KEMENTERIAN KEWANGAN

LAPORAN PASARAN HARTA MALAYSIA TIMUR
Separuh Pertama 2026

EAST MALAYSIA REGION PROPERTY MARKET REPORT
First Half 2026

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

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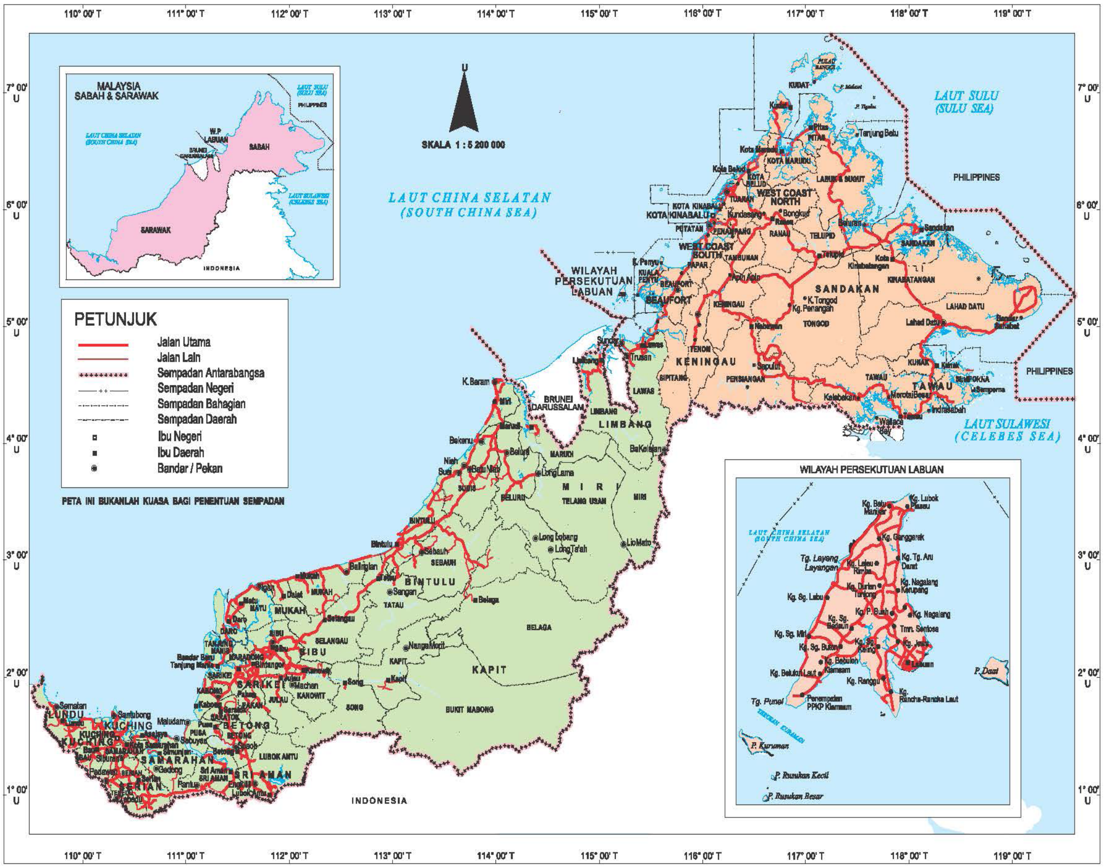
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PHILIPPINES
LAUT CHINA SELATAN (SOUTH CHINA SEA)
W.P LABUAN
BRUNEI DARUSSALAM
SABAH
LAUT SULAWESI (CELEBES SEA)
SARAWAK
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Ibu Daerah
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PETA INI BUKANLAH KUASA BAGI PENENTUAN SEMPADAN
LAUT CHINA SELATAN
(SOUTH CHINA SEA)
LAUT SULU
(SULU SEA)
PHILIPPINES
LAUT SULAWESI
(CELEBES SEA)
WILAYAH PERSEKUTUAN LABUAN
BRUNEI DARUSSALAM
KUDAT
PITAS
KOTA MARUDU
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KOTA KINABALU
PENAMPANG
PUTATAN
PAPAR
WEST COAST SOUTH
WEST COAST NORTH
RANAU
TUARAN
TAMBUNAN
BEAUFORT
KUALA PENYU
KENINGAU
TENOM
SIPITANG
NABAWAN
TONGOD
TELUPID
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SANDAKAN
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LAHAD DATU
KUNAK
SEMPORNA
TAWAU
Sandakan
Lahad Datu
Tawau
Semporna
Kalabakan
K. Tongod
Kg. Penangah
Sapulut
Pensiangan
Tanjung Batu
LAWAS
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BUKIT MABONG
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MARADONG
Bintangor
Tanjung Manis
Bandar Baru
BETONG
SARATOK
KABONG
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Roban
Pusa
Sebuyau
Simunjan
SAMARAHAN
Asajaya
SRI AMAN
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LUBOK ANTU
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SERIAN
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KUCHING
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Bau
LUNDU
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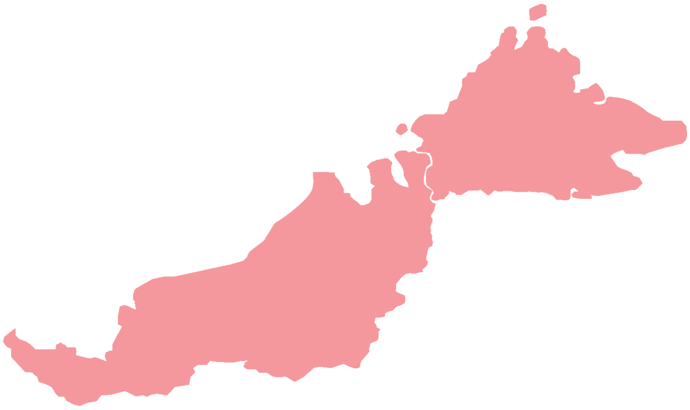
Sematan
Santubong
Maludam
INDONESIA
WILAYAH PERSEKUTUAN LABUAN
LAUT CHINA SELATAN (SOUTH CHINA SEA)
Kg. Batu Manikar
Kg. Lubok Temiang
Kg. Ganggarak
Tg. Layang Layangan
Kg. Layang Layangan
Kg. Lajau
Kg. Tg. Aru
Kg. Sg. Labu
Kg. Durian Tunjong
Kg. Nagalang
Kg. Sg. Bedaun
Kg. Bukit Kuda
Kg. Sg. Miri
Tmn. Sentosa
Kg. Sg. Bulan
Kg. Bebuloh
Kg. Jawa
Labuan
Kg. Bebuloh Laut
Kg. Ranggu
P. Daat
Tg. Punai
Perumahan PPKP Kiamsam
Kg. Rancha-Rancha Laut
P. Kuraman
P. Rusukan Kecil
P. Rusukan Besar

EAST MALAYSIA REGION



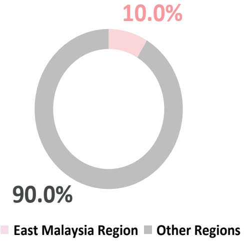
MARKET ACTIVITY

Volume, Value Transactions & Yearly Change (H1 2026 vs H1 2025)

▲ 10.2% Volume **18,666** transactions Value **RM7.89** billion ▲ 13.1%

Residential	7,997 units RM3.04 billion	1.5%	1.3%
Commercial	2,017 units RM1.13 billion	2.1%	-14.6%
Industrial	494 units RM0.76 billion	-10.8%	19.7%
Agriculture	5,989 units RM1.24 billion	26.3%	16.7%
Development Land & Others	2,169 units RM1.72 billion	21.2%	80.2%

Market Share between Regions (Volume)



Construction Activity

Completions	1,554	357	63	30
Starts	1,387	40	577	0
New Planned Supply	945	78	0	0

Unsold Status

Unsold Completed	3,632 units @ RM1.90 billion	1,817 units @ RM1.33 billion	376 units @ RM0.16 billion	127 units @ RM0.16 billion
Unsold Under Construction	6,817	730	5,177	88
Unsold Not Constructed	1,569	45	87	24

1.0 GAMBARAN KESELURUHAN PASARAN HARTA TANAH WILAYAH MALAYSIA TIMUR

Prestasi pasaran harta tanah di Wilayah Malaysia Timur menunjukkan pertumbuhan positif dalam tempoh kajian, dengan merekodkan sebanyak 18,666 transaksi bernilai RM7.89 bilion pada H1 2026, berbanding 16,943 transaksi bernilai RM6.97 bilion pada H1 2025. Prestasi ini mencerminkan peningkatan sebanyak 10.2% dalam bilangan transaksi dan 13.1% dalam nilai transaksi, disokong oleh pertumbuhan aktiviti pasaran di Sabah, Sarawak dan WP Labuan.

Secara keseluruhannya, Wilayah Malaysia Timur menyumbang 10% dan 7.5% daripada bilangan dan jumlah nilai transaksi negara. Prestasi ini menunjukkan peranan yang berterusan dalam menyokong perkembangan keseluruhan pasaran harta tanah Malaysia.

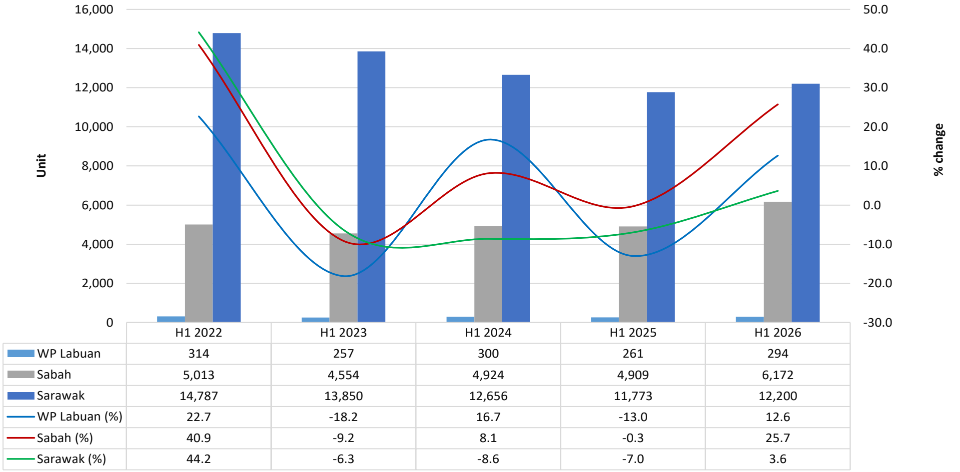
1.0 EAST MALAYSIA REGION PROPERTY MARKET OVERVIEW

The property market performance in East Malaysia Region showed positive growth during the review period, recording 18,666 transactions worth RM7.89 billion in H1 2026, compared to 16,943 transactions worth RM6.97 billion in H1 2025. This performance reflected an increase of 10.2% in transaction volume and 13.1% in transaction value, supported by improved market activities in Sabah, Sarawak, and WP Labuan.

Overall, East Malaysia Region contributed 10% and 7.5% of the total national transaction volume and value. The performance highlighting its continued role in supporting the overall growth of Malaysia's property market.

Chart 1

Overall Property Transactions Volume Trend H1 2022 – H1 2026



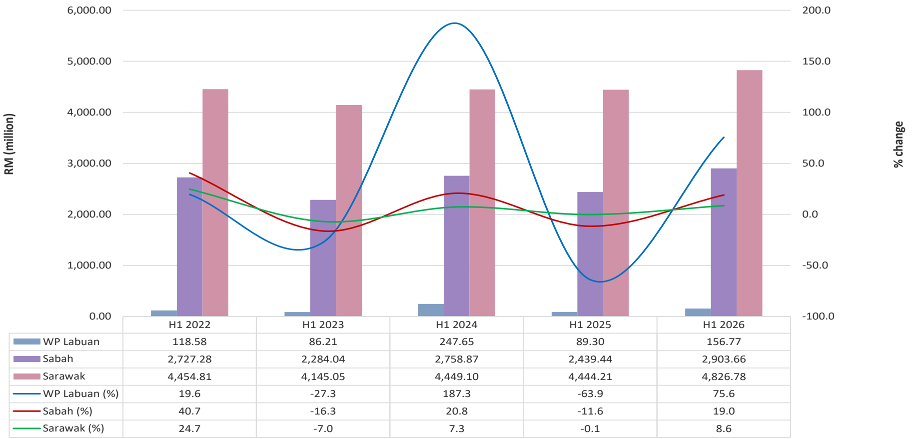
	H1 2022	H1 2023	H1 2024	H1 2025	H1 2026
WP Labuan	314	257	300	261	294
Sabah	5,013	4,554	4,924	4,909	6,172
Sarawak	14,787	13,850	12,656	11,773	12,200
WP Labuan (%)	22.7	-18.2	16.7	-13.0	12.6
Sabah (%)	40.9	-9.2	8.1	-0.3	25.7
Sarawak (%)	44.2	-6.3	-8.6	-7.0	3.6

Dari perspektif nilai transaksi, prestasi Wilayah Malaysia Timur menunjukkan peningkatan berbanding H1 2025. Sarawak kekal sebagai penyumbang utama nilai transaksi dengan merekodkan RM4.83 bilion, diikuti oleh Sabah sebanyak RM2.90 bilion dan WP Labuan sebanyak RM156.77 bilion. Peningkatan nilai transaksi di ketiga-tiga wilayah ini menyumbang kepada pengukuhan keseluruhan pasaran harta tanah di Wilayah Malaysia Timur dalam tempoh kajian.

From the perspective of transaction value, the performance of East Malaysia Region showed improvement compared to H1 2025. Sarawak remained the largest contributor to transaction value, recording RM4.83 billion, followed by Sabah with RM2.90 billion and WP Labuan with RM156.77 billion. The increase in transaction value across these regions contributed to the overall strengthening of the property market in East Malaysia during the review period.

Chart 2

Overall Property Transactions Value Trend H1 2022 – H1 2026



	H1 2022	H1 2023	H1 2024	H1 2025	H1 2026
WP Labuan	118.58	86.21	247.65	89.30	156.77
Sabah	2,727.28	2,284.04	2,758.87	2,439.44	2,903.66
Sarawak	4,454.81	4,145.05	4,449.10	4,444.21	4,826.78
WP Labuan (%)	19.6	-27.3	187.3	-63.9	75.6
Sabah (%)	40.7	-16.3	20.8	-11.6	19.0
Sarawak (%)	24.7	-7.0	7.3	-0.1	8.6

Chart 3

Overall Property Transactions Volume Breakdown by State H1 2026

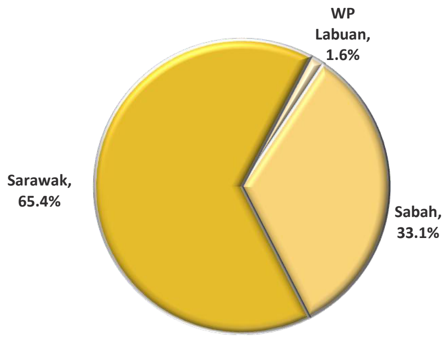
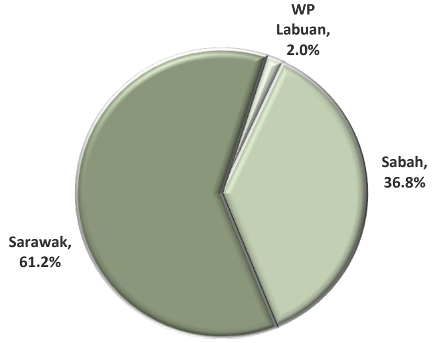


Chart 4

Overall Property Transactions Value Breakdown by State H1 2026



Mengikut negeri, Sarawak mendominasi jumlah transaksi dalam Wilayah Malaysia Timur dengan 65.4% (12,200 transaksi). Dari segi nilai, Sarawak turut mendahului pasaran, menyumbang 61.2% (RM4.83 bilion) daripada jumlah nilai transaksi.

By state, Sarawak dominated the transaction volume in East Malaysia Region with 65.4% (12,200 transactions). In terms of value, Sarawak also led the market, accounting for 61.2% (RM4.83 billion) of the total transaction value.

Chart 5

Overall Property Transactions Volume Breakdown by Sub-sector H1 2026

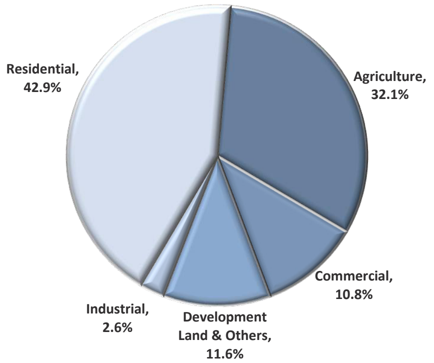
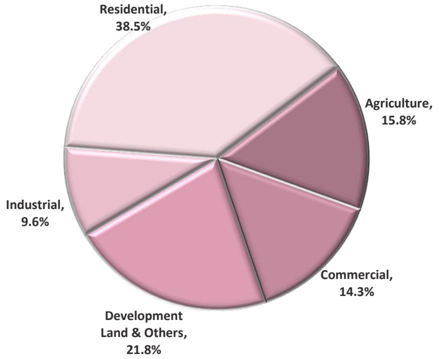


Chart 6

Overall Property Transactions Value Breakdown by Sub-sector H1 2026



Mengikut subsektor, subsektor kediaman terus menguasai aktiviti harta tanah di Wilayah Malaysia Timur dengan menyumbang 42.9% (7,997 transaksi) dalam bilangan dan 38.5% (RM3.04 bilion) dalam nilai daripada jumlah keseluruhan.

By sub-sector, the residential sub-sector continued to dominate property market activities in East Malaysia, contributing 42.9% (7,997 transactions) in volume and 38.5% (RM3.04 billion) in value of the total transactions.

Table 1

Summary of Prominent Sales in H1 2026

No.	State	Property	Location	Transaction Year	Consideration Price
HOTEL					
1.	Sabah	Ming Garden Hotel	Jalan Coastal	2025	RM15,270,210
2.	WP Labuan	Billion Waterfront	Jalan Wawasan	2025	RM32,000,000
INDUSTRIAL					
3.	Sabah	Detached Factory/ Warehouse	Jalan Apas	2026	RM15,000,000
4.	Sabah	Detached Factory/ Warehouse	Jalan Sepanggar	2025	RM32,000,000
5.	Sabah	Detached Factory/ Warehouse	Industrial Zone 2	2025	RM26,000,000
6.	Sabah	Detached Factory/ Warehouse	Jalan 3 KKIP Timur	2025	RM21,500,000
7.	Sarawak	Vacant Industrial Plot	Jalan Coastal Bintulu - Miri	2025	RM27,459,750
8.	Sarawak	Detached Factory/ Warehouse	Jalan Demak Laut 1	2025	RM23,000,000
9.	Sarawak	Vacant Industrial Plot	Jalan Dermaga	2025	RM12,050,000
10.	Sarawak	Vacant Industrial Plot	Jalan Saberkas, Kidurong	2024	RM135,216,000
ESTATE LAND					
11.	Sarawak	Estate Land (1,504 hectares)	Ladang Sastat, Batang Baram	2026	RM28,000,000
12.	Sabah	Estate Land (109.30 hectares)	Jalan Kunak – Lahad Datu	2026	RM10,379,850
13.	Sabah	Estate Land (40.47 hectares)	Off Jalan Sapi Nangoh - Paitan	2025	RM64,560,000
14.	Sabah	Estate Land (1,006 hectares)	Natural Plantation, Division 3	2025	RM54,688,172
15.	Sabah	Estate Land (115.32 hectares)	Jalan Dam	2025	RM25,294,050
16.	Sabah	Estate Land (340.46 hectares)	Off Jalan Sapi Nangoh - Paitan	2025	RM15,576,347
17.	Sabah	Estate Land (279.70 hectares)	Jalan Telupid - Tongod	2025	RM14,000,000

Note: This list only displays selected major transactions

2.0 AKTIVITI PASARAN HARTA TANAH

2.1 HARTA TANAH KEDIAMAN

Transaksi

Subsektor kediaman kekal sebagai subsektor utama di Wilayah Malaysia Timur. Prestasi pasaran subsektor kediaman di wilayah ini merekodkan sebanyak 7,997 transaksi pada H1 2026, berbanding 7,882 transaksi pada H1 2025. Prestasi mengikut negeri menunjukkan pergerakan bercampur, dengan WP Labuan dan Sarawak masing-masing merekodkan peningkatan bilangan transaksi, manakala Sabah mencatatkan sedikit penurunan berbanding tempoh yang sama tahun sebelumnya.

2.0 PROPERTY MARKET ACTIVITY

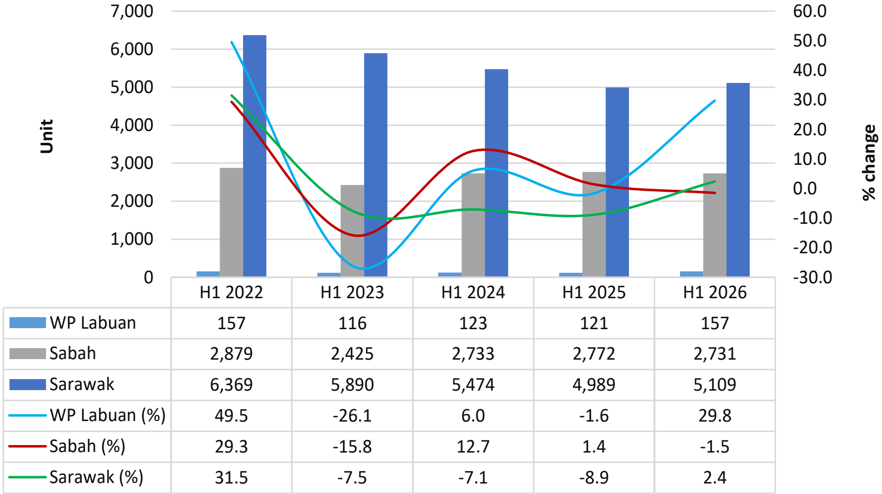
2.1 RESIDENTIAL PROPERTY

Transaction

The residential sub-sector remained the leading sub-sector in East Malaysia Region. The residential property market recorded 7,997 transactions in H1 2026, compared to 7,882 transactions in H1 2025. Performance by state showed mixed movements, with WP Labuan and Sarawak recording increases in transaction volume, while Sabah registered a slight decline compared to the same period of the previous year.

Chart 7

Residential Property Transactions Volume Trend H1 2022 – H1 2026



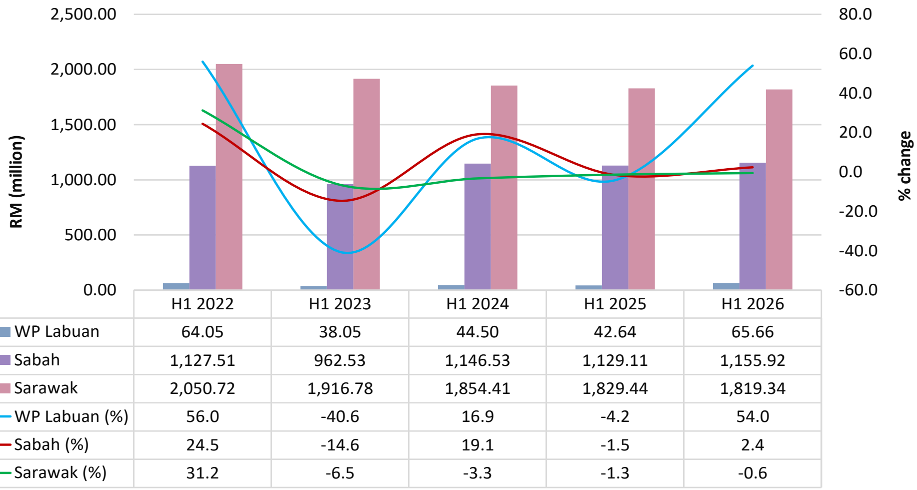
	H1 2022	H1 2023	H1 2024	H1 2025	H1 2026
WP Labuan	157	116	123	121	157
Sabah	2,879	2,425	2,733	2,772	2,731
Sarawak	6,369	5,890	5,474	4,989	5,109
WP Labuan (%)	49.5	-26.1	6.0	-1.6	29.8
Sabah (%)	29.3	-15.8	12.7	1.4	-1.5
Sarawak (%)	31.5	-7.5	-7.1	-8.9	2.4

Dari segi nilai transaksi, subsektor kediaman di Wilayah Malaysia Timur merekodkan sebanyak RM3.04 bilion pada H1 2026, berbanding RM3 bilion pada H1 2025. Sarawak kekal sebagai penyumbang utama dengan nilai transaksi sebanyak RM1.82 bilion, diikuti Sabah sebanyak RM1.16 bilion dan WP Labuan sebanyak RM65.66 juta. Nilai transaksi meningkat di WP Labuan dan Sabah, manakala Sarawak mencatatkan penurunan marginal berbanding H1 2025.

In terms of transaction value, the residential sub-sector in East Malaysia Region recorded RM3.04 billion in H1 2026, compared to RM3 billion in H1 2025. Sarawak remained the largest contributor, with a transaction value of RM1.82 billion, followed by Sabah with RM1.16 billion and WP Labuan with RM65.66 million. Transaction values increased in WP Labuan and Sabah, while Sarawak recorded a marginal decline compared to H1 2025.

Chart 8

Residential Property Transactions Value Trend H1 2022 – H1 2026



	H1 2022	H1 2023	H1 2024	H1 2025	H1 2026
WP Labuan	64.05	38.05	44.50	42.64	65.66
Sabah	1,127.51	962.53	1,146.53	1,129.11	1,155.92
Sarawak	2,050.72	1,916.78	1,854.41	1,829.44	1,819.34
WP Labuan (%)	56.0	-40.6	16.9	-4.2	54.0
Sabah (%)	24.5	-14.6	19.1	-1.5	2.4
Sarawak (%)	31.2	-6.5	-3.3	-1.3	-0.6

Pelancaran Baharu

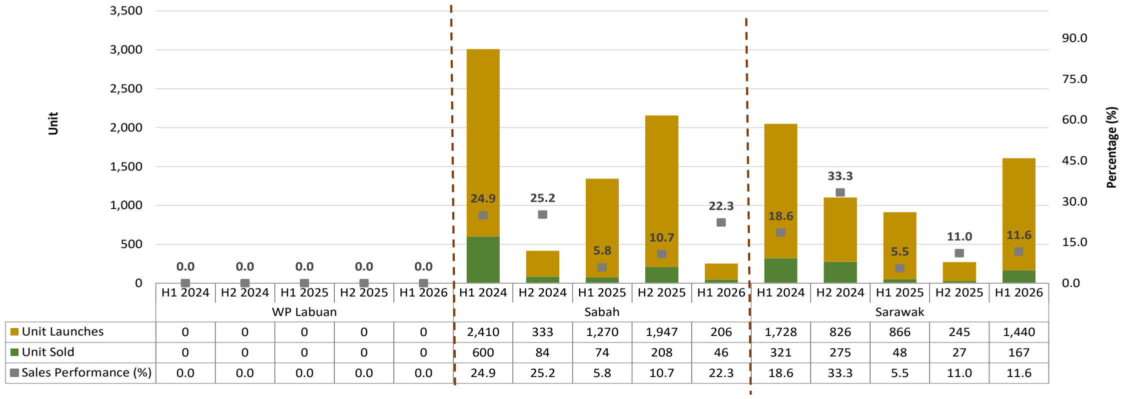
Sebanyak 1,646 unit kediaman telah dilancarkan di Wilayah Malaysia Timur pada H1 2026, berbanding 2,136 unit pada H1 2025. Penurunan aktiviti pelancaran baharu mencerminkan pendekatan lebih berhati-hati dalam kalangan pemaju bagi menyesuaikan penawaran baharu dengan keadaan permintaan semasa. Sarawak merekodkan jumlah pelancaran baharu tertinggi dengan 1,440 unit, diikuti oleh Sabah sebanyak 206 unit, manakala tiada unit dilancarkan di WP Labuan. Sabah mencatatkan prestasi jualan tertinggi sebanyak 22.3%, diikuti oleh Sarawak sebanyak 11.6%, manakala WP Labuan tidak merekodkan sebarang jualan. Secara keseluruhan, prestasi jualan kediaman di Wilayah Malaysia Timur meningkat kepada 12.9% berbanding 5.7% pada H1 2025.

New Launches

A total of 1,646 residential units were launched in East Malaysia Region in H1 2026, compared to 2,136 units in H1 2025. The decline in new launches reflected a more cautious approach among developers in aligning new supply with prevailing market demand conditions. Sarawak recorded the highest number of new launches with 1,440 units, followed by Sabah with 206 units, while no new launches were recorded in WP Labuan. Sabah recorded the highest sales performance at 22.3%, followed by Sarawak at 11.6%, while WP Labuan recorded no sales. Overall, residential sales performance in East Malaysia improved to 12.9%, compared to 5.7% in H1 2025.

Chart 9

Residential Newly Launched and Sales Performance H1 2024 – H1 2026



	WP Labuan					Sabah					Sarawak				
	H1 2024	H2 2024	H1 2025	H2 2025	H1 2026	H1 2024	H2 2024	H1 2025	H2 2025	H1 2026	H1 2024	H2 2024	H1 2025	H2 2025	H1 2026
Unit Launches	0	0	0	0	0	2,410	333	1,270	1,947	206	1,728	826	866	245	1,440
Unit Sold	0	0	0	0	0	600	84	74	208	46	321	275	48	27	167
Sales Performance (%)	0.0	0.0	0.0	0.0	0.0	24.9	25.2	5.8	10.7	22.3	18.6	33.3	5.5	11.0	11.6

Status Pasaran

Segmen kediaman siap dibina belum terjual di Wilayah Malaysia Timur menunjukkan pergerakan yang bercampur dalam tempoh kajian. Unit siap dibina belum terjual merekodkan sebanyak 3,632 unit pada H1 2026. Sabah merekodkan jumlah tertinggi dengan 1,887 unit, mewakili 52% daripada jumlah keseluruhan, diikuti Sarawak sebanyak 1,704 unit (46.9%) dan WP Labuan sebanyak 41 unit (1.1%).

Bagi unit dalam pembinaan belum terjual, sebanyak 6,817 unit direkodkan pada H1 2026. Sarawak menjadi penyumbang utama dengan 4,036 unit, mewakili 59.2% daripada jumlah keseluruhan, diikuti Sabah sebanyak 2,746 unit (40.3%) dan WP Labuan sebanyak 35 unit (0.5%).

Sementara itu, unit belum dibina belum terjual merekodkan sebanyak 1,569 unit pada H1 2026. Sarawak merekodkan jumlah tertinggi dengan 814 unit, mewakili 51.9% daripada jumlah keseluruhan dan diikuti Sabah sebanyak 755 unit (48.1%). Pergerakan ini mencerminkan perancangan penawaran baharu yang lebih berhati-hati dikalangan pemaju.

Market Status

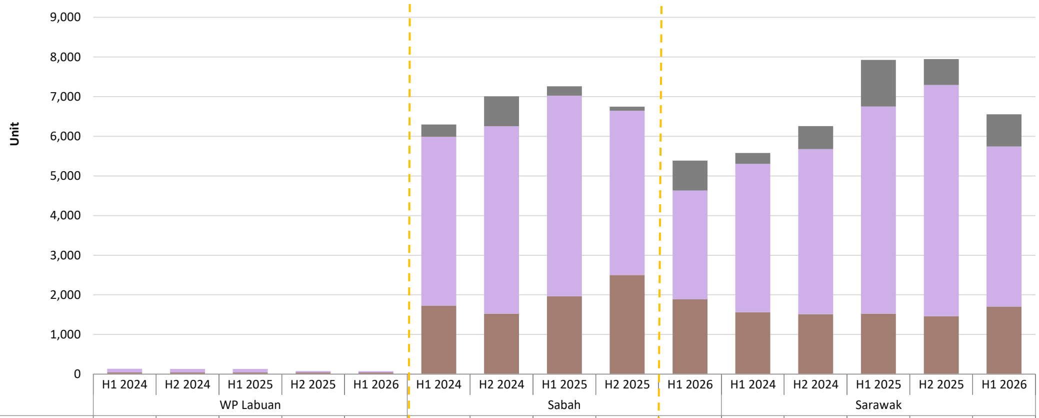
The unsold completed residential segment in the East Malaysia Region showed mixed movements during the review period. Unsold completed units recorded 3,632 units in H1 2026. Sabah recorded the highest number with 1,887 units, representing 52% of the total, followed by Sarawak with 1,704 units (46.9%) and WP Labuan with 41 units (1.1%).

For unsold under construction, a total of 6,817 units were recorded in H1 2026. Sarawak emerged as the largest contributor with 4,036 units, accounting for 59.2% of the total, followed by Sabah with 2,746 units (40.3%) and WP Labuan with 35 units (0.5%).

Meanwhile, unsold not constructed recorded 1,569 units in H1 2026. Sarawak recorded the highest number with 814 units, representing 51.9% of the total and followed by Sabah with 755 units (48.1%). This movement reflected a more cautious approach among the developers.

Chart 10

Residential Market Status H1 2024 – H1 2026



	H1 2024	H2 2024	H1 2025	H2 2025	H1 2026	H1 2024	H2 2024	H1 2025	H2 2025	H1 2026	H1 2024	H2 2024	H1 2025	H2 2025	H1 2026
	WP Labuan					Sabah					Sarawak				
■ Unsold Not Constructed	0	0	0	0	0	310	756	239	100	755	273	582	1,177	652	814
■ Unsold Under Construction	95	93	89	36	35	4,260	4,727	5,056	4,147	2,746	3,743	4,163	5,224	5,831	4,036
■ Unsold Completed	41	41	41	41	41	1,728	1,524	1,967	2,498	1,887	1,562	1,512	1,525	1,464	1,704

Aktiviti Pembinaan

Prestasi aktiviti pembinaan kediaman di Wilayah Malaysia Timur menunjukkan prestasi sederhana dalam tempoh kajian. Jumlah kediaman siap dibina menurun kepada 1,554 unit pada H1 2026, berbanding 3,556 unit pada H1 2025. Sarawak merekodkan jumlah unit siap dibina tertinggi dengan 1,399 unit, diikuti Sabah sebanyak 155 unit. Tiada unit siap dibina direkodkan di WP Labuan.

Aktiviti kediaman mula dibina turut menunjukkan penurunan kepada 1,387 unit pada H1 2026, berbanding 1,773 unit pada H1 2025. Sarawak kekal sebagai penyumbang utama dengan 1,130 unit, diikuti Sabah sebanyak 257 unit, manakala WP Labuan tidak merekodkan sebarang aktiviti mula dibina pada H1 2026.

Sementara itu, penawaran baharu dirancang merekodkan sebanyak 945 unit pada H1 2026, meningkat berbanding 856 unit pada H1 2025. Sarawak menyumbang jumlah terbesar dengan 945 unit, manakala tiada penawaran baharu dirancang direkodkan di Sabah dan WP Labuan.

Construction Activity

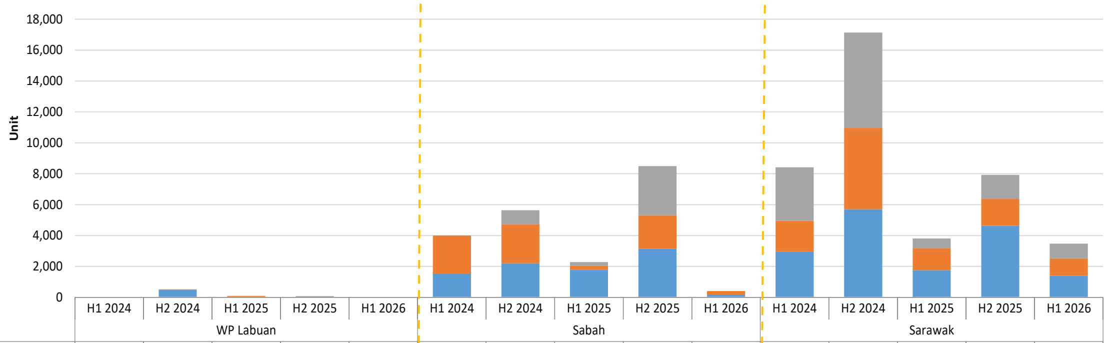
The performance of residential construction activity in the East Malaysia Region showed a moderation performance during the review period. Housing completions declining to 1,554 units in H1 2026, compared to 3,556 units in H1 2025. Sarawak recorded the highest number of completed units with 1,399 units, followed by Sabah with 155 units. No completed units were recorded in WP Labuan.

Residential starts also recorded a decline to 1,387 units in H1 2026, compared to 1,773 units in H1 2025. Sarawak remained the largest contributor with 1,130 units, followed by Sabah with 257 units, while WP Labuan recorded no new construction starts in H1 2026.

Meanwhile, new planned supply recorded 945 units in H1 2026, increasing from 856 units in H1 2025. Sarawak accounted for the largest share with 945 units, while no new planned supply was recorded in Sabah and WP Labuan.

Chart 11

Residential Construction Activity Trend H1 2022 – H1 2026



	H1 2024	H2 2024	H1 2025	H2 2025	H1 2026	H1 2024	H2 2024	H1 2025	H2 2025	H1 2026	H1 2024	H2 2024	H1 2025	H2 2025	H1 2026
	WP Labuan					Sabah					Sarawak				
▨ New Planned Supply	0	0	0	71	0	0	905	230	3,167	0	3,467	6,182	626	1,570	945
■ Starts	18	18	99	10	0	2,477	2,529	254	2,183	257	1,992	5,252	1,420	1,726	1,130
■ Completion	0	500	0	0	0	1,518	2,205	1,794	3,137	155	2,961	5,701	1,762	4,632	1,399

Table 2

Construction Activity of Residential in East Malaysia Region H1 2026

Stage of Development / State	WP Labuan	Sabah	Sarawak
Existing Supply (units)	14,039	253,378	305,274
Incoming Supply (units)	105	11,095	14,077
Planned Supply (units)	71	5,549	4,620

Indeks Harga Rumah

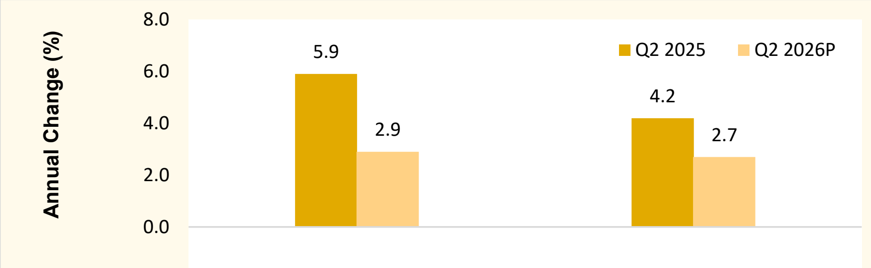
Indeks Harga Rumah bagi Sabah dan Sarawak menunjukkan peningkatan pada S2 2026^{P}, masing-masing merekodkan 217.7 mata dan 225.1 mata. Sarawak kekal merekodkan harga purata tertinggi iaitu RM574,099 pada S2 2026^{P}, meningkat daripada RM558,949 pada S2 2025. Sementara itu, Sabah pula mencatatkan harga purata RM558,358, lebih tinggi berbanding RM542,802 pada tempoh yang sama tahun sebelumnya.

House Price Index

The House Price Index for Sabah and Sarawak showed an increase in Q2 2026^{P}, recording 217.7 points and 225.1 points, respectively. Sarawak continued to record the higher average house price at RM574,099 in Q2 2026^{P}, increasing from RM558,949 in Q2 2025. Meanwhile, Sabah recorded an average house price of RM558,358, higher than RM542,802 in the same period of the previous year.

Chart 12

All House Price Index Annual Changes



YEAR		**SABAH**	**SARAWAK**
Q2 2025	**Index Point**	211.6	219.2
	Average House Price	RM542,802	RM558,949
Q2 2026^{P}	**Index Point**	217.7	225.1
	Average House Price	RM558,358	RM574,099

Harga

Secara keseluruhannya, harga harta tanah kediaman di Wilayah Malaysia Timur menunjukkan pergerakan yang stabil, dengan beberapa lokasi utama merekodkan peningkatan harga secara marginal. Peningkatan harga lebih ketara direkodkan bagi kediaman bertanah, khususnya rumah teres satu dan dua tingkat di kawasan yang mempunyai permintaan pasaran yang berterusan.

Di Sarawak, rumah teres satu tingkat menunjukkan peningkatan harga di beberapa lokasi utama. Taman Dayu, Bahagian Miri merekodkan kenaikan tertinggi sebanyak 15.0%, diikuti Desa Bahagia, Bahagian Miri (5.5%) dan Vista Perdana Phase 2, Bahagian Miri (4.5%). Selain itu, Taman Puteri, Bahagian Kuching turut mencatatkan peningkatan sebanyak 2.9%.

Price

Overall, residential property prices in the East Malaysia Region showed stable movements with several key locations recording marginal price increases. More notable price increases were observed for landed residential properties, particularly single and double-storey terraced houses in areas with sustained market demand.

In Sarawak, single storey terraced houses recorded price increases in several key locations. Taman Dayu, Miri Division, registered the highest increase at 15.0%, followed by Desa Bahagia, Miri Division (5.5%) and Vista Perdana Phase 2, Miri Division (4.5%). In addition, Taman Puteri, Kuching Division, also recorded an increase of 2.9%.

Sementara itu, bagi rumah teres dua tingkat di Sarawak, peningkatan harga tertinggi direkodkan di Taman Muara Tabuan, Bahagian Kuching dengan kenaikan sebanyak 12.9%, diikuti Boxhill 76, Bahagian Kuching (10.0%) dan Taman Springfield, Bahagian Kuching (9.6%). Sebagai tambahan, Tabuan Heights, Bahagian Kuching turut mencatatkan peningkatan sebanyak 4.3%.

Bagi WP Labuan, peningkatan harga direkodkan bagi rumah teres satu tingkat di Perumahan MPL Batu Arang sebanyak 5.2%, manakala Taman Kian Yap mencatatkan peningkatan sebanyak 7.5%.

Sewa

Pasaran sewa kediaman di Wilayah Malaysia Timur menunjukkan prestasi bercampur dalam tempoh kajian. Beberapa lokasi merekodkan peningkatan sewa, khususnya bagi rumah teres. Peningkatan ini lebih ketara di kawasan yang mempunyai permintaan pasaran yang berterusan dan kemudahan sokongan yang baik.

Bagi rumah teres satu tingkat di Sabah, peningkatan sewa tertinggi direkodkan di Taman Perwira, Daerah Tawau iaitu sebanyak 13.6%, dengan kadar sewa meningkat antara RM500 hingga RM750 sebulan.

Di Sarawak, rumah teres satu tingkat turut menunjukkan peningkatan sewa dilokasi terpilih. Holiday Park, Bahagian Miri merekodkan kenaikan sebanyak 7.7%, dengan kadar sewa RM1,400 sebulan, diikuti Taman Jelita, Bahagian Miri sebanyak 2.2% dengan kadar sewa antara RM1,000 hingga RM1,300 sebulan. Sementara itu, di WP Labuan, peningkatan sewa rumah teres satu tingkat direkodkan di SEC Durian Tunjung sebanyak 12.0%, dengan kadar sewa antara RM1,300 hingga RM1,500 sebulan dan Taman En Su sebanyak 8.3% dengan kadar sewa antara RM1,200 hingga RM1,400 sebulan.

Meanwhile, for double storey terraced houses in Sarawak, the highest price increase was recorded at Taman Muara Tabuan, Kuching Division, with an increase of 12.9%, followed by Boxhill 76, Kuching Division (10.0%) and Taman Springfield, Kuching Division (9.6%). In addition, Tabuan Heights, Kuching Division, also recorded an increase of 4.3%.

In WP Labuan, price increases were recorded for single-storey terraced houses at Perumahan MPL Batu Arang, with an increase of 5.2%, while Taman Kian Yap recorded an increase of 7.5%.

Rental

The residential rental market in the East Malaysia Region showed mixed performance during the review period. Several locations recording rental increases, particularly for terraced houses. The rental increases were more evident in areas with sustained market demand and good supporting amenities.

For single storey terraced houses in Sabah, the highest rental increase was recorded at Taman Perwira, Tawau District, with an increase of 13.6%, with rental rates rising between RM500 and RM750 per month.

In Sarawak, single storey terraced houses also recorded rental increases inselected areas. Holiday Park, Miri Division registering an increase of 7.7%, with rental rates at RM1,400 per month, followed by Taman Jelita, Miri Division (2.2%) with rental rates between RM1,000 to RM1,300 per month. Meanwhile, in WP Labuan, rental increases for single-storey terraced houses were recorded at SEC Durian Tunjung (12.0%), with rental rates between RM1,300 and RM1,500 per month, and Taman En Su (8.3%) with rental rates between RM1,200 and RM1,400 per month.

Peningkatan sewa juga direkodkan bagi rumah teres dua tingkat di Sabah. Beberapa peningkatan direkodkan di Taman Semarak Megah, Daerah Tawau dengan kenaikan sebanyak 15.9%, dengan kadar sewa antara RM1,150 hingga RM1,400 sebulan, diikuti Taman Pamalan dan Taman Milan masing-masing sebanyak 12.5%, dengan kadar sewa antara RM700 hingga RM1,800 sebulan. Di Sarawak pula, Curtin Water, Bahagian Miri merekodkan peningkatan sewa sebanyak 2.9%, dengan kadar sewa antara RM1,700 hingga RM1,800 sebulan.

2.2 HARTA TANAH KOMERSIAL

Transaksi

Subsektor komersial di Wilayah Malaysia Timur merekodkan sebanyak 2,017 transaksi pada H1 2026, berbanding 1,975 transaksi pada H1 2025. Prestasi pasaran menunjukkan pergerakan bercampur, dengan WP Labuan dan Sarawak merekodkan peningkatan aktiviti transaksi. Sarawak kekal sebagai penyumbang utama dengan mencatatkan 1,309 transaksi, diikuti oleh Sabah sebanyak 693 transaksi dan WP Labuan sebanyak 15 transaksi.

Rental increases also recorded for double storey terraced houses in Sabah. Several rental increases recorded at Taman Semarak Megah, Tawau District, by 15.9%, with rental rates ranging from between RM1,150 and RM1,400 per month and followed by Taman Pamalan and Taman Milan at 12.5%, with rental rates between RM700 and RM1,800 per month respectively. In Sarawak, Curtin Water, Miri Division recorded a rental increase of 2.9%, with rental rates ranging from between RM1,700 and RM1,800 per month.

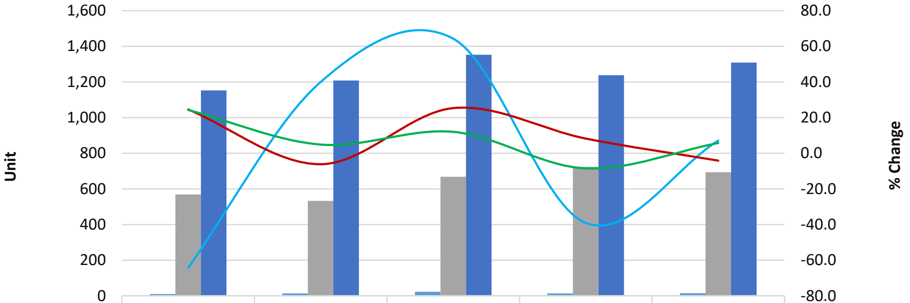
2.2 COMMERCIAL PROPERTY

Transaction

The commercial sub-sector in East Malaysia Region recorded 2,017 transactions in H1 2026, compared to 1,975 transactions in H1 2025. Market performance showed mixed movements, with WP Labuan and Sarawak recording increases in transaction activity. Sarawak remained the largest contributor, recording 1,309 transactions, followed by Sabah with 693 transactions and WP Labuan with 15 transactions.

Chart 13

Commercial Property Transactions Volume Trend H1 2022 – H1 2026



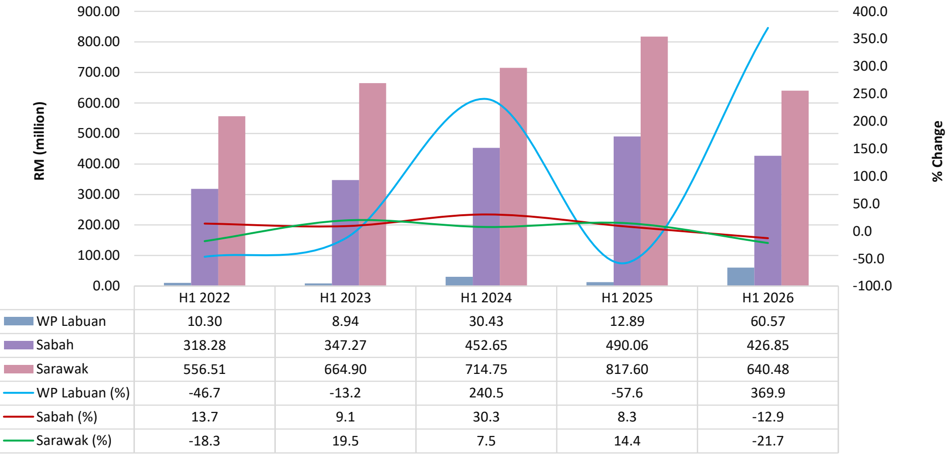
	H1 2022	H1 2023	H1 2024	H1 2025	H1 2026
WP Labuan	10	14	23	14	15
Sabah	568	533	668	723	693
Sarawak	1,152	1,208	1,353	1,238	1,309
WP Labuan (%)	-64.3	40.0	64.3	-39.1	7.1
Sabah (%)	24.6	-6.2	25.3	8.2	-4.1
Sarawak (%)	24.3	4.9	12.0	-8.5	5.7

Dari segi nilai transaksi, subsektor komersial di Wilayah Malaysia Timur merekodkan RM1.13 bilion pada H1 2026, berbanding RM1.32 bilion pada H1 2025. Sarawak kekal sebagai penyumbang utama nilai transaksi dengan RM640.48 juta, diikuti Sabah sebanyak RM426.85 juta dan WP Labuan sebanyak RM60.57 juta. Prestasi nilai transaksi menunjukkan pergerakan bercampur, dengan WP Labuan merekodkan peningkatan, manakala Sabah dan Sarawak mencatatkan penurunan berbanding H1 2025.

In terms of transaction value, the commercial sub-sector in East Malaysia recorded RM1.13 billion in H1 2026, compared to RM1.32 billion in H1 2025. Sarawak remained the largest contributor to transaction value at RM640.48 million, followed by Sabah with RM426.85 million and WP Labuan with RM60.57 million. Transaction value showed mixed movements, with WP Labuan recording an increase, while Sabah and Sarawak registered declines compared to H1 2025.

Chart 14

Commercial Property Transactions Value Trend H1 2022 – H1 2026



	H1 2022	H1 2023	H1 2024	H1 2025	H1 2026
WP Labuan	10.30	8.94	30.43	12.89	60.57
Sabah	318.28	347.27	452.65	490.06	426.85
Sarawak	556.51	664.90	714.75	817.60	640.48
WP Labuan (%)	-46.7	-13.2	240.5	-57.6	369.9
Sabah (%)	13.7	9.1	30.3	8.3	-12.9
Sarawak (%)	-18.3	19.5	7.5	14.4	-21.7

a. Kedai

Transaksi

Pada H1 2026, subsektor kedai di Wilayah Malaysia Timur merekodkan sebanyak 1,443 transaksi bernilai RM822.54 juta, berbanding 1,505 transaksi bernilai RM912.18 juta pada H1 2025. Aktiviti transaksi kedai menyumbang 71.5% daripada bilangan dan 72.9% daripada nilai keseluruhan transaksi harta tanah komersial di wilayah tersebut.

a. Shop

Transaction

In H1 2026, the shop sub-sector in East Malaysia recorded 1,443 transactions worth RM822.54 million, compared to 1,505 transactions worth RM912.18 million in H1 2025. The shop transaction activity dominating for 71.5% of the transaction volume and 72.9% of the total transaction value of commercial properties in the region.

Sarawak kekal sebagai penyumbang utama bilangan transaksi kedai dengan merekodkan 74.4% (1,074 transaksi) daripada keseluruhan transaksi kedai. Sabah merekodkan sebanyak 358 transaksi (24.8%) dan WP Labuan sebanyak 11 transaksi (0.8%). Dari segi nilai transaksi pula, Sarawak mendahului dengan RM538.18 juta, menyumbang 65.4% daripada jumlah nilai transaksi kedai, diikuti Sabah (RM269.60 juta) dan WP Labuan (RM14.76 juta).

Status Pasaran

Segmen kedai belum terjual di Wilayah Malaysia Timur menunjukkan pergerakan bercampur dalam tempoh kajian, dengan kategori stok belum terjual merekodkan perubahan berbeza mengikut peringkat pembangunan. Unit kedai siap dibina belum terjual merekodkan sebanyak 2,035 unit pada H1 2026, berbanding 1,017 unit pada H2 2025. Sarawak merekodkan jumlah tertinggi dengan 922 unit, diikuti Sabah sebanyak 895 unit dan tiada unit direkodkan di WP Labuan. Peningkatan unit siap dibina belum terjual ini menunjukkan cabaran penyerapan stok sedia ada masih tertumpu di Sarawak dan Sabah.

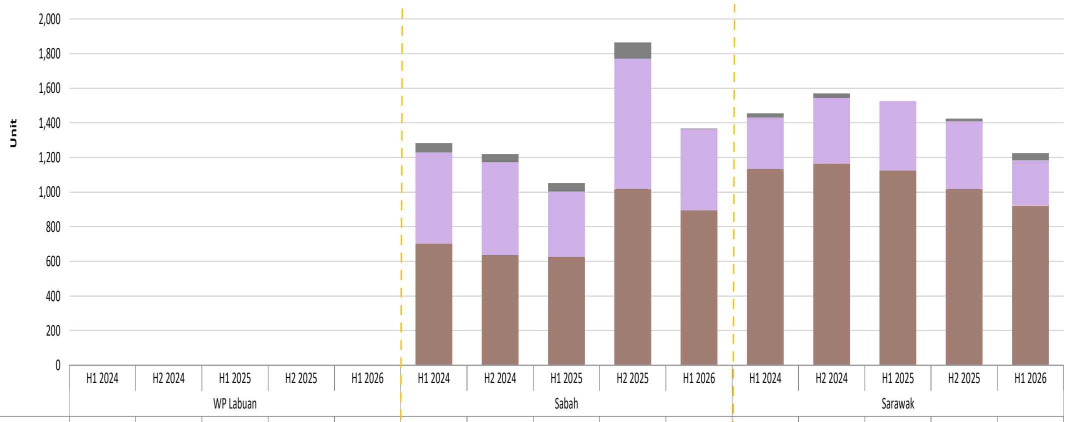
Sarawak remained the largest contributor to the shop transaction volume, recording 74.4% (1,074 transactions) of total shop transactions. Sabah recorded 358 transactions (24.8%) and WP Labuan with 11 transactions (0.8%). In terms of transaction value, Sarawak also led with RM538.18 million, accounting for 65.4% of the total shop transaction value, followed by Sabah (RM269.60 million) and WP Labuan (RM14.76 million).

Market Status

The unsold shop segment in the East Malaysia Region showed mixed movements during the review period, with unsold stock categories recording different changes across various development stages. Unsold completed shop units recorded 2,035 units in H1 2026, compared to 1,017 units in H2 2025. Sarawak recorded the highest number with 922 units, followed by Sabah with 895 units and no units were recorded in WP Labuan. The increase in unsold completed stock indicated that challenges in absorbing existing inventory remained concentrated in Sarawak and Sabah.

Chart 15

Shop Market Status H1 2024 – H1 2026



	H1 2024	H2 2024	H1 2025	H2 2025	H1 2026	H1 2024	H2 2024	H1 2025	H2 2025	H1 2026	H1 2024	H2 2024	H1 2025	H2 2025	H1 2026
	WP Labuan					Sabah					Sarawak				
■ Unsold Not Constructed	0	0	0	0	0	54	49	49	94	3	24	26	0	16	42
■ Unsold Under Construction	0	0	0	0	0	525	536	378	752	469	297	378	401	392	261
■ Unsold Completed	0	0	0	0	0	704	636	625	1,018	895	1,133	1,166	1,125	1,017	922

Bagi unit kedai dalam pembinaan belum terjual, sebanyak 730 unit direkodkan pada H1 2026 berbanding 1,144 unit pada H2 2025. Sabah menjadi penyumbang utama dengan 469 unit, diikuti Sarawak sebanyak 261 unit.

Sementara itu, kedai belum dibina belum terjual merekodkan sebanyak 45 unit pada H1 2026 berbanding 110 unit pada H2 2025. Sarawak merekodkan jumlah tertinggi dengan 42 unit, diikuti Sabah sebanyak 3 unit.

Aktiviti Pembinaan

Dari segi penawaran, aktiviti pembinaan kedai di Wilayah Malaysia Timur menunjukkan pergerakan yang bercampur dalam tempoh kajian. Jumlah unit siap dibina merekodkan sebanyak 357 unit (H1 2025: 374 unit). Sarawak merekodkan jumlah unit siap dibina tertinggi dengan 221 unit (H1 2025: 212 unit), diikuti oleh Sabah sebanyak 136 unit (H1 2025: 142 unit), manakala WP Labuan tidak merekodkan sebarang unit siap dibina (H1 2025: 20 unit).

Aktiviti kedai mula dibina menunjukkan penyusutan dengan merekodkan 40 unit (H1 2025: 76 unit). Sabah menyumbang keseluruhan aktiviti mula dibina dengan 40 unit, manakala Sarawak dan WP Labuan tidak merekodkan sebarang aktiviti mula dibina dalam tempoh kajian.

For unsold shops under construction, a total of 730 units were recorded in H1 2026, compared to 1,144 units in H2 2025. Sabah was the largest contributor with 469 units, followed by Sarawak with 261 units.

Meanwhile, unsold shops not constructed recorded 45 units in H1 2026, compared to 110 units in H2 2025. Sarawak recorded the highest number with 42 units, followed by Sabah with 3 units.

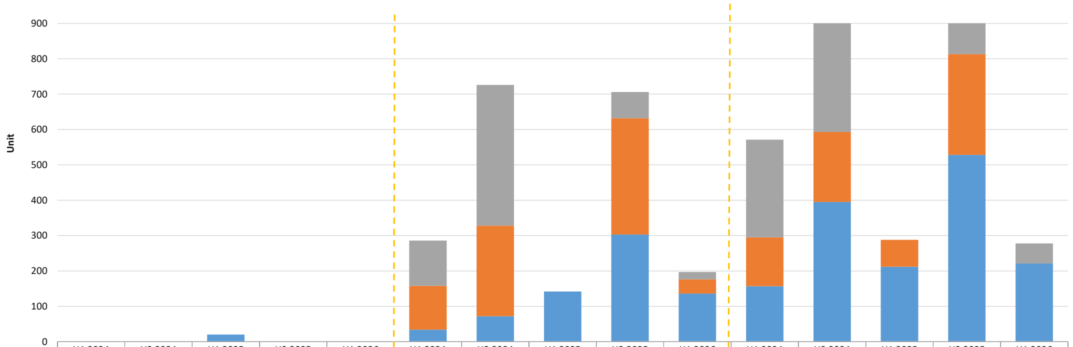
Construction Activity

In terms of supply, shop construction activity in the East Malaysia Region showed mixed movements during the review period. The number of completed units recorded 357 units (H1 2025: 374 units). Sarawak recorded the highest number of completed units with 221 units (H1 2025: 212 units), followed by Sabah with 136 units (H1 2025: 142 units), while WP Labuan did not record any completed units (H1 2025: 20 units).

Shop construction starts showed a decline, recording 40 units (H1 2025: 76 units). Sabah accounted for all construction starts with 40 units, while Sarawak and WP Labuan did not record any new construction starts during the review period.

Chart 16

Shop Construction Activity Trend H1 2024 – H1 2026



	WP Labuan					Sabah					Sarawak				
	H1 2024	H2 2024	H1 2025	H2 2025	H1 2026	H1 2024	H2 2024	H1 2025	H2 2025	H1 2026	H1 2024	H2 2024	H1 2025	H2 2025	H1 2026
■ New Planned Supply	0	0	0	0	0	128	398	0	74	21	276	416	0	414	57
■ Starts	0	0	0	0	0	124	256	0	329	40	138	198	76	285	0
■ Completion	0	0	20	0	0	34	72	142	303	136	157	395	212	528	221

Table 3

Construction Activity of Shop in East Malaysia Region H1 2026

Stage of Development / State	WP Labuan	Sabah	Sarawak
Existing Supply (units)	1,073	34,600	40,458
Incoming Supply (units)	12	1,697	1,307
Planned Supply (units)	0	381	496

Sementara itu, penawaran baharu dirancang merekodkan sebanyak 78 unit pada H1 2026. Sarawak merekodkan jumlah penawaran baharu dirancang tertinggi dengan 57 unit, diikuti oleh Sabah sebanyak 21 unit, manakala WP Labuan tidak merekodkan sebarang penawaran baharu dirancang. Pergerakan ini mencerminkan perancangan bekalan baharu yang lebih terpilih oleh pemaju dalam menyesuaikan pembangunan kedai dengan keadaan permintaan pasaran semasa.

Meanwhile, new planned supply recorded 78 units in H1 2026. Sarawak recorded the highest new planned supply with 57 units, followed by Sabah with 21 units, while WP Labuan did not record any new planned supply. This movement reflected a more selective approach by developers in planning new shop supply to align future developments with prevailing market demand conditions.

Harga

Price

Harga kedai di Wilayah Malaysia Timur menunjukkan pergerakan yang bercampur dalam tempoh kajian, dengan beberapa lokasi merekodkan peningkatan harga secara marginal. Kenaikan harga lebih tertumpu kepada kedai dua tingkat dan unit kedai berstrata di kawasan komersial yang mempunyai aktiviti perniagaan yang berterusan.

Shop prices in the East Malaysia Region showed mixed movements during the review period, with several locations recording marginal price increases. The price increases were mainly concentrated in double storey shops and strata shop units in commercial areas with sustained business activities.

Di Sabah, harga kedai dua tingkat menunjukkan peningkatan di beberapa lokasi. I-Peak, Daerah Lahad Datu merekodkan kenaikan tertinggi sebanyak 7.5%, dengan harga meningkat kepada RM950,000, diikuti Bandar Sibuga Jaya, Daerah Sandakan sebanyak 4.9% dengan harga meningkat kepada RM860,000 dan Beaufort Sentral, Daerah Beaufort sebanyak 2.1% dengan harga dalam lingkungan RM670,000.

In Sabah, double storey shop prices recorded increases in several locations. I-Peak, Lahad Datu District, recorded the highest increase of 7.5%, with prices rising to RM950,000, followed by Bandar Sibuga Jaya, Sandakan District, with an increase of 4.9%, with prices rising to RM860,000 and Beaufort Sentral, Beaufort District, with an increase of 2.1%, with prices recorded at around RM670,000.

Di Sarawak, harga kedai dua tingkat di Bahagian Kuching merekodkan peningkatan harga di Jalan Padungan sebanyak 8.7%, dengan harga meningkat daripada RM1.38 juta kepada RM1.50 juta, diikuti RPR Astana sebanyak 6.7% dengan harga meningkat daripada RM450,000 kepada RM480,000. Selain itu, unit kedai berstrata di MJC - Batu Kawah

In Sarawak, double storey shop prices in Kuching Division recorded an increase at Jalan Padungan by 8.7%, with prices rising from RM1.38 million to RM1.50 million, followed by RPR Astana with an increase of 6.7%, with prices rising from RM450,000 to RM480,000. In addition, strata shop units at MJC - Batu Kawah New Township, Kuching Division, also

New Township, Bahagian Kuching turut mencatatkan peningkatan sebanyak 13.0%, dengan harga meningkat daripada RM300,000 kepada RM340,000.

Sewa

Sewaan tingkat bawah kedai di Wilayah Malaysia Timur menunjukkan pergerakan bercampur dalam tempoh kajian, dengan beberapa kawasan merekodkan peningkatan sewa. Kenaikan lebih ketara diperhatikan di lokasi komersial yang mempunyai aktiviti perdagangan berterusan serta permintaan penyewa yang stabil.

Di Sabah, peningkatan sewa tingkat bawah kedai direkodkan di beberapa lokasi utama. Taman Palam Height Fasa 5, Daerah Lahad Datu mencatatkan kenaikan tertinggi sebanyak 16.7%, dengan kadar sewa antara RM1,500 hingga RM2,000 sebulan, diikuti Bandar Hot Spring, Daerah Tawau sebanyak 16.7% (RM2,400 hingga RM3,200 sebulan) dan Taman Megah Jaya, Daerah Tawau sebanyak 14.3% (RM1,500 hingga RM2,500 sebulan).

Selain itu, beberapa lokasi lain di Sabah turut merekodkan peningkatan sewa. The Palm Square, Daerah Papar mencatatkan kenaikan sebanyak 14.0% dengan kadar sewa antara RM2,000 hingga RM3,700 sebulan, manakala Berungis Commercial Centre, Daerah Tuaran meningkat sebanyak 12.5% dengan kadar sewa antara RM3,600 hingga RM4,500 sebulan.

Di WP Labuan, peningkatan sewa tingkat bawah kedai turut direkodkan di Paragon Labuan dengan kenaikan sebanyak 11.8%, dengan kadar sewa antara RM4,000 hingga RM4,500 sebulan, diikuti Lusu Plaza sebanyak 8.3% antara RM3,000 hingga RM3,500 sebulan dan Jalan Kemajuan sebanyak 7.6% antara RM3,200 hingga RM3,800 sebulan.

b. Kompleks Perniagaan

Transaksi

Tiada transaksi melibatkan kompleks perniagaan direkodkan bagi wilayah ini dalam tempoh kajian.

recorded an increase of 13.0%, with prices rising from RM300,000 to RM340,000.

Rental

Ground floor shop rentals in the East Malaysia Region showed mixed movements during the review period, with several locations recording rental increases. The rental growth was more evident in commercial locations with sustained business activities and stable tenant demand.

In Sabah, increases in ground floor shop rentals were recorded in several key locations. Taman Palam Height Phase 5, Lahad Datu District, recorded the highest increase of 16.7%, with rental rates ranging between RM1,500 and RM2,000 per month, followed by Bandar Hot Spring, Tawau District, with an increase of 16.7% (RM2,400 to RM3,200 per month) and Taman Megah Jaya, Tawau District, with an increase of 14.3% (RM1,500 to RM2,500 per month).

In addition, several other locations in Sabah also recorded rental increases. The Palm Square, Papar District, recorded an increase of 14.0%, with rental rates ranging between RM2,000 and RM3,700 per month, while Berungis Commercial Centre, Tuaran District, increased by 12.5%, with rental rates ranging between RM3,600 and RM4,500 per month.

In WP Labuan, increases in ground floor shop rentals were also recorded at Paragon Labuan, with an increase of 11.8%, with rental rates ranging from RM4,000 to RM4,500 per month, followed by Lusu Plaza with an increase of 8.3% between RM3,000 and RM3,500 per month and Jalan Kemajuan with an increase of 7.6% between RM3,200 and RM3,800 per month.

b. Shopping Complex

Transaction

No transactions involving shopping complexes were recorded in this region during the review period.

Penghunian dan Ketersediaan Ruang

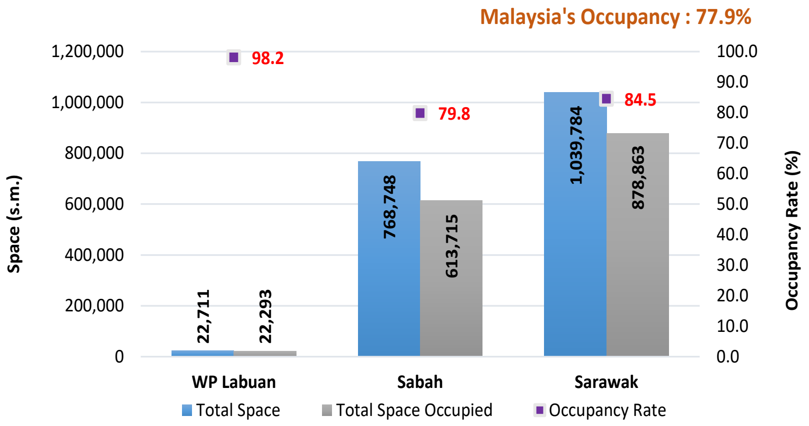
Prestasi segmen kompleks perniagaan di Wilayah Malaysia Timur kekal stabil dalam tempoh kajian, dengan kadar penghunian keseluruhan direkodkan pada 82.7%. Sebanyak 1.83 juta meter persegi ruang niaga sedia ada direkodkan di tiga negeri, dengan WP Labuan mencatatkan kadar penghunian tertinggi sebanyak 98.2%, diikuti Sarawak (84.5%) dan Sabah (79.8%). Ruang niaga diduduki di wilayah ini berjumlah 1.51 juta meter persegi, mencerminkan tahap penggunaan ruang perniagaan yang kekal kukuh dalam keadaan pasaran semasa.

Occupancy and Space Availability

The performance of the shopping complex segment in the East Malaysia Region remained stable during the review period, with an overall occupancy rate of 82.7%. A total of 1.83 million square metres of existing retail space was recorded across the three states, with WP Labuan recording the highest occupancy rate at 98.2%, followed by Sarawak (84.5%) and Sabah (79.8%). Occupied retail space in the region totalled 1.51 million square metres, reflecting a strong utilisation level of retail space under the current market conditions.

Chart 17

Supply and Occupancy of Shopping Complex H1 2026



Aktiviti Pembinaan

Tiada aktiviti pembinaan direkodkan dalam tempoh kajian.

Construction Activity

No new construction activity was recorded in the review period.

Table 4

Construction Activity of Shopping Complex in East Malaysia Region H1 2026

State Stage of Development	WP Labuan	Sabah	Sarawak
Existing Supply	2 complexes (22,711 s.m.)	44 complexes (768,748 s.m.)	75 complexes (1,039,384 s.m.)
Incoming Supply	0	3 complexes (61,415 s.m.)	2 complexes (41,676 s.m.)
Planned Supply	0	1 complex (23,509 s.m.)	0

Sewa

Pergerakan sewa ruang niaga dalam kompleks perniagaan di Wilayah Malaysia Timur menunjukkan prestasi yang bercampur dalam tempoh kajian, dengan majoriti lokasi merekodkan kadar sewa yang stabil, manakala beberapa lokasi mencatatkan peningkatan dan pelarasan kecil. Perubahan sewa lebih ketara di lokasi komersial sekunder yang mempunyai aktiviti perdagangan serta permintaan penyewa yang berbeza mengikut jenis ruang niaga.

Di WP Labuan, beberapa kompleks perniagaan merekodkan peningkatan sewa. Kompleks Ujana Kewangan mencatatkan peningkatan sebanyak 12.3% bagi ruang tingkat satu, dengan kadar sewa meningkat antara RM18.79 hingga RM46.18 kepada antara RM17.22 hingga RM55.76 sebulan. Selain itu, Labuan Times Square turut merekodkan peningkatan sebanyak 6.3% bagi ruang tingkat satu, dengan kadar sewa meningkat antara RM28.45 hingga RM34.15 kepada RM28.45 hingga RM38.10 sebulan.

Rental

Rental movements of retail space in shopping complexes in the East Malaysia Region showed mixed performance during the review period, with the majority of locations recording stable rental rates, while several locations recorded increases and minor adjustments. Rental changes were more evident in secondary commercial locations, where trading activities and tenant demand varied according to the type of retail space.

In WP Labuan, several shopping complexes recorded rental increases. Kompleks Ujana Kewangan recorded an increase of 12.3% for first floor retail space, with rental rates ranging between RM18.79 and RM46.18 to between RM17.22 and RM55.76 per month. In addition, Labuan Times Square also recorded an increase of 6.3% for first floor retail space, with rental rates increasing between RM28.45 and RM34.15 to between RM28.45 and RM38.10 per month.

Table 5

Pertinent Tenant Movements in Shopping Complex in East Malaysia Region H1 2026

No.	State	Shopping Complex	Estimated Space (s.m.)	Tenant Movement
1.	Sarawak	Boulevard Shopping Mall Kuching	1,235	Move In
2.		Boulevard Shopping Mall Kuching	256	Move Out
3.		Boulevard Shopping Complex Bintulu	95	Move In
4.		Boulevard Shopping Complex Bintulu	455	Move Out
5.		The Spring Kuching	821	Move In
6.		The Spring Kuching	496	Move Out
7.		The Spring Shopping Mall Bintulu	400	Move In
8.		The Spring Shopping Mall Bintulu	342	Move Out
9.		Vivacity Megamall	311	Move In
10.		Vivacity Megamall	267	Move Out
11.		Plaza Merdeka Shopping Mall	300	Move In
12.		Plaza Merdeka Shopping Mall	433	Move Out
13.		Sarawak Plaza	121	Move In
14.		Sarawak Plaza	94	Move Out
15.		Aiman Mall	177	Move In
16.		Aiman Mall	99	Move Out
17.		Delta Mall	12	Move In

Table 5

Pertinent Tenant Movements in Shopping Complex in East Malaysia Region H1 2026

No.	State	Shopping Complex	Estimated Space (s.m.)	Tenant Movement
18.		Wisma Sanyan	120	Move In
19.		Wisma Sanyan	120	Move Out
20.		Kin Orient Plaza	111	Move In
21.		Kin Orient Plaza	111	Move Out
22.		Boulevard Shopping Complex Miri	95	Move In
23.		Boulevard Shopping Complex Miri	455	Move Out
24.		Permaisuri Imperial City Mall	231	Move In
25.		Permaisuri Imperial City Mall	700	Move Out

Note: This list only displays selected major transactions.

c. Pejabat Binaan Khas

Transaksi

Tiada transaksi melibatkan pejabat binaan khas direkodkan bagi wilayah ini dalam tempoh kajian.

Penghunian dan Ketersediaan Ruang

Prestasi segmen pejabat binaan khas di Wilayah Malaysia Timur kekal kukuh dalam tempoh kajian, dengan kadar penghunian keseluruhan direkodkan pada 87.1%. Segmen pejabat binaan khas ini merekodkan jumlah ruang sedia ada sebanyak 1.78 juta meter persegi, dengan ruang diduduki berjumlah 1.55 juta meter persegi. WP Labuan mencatatkan kadar penghunian tertinggi sebanyak 91.8%, diikuti Sabah (88.3%) dan Sarawak (85.7%), menunjukkan tahap penggunaan ruang pejabat binaan khas yang stabil di ketiga-tiga negeri.

Aktiviti Pembinaan

Tiada aktiviti pembinaan direkodkan dalam tempoh kajian.

c. Purpose-Built Office

Transaction

No transactions involving purpose-built office were recorded in this region during the review period.

Occupancy and Space Availability

The performance of the purpose-built office segment in the East Malaysia Region remained strong during the review period, with an overall occupancy rate of 87.1%. The purpose-built office segment recorded a total existing space of 1.78 million square metres, with occupied space amounting to 1.55 million square metres. WP Labuan recorded the highest occupancy rate at 91.8%, followed by Sabah (88.3%) and Sarawak (85.7%), indicating a stable utilisation level of purpose-built office space across the three states.

Construction Activity

No new construction activity was recorded in the review period.

Chart 18

Supply and Occupancy of Purpose-Built Office H1 2026

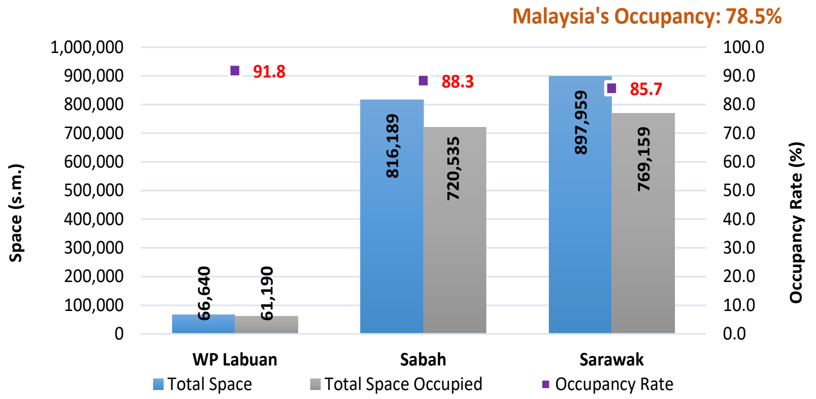


Table 6

Construction Activity of Purpose-Built Office in East Malaysia Region H1 2026

Stage of Development \ State	WP Labuan	Sabah	Sarawak
Existing Supply	9 buildings (66,640 s.m.)	93 buildings (816,189 s.m.)	97 buildings (897,959 s.m.)
Incoming Supply	0	1 building (4,104 s.m.)	1 building (10,528 s.m.)
Planned Supply	0	2 buildings (37,498 s.m.)	0

Sewa

Pasaran sewa pejabat binaan khas di Wilayah Malaysia Timur menunjukkan prestasi yang stabil dalam tempoh kajian, dengan majoriti bangunan merekodkan kadar sewa yang tidak berubah. Walau bagaimanapun, beberapa lokasi mencatatkan perubahan sewa yang mencerminkan perbezaan keadaan pasaran mengikut lokasi dan jenis ruang pejabat.

Di Sabah, peningkatan kadar sewa pejabat binaan khas direkodkan di Bangunan Lai Piang Kee, Daerah Sandakan, dengan kenaikan sebanyak 5.1%, apabila kadar sewa meningkat antara RM9.66 hingga RM11.03 kepada antara RM11.03 hingga RM11.13 per meter persegi sebulan. Selain itu, majoriti bangunan pejabat binaan khas di Kota Kinabalu, Penampang, Sandakan dan Tawau merekodkan kadar sewa yang stabil sepanjang tempoh kajian.

Rental

The purpose-built office rental market in the East Malaysia Region showed stable performance during the review period, with most of buildings recording unchanged rental rates. However, several locations recorded rental adjustments, reflecting differences in market conditions according to location and office space type.

In Sabah, increases in purpose-built office rental rates were recorded at Bangunan Lai Piang Kee, Sandakan District, with an increase of 5.1%, where rental rates increased between RM9.66 and RM11.03 to between RM11.03 and RM11.13 per square metre per month. In addition, most of purpose-built office buildings in Kota Kinabalu, Penampang, Sandakan and Tawau recorded stable rental rates throughout the review period.

Di Sarawak, pasaran sewa pejabat binaan khas kekal stabil, dengan semua lokasi yang dikaji tidak merekodkan perubahan ketara dalam kadar sewa. Keadaan ini menunjukkan permintaan sewaan pejabat binaan khas yang kekal terkawal di bahagian utama seperti Kuching, Sibu, Bintulu dan Miri.

Secara keseluruhannya, pasaran sewa pejabat binaan khas di Wilayah Malaysia Timur kekal stabil, dengan perubahan sewa hanya berlaku di lokasi tertentu. Pergerakan ini mencerminkan keadaan pasaran yang terkawal serta permintaan penyewa yang berbeza mengikut lokasi dan kategori ruang pejabat.

In Sarawak, the purpose-built office rental market remained stable, with all surveyed locations recording no significant changes in rental rates. This indicates that demand for purpose-built office space remained controlled in major divisions such as Kuching, Sibu, Bintulu, and Miri.

Overall, the purpose-built office rental market in the East Malaysia Region remained stable, with rental changes occurring only in selected locations. This movement reflects a controlled market environment and varying tenant demand according to location and office space category.

Table 7

Pertinent Tenant Movements in Purpose Built Office in East Malaysia Region H1 2026

No.	State	Purpose-built Office	Estimated Space (s.m.)	Tenant Movement
1.	Sarawak	Tun Jugah Centre	1,357	Move In
2.		Tun Jugah Centre	161	Move Out
3.		Gateway Kuching	1,723	Move Out
4.		Wisma Mahmud	294	Move In
5.		Wisma Interhill	395	Move Out

2.3 HARTA TANAH PERTANIAN

Transaksi

Subsektor pertanian menyumbang 32.1% kepada keseluruhan aktiviti pasaran harta tanah di Wilayah Malaysia Timur. Subsektor ini merekodkan sebanyak 5,989 transaksi bernilai RM1.24 bilion pada H1 2026, berbanding 4,743 transaksi bernilai RM1.07 bilion pada H1 2025. Prestasi transaksi menunjukkan peningkatan, dengan Sarawak kekal sebagai penyumbang utama bilangan transaksi dengan 3,940 transaksi, diikuti Sabah sebanyak 2,025 transaksi dan WP Labuan sebanyak 24 transaksi.

2.3 AGRICULTURE PROPERTY

Transaction

The agricultural sub-sector contributed 32.1% to the overall property market activity in East Malaysia. The sub-sector recorded 5,989 transactions worth RM1.24 billion in H1 2026, compared to 4,743 transactions worth RM1.07 billion in H1 2025. Transaction performance showed an increase, with Sarawak remaining the largest contributor in terms of transaction volume with 3,940 transactions, followed by Sabah with 2,025 transactions and WP Labuan with 24 transactions.

Sewa

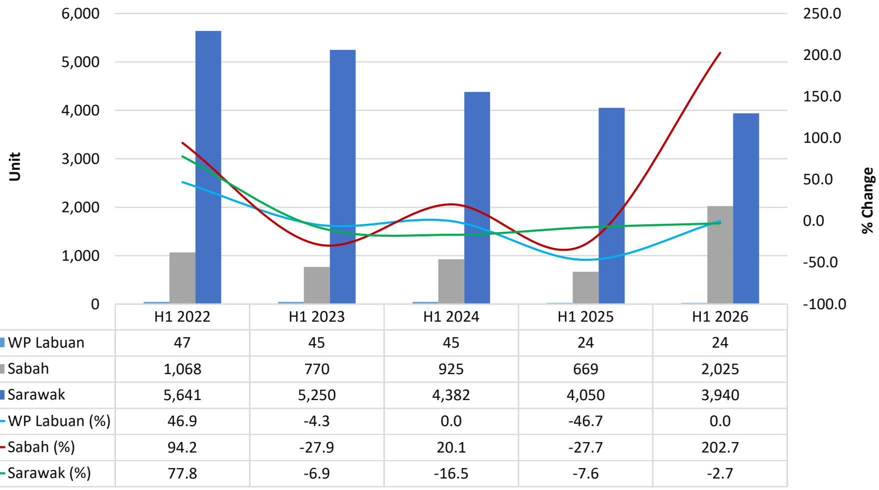
Harga tanah pertanian pada umumnya stabil dengan sedikit pergerakan harga direkod di Kawasan tertentu. Di daerah Tawau, tanah akuakultur di Wakuba/ Inderasabah mencatat peningkatan harga sebanyak 48.3%, daripada RM114,500 kepada RM221,000 sehektar. Bagi transaksi tanah sawit, harga tertinggi dicatat di daerah Tawau, iaitu RM189,000 sehektar lokasi di Off Batu 13 Jalan Apas.

Rental

Agricultural land prices were generally stable, with slight price movements recorded in certain areas. In Tawau district, aquaculture land in Wakuba/ Inderasabah recorded a price increase of 48.3%, from RM114,500 to RM221,000 per hectare. For oil palm land transactions, the highest price was recorded in Tawau district, at RM189,000 per hectare for land located off Batu 13 Jalan Apas.

Chart 19

Agriculture Property Transactions Volume Trend H1 2022 – H1 2026



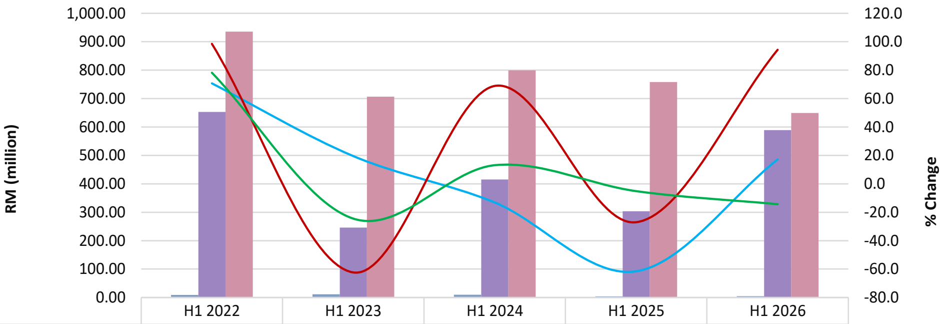
	H1 2022	H1 2023	H1 2024	H1 2025	H1 2026
WP Labuan	47	45	45	24	24
Sabah	1,068	770	925	669	2,025
Sarawak	5,641	5,250	4,382	4,050	3,940
WP Labuan (%)	46.9	-4.3	0.0	-46.7	0.0
Sabah (%)	94.2	-27.9	20.1	-27.7	202.7
Sarawak (%)	77.8	-6.9	-16.5	-7.6	-2.7

Dari segi nilai transaksi, subsektor pertanian di Wilayah Malaysia Timur turut menunjukkan peningkatan berbanding H1 2025. Sarawak kekal sebagai penyumbang utama nilai transaksi dengan RM649.46 juta, diikuti Sabah sebanyak RM589.19 juta dan WP Labuan sebanyak RM4.43 juta.

In terms of transaction value, the agricultural sub-sector in East Malaysia also recorded an increase compared to H1 2025. Sarawak remained the largest contributor to transaction value with RM649.46 million, followed by Sabah with RM589.19 million and WP Labuan with RM4.43 million.

Chart 20

Agriculture Property Transactions Value Trend H1 2022 – H1 2026



	H1 2022	H1 2023	H1 2024	H1 2025	H1 2026
WP Labuan	9.47	11.31	9.83	3.78	4.43
Sabah	653.34	245.88	415.31	303.15	589.19
Sarawak	935.95	706.63	799.36	758.16	649.46
WP Labuan (%)	70.7	19.5	-13.1	-61.5	17.2
Sabah (%)	98.5	-62.4	68.9	-27.0	94.4
Sarawak (%)	78.2	-24.5	13.1	-5.2	-14.3

Harga

22 Di Wilayah Malaysia Timur, harga tanah pertanian menunjukkan pergerakan yang bercampur di Sabah dan Sarawak yang dipengaruhi oleh jenis penggunaan tanah, tanaman serta ciri-ciri lokasi. Di Sabah, tanah kelapa sawit di Pulau Sebatik, Tawau (kawasan pedalaman) merekodkan peningkatan harga tertinggi sebanyak 15.9%, meningkat antara RM74,000 hingga RM85,000 kepada RM86,000 sehektar. Peningkatan ini mencerminkan permintaan berterusan terhadap tanah pertanian di kawasan strategik yang berpotensi untuk aktiviti perladangan.

Di Sarawak, tanah pertanian kosong di Riih Mawang, Serian turut mencatatkan peningkatan sebanyak 7.7%, meningkat kepada RM91,000 sehektar.

Price

In the East Malaysia Region, agricultural land prices showed mixed movements at Sabah and Sarawak influenced by land use, crop type and location characteristics. In Sabah, oil palm land at Pulau Sebatik, Tawau (interior area) recorded the highest price increase of 15.9%, rising between RM74,000 and RM85,000 to RM86,000 per hectare. This increase reflected continued demand for agricultural land in strategic areas with potential for plantation activities.

In Sarawak, vacant agricultural land at Riih Mawang, Serian also recorded an increase of 7.7%, rising to RM91,000 per hectare.

3.0 PROPERTY HIGHLIGHTS

3.1 Infrastructure Development

No.	Infrastructure Projects	Description	Current Development Status
1.	Pan Borneo Highway	WP01 - Upgrading Road from Sindumin to Kampung Melalia • Connecting areas: Sindumin - Sipitang • Length: 29.00 kilometres • Project Cost: RM668,775,508.89	Project status: Under construction. Stage of construction 87.4%.
		WP02 - Upgrading Road from Kampung Melalia to Beaufort • Connecting areas: Sindumin - Sipitang • Length: 31.00 kilometres • Project Cost: RM906,110,188.34 • Expected Completion Date : March 2027	Project status: Under construction. Stage of construction 61.9%.
		WP03 - Upgrading Road from Beaufort to Bongawan • Connecting areas: Beufort - Bongawan • Length: 25.00 kilometres • Project Cost: RM476,541,855.67	Project status: Under construction. Stage of construction 93%.
		WP04 - Upgrading Road from Bongawan to Papar • Connecting areas: Beufort - Bongawan • Length: 25.00 kilometres • Project Cost: RM562,682,691.88 • Expected Completion Date: October 2026	Project status: Under construction. Stage of construction 99.4%.
		WP06 - Upgrading Road from Putatan to Inanam • Connecting areas: Putatan - Inanam • Length: 10.90 kilometres • Project Cost: RM913,519,360.72 • Expected Completion Date: May 2028	Project status: Under construction. Stage of construction 94.2%.
		WP07 - Upgrading Road from Inanam to Sepanggar • Connecting areas: Inanam - Sepanggar • Length: 15.90 kilometres • Project Cost: RM449,547,004.74 • Expected Completion Date: November 2026	Project status: Under construction. Stage of construction 92.3%.
		WP08 - Upgrading Road from Sepanggar to Bulatan Berunggis • Connecting areas: Sepanggar - Tuaran • Length: 13.20 kilometres • Project Cost: RM548,429,956.60 • Expected Completion Date: September 2026	Project status: Under construction. Stage of construction 87.8%.
		WP09 – Development of road from Serusop to Pituru • Connecting areas: Tuaran – Kota Belud • Length: 30.00 kilometres • Project Cost: RM504,651,200.00 • Expected Completion Date: July 2028	Project status: Under construction. Stage of construction 14.2%.
		WP10 – Under Construction from Pituru to Rampayan Laut • Connecting areas: Kota Belud - Kudat • Length: 30.00 kilometres • Project Cost: RM554,627,896.90	Project status: Under construction. Stage of construction 99.9%.
		WP11 – Development of road from Rampayan Laut to Sarang • Connecting areas: Kota Belud - Kudat • Length: 19.40 kilometres • Project Cost: RM167,477,833.75 • Expected Completion Date: September 2026	Project status: Under construction. Stage of construction 87.8%.

No.	Infrastructure Projects	Description	Current Development Status
24		WP12 – Development of road from Sarang to Temuno • Connecting areas: Kota Belud - Kudat • Length: 15.60 kilometres • Project Cost: RM316,500,000.00 • Expected Completion Date: Oktober 2027	Project status: Under construction. Stage of construction 31.4%.
		WP13 – Development of road from Temuno to Bingolon • Connecting areas: Kota Belud - Kudat • Length: 20.00 kilometres • Project Cost: 373,600,000.00 • Expected Completion Date: February 2028	Project status: Under construction. Stage of construction 21.9%.
		WP14 – Development of road from Bingolon to Simpang Mengayau • Connecting areas: Kota Belud - Kudat • Length: 20.20 kilometres • Project Cost: RM452,500,000.00 • Expected Completion Date: November 2028	Project status: Under construction. Stage of construction 37.4%.
		WP16 - Upgrading Road from Tawau Airport to Sungai Kalumpang • Connecting areas: Tawau – Lahad Datu • Length: 31.00 kilometres • Project Cost: RM485,500,000.00 • Expected Completion Date: September 2028	Project status: Under construction. Stage of construction 28.3%.
		WP17 - Upgrading Road from Sungai Kalumpang to Madai • Connecting areas: Tawau – Lahad Datu • Length: 19.00 kilometres • Project Cost: RM431,219,934.60 • Expected Completion Date: Januari 2029	Project status: Under construction. Stage of construction 22%.
		WP18 - Upgrading Road from Madai to IGN Estate • Connecting areas: Tawau – Lahad Datu • Length: 19.00 kilometres • Project Cost: RM360,990,023.22 • Expected Completion Date: December 2028	Project status: Under construction. Stage of construction 41%.
		WP19 - Upgrading Road from IGN Estate to Agri Harvest • Connecting areas: Tawau – Lahad Datu • Length: 19.00 kilometres • Project Cost: RM431,139,620.60 • Expected Completion Date: September 2027	Project status: Under construction. Stage of construction 34%.
		WP20 - Upgrading Road from Agri Harvest to Sapagaya • Connecting areas: Tawau – Lahad Datu • Length: 18.00 kilometres • Project Cost: RM428,055,210.00 • Expected Completion Date: March 2028	Project status: Under construction. Stage of construction 18.3%.
		WP22- Upgrading Road from Lahad Datu Bypass to Kampung Sandau • Connecting areas: Tawau – Sandakan M32 • Length: 25.50 kilometres • Project Cost: 635,447,188.87 • Expected Completed Date: July 2029	Project status: Under construction. Stage of construction 17.4%.
		WP23 - Upgrading Road from Kampung Sandau to Sungai Takala • Connecting areas: Tawau – Sandakan M32 • Length: 24.80 kilometres • Project Cost: RM614,677,332.91 • Expected Completion Date: August 2029	Project status: Under construction. Stage of construction 13.9%.

No.	Infrastructure Projects	Description	Current Development Status
		WP24 - Upgrading Road from Sungai Takala to Kampung Perpaduan Datuk Moh • Connecting areas: Tawau – Sandakan M32 • Length: 16.40 kilometres • Project Cost: RM609,000,000.00 • Expectation Completion Date: April 2028	Project status: Under construction. Stage of construction 21.1%.
		WP25 - Upgrading Road from Kampung Perpaduan Datuk Moh to Sukau • Connecting areas: Tawau – Sandakan M32 • Length: 16.80 kilometres • Project Cost: RM485,039,000.00 • Expected Completion Date: February 2028	Project status: Under construction. Stage of construction 14%.
		WP26 - Upgrading Road from Sukau to Kampung Lot M • Connecting areas: Tawau – Sandakan M32 • Length: 18.00 kilometres • Project Cost: RM487,906,953.43 • Expected Completion Date: February 2030	Project status: Under construction. Stage of construction 7.8%.
		WP28 – Upgrading Road from Sandakan Mile 32 to Moynod • Connecting areas: Sandakan M32 – Ranau • Length: 22.00 kilometres • Project Cost: RM351,543,121.30 • Expected Completion Date: September 2027	Project status: Under construction. Stage of construction 40.1%.
		WP29 – Upgrading Road from Moynod ke Sapi Nangoh • Connecting areas: Sandakan M32 – Ranau • Length: 20.00 kilometres • Project Cost: RM341,730,016.18 • Expected Completion Date: November 2026	Project status: Under construction. Stage of construction 90.4%.
		WP30 – Upgrading Road from Sapi Nangoh to Sungai Bauto • Connecting areas: Sandakan M32 – Ranau • Length: 22.70 kilometres • Project Cost: RM262,595,897.60 • Expected Completion Date: September 2026	Project status: Under construction. Stage of construction 69.6%.
		WP31 – Upgrading Road from Sungai Bauto to Telupid • Connecting areas: Sandakan M32 – Ranau • Length: 12.30 kilometres • Project Cost: RM659,101,998.00 • Expected Completion Date: March 2028	Project status: Under construction. Stage of construction 29.6%.
		WP32 – Upgrading Road from Telupid to Kampung Lumou Baru • Connecting areas: Sandakan M32 – Ranau • Length: 18.40 kilometres • Project Cost: RM611,297,998.00 • Expected Completion Date: June 2028	Project status: Under construction. Stage of construction 35.8%.
		WP33 – Upgrading Road from Kampung Lumou Baru to Kampung Toupos • Connecting areas: Sandakan M32 – Ranau • Length: 17.6 kilometres • Project Cost: RM1,333,871,000.00 • Expected Completion Date: June 2030	Project status: Under construction. Stage of construction 12%.
		WP34 – Upgrading Road from Kampung Toupos to Kampung Nabutan • Connecting areas: Sandakan M32 – Ranau • Length: 26.00 kilometres • Project Cost: RM966,447,318.10 • Expected Completion Date: June 2030	Project status: Under construction. Stage of construction 7.5%.

No.	Infrastructure Projects	Description	Current Development Status
		WP35 – Upgrading Road from Kampung Nabutan to Ranau • Connecting areas: Sandakan M32 – Ranau • Length: 31.00 kilometres • Project Cost: RM1,057,414,813.23 • Expected Completion Date: January 2030	Project status: Under construction. Stage of construction 1.4%.
2.	Jalan Utara Baru, Tawau, Sabah	• Upgrading Jalan Utara Baru - Connecting areas: Sandakan M32 – Ranau - Length: 5.40 kilometres - Project Cost: RM206,000,000.00 - Construction period: 2023 – 2026	Project status: Under construction. Stage of construction 78.8%.
3.	Expansion of Tawau Airport in Sabah	• The upgrade will introduce separate facilities for international and domestic passengers, including immigration and quarantine (CIQ) areas, and support scheduled international flights. • Contractor: Pembinaan Azam Jaya Sdn Bhd. • Project cost: RM120,900,000.00. • Expected Completion Date: 2028.	Project Status: Newly launched on 26 September 2025
4.	Second Main Road Project, Sarawak	• Shortening the travel time between Sibu and Kuching (from 6-7 hours to around 3 hours) • Divided into several packages: - Batang Samarahan Road to Batang Sadong (4 lanes/ 13.7 km/ RM530 million) - Batang Sadong Road to Sebuyau/ Batang Lupar Bridge (2 lanes/ 28 km/ RM525 million) including an 800-meter overpass crossing the Sedilu National Park.	Project status: Under construction. Stage of construction 84%. Project status: Under construction. Stage of construction 11.6%.
5.	Batang Lupar 2 Bridge Construction Project, Sarawak	• The longest cable-stayed bridge in Sarawak (870 meters long) and the tallest bridge tower in Malaysia (145 meters high) valued at RM223.6 million • One of the packages of the Second Main Road or Coastal Road connecting Jalan Lingga, Sri Aman, and Lidong, Betong over 28 kilometers.	Project status: Under construction. Stage of construction 91%.
6.	Project to build the Ulu Paku/ Ulu Kota Road, Spaoh, Betong, Sarawak	• New Ulu Paku-Ulu Kota connector road, 20 kilometers long, from the Pan Borneo Highway in Spaoh, Betong to Pakan, Sarikei • Allocation of RM247 million • The construction of the new road will shorten the travel distance by approximately 50 kilometers between the towns of Betong and Sarikei	Project status: Under construction. Stage of construction 20.9%.
7.	North Coastal Highway, Sarawak	• Location: Miri, Limbang, and Lawas • Project Cost: Estimated at RM6.1 billion • Project Duration: 60 months • The project involves the construction of a four-lane highway to connect Miri, Limbang, and Lawas via Brunei	Project status: Under construction.
8.	Bintulu – Jepak Bridge, Sarawak	• Location: Bintulu City Center • Bridge Length: 1,048 meters • Project Cost: RM466 million • Project Duration: 48 months • The bridge will shorten the travel time from Jepak to Bintulu City Center, thereby impacting other development projects and boosting socio-economic activities in the Jepak area	Project status: Completed

No.	Infrastructure Projects	Description	Current Development Status
9.	Sungai Limbang Second Bridge, Sarawak	• Location: Limbang River • Bridge Length: 760 meters • Project Duration: 96 months • Project Cost: RM188 million • The bridge will connect Limbang with Brunei, thereby driving development in the area across the river	Project status: Under construction. Stage of construction 76%.
10.	Ulu Sungai Merah Road Upgrading Project, Sibu, Sarawak	• Location: Traffic lights at Jalan Ling Kai Cheng to Lorong Ulu Sungai Merah 48 • Allocation: RM25.58 million • Construction involves road widening over 2.14 kilometres	Project status: Under construction. Stage of construction 67%.
11.	Phase 1 Project (Jalan Nanga Kabah - SK Beguang - Sungai Song), Sarawak	• Location: From the Nanga Kabah area to any Kapit town. • Phase 1 starts at the intersection of Jalan Sibu and Jalan Nibong, covering approximately 16.35 km • Project Cost: RM145.89 million	Project status: Under construction. Stage of construction 25%.
12.	The Sibu – Tg Manis Road Project, including the Batang Rajang Bridge in Sarikei, Sarawak	• Project Cost: RM321 million • Road Length: 17 km • Bridge Length: 1.4 km	Project status: Completed.
13.	Miri – Marudi – Mulu and Long Panai – Long Lama Road Project	• Investor/Owner: Federal and State Government. • Project Cost: Estimated RM3.8 billion. • Project Duration: 48 months. • Project Scope: **Phase 1:** Construction and upgrading of a 42-kilometer road from Simpang Eastwood in Miri to Marudi, meeting JKR R5 standards. **Phase 2:** Construction and upgrading of a 100-kilometer road from Marudi to Kuala Melinau and Long Panai to Long Lama, adhering to JKR R3 standards. • The project also includes the construction of 23 bridges to facilitate smooth traffic flow in the area.	Project status: Under construction. Stage of construction 10 - 15%.
14.	Sarawak – Sabah Link Road	**Phase 1** • Investor/ Owner: Federal and State Government. • Project Cost: RM1 billion. • Project Duration: 60 months. • Scope: ○ Construction of 76 kilometers of road from Lawas to Long Lopeng Junction. ○ This project will establish a direct road connection between Sarawak and Sabah without passing through Brunei. ○ Approved by the federal government in 2021, it is being implemented in phases.	Project status: Under construction. Stage of construction 40%.
		Phase 2 • Investor/ Owner: Federal and State Government. • Project Cost: RM7.4 billion. • Project Duration: 60 months. • Scope: ○ Construction of new roads and upgrading of existing roads covering a total of 322 kilometers, including: - Mulu to Long Seridan (61 km). - Long Seridan to Nanga Mendamit (101 km). - Long Lopeng to Long Komap, Ba'kalalan (63 km). - Rumah Aling to Long Merarap (97 km). • The project will connect key locations in Sarawak, including Lawas, Limbang, and Mulu, without passing through Brunei. • It aims to enhance accessibility and mobility for local communities and tourists, providing a safer and more comfortable travel experience. • Additionally, the road will act as a catalyst for economic development and eco-tourism in northern Sarawak, particularly in Ba'kalalan and Mulu, which are rich in biodiversity and natural attractions.	Project status: Under construction.

3.2 Mega Project

No.	Development Project	Descriptions	Current Status
1.	Solar Manufacturing, Sabah	- Kibing Group, through its subsidiary SBH Kibing New Solar Energy (M) Sdn. Bhd. has committed to invest approximately RM7.2 billion in a solar glass manufacturing plant in Sabah. The project will be implemented in three (3) phases and is expected to generate approximately 5,000 employment opportunities for the local population.	Project status: Under construction. Stage of construction is as below: Phase 1C1: Completed. Phase 1C2: Completed. Phase 2: Completed.
2.	Mixed Commercial Development at Jesselton Jetty Terminal, Sabah	• Suria Capital has announced its collaboration with BEDI Development, a subsidiary of EXSIM Development Sdn Bhd, to develop two parcels of land totaling approximately 35.2 acres in Kota Kinabalu, Sabah. These companies will undertake the development, construction, and completion of an integrated mixed-use commercial project on Land 1, covering 6.3 acres held under Town Lease, and Land 2, covering 28.9 acres under Country Lease. • Land 1 encompasses the Jesselton Point Ferry Terminal, which serves as the gateway to nearby islands in the Tunku Abdul Rahman Marine Park, while Land 2, which lies adjacent, comprises 10 acres of the KK Port jetty area and its surrounding waterbody. • The proposed mixed-use commercial development on these lands, alongside existing waterfront developments such as Jesselton Quay, the Sabah International Convention Centre (SICC), and the Kota Kinabalu Convention City (KKCC), will collectively be known as Jesselton Waterfront City. • The estimated gross development value (GDV) for the entire project is approximately RM4.2 billion.	Work Progress: Building Plan approval on 7 October 2025 Project launch on 6 September 2025 Project name: The Bedrock @ Jesselton Docklands. Total units: Tower A 610 units. Tower B 470 units.
3.	New commercial center known as Plaza Semporna	• Location 5km from Semporna Town. • Located at Jalan Bubul. • Total development area 62,466.87 sq. meter. • Proposed development: a. Premium Outlet – 2 storey detached unit consisting of 80 units retail lots with total floor area: 5,884 sq. meter (Building plan approved on 2023). b. Commercial suites – 13 storey building consisting of 196 units – proposed for hotel. c. 22 units - 3 storey shop office. d. 2 units - 1 1/2 storey semi-detached showroom. e. Petrol station.	Work Progress: Under construction 90% for 3 storey shop office only Launch date: 1 March 2023 (only for premium outlet and 3 storey shop office)
4.	Sejati Sentral Sandakan, Sabah	• Location: Batu 7, Off Jalan Airport, Sandakan • Development area: 63,962.68 s.m. • Total build-up area: 32,587.97 s.m. • Land Owner and Project Developer: Sejati Sentral (Sandakan) Sdn. Bhd. • Proposed Development: a. 141 units of 2-storey terrace shop-offices, with a land area of 29,850 s.m. b. 1-storey drive-thru unit, with a land area of 232.45 square meters c. 6 units of 2-storey pavilion-style linked shops, with a land area of 2,401.05 s.m. d. 5-storey hotel, with a total land area of 1,582.38 square meters	Construction Status: Phase 1: 70% complete (69 units) Phase 2: 30% complete (24 units) Estimated Completion Date: Phase 1: 31 October 2026 Phase 2: 31 January 2027

No.	Development Project	Descriptions	Current Status
5.	Taman Seraya, Sandakan, Sabah	• Location: Batu 7, Jalan Merpati, Off Jalan Airport. • Development area: 132,100 square meters. • Landowner: Housing and Town Development Board. • Project developer: KTI Landmark Bhd. • Proposed development: a. 186 units of double-storey terraced houses. a. 124 units of double-storey terraced houses under the Malaysia Civil Servants Housing Programme (PPAM). • Composition of development: a. Phase 1 : 94 units, b. Phase 2 : 53 units. c. Phase 3 : 82 units. d. Phase 4 : 81 units.	Construction Status: Phase 1: 70% complete (94 units) Phase 2: 35% complete (53 units) Phase 3: 35% complete (82 units) Phase 4: 35% complete (81 units) Estimated Completion Date: 2027 – 2028
6.	Wyndham Semporna Resort	• Construction of 188 overwater villas at Wyndham Semporna Resort. Located at Town of Semporna. • Total units: 98 units (1-storey overwater villa). • Built-up area: 46.80 square meters. • Price from RM 323,000 – RM363,000 per unit. • Total units: 90 units (1.5-storey overwater villa). • Built-up area: 83.73 square meters. • Price from RM 600,000 – RM744,000 per unit. • Developer: Goldstone Holdings.	Project status: Under construction. Stage of construction 20%.
7.	Universiti Malaysia Sabah Specialist Hospital (HUMS)	• Capacity: 400 beds. • Land Area: 60 Acres. • Concession Period: 30 Years. • Providing specialist healthcare services. • Progressively expanding towards full operational capacity.	Current Stage: Operational (Phase 1 Operations). Operational Status: Officially commenced operations in January 2026.
8.	Club Med Resort, Kuala Penyu	• 5T Suite (40 Rooms), Deluxe (70 Rooms) & Club Superior (290 Rooms). • Land Area: 170,672.30 square meters. • Developer: Golden Sands Beach Resort City Sdn. Bhd.	Expected to operate on November 2026
9.	Intercontinental Resort, Melinsung, Papar	• Total units: 450 rooms. • Land Area: 141,640.00 square meters. • Developer: Zhancheng Tourism Development Sdn. Bhd. • Estimated Completion Date: November 2026.	Under construction: 2 blocks Waiting for Occupancy Certificate: 1 block
10.	The Ulu Padas Hydroelectric Project	• Alongside the original 187.5 MW dam, developers are adding a 150 MWac floating solar plant, creating a massive clean energy source for the state. • Total Capacity & Output: The dam will generate 1,052 GWh annually, while the floating solar facility will add another 300 GWh. • Concessions: The hybrid setup has split concession tenures: 40 years for the hydroelectric plant and 25 years for the floating solar plant, projecting over RM450 million in annual revenue. • Developer: Upper Padas Power Sdn Bhd—a joint venture between Gamuda Bhd (45%), Sabah Energy Corporation (40%), and Kerjaya Kagum Hitech JV (15%).	Project status: Under construction. Stage of construction 8%. Expected Completion Date: 31 December 2030.

No.	Development Project	Descriptions	Current Status
11.	Springvale Residence	• Location: Jalan Stutong, Kuching. • Property Type: 13 Storey (140 Serviced Apartment Units). • Developer: Tecktonic & Sons Holdings. • Price: Starting from RM382,000. • Size: 562 sq ft – 1,285 sq ft. • Sales Performance: 61.1% (Q2 2026).	Project status: Under construction. Stage of construction 71%.
12.	Teku Hill	• Location: Lot 1359 Seduan Land District, Sibu O.T.3327 & Lot 10100 Block 6 Seduan Land District, Rantau Panjang, Sibu. • Developer: Sung Kiong Realty Sdn Bhd. • Units Launched: 58 units of double-storey terraced houses • House Price: RM475,000 – RM713,000.	Project status: Completed.
13.	Onyx Residence	• Location: Galacity, Jalan Tun Jugah. • Property Type: 19-story building (510 serviced apartment units + retail units). • Developer: Musyati Development Sdn. Bhd. • Price Range: RM477,000 – RM813,000. • Size Range: 527 square feet – 2,164 square feet • Sales Performance: 51.6% (Q2 2026).	Project status: Under construction. Stage of construction 20%.
14.	Summervale Residences	• Location: Jalan Stutong, Kuching. • Property Type: 10-story building (195 serviced apartment units). • Developer: Tecktonic & Sons Holdings. • Price: Starting from RM382,000. • Size Range: 420 square feet – 1,631 square feet • Sales Performance: 80.0% (Q2 2026).	Project status: Under construction. Stage of construction 85%.
15.	IKE Village Phase 3	• Location: Jalan Datuk Mohammad Musa, Kota Samarahan. • Property Type: 8 & 9-story apartment buildings (300 units) – Blocks D, E & F. • Developer: Musyati Ibanco Property Sdn. Bhd. • Price Range: RM259,000 – RM297,000. • Size Range: 850 – 1,150 square feet • Sales Performance: 99.6% (Q2 2026).	Project status: Under construction. Stage of construction 80%.
16.	The Corliss Residence	• Location: The Northbank, Kuching-Samarahan Expressway. • Property Type: 12-story building (330 serviced apartment units). • Developer: Ibraco Berhad. • Price: Starting from RM382,000. • Size Range: 452 – 1,414 square feet • Sales Performance: 43.0% (Q2 2026).	Project status: Under construction. Stage of construction 50%.
17.	Abberton Avenue	• Location: Pines Square, Jalan Batu Kawa. • Property Type: 8-story building (168 serviced apartment units & 14 commercial units). • Developer: Ih Hung Enterprise Sdn. Bhd. • Price Range: RM325,000 – RM575,280. • Size Range: 576 square feet – 1,137 square feet • Sales Performance: 44.0% (Q2 2026).	Project status: Completed.
18.	Avanti	• Location: Jalan Kong Ping. • Property Type: 9-story apartment complex (5 blocks, 360 units). • Developer: Elica Sdn. Bhd. • Price Range: RM638,600 – RM979,602. • Size Range: 1,030 – 1,482 square feet • Sales Performance: 26.4% (Block B).	Project status: Under construction. Stage of construction 80%.

No.	Development Project	Descriptions	Current Status
19.	Neu Pendington	• Location: Jalan Merican Salleh, Pending. • Developer: UDA Land (Sarawak) Sdn. Bhd. & SEDC. • Price Range: RM438,000 – RM815,000 • Sales Performance: 26.8% (Q2 2026). • Property Type: a. Serviced Apartments: 25-story, 2 blocks, 509 units. b. Commercial Units: 6-story shop lots (48 units). 4-story shop lots (184 units). 2-story shop lots (20 units). • Size and Layout: Type A (3 bedrooms) – 102.2 s.m. Type B (3 bedrooms) – 78.95 s.m. Type C (2 bedrooms) – 60.40 s.m.	Project status: Under construction. Stage of construction 30%.
20.	Penyau Heights	• Current Development (Ongoing). • Location: Jalan Bukit Penyau. • Developer: Jiawood Jaya Sdn. Bhd. • Price Range: RM293,000 – RM575,000. • Size Range: 750 square feet – 1,200 square feet • Property Types: 6-story apartment (Block B). 2-story townhouses (26 units). 7-story apartment (Block A - 94 units).	Project status: Under construction. Stage of construction 85%.
21.	Desa Damai	• Location: Lot 8619, Block 11, Kuala Baram Land District, Miri, Sarawak. • Developer: Naim Land Sdn. Bhd. • Total Units: 302 units. • Property Types: Single-Story Terrace Houses: 111 units. Double-Story Terrace Houses: 133 units. Double-Story Semi-Detached Houses: 58 units. Construction Start Date: 1 November 2023. • Price: a. Single-Story Terrace Houses: Intermediate: RM392,888. Corner/End Lot: RM531,888. b. Double-Story Terrace Houses. Intermediate: RM580,888. Corner/End Lot: RM670,000. c. Double-Story Semi-Detached Houses: RM746,888.	Project status: Under construction. Stage of construction 50%.

3.3 State Government Policy

No.	State	Details
1.	**Sabah**	**Rumah Mesra SMJ** • The Sabah State Government will increase the Rumah Mesra SMJ quota from 40 units to 50 units for each state constituency in year 2026. The additional 10 units of Rumah Mesra SMJ are specifically for those aged 40 and below, married and do not own a home.
2.	**Sarawak**	**Housing Developers in Sarawak No Longer Obligated to Build Affordable Homes** • The Sarawak Government has eliminated the requirement for 30% allocation for affordable homes in housing development projects that exceeding 10 acres (4.047 Hectares) and this was already implemented in first quarter of 2024. • The payment quantum is still under discussion, specifically concerning how much the developer needs to pay per acre to the state's trust fund based on the value of the land and the project's location. For example, if 30 per cent involves a total of 50 low-cost housing units, the state will assess it based on the market prices. • The developers that involved in projects that span 10 acres, or more are required to make compensation in lieu of a housing fund which would allow the state government to use these funds for the development of affordable homes on the specific project sites. • The decision for the state government to take control of affordable housing construction was made because some property developers were not serious in developing such projects. By empowering the state government to oversee the construction of low-cost homes, the state hopes to prevent issues of delay in projects such as Sentoria Borneo Samariang Garden which was supposed to be completed in 2020.