

Real- Estate Comprehensive Report Q2/2019

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Abstracts

VIETNAM REAL ESTATE MARKET

After a long time of bubble development with a virtual price and then falling into a recession, house prices have gradually returned to the real value. In the first 3 months of the year, the retail market in Hanoi was gloomy, no new projects were launched, the situation did not change much compared to Q4/2018. While the HCM.City market continued to increase the retail supply, the rental rates as well as the occupancy rates were improved.

The office supply in 2 major markets - Hanoi as well as TP. Ho Chi Minh City all received significant additions in Q1/2018. The demand for offices across the country is forecast to continue to grow thanks to the high economic growth prospects and the abundant investment flows both domestic and abroad.

With an export-oriented economy, with exports accounting for a significant proportion of 80% of GDP, Vietnam is attracting a large and growing amount of foreign investment. With the increasing demand for land and industrial plants, this segment will continue to be an attractive investment channel.

In the first 3 months of 2019, while the apartment market for sale in Hanoi was vibrant due to the plentiful new supply to the market, Ho Chi Minh City also experienced a decrease in supply as well as sales due to the limited land fund. However, the price offered by HCM. City increased strongly in Q1/2019 due to some projects in the high-end segment marketed.

According to the latest announcement of the Ministry of Construction, the inventory number as of the end of April 2019 is estimated at 20,000 billion dong, continuing the downward trend thanks to the stable market development, good sales in many segment.

In 2018, the real estate market witnessed a large number of M&A deals whose scale was up to over \$ 1 billion. Vietnam is forecasted to be a potential medium and long-term investment market for at least the next 5 years.

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