

# Singapore Property Industry Report - H1, 2013

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## Abstracts

This report provide an overview of Singapore's property market, including an industry profile, trends and developments in the sector through H1 2013, and an overview of the leading players. (These include CapitaLand, City Developments, Keppel Land, and Singapore Land.)

The Singapore property market proved to be resilient in 2012 on the back of strong demand from home buyers and high employment, coupled with a high-liquidity and low interest-rate environment. According to the Urban Redevelopment Authority (URA), developers sold 22,197 units of new homes in 2012, an all-time high, 39.6% more than the 15,904 units sold in 2011. In 2012, prices of residential properties increased by 2.8% as compared to 5.9% in 2011.

Given the robust demand for private housing and buoyant conditions in the property market, the Singapore government announced in January 2013 a set of measures aimed at cooling the property market further. These measures include raising additional buyer's stamp duty (ABSD) rates, lowering loan-to-value (LTV) ratios, and tightening mortgage loans. In June 2013, the government further introduced the total debt servicing ratio (TDSR) rule governing how financial institutions grant property loans to individuals. URA statistics showed the rate of increase in Singapore's 2013 property prices moderating in line with the government's property cooling measures.

Most property developers saw an improvement in their revenue and net income in the first half of 2013, despite the uncertain global economic climate and restructuring of the domestic economy. This follows a recovery in the manufacturing sector in Q2 2013, which saw an expansion of 3.8%.

## Key Points:

The report offers financial information and performance data for leading players in the market including CapitaLand Limited, City Developments Limited (CDL), Keppel Land Limited, and Singapore Land Limited (SingLand). It also contains a SWOT analysis for these firm's future outlook in the sector.

The property price index for landed and non-landed private residential units rose from 206.9 points in Q2 2012 to 215.4 points in Q2 2013. The property rental index also increased y/y from 160 points to 164.4 points in Q2 2013.

According to the URA, the total of number of private residential property transactions in 2012 increased 5.5% to 38,760 deals with a value of SGD 56.5bn. Only 14,547 deals were recorded in the first half of 2013, a decline of 25.9% y/y, mainly due to the fairly cautious environment amid property cooling measures.

The Singapore office market continued to expand in H1 2013, riding on the momentum from 2012. URA statistics showed that the island-wide office occupancy rate increased from 95.4% in Q1 to 96.3% in Q2.

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