks perniagaan adalah sederhana pada H1 2021, dengan kadar penghunian keseluruhan menyaksikan sedikit penurunan pada 76.6% berbanding H1 2020 (78.6%). WP Kuala Lumpur dan Selangor masing-masing mencatatkan kadar penghunian 81.6% dan 78.8%, sementara Johor dan Pulau Pinang masing-masing memperoleh penghunian purata 73.4% dan 72.2%.

18. Hanya satu bangunan siap dibina dicatatkan pada H1 2021 iaitu tambahan ruang Setia City Mall, Shah Alam (21,363 m.p), menjadikan jumlah ruang kompleks perniagaan di seluruh negara menjadi 16.93 juta meter persegi. Terdapat 47 kompleks perniagaan (1.94 juta m.p.) dalam penawaran akan datang dan 10 kompleks (0.34 juta m.p.) dalam penawaran yang dirancang.

19. Prestasi pejabat binaan khas secara keseluruhannya menurun kepada 78.5% lebih rendah daripada H1 2020 (80.6%). Kadar penghunian purata bagi bangunan pejabat swasta menurun kepada 71.7%, menurun sedikit daripada 74.3% (H1 2020). Pulau Pinang memperoleh kadar penghunian yang lebih tinggi pada 85.3% sementara Kuala Lumpur, Selangor dan Johor masing-masing mencatatkan lebih rendah daripada paras nasional iaitu pada 73.8%, 68.4%, dan 72.7%.

20. Lapan bangunan baru pejabat binaan khas dengan jumlah ruang 505,842 m.p. telah siap dibina lebih dalam tempoh kajian, penawaran sedia ada ruang pejabat di pasaran telah bertambah kepada 23.84 juta meter persegi dari 2,581 bangunan. WP Kuala Lumpur adalah penyumbang utama ruang pejabat dengan 40.7% (9.70 juta m.p) ruang pejabat sedia ada, 54.0% (1.09 juta m.p) dalam penawaran akan datang dan 52.9% (0.17 juta m.p.) dalam penawaran yang dirancang.

PROSPEK 2021

21. Kelancaran pelaksanaan Program Imunisasi COVID-19 Kebangsaan dan kebolehcapaian nilai ambang Pelan Pemulihan Negara di seluruh negeri akan menyaksikan pembukaan semula lebih banyak sektor ekonomi dan sosial pada suku keempat 2021. Disokong oleh pelaksanaan berbagai inisiatif dan bantuan kerajaan, pasaran harta tanah dijangka berada di aliran pemulihan seiring dengan pemulihan ekonomi secara berperingkat.

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PRESS RELEASE

MALAYSIA PROPERTY MARKET REPORT

FIRST HALF YEAR 2021

PROPERTY MARKET ACTIVITY

1. The property market performance recorded a significant increase in the first half of 2021 (H1 2021) as compared to the same period last year (H1 2020).

2. A total of 139,754 transactions worth RM62.01 billion were recorded, showing an increase of 21.0% in volume and 32.1% in value compared to the same period last year.

3. Volume of transactions across the sub-sectors showed upward movements. Residential, commercial, industrial, agriculture and development land sub-sectors recorded year-on-year growths of 22.2%, 28.5%, 29.4%, 13.9% and 21.3% respectively.

4. Value of transactions moved in tandem with residential, commercial, industrial, agriculture and development land sub-sectors recorded growths of 34.7%, 28.4%, 19.8%, 33.1% and 40.6% respectively.

RESIDENTIAL PROPERTY

5. There were 92,017 transactions worth RM34.51 billion recorded in the review period, increased by 22.2% in volume and 34.7% in value year-on-year. Performance across the states improved

in the review period. All states recorded higher market volume except for WP Putrajaya. The four major states namely WP Kuala Lumpur, Selangor, Johor and Pulau Pinang formed about 50% of the total national residential volume.

6. In the primary market, there were 16,660 units launched, down by 34.0% against 25,227 units (revised) in H1 2020. Against H2 2020, the new launches were lower by 24.1% (H2 2020: 21,951 units).

7. Sales performance for new launches recorded at 24.7%, better compared to H1 2020 (revised 12.9%) and H2 2020 (17.0%). The improvement in sales performance probably attributed to various measures by the government such as incentives of the Home Ownership Campaign (reintroduced from 1 June 2020 – 31 Dec 2021) and low OPR.

8. Selangor recorded the highest number of new launches in the country, capturing nearly 24.7% (4,114 units) of the national total with sales performance at 26.2%. WP Kuala Lumpur recorded the second highest number (3,651 units, 21.9% share) with sales performance at 3.5%. Johor came third (2,187 units, 13.1% share) with sales performance at 49.8%.

9. By property type, terraced houses dominated the new launches. Single storey (2,624 units) and 2-3 storey (5,455 units) together contributed 48.5% of the total units, followed by condominium/apartment units at 41.4% share (6,893 units).

10. The residential overhang exhibited a moderated growth. A total of 31,112 overhang units worth RM20.09 billion was recorded, showing an increase of 5.2% and 6.2% in volume and value respectively against the preceding half.

11. Construction activity recorded an increase in completion, starts and new planned supply, each up by 8.7%, 35.3% and 36.0% respectively compared to the same period last year.

12. The Malaysian House Price Index (MHPI) saw an unprecedented negative growth in Q2 2021^{P}, after a series of slow price growth since 2018. MHPI stood at 197.9 points, down by 1.2% year-on-year. Quarterly movements saw a decline of 1.6%.

COMMERCIAL PROPERTY

13. There were 10,433 transactions worth RM10.93 billion recorded, up by 28.5% in volume and 28.4% in value compared to the same period last year. All states recorded more market activity in the review period except for WP Putrajaya and Pahang. Selangor contributed the highest volume and value to the national market share, with 26.3% in volume (2,741 transactions) and 30.8% in value (RM3.37 billion); followed by WP Kuala Lumpur with 13.0% in volume (1,359 transactions) and 28.2% in value (RM3.08 billion) and Johor with 13.5% in volume (1,410 transactions) and 11.6% in value (RM1.27 billion).

14. Serviced apartment sub-sector recorded 1,912 transactions worth RM1.21 billion, formed 18.3% of the commercial property transactions volume and 11.0% of the value. Market performance recorded an increase of 33.4% in volume and 23.7% in value compared to similar period last year.

15. Serviced apartment sub-sector recorded 24,064 overhang units with a value of RM20.41 billion, indicating a marginal increase of 1.9% in volume, but value declined by 10.2% compared to the preceding half. Meanwhile, the unsold under construction recorded 42,358 units, increased by 20.1%.

16. The construction activities saw a mixed trend with completions decreased by 8.3% to 4,030 units, starts increased by 89.6% to 21,278 units and new planned supply up by 33.7% to 7,339 units against similar half last year.

17. The performance of shopping complex moderated in H1 2021, with the national occupancy rate saw a slight decline of 76.6% as compared to H1 2020 (78.6%). WPKL and Selangor

recorded 81.6% and 78.8% occupancy rate respectively, whereas Johor and Pulau Pinang managed to secure an average occupancy of 73.4% and 72.2% respectively.

18. The sole completion recorded in H1 2021 was contributed by the extension of Setia City Mall, Shah Alam (21,363 s.m.), bringing the total space for shopping complex nationwide to 16.93 million square metres. There were another 47 complexes (1.94 million s.m.) in the incoming supply and with another 10 complexes (0.34 million s.m.) in the planned supply.

19. The overall performance of purpose-built office decreased to 78.5%, slightly lower than H1 2020 (80.6%). The occupancy rate for private office buildings declined further to 71.7%, down from 74.3% recorded in H1 2020. Pulau Pinang secured a higher occupancy rate at 85.3% while Kuala Lumpur, Selangor and Johor recorded lower than the national level at 73.8%, 68.4%, and 72.75%, respectively.

20. Eight new purpose-built offices with office spaces totalling 505,842 square metres were completed in the review period, extending the existing market supply to 23.84 million square metres from 2,581 buildings. WP Kuala Lumpur was the lead contributor for office space with a share of 40.7% (9.70 million s.m.) in the existing market, 54.0% (1.09 million s.m.) in incoming supply and 52.9% (0.17 million s.m.) in planned supply.

2021 OUTLOOK

21. The acceleration of the National COVID-19 Immunisation Programme and the National Recovery Plan threshold across the states will see the reopening of more economic and social sectors in the fourth quarter of 2021. Supported by the implementation of various government initiatives and assistance, the property market is expected to be on the recovery path in line with the gradual economic recovery.

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