

Chinese Real Estate Industry Report 2011H1

<https://marketpublishers.com/r/CA2A79429B0EN.html>

Date: August 2011

Pages: 18

Price: US\$ 500.00 (Single User License)

ID: CA2A79429B0EN

Abstracts

In 2011 H1, China's real estate development investment was CNY 2.63 trillion, ascending by 32.90% YOY, in which the residence investment was CNY 1.86 trillion, increasing by 36.10%. China's commercial building sales area was 444.19 million square meters, rising by 12.90% YOY, in which the residence sales area increased by 12.10%. In 2011 H1, real estate development enterprises had the annual capital source of CNY 4.10 trillion, increasing by 21.60% YOY. In 2011 H1, in China's major financial institutions, rural cooperative financial institutions, urban credit associations and foreign-funded banks, the RMB real estate loans increased by CNY 791.20 billion in total, CNY 598.50 billion less than that in 2010 H1; the balance grew by 16.90% YOY. In terms of specific composition, in 2011 H1, the RMB real estate development loans increased by CNY 209.80 billion in total, which was less than a half of CNY 442.30 in 2010 H1; the newly increased house purchase loans also decreased from CNY 932.30 billion in 2010 H1 to CNY 581.50 billion in 2011 H1.

Despite slowdown of residence sales area growth, seen from the financial reports of 2011 H1 gradually revealed by listed real estate enterprises at present, such leading enterprises as Vanke and Evergrand with rapid turnover as the strategy still present favorable situation, surpassing that in 2010 H1. In 2011 H1, China's top 10 real estate enterprises realized the sales value of 13.50% of the total in China, growing by 3.30% over 2010; China's top 20 real estate enterprises realized the sales value proportion of up to 18%, 3.60% higher than that in 2010. Vanke, Evergrand, Country Garden and other real estate enterprises all realized the sales value growth rate of more than 50% YOY in 2011 H1, significantly higher than the year-on-year growth rate of 22.30% of China's sales value in 2011 H1, directly resulting in a significant rise in the market concentration of the real estate industry.

In 2011 H1, in order to further consolidate and expand the results of regulation and control, the Chinese government further deepened the policies aiming at regulating and

controlling the real estate industry. To further suppress the demand of commercial buildings, the administrative and economic methods were utilized simultaneously; nearly 40 cities implemented purchase restriction, and more than 600 cities issued the targets of control over housing prices.

More following information can be acquired from this briefing:

China's Real Estate Investment, 2011 H1

China's Real Estate Development and Sales, 2011 H1

Land Purchase of China's Real Estate Enterprises, 2011 H1

Major Government Policies of China's Real Estate Industry, 2011 H1

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