

KEMENTERIAN KEWANGAN

LAPORAN STOK HARTA TANAH

Property Stock Report

H1 2025



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

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PENDAHULUAN

Laporan Stok Harta Tanah menyebarkan maklumat berdasarkan kepada skop berikut:

- i. Stok sedia ada mengikut sub-sektor harta tanah iaitu kediaman, perdagangan, industri dan riadah.
- ii. Penawaran hadapan yang terdiri daripada data penawaran akan datang, mula pembinaan dan penawaran yang dirancang.

Ingin dimaklumkan bahawa semua jadual data tersebut perlu dibaca seiring dengan catatan teknikal yang disertakan bersama laporan ini. Maklumat berkenaan harta tanah perdagangan iaitu kompleks perniagaan dikategorikan kepada pusat membeli belah, arked dan pasaraya besar manakala bagi pejabat binaan khas terdiri daripada pejabat kerajaan dan swasta.

Kami ingin merakamkan ucapan ribuan terima kasih kepada semua yang telah menjayakan penerbitan laporan ini terutamanya kepada semua Pihak Berkuasa Tempatan, Pemaju, Pengurus Harta, Pemilik Bangunan, Pejabat Tanah dan lain-lain agensi Kerajaan yang terlibat di dalam memberikan input bagi tujuan penerbitan berkala ini. Tanpa sokongan tuan, kami tidak mungkin dapat menerbitkan laporan ini.

Seperti yang telah diketahui, pasaran harta tanah yang sihat dan stabil tidak sahaja penting bagi individu tetapi juga kepada ekonomi negara pada keseluruhannya. Oleh itu, kami akan sentiasa memastikan laporan yang disediakan kepada pembaca adalah berkualiti dan menepati masa. Kami sangat mengalu-alukan maklum balas, komen serta pandangan daripada pembaca untuk memperbaiki lagi laporan ini. Kami boleh dihubungi melalui telefon, faksimili atau emel kepada:

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FOREWORD

The Property Market Stock Report disseminates informations on the following scopes:

- i. Existing inventories of properties on a sectorial basis namely residential, commercial, industry and leisure.*
- ii. Future supply comprises Incoming Supply, Construction Starts and Planned Supply.*

Please be informed that all the data tabulated should be read in line with NAPIC's Technical Notes attached in the report. Information pertaining to commercial properties ie shopping complex is categorized into three sections ie shopping centre, arcade and hypermarket whilst for purpose built office designated for publicly owned and private ownership.

We would like to express our gratitude to all those who had made this publication a success. Specifically, we wish to thank all local councils, developers, property managers/building owners, land offices nation wide and other relevant government bodies for giving their valuable inputs to make this quarterly survey a success. Without your support we will not be able to publish this report.

It is a known fact that a healthy and stable property market is crucial to not only the individuals but also to the country's economy as a whole. Therefore, it is our utmost wish to provide readers with high quality information in a timely manner. We welcome feedback, comments and suggestions from our readers to further improve this report. You may call, write, fax or email to us.

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Laporan Stok Harta Tanah H1 2025

Property Stock Report H1 2025

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Ringkasan Stok Harta Tanah 2024
Property Stock Summary 2024

| State | Residential | | |
|-----------------|------------------|-----------------|----------------|
| | Existing Stock | Incoming Supply | Planned Supply |
| WP Kuala Lumpur | 567,469 | 56,953 | 54,196 |
| WP Putrajaya | 20,251 | 28 | 3,224 |
| WP Labuan | 14,039 | 428 | 0 |
| Selangor | 1,745,057 | 83,704 | 61,939 |
| Johor | 934,439 | 38,510 | 43,964 |
| Pulau Pinang | 568,496 | 29,643 | 18,923 |
| Perak | 550,730 | 35,406 | 28,515 |
| Negeri Sembilan | 318,094 | 24,300 | 15,968 |
| Melaka | 231,136 | 15,789 | 19,836 |
| Kedah | 358,177 | 18,674 | 11,537 |
| Pahang | 313,071 | 19,813 | 22,252 |
| Terengganu | 120,195 | 10,690 | 4,010 |
| Kelantan | 96,406 | 7,145 | 2,841 |
| Perlis | 28,164 | 758 | 1,737 |
| Sabah | 247,802 | 16,259 | 20,159 |
| Sarawak | 297,779 | 17,844 | 5,769 |
| MALAYSIA | 6,411,305 | 375,944 | 314,870 |

| State | Shop | | |
|-----------------|----------------|-----------------|----------------|
| | Existing Stock | Incoming Supply | Planned Supply |
| WP Kuala Lumpur | 30,456 | 449 | 840 |
| WP Putrajaya | 538 | 0 | 48 |
| WP Labuan | 1,073 | 30 | 0 |
| Selangor | 111,263 | 5,457 | 2,992 |
| Johor | 98,031 | 4,857 | 4,731 |
| Pulau Pinang | 39,493 | 1,149 | 1,799 |
| Perak | 58,923 | 2,047 | 2,453 |
| Negeri Sembilan | 27,135 | 1,887 | 1,352 |
| Melaka | 24,599 | 1,027 | 1,330 |
| Kedah | 31,459 | 860 | 803 |
| Pahang | 26,385 | 1,979 | 2,331 |
| Terengganu | 8,522 | 578 | 425 |
| Kelantan | 14,742 | 1,037 | 341 |
| Perlis | 4,655 | 37 | 77 |
| Sabah | 33,623 | 2,182 | 2,174 |
| Sarawak | 39,520 | 1,270 | 765 |
| MALAYSIA | 550,417 | 24,846 | 22,461 |

| State | SOHO | | | Serviced Apartment | | |
|-----------------|----------------|-----------------|----------------|--------------------|-----------------|----------------|
| | Existing Stock | Incoming Supply | Planned Supply | Existing Stock | Incoming Supply | Planned Supply |
| WP Kuala Lumpur | 10,273 | 3,939 | 5,211 | 143,598 | 35,264 | 56,989 |
| WP Putrajaya | 0 | 0 | 0 | 1,204 | 671 | 940 |
| WP Labuan | 0 | 0 | 0 | 0 | 0 | 0 |
| Selangor | 47,914 | 17,100 | 2,065 | 137,999 | 68,651 | 18,106 |
| Johor | 3,567 | 1,824 | 1,294 | 109,425 | 27,616 | 26,267 |
| Pulau Pinang | 4,714 | 1,395 | 1,207 | 10,751 | 8,882 | 6,999 |
| Perak | 1,043 | 744 | 2,737 | 1,567 | 1,104 | 408 |
| Negeri Sembilan | 104 | 0 | 0 | 16,183 | 1,286 | 292 |
| Melaka | 0 | 352 | 0 | 10,820 | 6,344 | 4,255 |
| Kedah | 0 | 0 | 0 | 637 | 0 | 433 |
| Pahang | 0 | 0 | 0 | 10,085 | 3,059 | 6,475 |
| Terengganu | 0 | 0 | 117 | 276 | 1,046 | 0 |
| Kelantan | 0 | 0 | 0 | 1,694 | 940 | 0 |
| Perlis | 0 | 0 | 0 | 0 | 0 | 0 |
| Sabah | 467 | 0 | 0 | 3,353 | 1,297 | 3,793 |
| Sarawak | 563 | 72 | 12 | 1,537 | 4,267 | 4,791 |
| MALAYSIA | 68,645 | 25,426 | 12,643 | 449,129 | 160,427 | 129,748 |

| State | SHOPPING COMPLEX | | | | | | | | | |
|-----------------|------------------|--------------------|-----------------|--------------------|-----------------|--------------------|------------------------|--------------------|------------------------|--------------------|
| | Existing Stock | | | | | | Incoming Supply | | Planned Supply | |
| | Shopping Centre | | Arcade | | Hypermarket | | All Shopping Complexes | | All Shopping Complexes | |
| | No. of Building | Total Space (s.m.) | No. of Building | Total Space (s.m.) | No. of Building | Total Space (s.m.) | No. of Building | Total Space (s.m.) | No. of Building | Total Space (s.m.) |
| WP Kuala Lumpur | 84 | 3,018,288 | 25 | 244,395 | 7 | 166,821 | 8 | 286,297 | 3 | 196,691 |
| WP Putrajaya | 1 | 53,484 | 1 | 1,380 | 0 | 0 | 2 | 29,277 | 0 | 0 |
| WP Labuan | 1 | 26,197 | 1 | 2,273 | 0 | 0 | 0 | 0 | 0 | 0 |
| Selangor | 91 | 2,995,617 | 10 | 62,041 | 51 | 695,299 | 5 | 289,607 | 0 | 0 |
| Johor | 65 | 1,815,819 | 37 | 97,244 | 44 | 504,803 | 3 | 25,916 | 0 | 0 |
| Pulau Pinang | 36 | 1,328,757 | 44 | 298,112 | 20 | 305,002 | 1 | 25,040 | 2 | 96,421 |
| Perak | 27 | 521,782 | 9 | 42,206 | 40 | 417,469 | 2 | 8,783 | 0 | 0 |
| Negeri Sembilan | 20 | 268,021 | 19 | 77,620 | 26 | 235,545 | 1 | 7,345 | 0 | 0 |
| Melaka | 18 | 426,655 | 0 | 0 | 9 | 153,172 | 2 | 57,245 | 0 | 0 |
| Kedah | 26 | 418,124 | 11 | 18,290 | 16 | 153,664 | 0 | 0 | 2 | 20,031 |
| Pahang | 20 | 351,966 | 11 | 11,613 | 9 | 55,898 | 1 | 6,276 | 2 | 15,373 |
| Terengganu | 7 | 167,739 | 29 | 48,175 | 4 | 53,967 | 1 | 7,845 | 0 | 0 |
| Kelantan | 5 | 187,682 | 14 | 73,722 | 10 | 130,346 | 0 | 0 | 0 | 0 |
| Perlis | 2 | 12,492 | 15 | 28,708 | 2 | 16,759 | 3 | 30,418 | 0 | 0 |
| Sabah | 29 | 679,460 | 9 | 27,386 | 7 | 75,702 | 3 | 61,415 | 1 | 23,509 |
| Sarawak | 67 | 965,977 | 2 | 1,393 | 7 | 95,097 | 2 | 41,676 | 0 | 0 |
| MALAYSIA | 499 | 13,238,060 | 237 | 1,034,558 | 252 | 3,059,544 | 34 | 877,140 | 10 | 352,025 |

| State | PURPOSE BUILT OFFICE | | | | | | | |
|-----------------|----------------------|--------------------|-----------------|--------------------|----------------------|--------------------|----------------------|--------------------|
| | Existing Stock | | | | Incoming Supply | | Planned Supply | |
| | Private-owned | | Public-owned | | All Office Buildings | | All Office Buildings | |
| | No. of Building | Total Space (s.m.) | No. of Building | Total Space (s.m.) | No. of Building | Total Space (s.m.) | No. of Building | Total Space (s.m.) |
| WP Kuala Lumpur | 419 | 9,637,185 | 41 | 569,072 | 8 | 518,461 | 18 | 736,092 |
| WP Putrajaya | 12 | 410,574 | 34 | 2,132,071 | 3 | 59,940 | 3 | 39,875 |
| WP Labuan | 5 | 51,247 | 4 | 15,459 | 0 | 0 | 0 | 0 |
| Selangor | 255 | 4,380,874 | 22 | 318,585 | 1 | 32,906 | 0 | 0 |
| Johor | 90 | 949,628 | 63 | 418,515 | 7 | 195,272 | 1 | 33,817 |
| Pulau Pinang | 102 | 734,399 | 26 | 221,000 | 4 | 47,040 | 2 | 42,488 |
| Perak | 50 | 244,249 | 74 | 311,666 | 4 | 20,072 | 0 | 0 |
| Negeri Sembilan | 28 | 131,954 | 38 | 175,608 | 3 | 8,831 | 0 | 0 |
| Melaka | 33 | 198,691 | 24 | 184,086 | 0 | 0 | 0 | 0 |
| Kedah | 43 | 196,012 | 34 | 177,815 | 0 | 0 | 0 | 0 |
| Pahang | 43 | 185,794 | 53 | 230,171 | 0 | 0 | 0 | 0 |
| Terengganu | 30 | 119,503 | 42 | 250,037 | 1 | 9,704 | 1 | 31,760 |
| Kelantan | 27 | 122,866 | 41 | 160,590 | 1 | 46,988 | 0 | 0 |
| Perlis | 6 | 28,139 | 20 | 72,978 | 2 | 25,085 | 0 | 0 |
| Sabah | 63 | 528,635 | 32 | 284,400 | 2 | 11,067 | 2 | 37,498 |
| Sarawak | 76 | 553,630 | 31 | 326,924 | 1 | 10,528 | 0 | 0 |
| MALAYSIA | 1,282 | 18,473,380 | 579 | 5,848,977 | 37 | 985,894 | 27 | 921,530 |

| State | Industrial | | |
|-----------------|----------------|-----------------|----------------|
| | Existing Stock | Incoming Supply | Planned Supply |
| WP Kuala Lumpur | 5,138 | 0 | 37 |
| WP Putrajaya | 48 | 0 | 0 |
| WP Labuan | 650 | 41 | 0 |
| Selangor | 43,295 | 1,472 | 1,095 |
| Johor | 19,533 | 619 | 189 |
| Pulau Pinang | 9,952 | 221 | 2 |
| Perak | 8,524 | 211 | 539 |
| Negeri Sembilan | 5,576 | 838 | 553 |
| Melaka | 7,309 | 261 | 249 |
| Kedah | 3,887 | 386 | 130 |
| Pahang | 3,686 | 72 | 193 |
| Terengganu | 910 | 56 | 1 |
| Kelantan | 634 | 15 | 28 |
| Perlis | 315 | 182 | 19 |
| Sabah | 6,432 | 291 | 291 |
| Sarawak | 7,641 | 199 | 203 |
| MALAYSIA | 123,530 | 4,864 | 3,529 |

| State | Leisure | | | | | |
|-----------------|----------------|----------------|-----------------|---------------|----------------|---------------|
| | Existing Stock | | Incoming Supply | | Planned Supply | |
| | No. of Hotel | No. of Room | No. of Hotel | No. of Room | No. of Hotel | No. of Room |
| WP Kuala Lumpur | 260 | 49,772 | 17 | 3,862 | 11 | 2,248 |
| WP Putrajaya | 7 | 1,769 | 0 | 0 | 1 | 270 |
| WP Labuan | 43 | 1,858 | 1 | 116 | 0 | 0 |
| Selangor | 210 | 26,286 | 0 | 0 | 1 | 495 |
| Johor | 492 | 32,455 | 10 | 2,318 | 7 | 2,890 |
| Pulau Pinang | 252 | 25,583 | 11 | 2,174 | 10 | 1,431 |
| Perak | 337 | 17,849 | 10 | 1,106 | 2 | 363 |
| Negeri Sembilan | 158 | 12,151 | 5 | 1,594 | 5 | 446 |
| Melaka | 180 | 19,863 | 2 | 699 | 4 | 1,582 |
| Kedah | 177 | 13,320 | 6 | 756 | 4 | 406 |
| Pahang | 305 | 26,037 | 0 | 0 | 9 | 783 |
| Terengganu | 251 | 11,677 | 3 | 446 | 2 | 316 |
| Kelantan | 91 | 4,360 | 1 | 144 | 1 | 10 |
| Perlis | 32 | 1,273 | 2 | 120 | 1 | 120 |
| Sabah | 437 | 25,388 | 13 | 3,406 | 11 | 2,791 |
| Sarawak | 390 | 22,038 | 1 | 205 | 1 | 220 |
| MALAYSIA | 3,622 | 291,679 | 82 | 16,946 | 70 | 14,371 |

RESIDENTIAL PROPERTY STOCK REPORT

1.0 HARTA TANAH KEDIAMAN

Stok kediaman sedia ada melebihi 6.41 juta unit pada separuh pertama 2025, meningkat 2.2% berbanding 2024. Penawaran akan datang merekodkan sebanyak 375,944 unit meningkat 0.4% manakala penawaran yang dirancang berkurangan 20% berbanding tempoh yang sama 2024 (H1 2024: 393,641 unit).

Selangor menerajui penawaran kediaman dengan bilangan tertinggi merentasi ketiga-tiga peringkat pembangunan.

Kediaman bertanah mendominasi inventori berbanding strata dengan 68.4% di stok sedia ada, 56.8% di penawaran akan datang dan 53.9% di penawaran yang dirancang.

Aktiviti pembinaan pada separuh pertama 2025 kekal aktif di mana unit mula bina dan unit siap bina masing-masing meningkat 4.8% dan 34.4% berbanding tempoh yang sama pada tahun sebelumnya. Penurunan penawaran baharu yang dirancang menunjukkan fokus lebih kepada menyelesaikan projek yang sudah berjalan daripada memulakan projek baharu.

1.0 RESIDENTIAL PROPERTY

The existing residential stock exceeded 6.41 million units in the first half of 2025, reflecting a 2.2% increase compared to 2024. Incoming supply recorded a total of 375,944 units, which is a 0.4% rise, while the planned supply decreased by 20% compared to the same period in 2024 (H1 2024: 393,641 units).

Selangor leads in residential supply with the highest number across all three stages of development.

Landed properties dominate the inventory compared to strata, accounting for 68.4% of the existing stock, 56.8% of incoming supply, and 53.9% of planned supply.

Construction activities in the first half of 2025 remain active, with the number of units starts and completion increasing by 4.8% and 34.4%, respectively, compared to the same period in the previous year. The decline in new planned supply indicates a greater emphasis on completing ongoing projects rather than initiating new ones.

Chart 1: Residential Existing Stock by State H1 2025

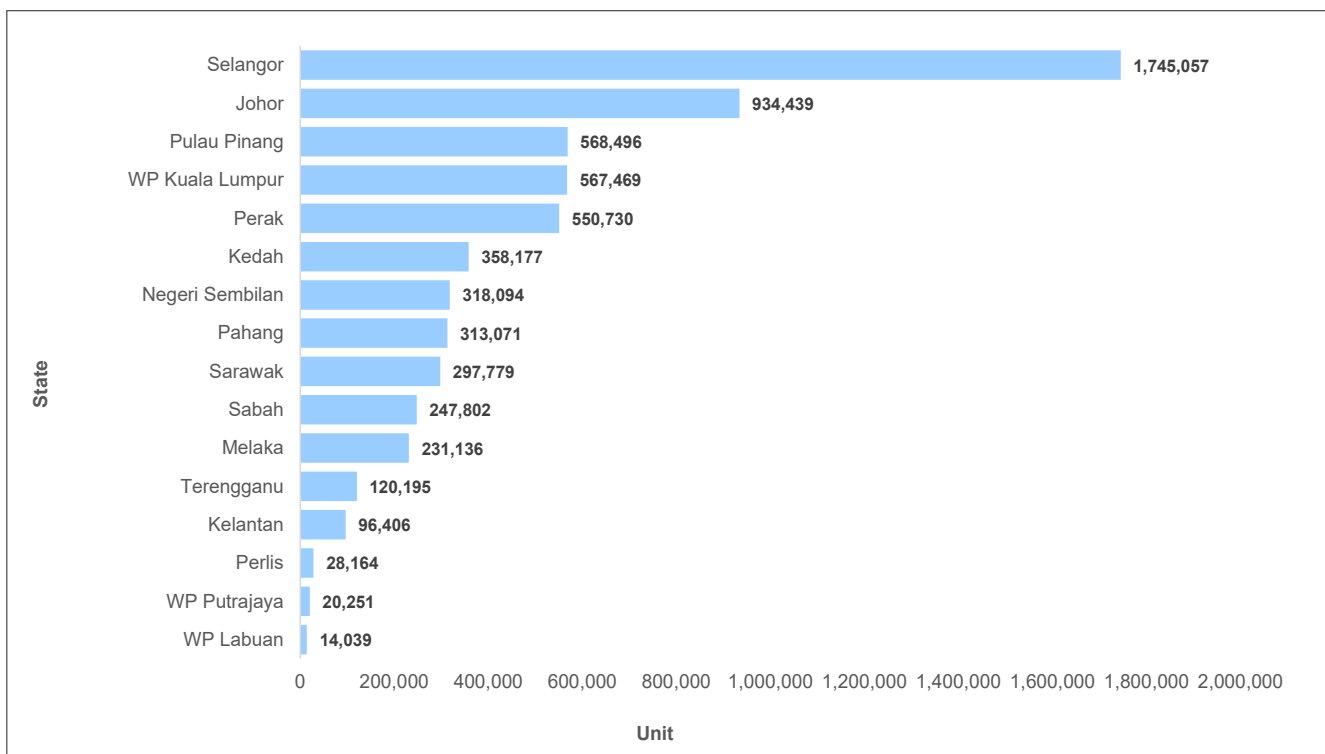


Chart 2: Residential Incoming Supply and Planned Supply by State H1 2025

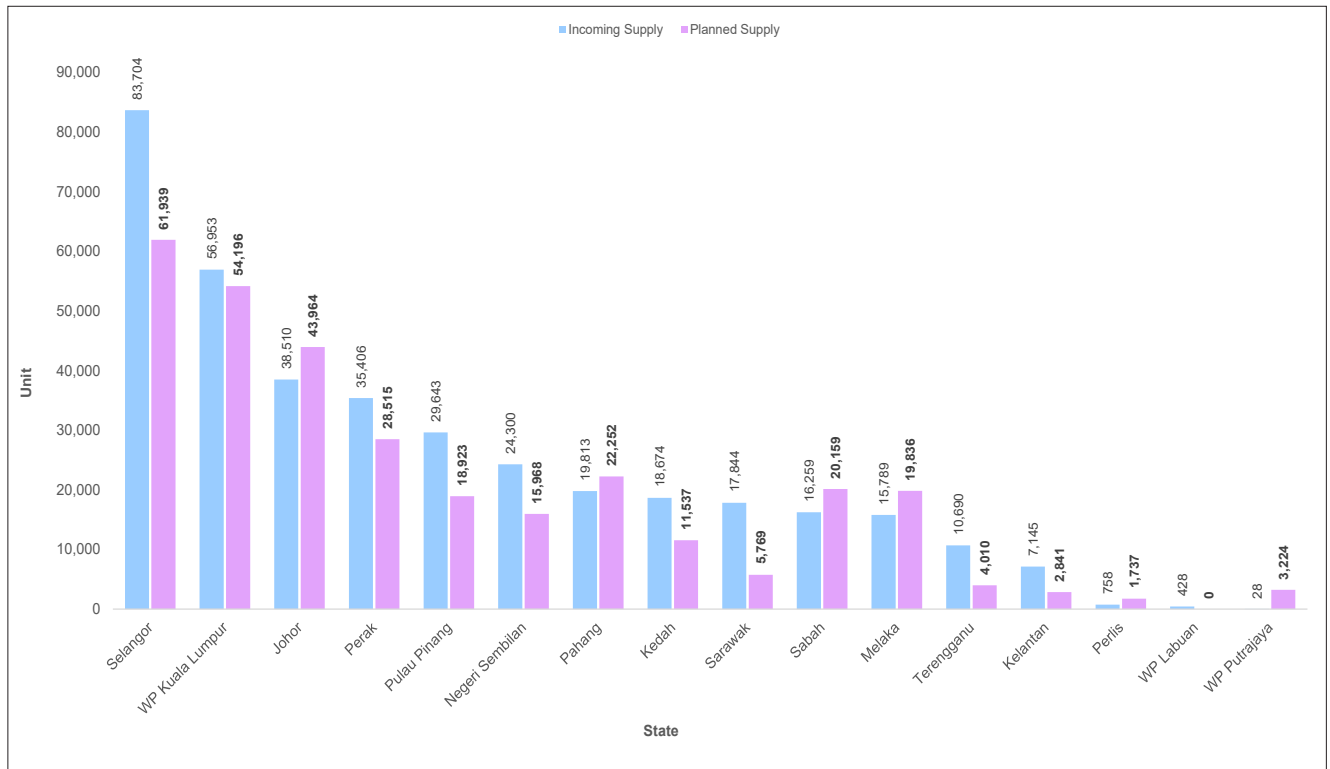


Chart 3: Distribution of Landed and Stratified Residential Supply by Development Stage H1 2025

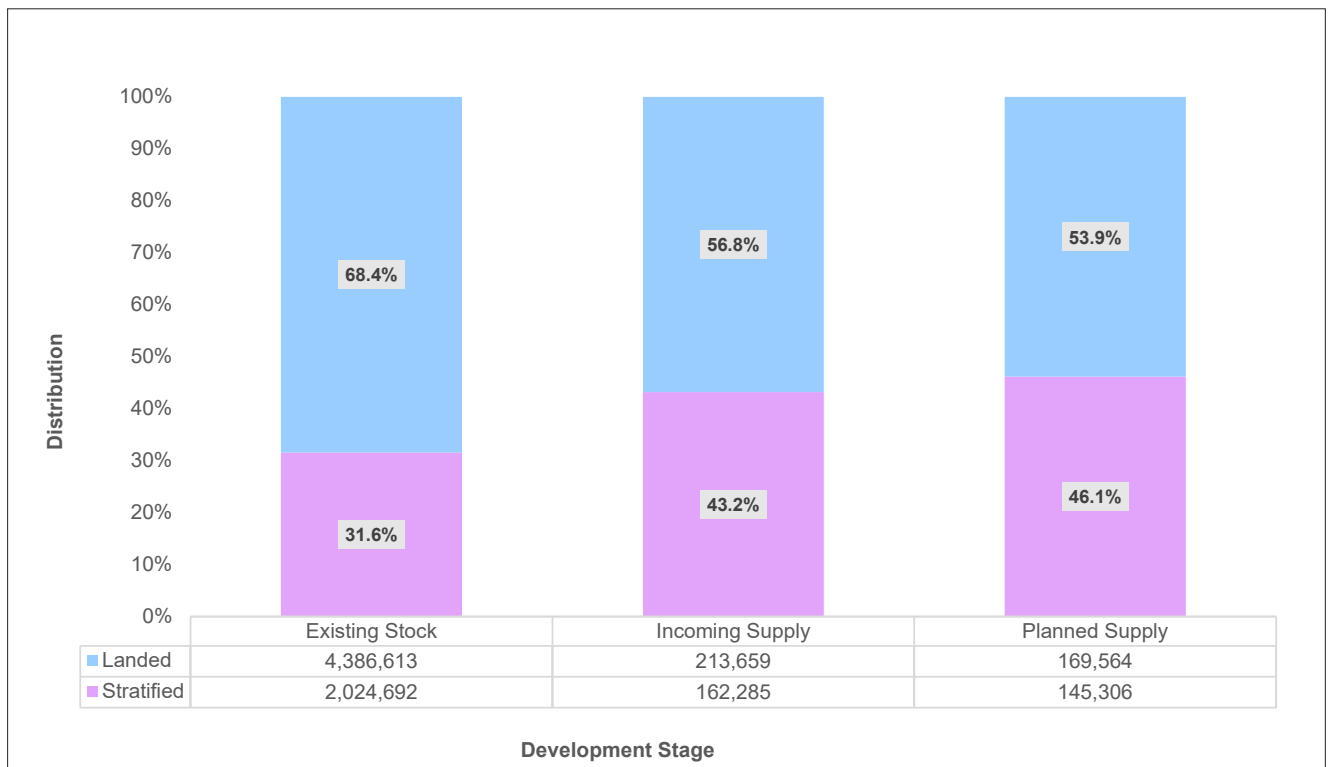
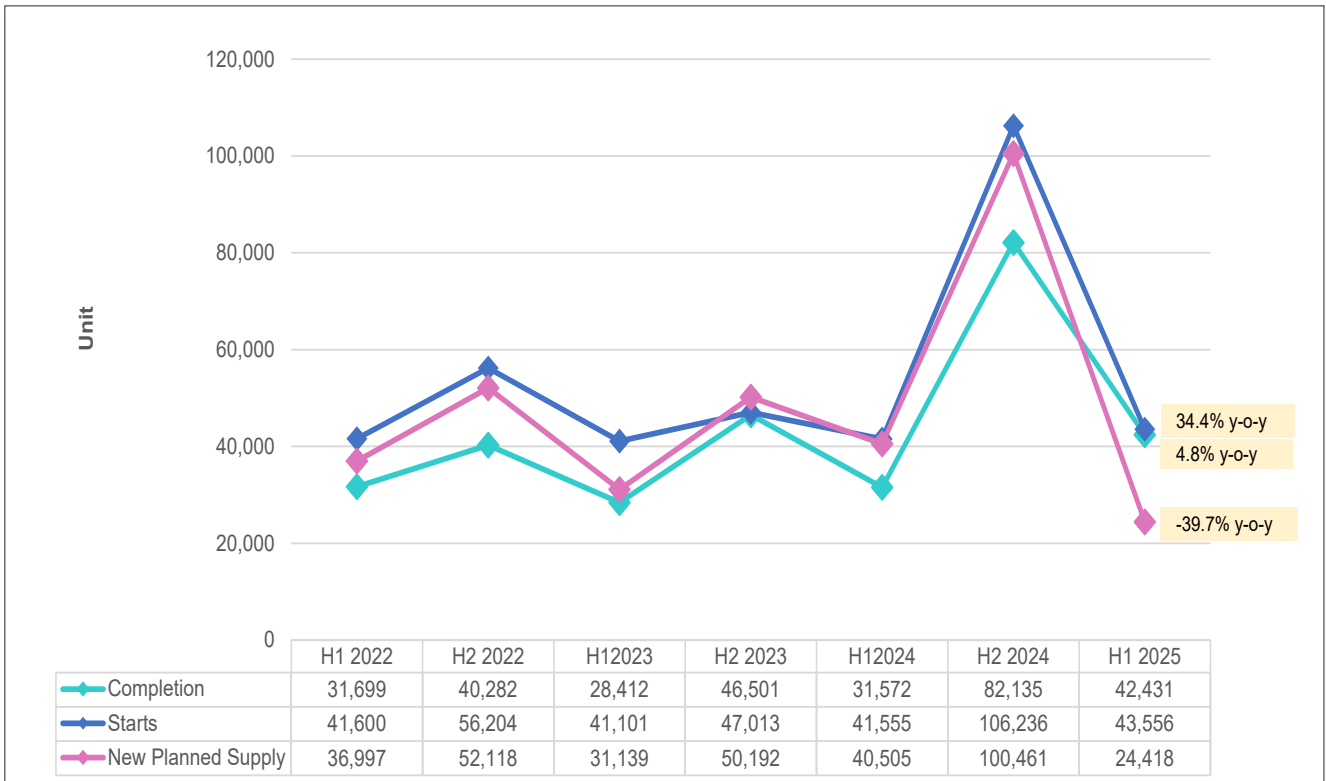


Chart 4: Trends of Completion, Starts and New Planned Supply for Residential Supply from H1 2022 to H1 2025



SHOP PROPERTY STOCK REPORT

2.0 KEDAI

Pada separuh pertama 2025, stok sedia ada kedai di seluruh negara merekodkan sejumlah 550,417 unit, penawaran akan datang 24,846 unit dan penawaran yang dirancang 22,461 unit.

Selangor menerajui stok kedai sedia ada dan penawaran akan datang masing-masing melebihi 20.0% iaitu 111,263 unit kedai sedia ada dan 5,457 unit di peringkat penawaran akan datang. Selain itu, Johor juga menunjukkan pertumbuhan yang kukuh dengan bilangan penawaran yang dirancang tertinggi iaitu 4,731 unit.

Kedai teres dua dan dua setengah tingkat mendominasi inventori di semua peringkat pembangunan.

Secara keseluruhannya, aktiviti pembinaan unit kedai pada separuh pertama 2025 menunjukkan momentum yang sederhana. Berbanding tempoh yang sama pada tahun 2024, peringkat mula bina dan penawaran baharu dirancang masing-masing menunjukkan penurunan 25.6% dan 27.7%. Walau bagaimanapun, peningkatan yang signifikan dapat dilihat pada unit siap di mana peningkatannya mencapai 59.8% berbanding tahun sebelumnya.

2.0 SHOP

In the first half of 2025, the existing stock of shop nationwide recorded a total of 550,417 units, with an incoming supply of 24,846 units and a planned supply of 22,461 units.

Selangor leads the existing stock and incoming supply of shops, each exceeding 20.0%, with 111,263 units of existing stock and 5,457 units of incoming supply phase. Meanwhile, Johor has also demonstrated robust growth with the highest number of planned supply, totalling 4,731 units.

Two and two-and-a-half story terrace shops dominate the inventory across all stages of development.

Overall, the construction activities for shop units in the first half of 2025 exhibit a moderate momentum. In comparison to the same period in 2024, the start unit and new plan supply are projected to decline by 25.6% and 27.7%, respectively. However, a significant increase is observed in completion units, with a rise of 59.8% compared to the previous year.

Chart 5: Shop Existing Stock by State H1 2025

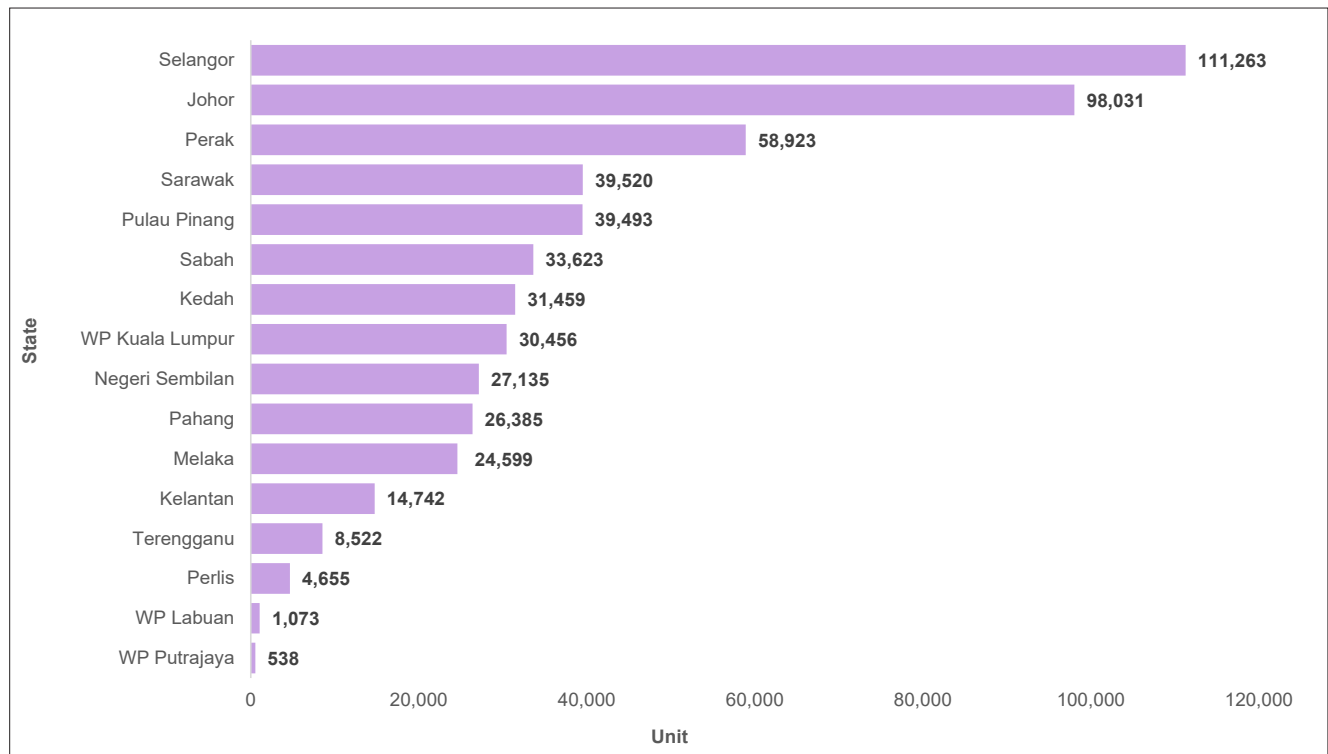


Chart 6: Shop Incoming Supply and Planned Supply by State H1 2025

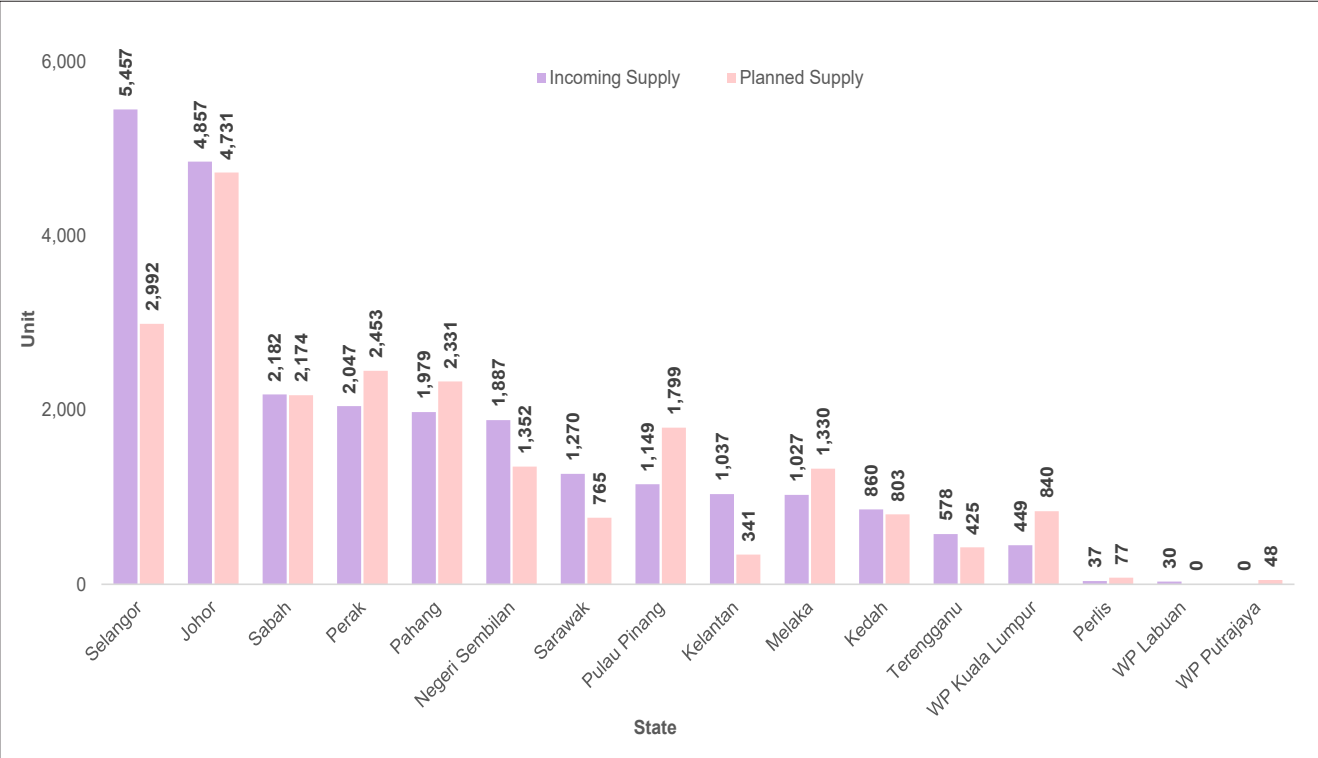


Chart 7: Distribution of Shop by Building Type H1 2025

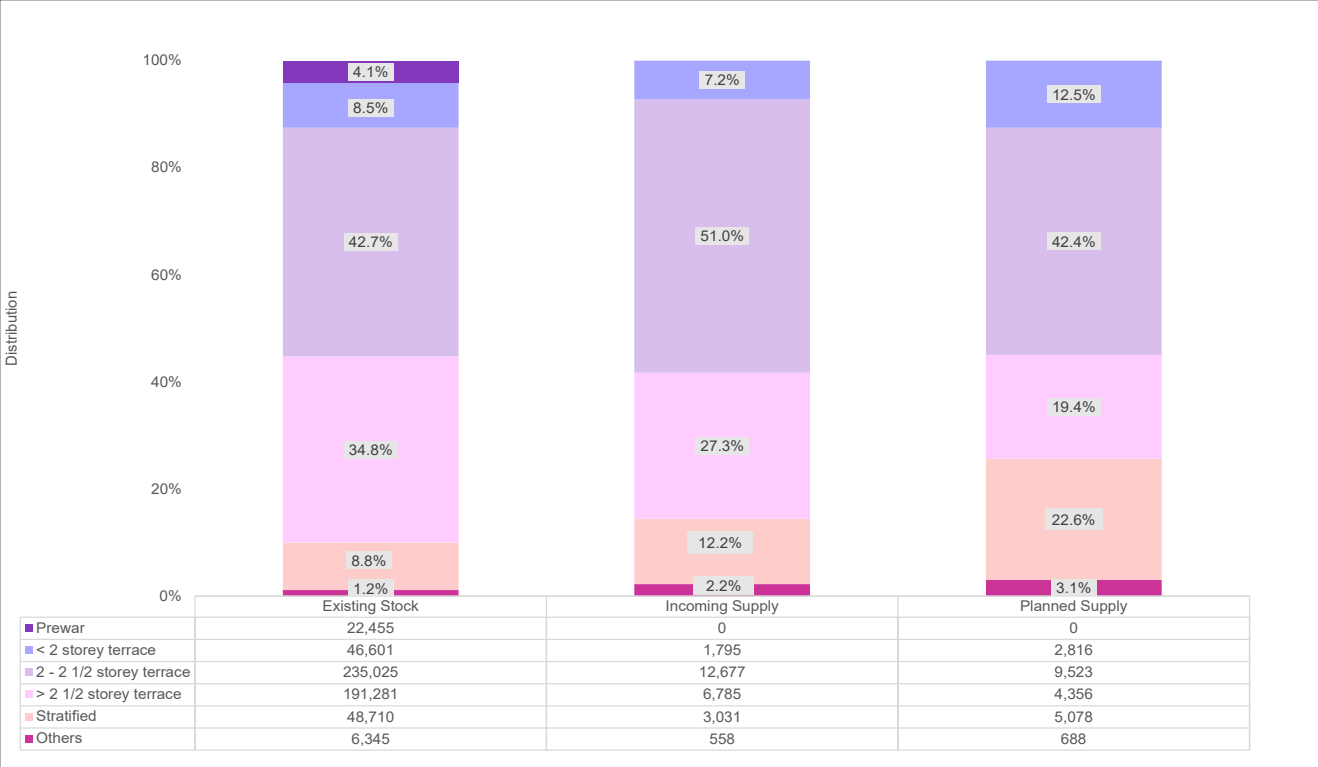
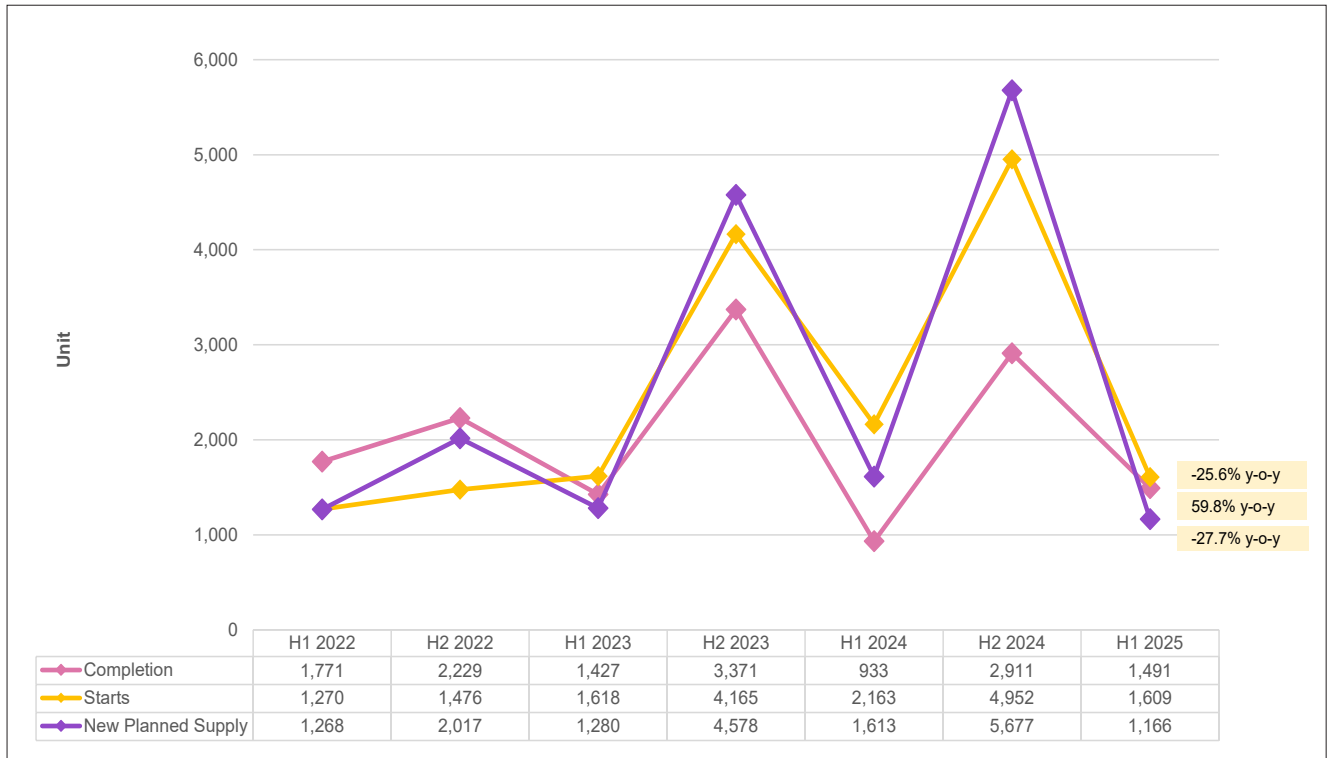


Chart 8: Trends of Completion, Starts and New Planned Supply for Shop from H1 2022 to H1 2025



SERVICED APARTMENT PROPERTY STOCK REPORT

3.0 PANGSAPURI KHIDMAT

Pada separuh pertama 2025, sejumlah 449,129 unit pangsapuri khidmat sedia ada direkodkan di seluruh negara. Sementara itu, jumlah unit yang direkodkan di peringkat penawaran akan datang dan penawaran yang dirancang masing-masing 160,427 unit dan 129,748 unit.

Majoriti pangsapuri khidmat tertumpu di W. P Kuala Lumpur, Selangor dan Johor dengan gabungan syer pasaran 87.1% stok sedia ada (391,022 unit), 82.0% penawaran akan datang (131,531 unit) dan 78.1% penawaran yang dirancang (101,362 unit).

Trend aktiviti pembinaan pangsapuri khidmat menunjukkan fasa pertumbuhan yang tidak stabil antara 2022 hingga 2025. Selepas fasa perlahan dari 2022 hingga 2023, tahun 2024 menjadi titik pemulihan yang ketara. Separuh tahun pertama 2025 menyaksikan penurunan ketara dalam projek siap dan perancangan baharu, tetapi projek mula dibina meningkat lebih 50% berbanding tahun sebelumnya, mencerminkan peralihan fokus daripada merancang kepada melaksanakan projek sedia ada.

3.0 SERVICED APARTMENT

In the first half of 2025, a total of 449,129 existing stock of serviced apartment units were recorded nationwide. Meanwhile, the number of units recorded in incoming supply and planned supply stands at 160,427 units and 129,748 units, respectively.

The majority of serviced apartments are concentrated in W. P Kuala Lumpur, Selangor, and Johor, accounting for a combined market share of 87.1% of existing stock (391,022 units), 82.0% of incoming supply (131,531 units), and 78.1% of planned supply (101,362 units).

The trend in the construction activities of serviced apartments indicates an unstable growth phase from 2022 to 2025. Following a slow period from 2022 to 2023, the year 2024 marks a significant recovery point. The first half of 2025 has seen a notable decline in completed projects and new planned supply; however, the number of projects start has increased by over 50% compared to the previous year, reflecting a shift in focus from planning to executing existing projects.

Chart 9: Serviced Apartment Existing Stock by State H1 2025

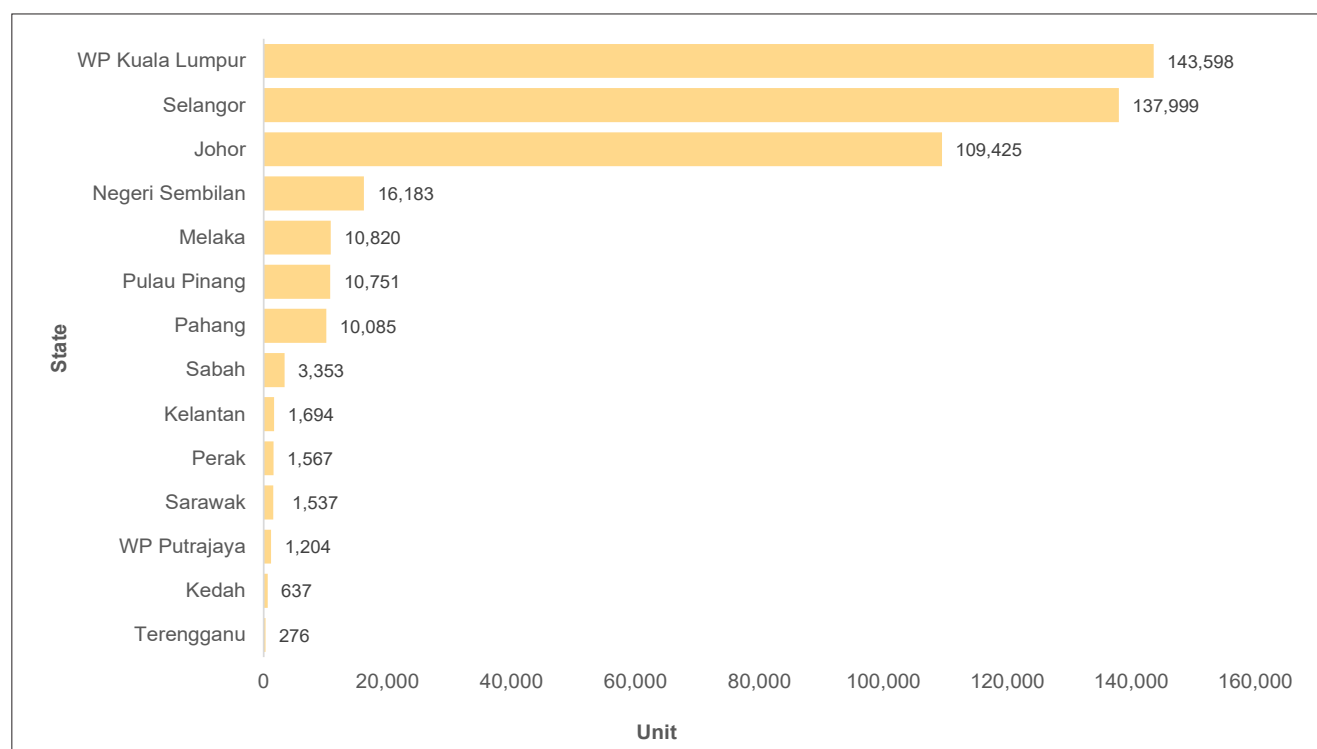


Chart 10: Serviced Apartment Incoming Supply and Planned Supply by State H1 2025

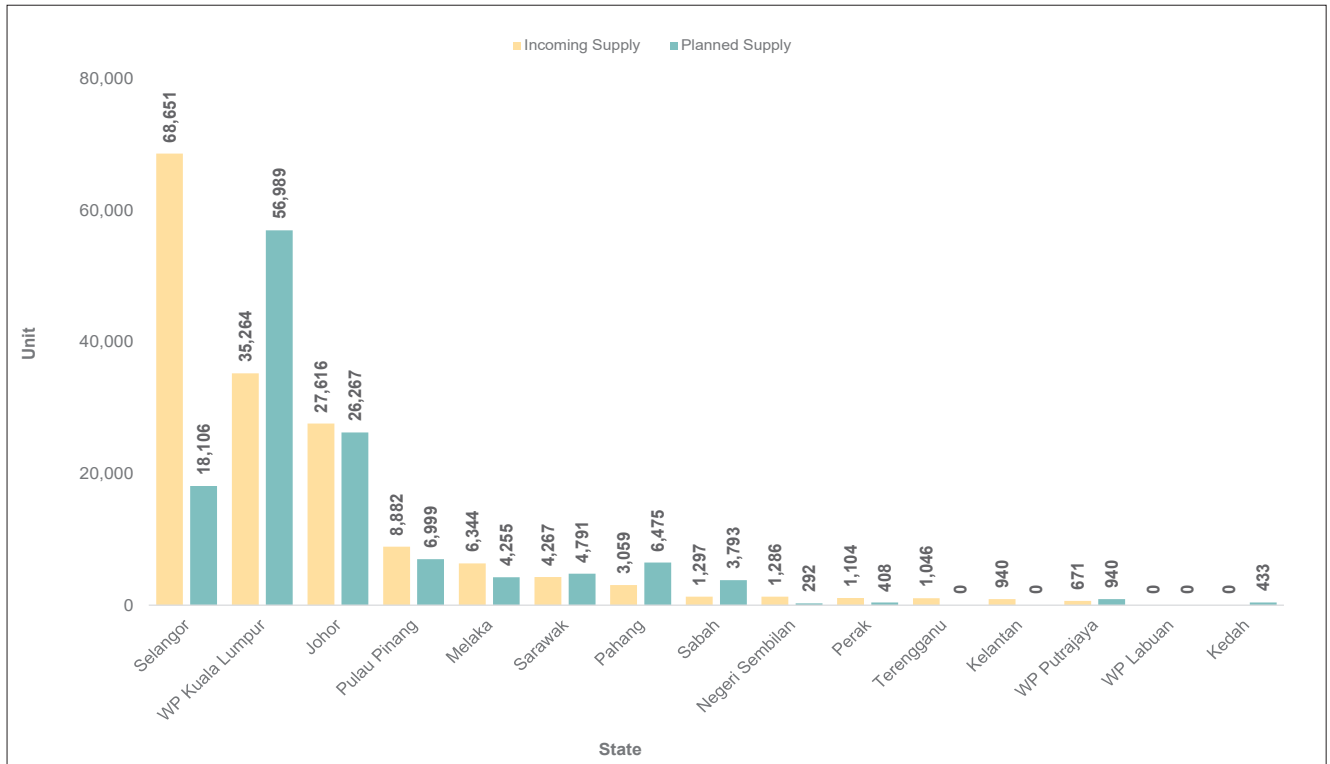
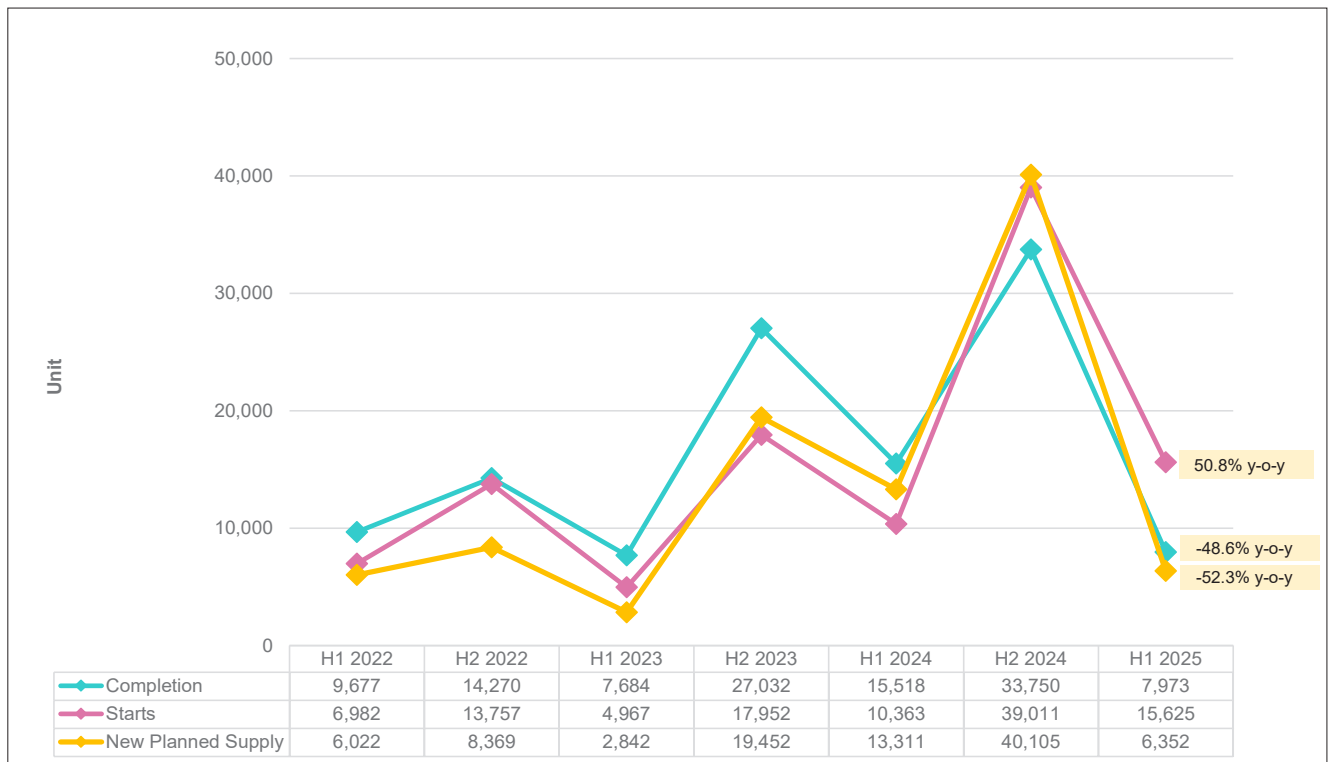


Chart 11: Trends of Completion, Starts and New Planned Supply for Serviced Apartment from H1 2022 to H1 2025



SHOPPING COMPLEX PROPERTY STOCK REPORT

4.0 KOMPLEKS PERNIAGAAN

Sepuluh pertama 2025, merekodkan sejumlah 17.33 juta meter persegi stok ruang perniagaan sedia ada yang terdiri daripada 499 pusat beli-belah (13.24 juta m.p.), 237 arkad (1.03 juta m.p.) dan 252 pasaraya besar (3.06 juta m.p.).

Sementara itu, sejumlah 877,140 m.p ruang kompleks perniagaan berada di penawaran akan datang dan 352,025 meter persegi direkodkan di penawaran yang dirancang.

Selangor mendahului pasaran dari segi penawaran ruang sedia ada dan penawaran akan datang dengan syer 21.6% (3.75 juta m.p.) dan syer 33.0% (289,607 m.p.). Selepas Selangor, W.P Kuala Lumpur turut menjadi penyumbang yang besar ruang sedia ada dengan syer 19.8% (3.43 juta m.p.) dan 32.6% (286,297 m.p.) di penawaran akan datang.

Empat kompleks perniagaan direkodkan telah siap dibina pada separuh pertama 2025 seperti di **Jadual 1**.

4.0 SHOPPING COMPLEX

In the first half of 2025, a total of 17.33 million square meters of existing shopping complex space was recorded, comprising 499 shopping centres (13.24 million s.m), 237 arcades (1.03 million s.m), and 252 hypermarkets (3.06 million s.m).

Meanwhile, a total of 877,140 s.m of shopping complex space is set to be available in incoming supply, while 352,025 square meters has been recorded in planned supply.

Selangor leads the market in terms of existing stock and incoming supply, holding a share of 21.6% (3.75 million s.m) and a share of 33.0% (289,607 s.m). Following Selangor, W.P Kuala Lumpur also significantly contributes to the existing stock with a share of 19.8% (3.43 million s.m) and 32.6% (286,297 s.m) in the incoming supply.

*Four shopping complexes have been recorded as completed in the first half of 2025, as shown in **Table 1**.*

Table 1: Completion of Shopping Complex in H1 2025

| No | State | Name of Building | Location | Category | Total Space (s.m.) |
|------------------------------------|--------------|--------------------------|---|-----------------|--------------------|
| 1. | Selangor | Sunway Square Mall | Jalan Lagoon Selatan, Bandar Sunway | Shopping Centre | 29,357 |
| 2. | Pulau Pinang | The Waterfront Shoppes | Jalan Pantai Sinaran, Gelugor | Shopping Centre | 61,873 |
| 3. | Pulau Pinang | Klipa Shopping Centre | Persiaran Cassia Barat 8, Bandar Cassia | Shopping Centre | 7,108 |
| 4. | Perak | Econsave Hutan Melintang | Lorong Lagenda 8, Section Niaga Lagenda | Hypermarket | 6,789 |
| Total Completion in H1 2025 | | | | | 105,127 |

Chart 12: Shopping Complex Existing Stock by State H1 2025

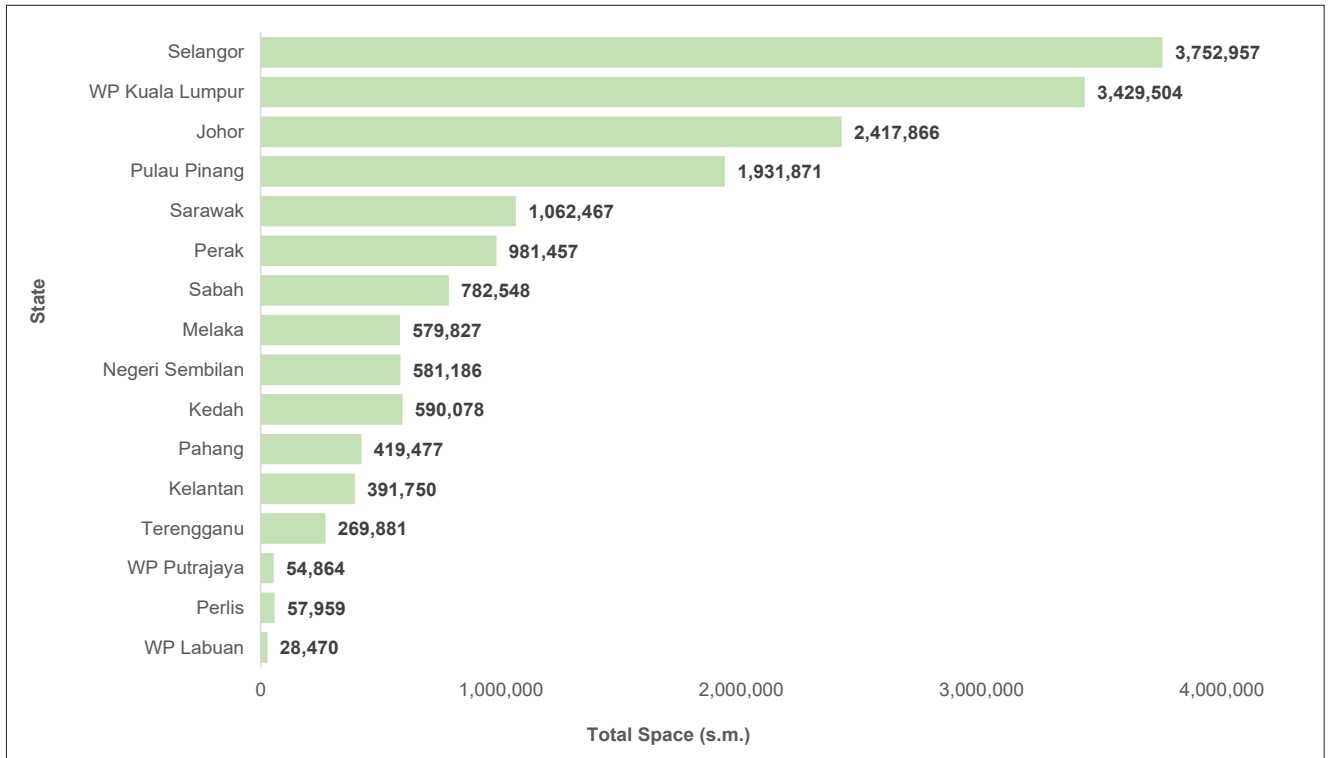


Chart 13: Shopping Complex Incoming Supply and Planned Supply by State H1 2025

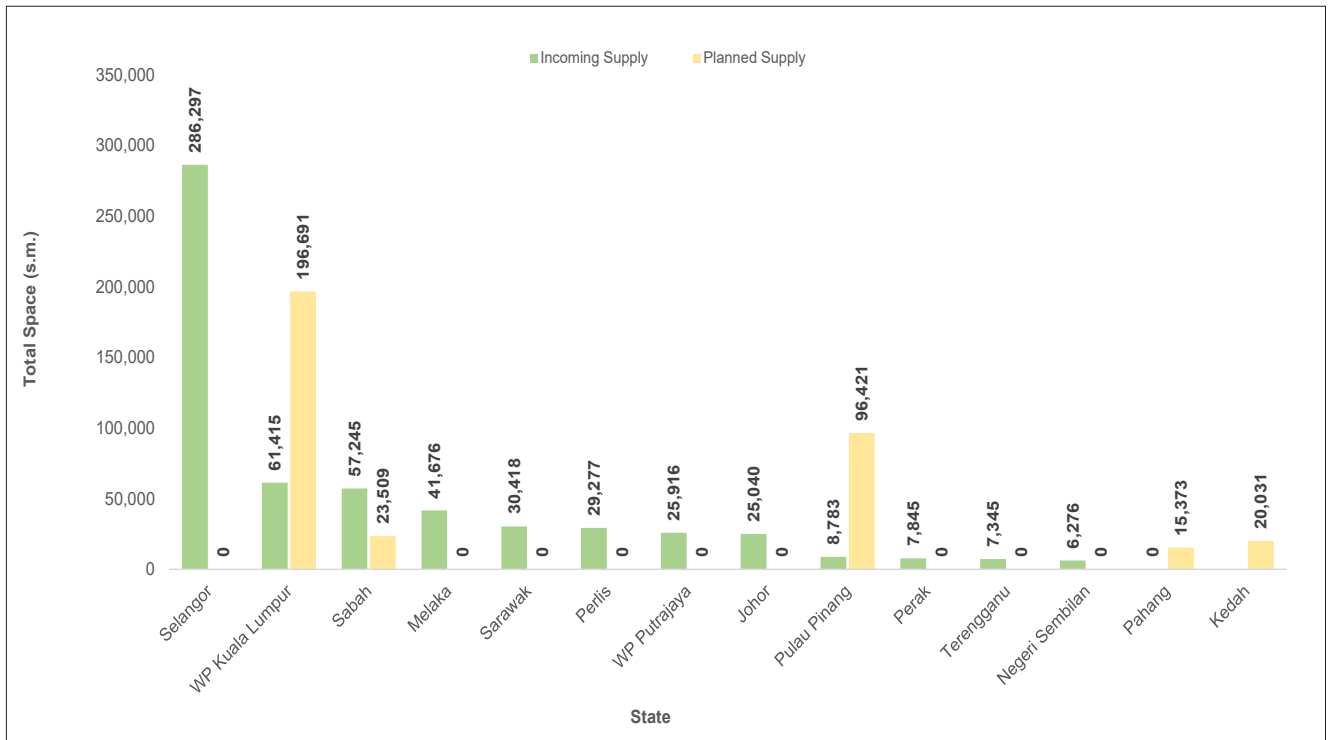
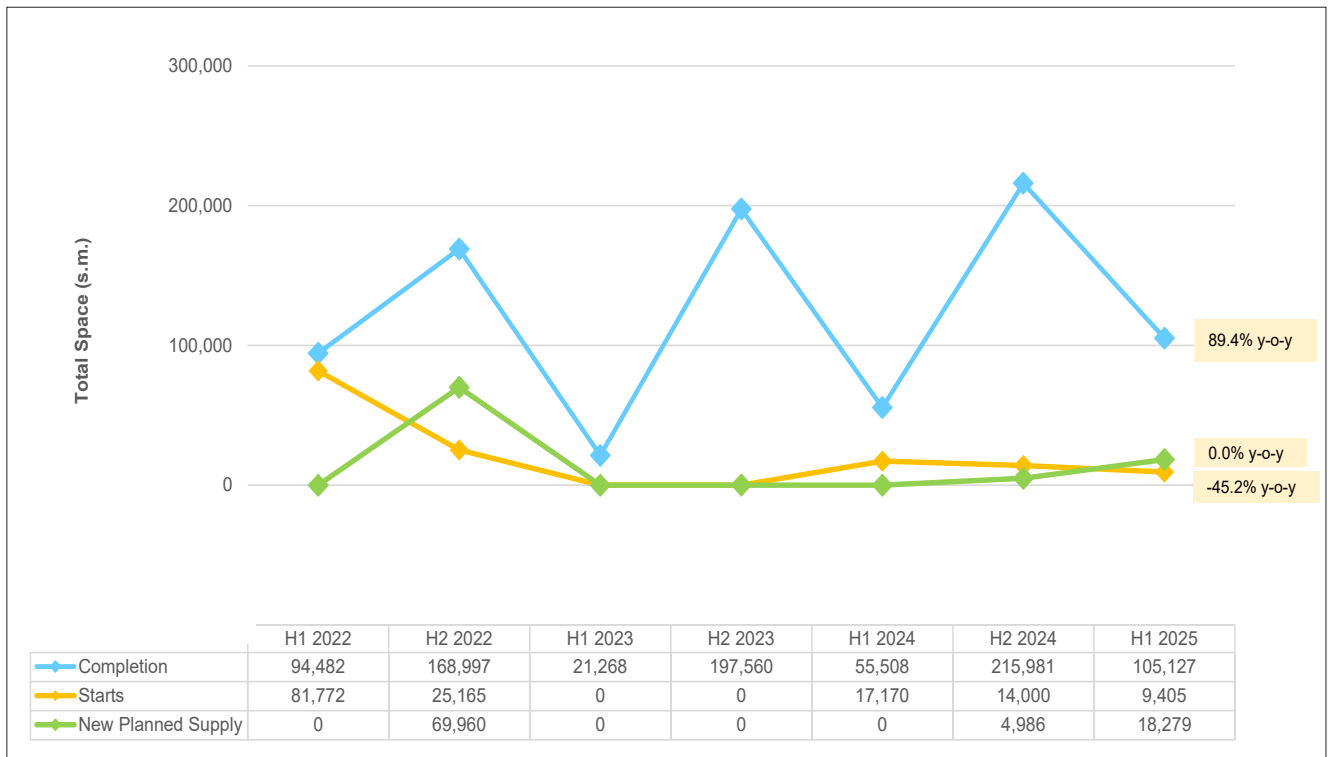


Chart 14: Trends of Completion, Starts and New Planned Supply for Shopping Complex from H1 2022 to H1 2025



PURPOSE-BUILT OFFICE STOCK REPORT

5.0 PEJABAT BINAAN KHAS

Pada separuh pertama 2025, sejumlah 24.32 bilion m.p stok sedia ada ruang pejabat binaan khas direkodkan. Stok sedia ada ini merangkumi 1,282 bangunan swasta (18.47 juta m.p) dan 579 bangunan kerajaan (5.85 juta m.p).

W. P Kuala Lumpur menerajui penawaran ruang pejabat binaan kkkhas dengan syer 42.0% (10.21 juta m.p.) stok sedia ada, 52.6% (518,461 m.p) di penawaran akan datang dan 79.9% (736,092 m.p) di penawaran yang dirancang. Mengikuti di tempat kedua bagi stok sedia ada ialah Selangor dengan luas yang direkodkan 4.70 juta m.p.

Empat buah pejabat binaan khas (swasta) dan sebuah pejabat binaan khas (kerajaan) siap dibina pada separuh pertama 2025, menambah jumlah ruang pejabat sebanyak 155,772 m.p.

Senarai pejabat binaan khas yang siap dibina pada separuh pertama 2025 adalah seperti di **Jadual 2**.

5.0 PURPOSE-BUILT OFFICE

In the first half of 2025, a total of 24.32 billion s.m of existing stock of purpose-built office space was recorded. This existing stock includes 1,282 private buildings (18.47 million s.m) and 579 government buildings (5.85 million s.m).

W. P Kuala Lumpur leads the purpose-built office space market with a share of 42.0% (10.21 million s.m) of the existing stock, 52.6% (518,461 s.m) in incoming supply, and 79.9% (736,092 s.m) in planned supply. Following in second place for existing stock is Selangor, which has recorded an area of 4.70 million s.m.

Four purpose-built offices (private) and one purpose built office (government) have been completed in the first half of 2025, increasing the total office space by 155,772 s.m.

The list of purpose-built offices that have been completed in the first half of 2025 is as shown in Table 2.

Table 2: Completion Of Purpose Built Office In H1 2025

| No | State | Name of Building | Location | Category | Total Space (s.m.) |
|------------------------------------|--------------|---------------------------------|---|------------|--------------------|
| 1. | Kuala Lumpur | TRX Campus Office | Persiaran TRX Timur, Tun Razak Exchange | Private | 25,529 |
| 2. | Kuala Lumpur | Oxley Tower | Jalan Ampang | Private | 33,000 |
| 3. | Selangor | Sunway Square Corporate Tower 1 | Jalan Lagoon Selatan, Bandar Sunway | Private | 40,180 |
| 4. | Selangor | Sunway Square Corporate Tower 2 | Jalan Lagoon Selatan, Bandar Sunway | Private | 50,074 |
| 5. | Sarawak | Unifor Complex | Jalan Ong Tiang Swee | Government | 6,989 |
| Total Completion in H1 2025 | | | | | 155,772 |

Chart 15: Purpose Built Office Existing Stock by State H1 2025

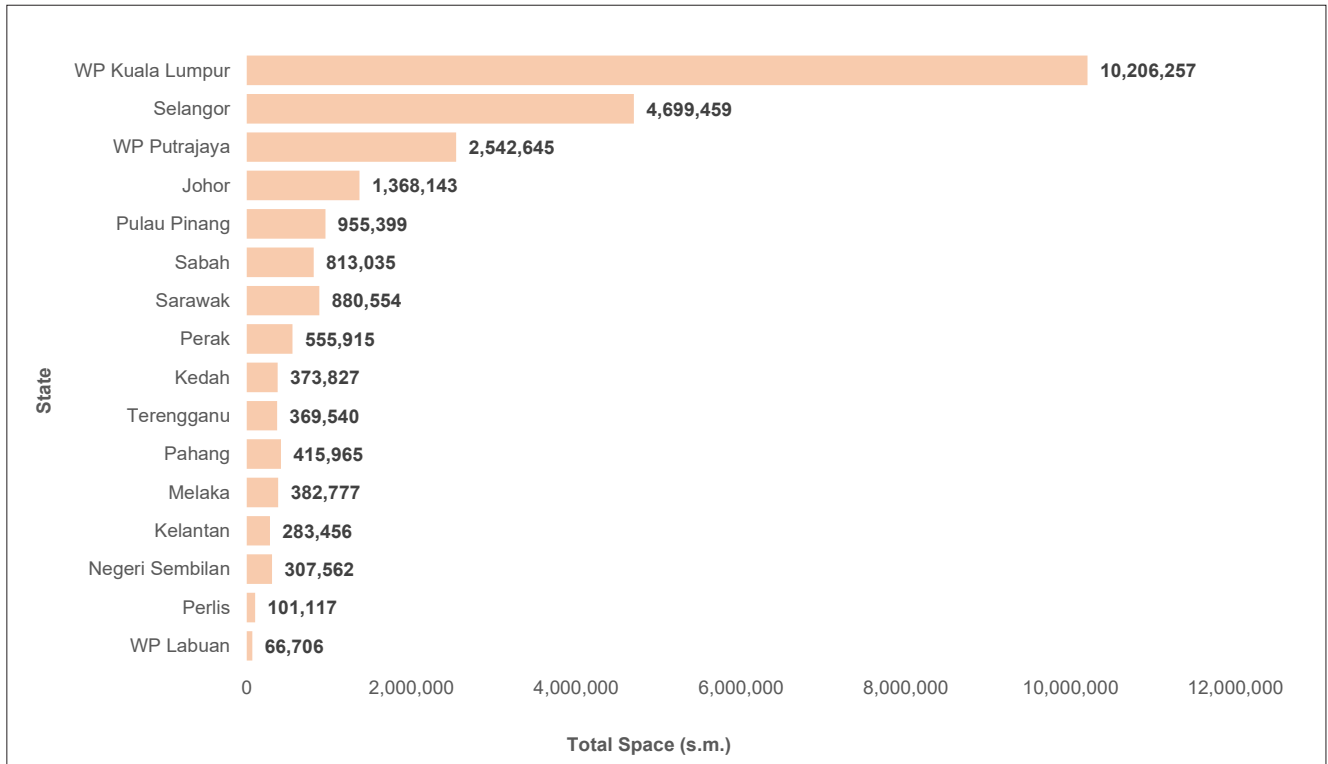


Chart 16: Purpose Built Office Incoming Supply and Planned Supply by State H1 2025

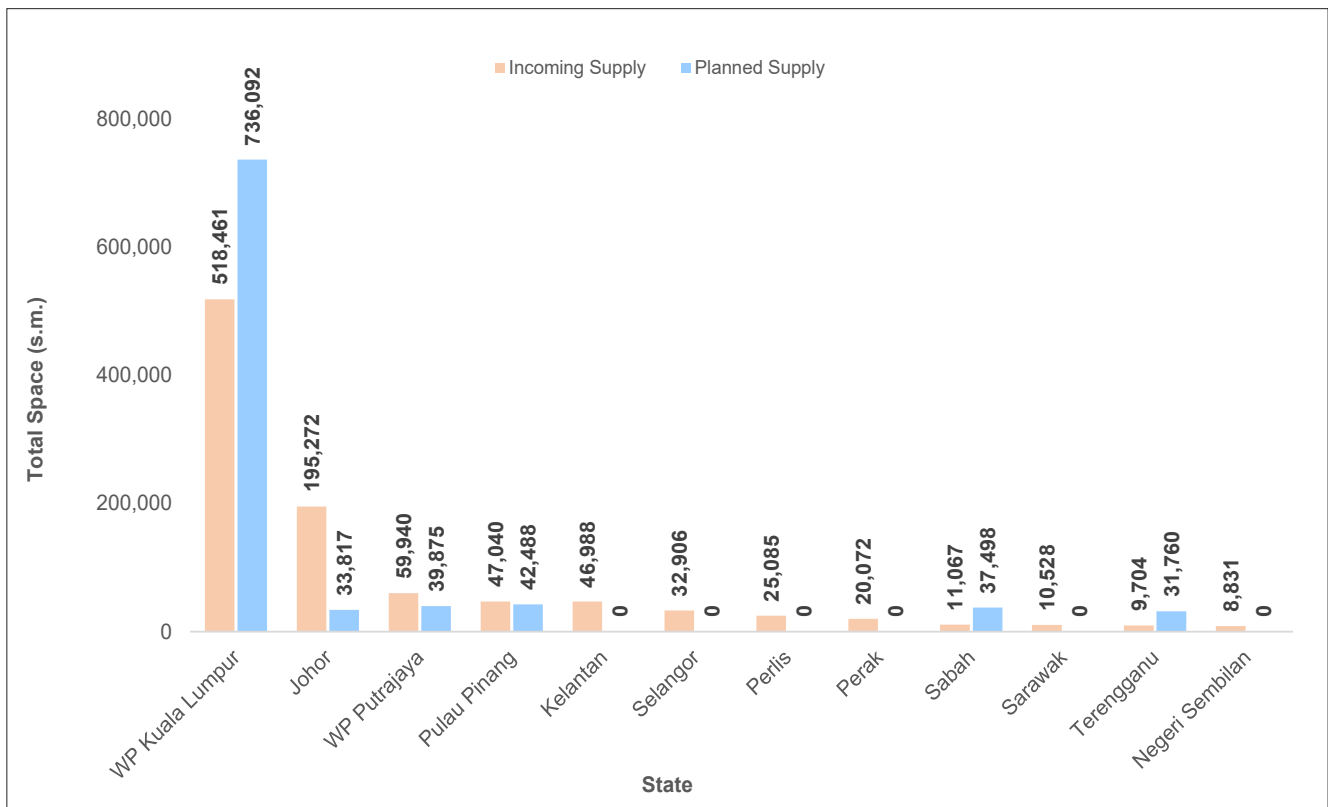
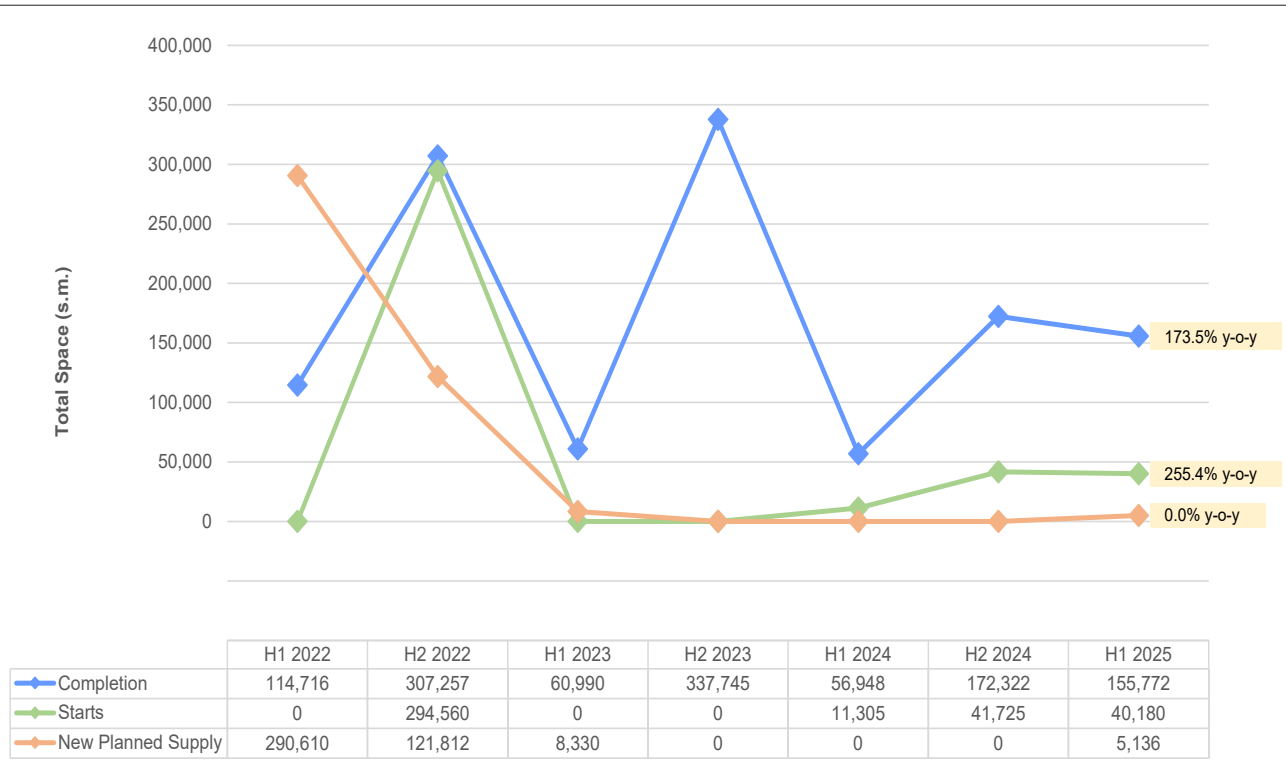


Chart 17: Trends of Completion, Starts and New Planned Supply for Purpose Built Office from H1 2022 to H1 2025



6.0 HARTA TANAH INDUSTRI

Pada separuh pertama 2025, stok sedia ada industri berjumlah 123,530 unit telah direkodkan. Penawaran akan datang dan penawaran yang dirancang masing-masing merekodkan 4,864 unit dan 3,259 unit.

Teres industri menerajui stok sedia ada dengan syer melebihi 50.0% tetapi dari segi pembangunan yang akan datang menyaksikan harta tanah industri jenis berkembar dilihat lebih menonjol dengan penawaran akan datang dan penawaran yang dirancang masing-masing mendominasi 39.6% dan 45.2% dari jumlah penawaran.

Selangor menerajui penawaran industri dengan bilangan tertinggi merentasi ketiga-tiga peringkat pembangunan.

Aktiviti pembinaan menunjukkan peningkatan yang signifikan melebihi 100% berbanding tempoh yang sama pada tahun 2024. Siap dibina merekodkan 353 unit (2024 : 149 unit), mula dibina sebanyak 823 unit (2024: 301 unit) dan penawaran baharu dirancang menyaksikan peningkatan sehingga 496 unit berbanding 148 pada tahun 2024.

6.0 INDUSTRIAL PROPERTY

In the first half of 2025, the existing stock in the industry was recorded at 123,530 units. Incoming supply and planned supply were recorded at 4,864 units and 3,259 units, respectively.

Terrace industrial sector leads the existing stock with a share exceeding 50.0%. However, in terms of future development, semi-detached industrial properties are expected to stand out more prominently, with incoming supply and planned supply projected to dominate 39.6% and 45.2% of the total respectively.

Selangor leads the industry supplies with the highest number across all three stages of development.

Construction activities have demonstrated a significant increase exceeding 100% compared to the same period in 2024. A total of 353 units completion recorded (2024: 149 units), 823 units start (2024: 301 units), and new plan supply projected to rise to 496 units, compared 148 in 2024.

Chart 18: Industrial Existing Stock by State H1 2025

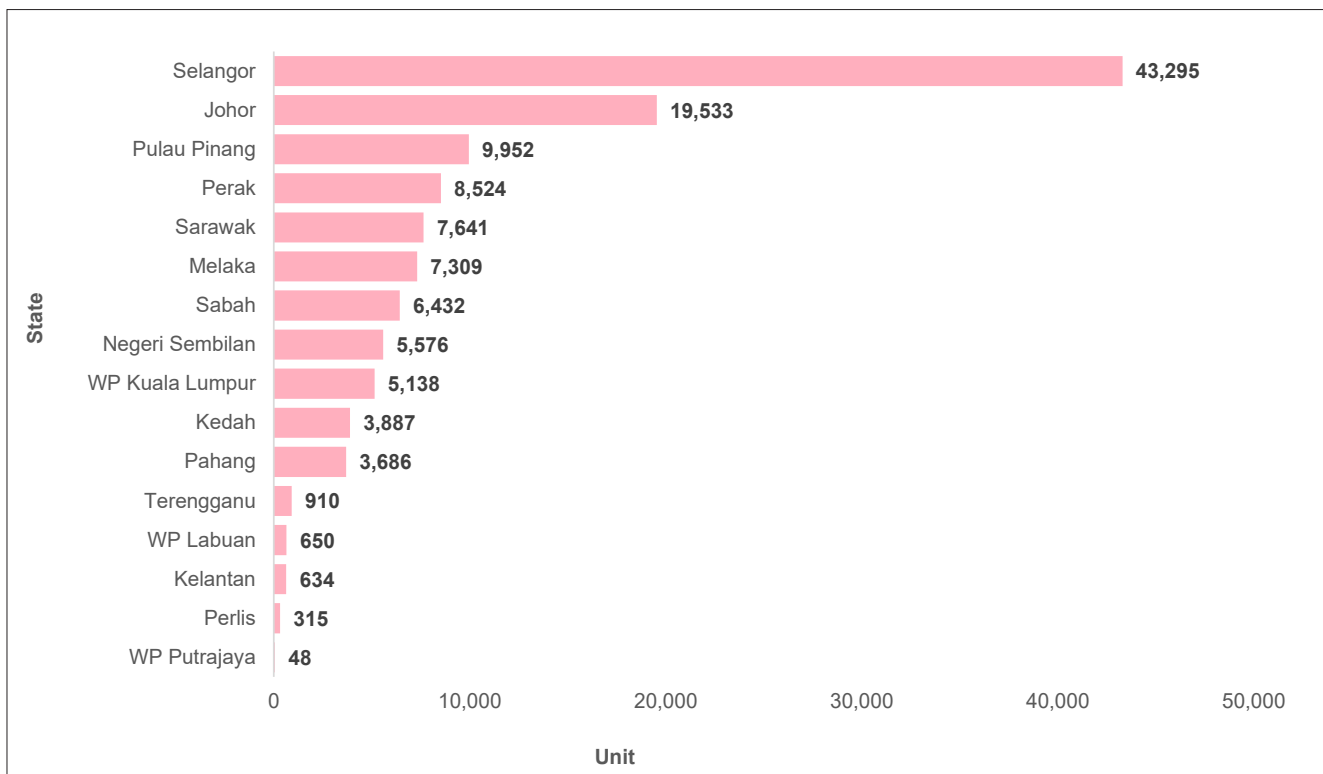


Chart 19: Industrial Incoming Supply and Planned Supply by State H1 2025

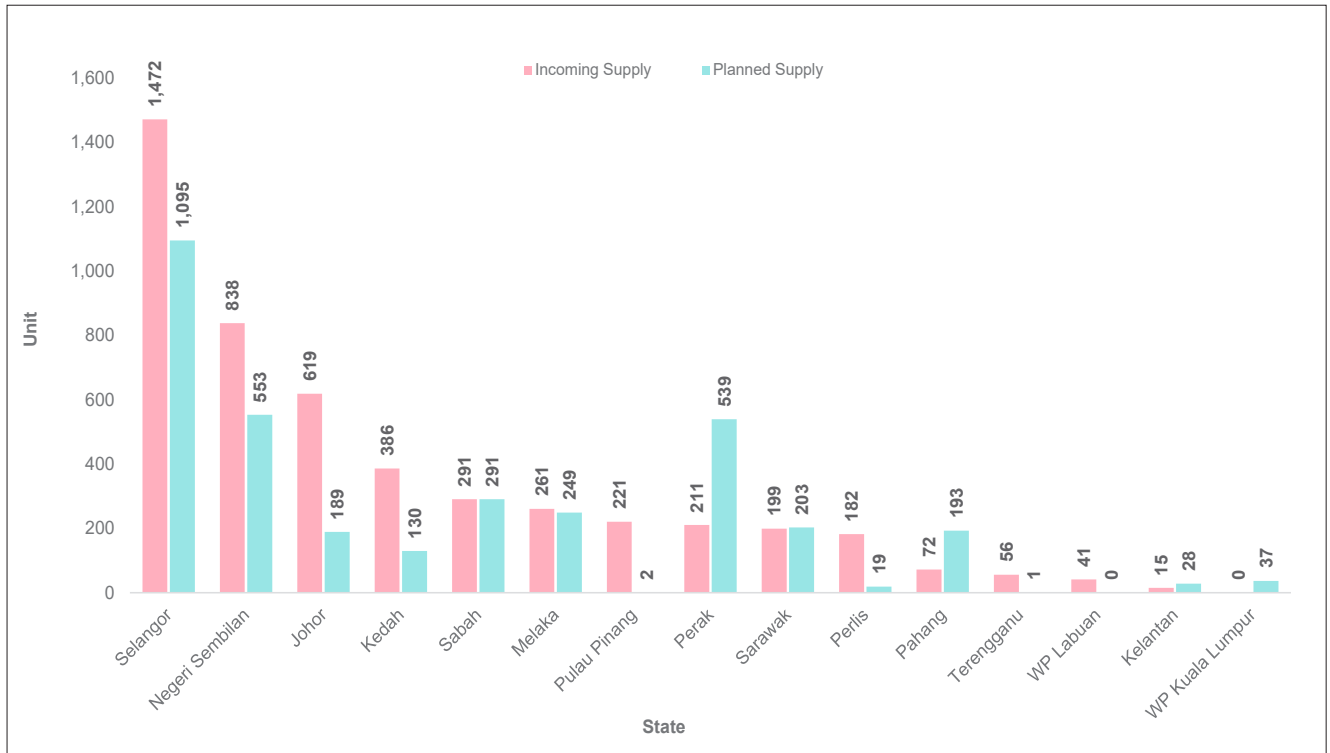


Chart 20: Distribution of Industrial by Building Type H1 2025

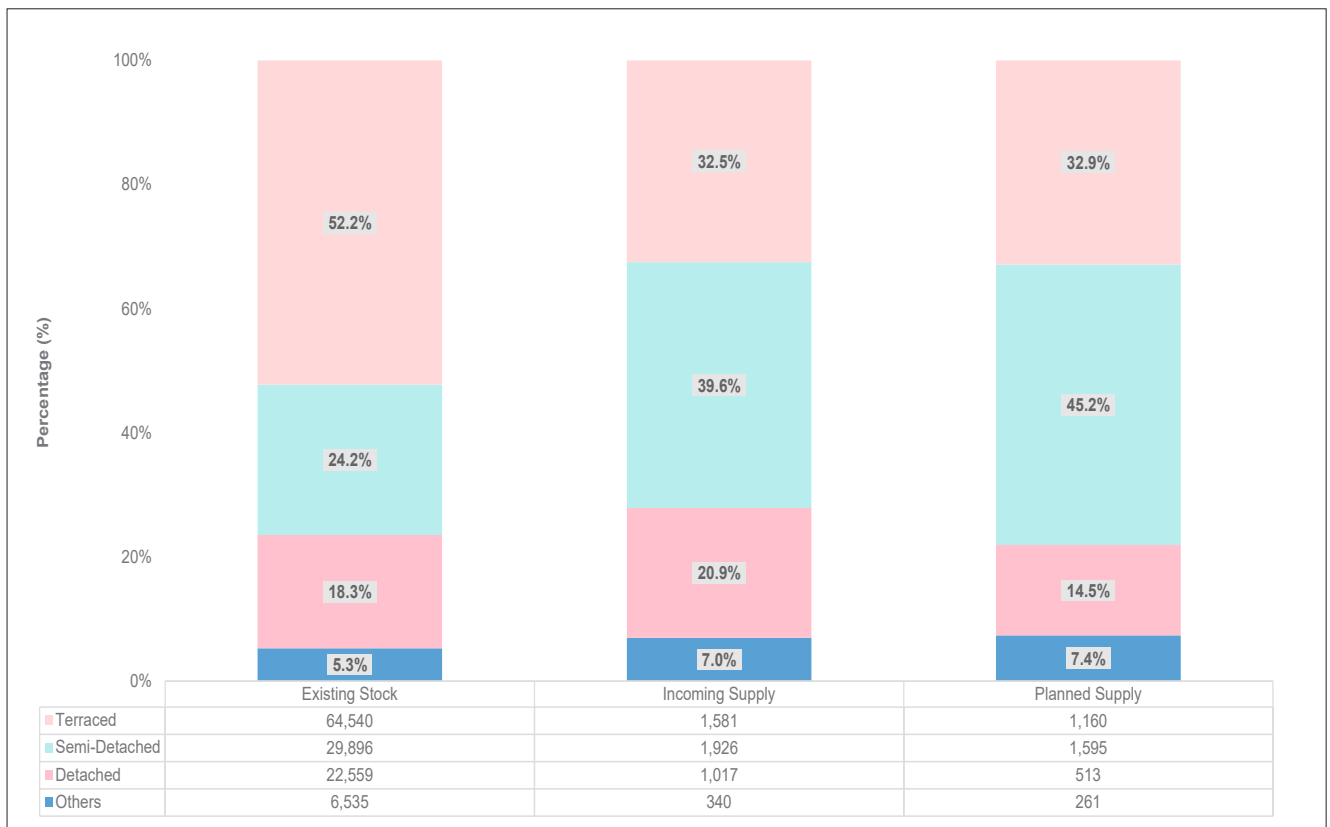
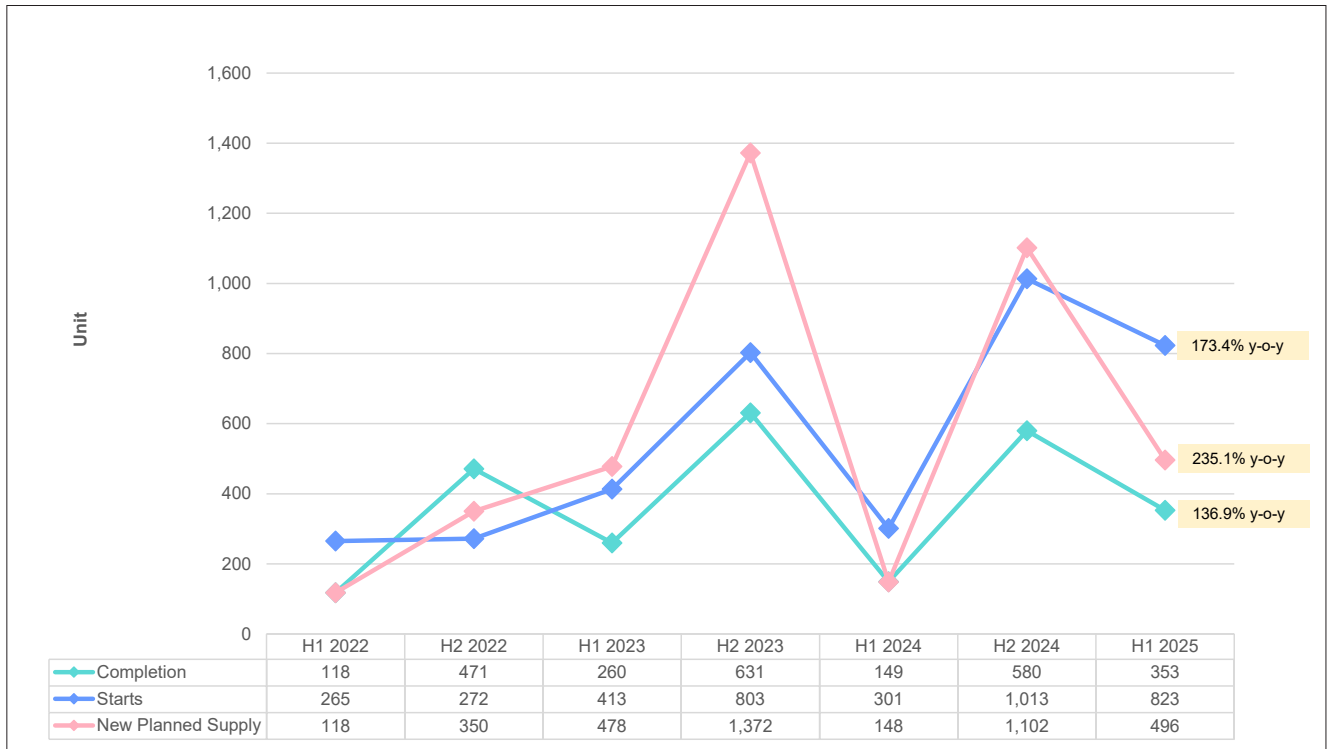


Chart 21: Trends of Completion, Starts and New Planned Supply for Industrial from H1 2022 to H1 2025



LEISURE PROPERTY STOCK REPORT

7.0 HARTA TANAH RIADAH

Separuh pertama 2025 merekodkan sejumlah 291,679 bilik (3,622 hotel) berada di pasaran manakala 16,946 bilik dalam penawaran akan datang dan 14,371 bilik dalam penawaran yang dirancang.

W.P Kuala Lumpur menyumbangkan jumlah tertinggi bilik hotel sedia ada (49,772 bilik) dan penawaran akan datang (3,862 bilik). Johor menawarkan bilangan bilik tertinggi di penawaran yang dirancang (2,890 bilik).

Tiga hotel direkodkan sebagai penawaran baharu dirancang masing-masing dengan satu hotel di W. P Kuala Lumpur (552 bilik), Sarawak (220 bilik) dan Pahang (13 bilik). Lima buah hotel (712 bilik) direkodkan telah siap dibina pada separuh pertama 2025 sebagaimana **Jadual 3**.

7.0 LEISURE PROPERTY

In the first half of 2025, a total of 291,679 rooms (3,622 hotels) were recorded, while 16,946 rooms are in the incoming supply and 14,371 rooms are in the planned supply.

W.P Kuala Lumpur contributes the highest number of existing hotel rooms (49,772 rooms) and incoming supply (3,862 rooms). Johor presents the largest number of rooms in planned supply (2,890 rooms).

*Three hotels have been recorded as new planned supply, with one hotel each in W. P Kuala Lumpur (552 rooms), Sarawak (220 rooms), and Pahang (13 rooms). Five hotels (712 rooms) are recorded to have been completed in the first half of 2025, as indicated in **Table 3**.*

Table 3: Completion of Hotel in H1 2025

| No | State | Name of Hotel | Location | No. of Room |
|------------------------------------|--------------|-------------------------------|-----------------------------------|-------------|
| 1. | Johor | Kontena Hotel (Taman Bersatu) | Jalan Batu Pahat, Kluang | 16 |
| 2. | Johor | Sin Lien Hotel | Jalan Mersing, Taman Kluang Baru | 19 |
| 3. | Sabah | Seafest Regency | Jalan Kastam, Pekan Semporna | 136 |
| 4. | Pulau Pinang | Fifth Avenue Hotel & Suites | Lebuh Macallum, Bandar Georgetown | 241 |
| 5. | Melaka | Birkin International Hotel | Pekan Klebang, Melaka Tengah | 300 |
| Total Completion in H1 2025 | | | | 712 |

Chart 22: Hotel Existing Stock by State H1 2025

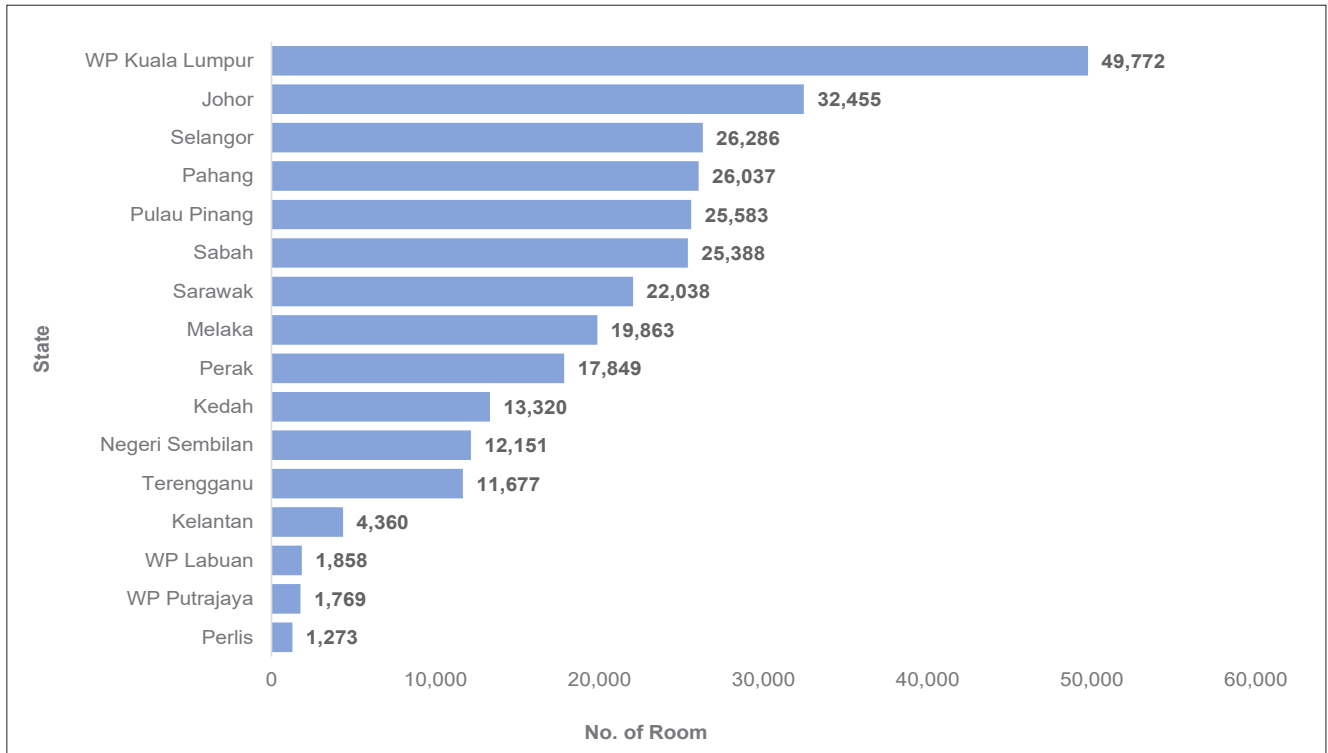


Chart 23: Hotel Incoming Supply and Planned Supply by State H1 2025

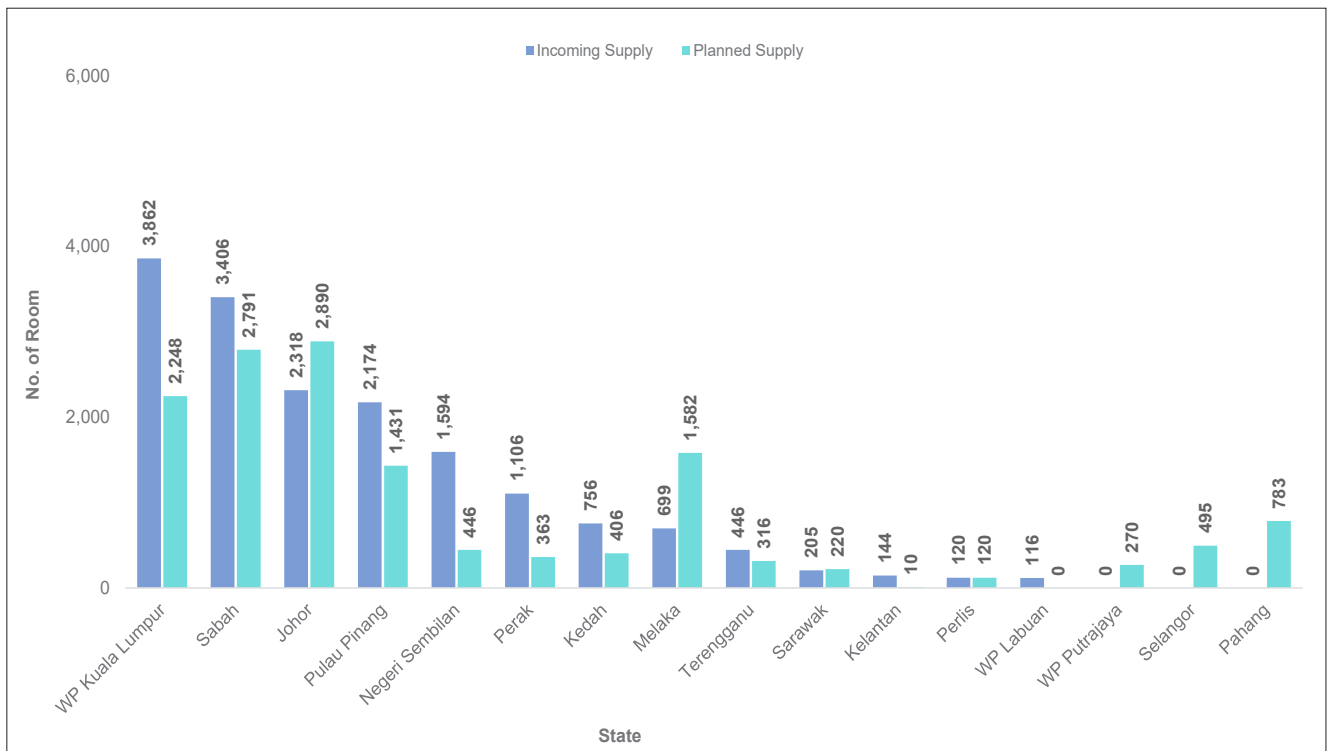
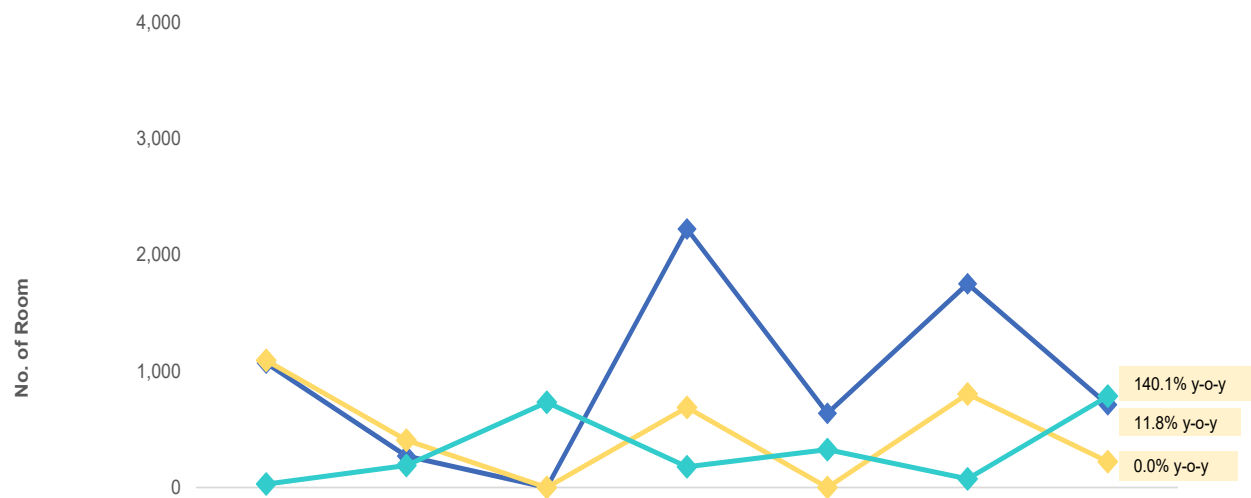


Chart 24: Trends of Completion, Starts and New Planned Supply for Hotel from H1 2022 to H1 2025



| | H1 2022 | H2 2022 | H1 2023 | H2 2023 | H1 2024 | H2 2024 | H1 2025 |
|--------------------|---------|---------|---------|---------|---------|---------|---------|
| Completion | 1,071 | 270 | 0 | 2,225 | 637 | 1753 | 712 |
| Starts | 1,094 | 407 | 0 | 690 | 0 | 804 | 223 |
| New Planned Supply | 29 | 190 | 733 | 178 | 327 | 73 | 785 |

Catatan Teknikal

Technical Notes

CATATAN TEKNIKAL

1.0 Tempoh kajian

Laporan Stok Harta Tanah pada tahun 2024 adalah seperti berikut:

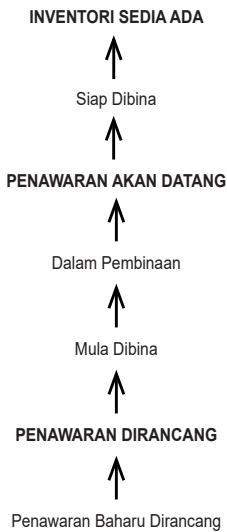
- Q1 : 1 Januari 2024 - 31 Mac 2024
- Q2 : 1 April 2024 - 30 Jun 2024
- Q3 : 1 Julai 2024 - 30 September 2024
- Q4 : 1 Oktober 2024 - 31 Disember 2024

2.0 Peringkat Penyebaran

Laporan terbahagi adalah pada tiga peringkat pembangunan yang utama dan subperingkat berbandukan jadual di bawah:

2.1 Inventori Sedia Ada

Inventori sedia ada (stok) adalah unit yang telah memperoleh sijil layak menduduki (CF) atau sijil layak menduduki sementara (TCF) sebelum tempoh kajian termasuk unit yang siap dibina dan memperoleh CF/ TCF dalam tempoh kajian. Angka dalam inventori sedia ada adalah jumlah terkumpul dari suku-suku sebelumnya ditambah dengan suku semasa.



2.2 Siap dibina

Siap dibina adalah terma yang digunakan bagi bangunan yang mana kerja pembinaan bangunan telah siap dan CF/ TCF telah diperolehi dalam tempoh kajian.

2.3 Penawaran akan datang

Penawaran akan datang merangkumi unit yang mana kerja pembinaannya sedang dijalankan termasuk unit mula dibina dan CF/ TCF belum dikeluarkan dalam tempoh kajian. Unit dalam penawaran akan datang mewakili jumlah terkumpul yang mana unit dalam pembinaan dalam suku kajian dan suku sebelumnya ditambah dengan unit yang memulakan pembinaan dalam suku kajian. Ianya tidak mengambil kira tanah kosong tetapi termasuk **unit tertangguh**.

Pengiraan penawaran akan datang adalah berterusan dan belum menyamai jumlah bilangan penduduk. Penawaran akan datang yang disebarkan dalam sebarang laporan suku tahunan merangkumi penawaran akan datang yang diselaraskan bagi suku sebelumnya dan penawaran akan datang dalam suku kajian.

Penawaran akan datang suku sebelumnya perlu diselaraskan dalam suku kajian atas sebab berikut:

- Pertambahan dalam kawasan liputan kajian
- Data tertunda dari suku sebelumnya tetapi diterima dalam suku semasa
- Kesilapan dalam operasi.

Unit tertangguh ialah yang mana kerja asas bangunan secara fizikalnya telah dimulakan tetapi belum siap dibina dan tiada aktiviti pembinaan selepas tiga tahun daripada tarikh kelulusan pembangunan.

TECHNICAL NOTES

1.0 Review Periods

The quarters in the 2024 of the Property Stock Report is as follows:

- Q1 : 1 January 2024 - 31 March 2024
- Q2 : 1 April 2024 - 30 June 2024
- Q3 : 1 July 2024 - 30 September 2024
- Q4 : 1 October 2024 - 31 December 2024

2.0 Stages of Dissemination

Information at the three main stages of development and their sub-stages according to the chart below:

2.1 Existing Inventory (stock)

Existing inventory (stock) are units that have been issued with the certificate of fitness (CF) or temporary certificate of fitness (TCF) prior to the review period plus units completed and issued with CF/ TCF within the review period. The figures in the existing inventory are accumulated figures from previous quarters plus the review quarter.



2.2 Completions

Completion is the term used when the building construction works are completed and a CF/ TCF is issued within the review period.

2.3 Incoming supply

Incoming supply comprises units where physical construction works are in progress including starts and CF/ TCF have not been issued during the review period. Units in the incoming supply represent accumulative totals where units under construction in the review quarter and from the previous quarter are added to the units that have started construction in the review quarter. It does not include vacant land but includes **delayed units**.

The calculation of incoming supply is on going and has not reached a total population count. Incoming supply disseminated in any quarter publication includes the adjusted incoming supply for the previous quarter and the incoming supply in the review quarter.

Incoming supply of the previous quarter have to be adjusted in the review quarter because of the following reasons:

- An increase in coverage
- Delayed data from the previous quarter but received during the review period,
- Operational errors.

Delayed units are those where the foundation work has physically started but not completed and no construction activity has taken place for a period of more than three years from the date the development was approved.

| | |
|--|---|
| <p>2.4 Mula dibina Mula dibina terdiri daripada bangunan-bangunan yang mana:</p> <ul style="list-style-type: none"> • Kerja asas dan kerja tapak bagi bangunan bertingkat rendah atau kerja bawah paras tanah termasuk cerucuk dan asas bagi bangunan bertingkat tinggi, telah dimulakan, • Ianya tidak termasuk kerja-kerja membersihkan, merata dan menyediakan infrastruktur | <p>2.4 Starts <i>Starts comprises buildings where:</i></p> <ul style="list-style-type: none"> • <i>The foundation and footing works of low-rise buildings or works below ground level including piling and foundation of high-rise buildings have started, and</i> • <i>It does not include site clearing, levelling and laying of infrastructure.</i> |
| <p>2.5 Penawaran dirancang Penawaran dirancang merangkumi unit yang mana kelulusan pelan bangunan telah diperolehi daripada pihak berkuasa tempatan dalam suku kajian. Unit tersebut belum memulakan pembinaan secara fizikalnya. Unit dalam penawaran dirancang termasuk jumlah terkumpul daripada suku-suku sebelumnya ditambah dengan unit dalam penawaran baharu dirancang dalam suku kajian. Pengiraan penawaran dirancang adalah berterusan dan belum menyamai jumlah bilangan penduduk. Penawaran dirancang yang disebarkan dalam sebarang laporan suku tahunan merangkumi penawaran dirancang yang diselaraskan bagi suku sebelumnya dan penawaran baharu dirancang dalam suku kajian. Penawaran yang dirancang suku sebelumnya perlu diselaraskan dalam suku kajian atas sebab berikut:</p> <ul style="list-style-type: none"> • Pertambahan kawasan liputan kajian, • Data tertunda daripada suku sebelumnya tetapi diterima dalam suku semasa, • Kesilapan dalam operasi. | <p>2.5 Planned supply <i>Planned supply comprises units with building plan approval obtained within a review quarter from the local authority. The units have not started physical construction works. Units in the planned supply include accumulative totals from previous quarters plus units in the new planned supply in the review quarter. The calculation of planned supply is on going and has not reached a total population count. Planned supply disseminated in any quarter publication includes the adjusted planned supply for the previous quarter and the planned supply in the review quarter. Planned supply of the previous quarter has to be adjusted in the review quarter because of the following reasons:</i></p> <ul style="list-style-type: none"> • <i>An increase in coverage,</i> • <i>Delayed data from the previous quarter but received during the review period,</i> • <i>Operational errors.</i> |
| <p>2.6 Kelulusan Pelan Bangunan (Penawaran baharu dirancang) Penawaran baharu dirancang merangkumi unit dimana kelulusan pelan bangunan telah diperolehi dari pihak berkuasa tempatan dalam suku kajian.</p> | <p>2.6 Building Plan Approval (New planned supply) <i>New planned supply comprises units where building plan approval have been obtained within the review period.</i></p> |
| <p>3.0 Penawaran hadapan adalah terma yang digunakan dalam laporan ini bagi menunjukkan penawaran akan datang dan penawaran dirancang.</p> | <p>3.0 Future supply is a term used in the report to denote incoming supply and planned supply.</p> |
| <p>4.0 Terma Am</p> | <p>4.0 General Terms</p> |
| <p>4.1 Struktur Struktur termasuk kekal, separuh kekal dan sementara.</p> | <p>4.1 Structures <i>The structures include permanent, semi-permanent and temporary construction.</i></p> |
| <p>4.2 Pemilikan Termasuk kedai/ Pejabat binaan khas/ Kompleks perniagaan milik kerajaan dan swasta. Kerajaan termasuklah kerajaan persekutuan, negeri dan pihak berkuasa tempatan. Swasta juga merangkumi kedai yang dimiliki oleh badan separa kerajaan.</p> | <p>4.2 Ownership <i>Include all shops/ purpose-built office/ shopping complexes owned by government and private sectors. Governments comprise federal, state and local authorities. Private sector embraces private companies and quasi-government agencies.</i></p> |
| <p>4.3 Tanah kosong tidak dikira dalam inventori sedia ada. Setelah ianya memperoleh kelulusan pelan bangunan, ianya dimasukkan dalam penawaran yang dirancang dan seterusnya memasuki pelbagai peringkat pembinaannya.</p> | <p>4.3 Vacant lands are not included under existing inventory. When they obtain building plan approval they are included under planned supply and progresses into the construction stages.</p> |
| <p>5.0 Harta Tanah Kediaman</p> | <p>5.0 Residential Property</p> |
| <p>5.1 Definisi Rumah tempat tinggal adalah termasuk mana-mana bangunan, tenaman atau mesuaj yang keseluruhannya atau sebahagian binaannya, disesuaikan atau diniatkan bagi kediaman manusia dan sebahagiannya bagi premis perniagaan. Istilah kediaman manusia adalah termasuk bangunan yang dibina untuk manusia tinggal bersama keluarga. Bagi tujuan laporan ini, rumah kedai, yang mana sebahagiannya lagi untuk tempat tinggal adalah dikecualikan daripada harta tanah kediaman tetapi dilaporkan sebagai kedai.</p> | <p>5.1 Definition <i>Defines housing accommodation to include any building, which is wholly or principally constructed, adapted or intended for human habitation or partly for human habitation and partly for business premises. The term human habitation would include buildings constructed for humans to live with their families. For the purpose of this report, shop houses, which is partially used as retail and partially for human habitation is excluded as residential property but reported as shop.</i></p> |
| <p>5.2 Jenis Harta Tanah Maklumat merangkumi kediaman individu samada yang terletak dalam atau luar skim perumahan di dalam kawasan pihak berkuasa tempatan. Jenis harta tanah kediaman termasuk teres, berkembar, sesebuah, unit kos rendah, rumah pangsa, pangsapuri/ kondominium, unit berkelompok dan rumah bandar di semua peringkat.</p> | <p>5.2 Property Types <i>The data is conducted by survey within local authority area. Property types include terraced, semi-detached, detached, low-cost units, flats, condominium/ apartment, clustered units and town houses at various levels.</i></p> |
| <p>Walau bagaimanapun, institusi, kuarters dan unit setinggan tidak termasuk dalam laporan ini.</p> | <p><i>However, the property excluded from this report are institutional quarters and squatter units.</i></p> |

| | | | |
|------------|--|------------|--|
| 6.0 | Kedai | 6.0 | Shop |
| 6.1 | <p>Definisi</p> <p>Kedai merangkumi premis di mana barang runcit dan perkhidmatan diniagakan. Barang yang dijual dan perkhidmatan yang disediakan memenuhi keperluan harian pelanggan.</p> <p>Kedai adalah merangkumi:</p> <ul style="list-style-type: none"> • Rumah kedai • Kedai pejabat • Unit kedai dengan kegunaan perniagaan • Kedai makan binaan khas <p>Kedai tidak termasuk:</p> <ul style="list-style-type: none"> • Kedai yang telah diubahsuai 75% (ini menunjukkan penukaran kegunaan yang kekal) kepada kegunaan perdagangan lain seperti ruang pejabat. • Kedai yang telah ditukar kegunaan secara kekal | 6.1 | <p>Definition</p> <p><i>Shops are premises where retail goods and services are sold. The goods and services meet day-to-day needs of customers.</i></p> <p><i>The Shops include:</i></p> <ul style="list-style-type: none"> • Shop house • Shop offices • Shop unit with retail use • Purpose-built eateries <p><i>The shops excluded:</i></p> <ul style="list-style-type: none"> • Shops that have been renovated 75% (indicating a permanent change) to other commercial uses like office space. • Shops that has permanently changed to another use. |
| 6.2 | <p>Jenis Harta Tanah</p> <p>Data adalah berdasarkan lawat periksa dalam kawasan pihak berkuasa tempatan. Jenis harta tanah kedai adalah termasuk teres, berkembar, sesebuah, kedai strata dan kedai sebelum perang. SOHO dan pangsapuri khidmat dimasukkan mulai Q1 2018.</p> | 6.2 | <p>Property Types</p> <p><i>The data is conducted by survey within local authority area. Property types include terraced, semi-detached, detached, stratified shop and pre-war. SOHO and serviced apartments are included from Q1 2018 onwards.</i></p> |
| 7.0 | Industri | 7.0 | Industrial |
| 7.1 | <p>Definisi</p> <p>Unit perindustrian iaitu bangunan/ kilang yang terlibat dalam aktiviti pembuatan dan penyimpanan (gudang). Akta Penyelarasan Perindustrian 1975 (ICA) mendefinisikan "Aktiviti Pengilangan" sebagai membuat, mengubah, mengadun, menghiasi, memperkemas atau dengan cara lain merawat atau menyesuaikan apa-apa barang atau bahan dengan bermaksud penggunaan, penjualan, pengangkutan, penghantaran atau pembuangannya dan merangkumi pemasangan bahagian-bahagian dan pembaikan kapal tetapi tidak termasuk sebarang aktiviti yang biasanya berkaitan dengan perniagaan jual runcit atau borong. Unit perindustrian juga termasuk kemudahan penyimpanan <i>stand-alone</i> atau gudang yang tidak disebut di dalam definisi ICA. Walau bagaimanapun, laporan ini belum mengumpul data bagi kemudahan penyimpanan.</p> | 7.1 | <p>Definition</p> <p><i>Units that are buildings/ factories that engage in manufacturing activity and storage (warehouses). The Industrial Co-ordination Act 1975 (ICA) defines industrial activity as the making, altering, blending, ornamenting, finishing or otherwise treating or adapting any article or substance with a view of its use, sale, transport, delivery or disposal; and includes the assembly of parts and ship repairing but shall not include any activity normally associated with retail or wholesale trade. Industrial units also include stand-alone storage facilities or warehouses that is not mentioned in the ICA definition. However the publication has not captured the data on storage facilities.</i></p> |
| 7.2 | <p>Jenis Harta Tanah</p> <p>Data adalah berdasarkan lawatperiksa dalam dan luar kawasan pihak berkuasa tempatan. Jenis harta tanah industri merangkumi Jenis perindustrian termasuk unit teres, berkembar, sesebuah, kompleks perindustrian dan bertingkat.</p> | 7.2 | <p>Property Types</p> <p><i>The data is conducted by survey within and outside local authority area. Property types include terraced, semi-detached, detached, industrial complex and flatted units.</i></p> |
| 8.0 | Pejabat Binaan khas | 8.0 | Purpose-built Offices |
| 8.1 | <p>Definisi</p> <p>Bangunan binaan khas bermaksud satu kegunaan utama yang disokong oleh kegunaan sampingan. Kegunaan utama menggabungkan rekabentuk asal, yang mengoptimumkan ruang bagi manfaatnya. Apabila rekabentuk asal diubahsuai sebanyak 75% bagi memanfaatkan kegunaan lain, kegunaan asalnya akan ditukar dengan kegunaan baru.</p> <p>Inventori pejabat binaan khas dalam laporan NAPIC termasuk tempat perniagaan berbentuk perkhidmatan dijalankan dan bukannya pembuatan atau penjualan barangan. Ruang pejabat ini diperlukan untuk aktiviti kertas kerja, komunikasi serta lain-lain aktiviti pejabat.</p> <p>Dengan ini terma pejabat binaan khas digunakan untuk menunjukkan bangunan yang dibina secara khusus untuk pejabat sebagai kegunaan utamanya. Bagi pengumpulan dan penyebaran maklumat oleh NAPIC, kegunaan dominan bermaksud kegunaan pejabat adalah tidak kurang dari 75% daripada keluasan bersih yang disewakan. Penyebaran maklumat ruang pejabat adalah berdasarkan luas bersih yang disewakan sebagaimana yang dinyatakan di dalam <i>Uniform Methods of Measurement of Buildings</i> yang diterbitkan oleh Pertubuhan Juruukur DiRaja Malaysia.</p> | 8.1 | <p>Definition</p> <p><i>Purpose-built (as opposed to multi-purpose) signifies one primary use with supporting uses complimenting it. The intended use incorporates an original design, which optimises space for its benefit. When the original design is renovated by 75% to benefit another use, the original intention is replaced by the new use.</i></p> <p><i>NAPIC publication of purpose-built office inventory includes places where service-orientated businesses are carried out as opposed to goods being manufactured or sold. The office space is required to attend to paperwork for communication and other office activity.</i></p> <p><i>Therefore the term purpose-built office is used to denote buildings that are intentionally built with office as a dominant use. In data capturing and dissemination by NAPIC, dominant use means office use not less than 75% of the net let-table area. Office space information is disseminated based on the net let-table floor area according to the Uniform Methods of Measurement of Buildings of the Royal Institution of Surveyors Malaysia.</i></p> |

Termasuk di dalam laporan ini adalah:

- Ruang pejabat dalam pembangunan bersepadu
- Ruang dengan kegunaan asal misalnya pejabat tetapi telah ditukar kegunaannya buat sementara waktu

Tidak termasuk di dalam laporan ini adalah:

- Ruang pejabat dalam bangunan pelbagai guna di mana kegunaannya boleh bertukar ganti dengan kegunaan perniagaan, kediaman, hotel dan perindustrian
- Ruang pejabat yang mana telah ditukar dari kegunaan asalnya secara kekal

9.0 Kompleks Perniagaan

9.1 Definisi

Kompleks perniagaan termasuk penubuhan perniagaan pelbagai unit dengan laluan pejalan kaki yang tertutup bagi menggalakkan aliran pejalan kaki untuk menampung aktiviti perniagaan. Maklumat kompleks perniagaan yang disebarkan oleh NAPIC merangkumi:

- Pusat membeli-belah
- Arked perniagaan
- Pasar raya besar (stand-alone)

Pusat beli-belah ialah penubuhan perniagaan binaan khas dominan yang dirancang, dibangunkan dan diurusniagakan dalam beberapa rangkaian dalam satu pusat untuk perniagaan. Bagi pengumpulan dan penyebaran maklumat oleh NAPIC, kegunaan dominan bermaksud kegunaan perniagaan adalah tidak kurang dari 75% daripada luas bersih yang disewakan.

Pusat membeli-belah mempunyai:

- Jalan-jalan keluar dalam kawasan tertutup yang mempunyai kawalan suhu dan ruang laluan pejalan kaki yang lebar
- Penyewa perniagaan runcit dan perkhidmatan yang telah dipilih bagi tujuan keseimbangan perniagaan
- Satu atau lebih penyewa utama
- Satu syarikat pengurusan
- Tempat letak kereta kegunaan bersama
- Sistem penyaman udara pusat
- Perkhidmatan keselamatan pusat
- Perkhidmatan kawalan kebakaran pusat
- Lif dan eskalator kegunaan bersama
- Lampu, tunjuk arah dan landskap kegunaan bersama
- Polisi pengurusan yang seragam
- Kegunaan sampingan seperti perbankan dan perkhidmatan lain, yang mana adalah kurang dari 25% daripada luas lantai bersih.

Arked perniagaan adalah kedai runcit dominan bagi tujuan perniagaan yang terletak di sebelah atau kedua-dua belah laluan kedai tersebut. Bagi pengumpulan dan penyebaran maklumat oleh NAPIC, kegunaan dominan bermaksud kegunaan perniagaan mestilah tidak kurang daripada 75% luas lantai bersih.

Arked perniagaan mempunyai:

- Kebiasaannya laluan pejalan kaki terbuka dan terdapat juga arked yang mempunyai ruang laluan pejalan kaki yang mempunyai kawalan suhu
- Penyewa runcit dan perkhidmatan kebiasaannya tidak terancang serta barangan yang dijual adalah serupa
- Tiada penyewa utama dalam arked
- Satu syarikat pengurusan
- Tempat letak kereta kegunaan bersama
- Kebiasaannya tiada sistem penyaman udara, tetapi terdapat juga arked yang mempunyai unit penyaman udara dan sistem penyaman udara
- Kebiasaannya tiada perkhidmatan keselamatan pusat
- Perkhidmatan kawalan kebakaran pusat
- Kebiasaannya tangga tetapi terdapat arked yang mempunyai lif dan eskalator kegunaan bersama
- Lampu, tunjuk arah dan landskap pada amnya adalah minimum
- Polisi pengurusan seragam yang minima
- Kegunaan sampingan seperti perkhidmatan insuran, yang mana adalah kurang dari 25% daripada luas lantai bersih.

Included within the inventory are:

- Office space within integrated development
- Space with the original use as office but has changed use on a temporary basis

Excluded from the inventory are:

- Office space within multipurpose buildings where use can interchange with retail, residential, hotel and industrial use
- Office space that has permanently changed from the original use

9.0 Shopping Complex

9.1 Definition

Shopping complexes includes multi-unit retail establishments under a covered walkway that encourages pedestrian flow to sustain business activity. Shopping complexes disseminated by NAPIC includes:

- Shopping centres
- Shopping arcades
- Hypermarkets (stand-alone)

Shopping centres are purpose-built dominant retail establishments planned, developed and operated as a number of outlets within a centre for trade. In data capturing and dissemination by NAPIC, dominant use means retail use not less than 75% of the net lettable area.

Shopping centres have:

- Outlets within an enclosed climate-controlled and spacious walkway
- Retail and service tenants selected for merchandise balance
- One or more anchor tenants
- A single management company
- Common car parks
- Central air-conditioning
- Central security service
- Central fire fighting services
- Common lifts and escalators
- Common lighting, signage and landscaping
- Unified management policies
- Complimentary secondary uses like banking and other services, which are less than 25% of the net floor area.

Shopping arcades are dominant retail shops along one or both sides for trade. In data capturing and dissemination by NAPIC, dominant use means retail use not less than 75% of the net lettable area.

Shopping arcades have:

- Generally open-sided walkway and few have an enclosed climate-controlled passageway.
- Retail and service tenants mix generally unplanned and retail goods are generally similar in kind
- No anchor tenants within the arcade
- A single management company
- Common car parks or public car parks
- Generally no air-conditioning, some unit air-conditioning and few with central air conditioning
- Central security service generally unavailable
- Central fire fighting services
- Mostly stairways but some have common lifts and escalators
- General minimum common lighting, signage and landscaping
- Minimum unified management policies
- Complimentary secondary uses like insurance services, which are less than 25% of the net floor area.

Inventori arked perniagaan juga merangkumi:

- Ruang dengan kegunaan asal sebagai perniagaan tetapi telah ditukar kegunaannya buat sementara waktu.
- Ruang niaga dalam pembangunan bersepadu (di mana pelbagai kategori kegunaan saling membantu satu sama lain).

Tidak termasuk dalam laporan ini adalah:

- Ruang niaga dalam bangunan pelbagai guna di mana kegunaannya boleh bertukar ganti dengan kegunaan pejabat, kediaman, hotel dan industri.
- Ruang niaga yang mana telah ditukar dari kegunaan asalnya secara kekal.
- Ruang niaga dalam kompleks perniagaan yang digunakan untuk boling, medan selera, taman tema dan panggung wayang.

Pasar raya besar adalah pembangunan perniagaan yang mendapat faedah dari skala ekonomi akibat daripada saiz minimum yang besar dan menawarkan persaingan harga dan rangkaian barangan yang banyak. Pasar raya dalam data NAPIC termasuklah:

- Pembangunan perniagaan dengan keperluan modal minimum RM50 juta dan saiz minimum 5,000 m.p.
- Diuruskan oleh satu pemilik/ perbadanan dengan kemudahan umum.
- Bangunan bebas (freestanding) di bawah satu bumbung.

Tidak termasuk di dalam laporan ini adalah:

- Pasar raya yang mana merupakan penyewa utama di kompleks perniagaan.

10.0 Liputan Kajian

Liputan kajian bagi semua jenis sektor harta tanah kecuali hotel adalah seperti berikut:

- Dalam kawasan pihak berkuasa tempatan
- Skim perumahan
- Luar skim perumahan - bangunan yang mempunyai kelulusan plan bangunan

11.0 Harta Tanah Riadah

11.1 Definisi

Merangkumi Hotel yang menyediakan penginapan jangka pendek yang mana tetamu hotel atau pengunjung perlu membayar kemudahan yang disediakan. Bilik yang disediakan adalah lengkap untuk penginapan sementara dan khidmat pembantu hotel.

Termasuk di dalam laporan ini adalah:

- Hotel yang menawarkan 10 bilik dan ke atas yang dikenalpasti oleh Kementerian Pelancongan.
- Motel, rumah tumpangan, chalet, kabin, kotej, rumah kampung, hotel resort.
- Hotel binaan khas dan bangunan pelbagai guna atau bangunan yang diubahsuai yang mempunyai lesen untuk beroperasi sebagai hotel.

Tidak termasuk:

Hostel, pangsapuri khidmat dan rumah rehat kerajaan.

Pangsapuri Khidmat yang dimasukkan dalam Laporan Stok Harta Tanah Riadah merupakan sesebuah bangunan yang turut menyediakan penginapan jangka pendek yang mana tetamu hotel atau pengunjung perlu membayar kemudahan yang disediakan. Setiap unit menyediakan ruang yang lebih besar berbanding dengan bilik hotel dan mempunyai suasana seperti sebuah rumah yang dilengkapi dengan ruang tamu, ruang makan, dapur dan bilik tidur daripada satu hingga empat bilik beserta bilik air. Perkhidmatan yang disediakan sama seperti hotel. Unit-unit ini adalah sebagaimana yang terdapat di dalam stok kediaman kecuali ianya dimiliki oleh pengusaha hotel atau dijalankan oleh mereka sebagai alternatif kepada bilik hotel.

Included within the inventory are:

- Space with the original use as retail but has changed use on a temporary basis.
- Retail space in an integrated development (where various category of use compliment each other).

Excluded from the inventory are:

- Retail space within multipurpose buildings where use can interchange with office, residential, hotel and industrial use.
- Retail space that has permanently changed from the original use.
- Retail space within shopping complexes for bowling alley, food court, theme park and Cineplex.

Hypermarkets are retail establishments that benefit from the economies of scale due to its large minimum size and offers competitive pricing and a wide range of goods. Hypermarkets in NAPIC publication include:

- Retail establishments with a minimum paid-up capital requirement of RM50 million and minimum size of 5,000 s.m.
- Operated by a single owner/corporation with common facilities/ amenities.
- A freestanding building under one roof.

Excluded from publication:

- Hypermarkets that are an anchor in shopping centres.

10.0 Coverage

The coverage of for all property sector except hotel are follows:

- Within local authority area
- Housing scheme
- Outside housing scheme - buildings that hare obtained building plan approval

11.0 Leisure Property

11.1 Definition

Includes hotel with a number of rooms within a building that provides short-term accommodation for hotel guests or travellers who pay for the services provided. The rooms provided are furnished for a short stay and maid service.

Hotel inventory includes:

- Hotels that offer 10 rooms and above as defined by the Ministry of Tourism.
- Motels, lodging homes, chalets, cabins, cottages, kampong houses, resort hotels.
- Purpose-built hotels and multi-purpose buildings or modified buildings with a licence to operate as a hotel.

Excludes:

Hostels, serviced apartments and public operated rest house.

The Leisure Property Stock Report also includes serviced apartments, which are a number of units within a building that also provides a short-term accommodation for hotel guests and travellers who pay for the services provided. Each unit provides more space compared to a hotel room and has a home atmosphere like a living room, a dining room, a kitchenette and a choice of bedrooms from one to four rooms with attached bathrooms. Services provided are very similar to hotels. These units are similar to those under residential stock except that hoteliers own them or run them as an alternative to hotel rooms.

11.2 Jenis Harta Tanah

Penyebaran NAPIC termasuk semua hotel yang berada di dalam sempadan negeri.

11.3 Pengelasan

Penerbitan adalah termasuk hotel yang diberi penarafan atau tidak. Pengelasan hotel ditentukan oleh Kementerian Pelancongan Malaysia berdasarkan taraf antarabangsa. Hotel kelas ekonomi diberi penarafan okid (3 peringkat) dan selain itu adalah penarafan bintang (5 peringkat). Penarafan bintang bagi hotel-hotel di Malaysia dikendalikan oleh Kementerian Pelancongan dan Kebudayaan Malaysia.

11.2 Property Types

NAPIC dissemination includes all hotels within the state boundary.

11.3 Classification

Both rated and unrated hotels are included within the publication. Hotel rating classification is carried out by the Ministry of Tourism Malaysia based on international standards. Budget hotels are rated by orchid classification (3 levels) and the others are by star classification (5 levels). The rating of hotels in Malaysia is ongoing and carried out by the Ministry of Tourism and Culture Malaysia.

Glosari

Q1- suku pertama
Q2- suku kedua
Q3 - suku ketiga
Q4 - suku keempat
bahagian
berkembar
bilangan bangunan
bilangan bilik
bilik
daerah
jumlah
jumlah penawaran
jumlah ruang
jumlah ruang dihuni
kadar ambilan
kadar penghunian
kadar purata penginapan
kedai tanpa inap
kelas
kilang bertingkat
kompleks industri
kompleks perniagaan
kondominium
lebih daripada 6 ½ tingkat
lokasi
negeri
padang golf
pangsapuri
pangsapuri khidmat
pejabat binaan khas
pekan/bandar
penawaran akan datang
penawaran yang dirancang
perubahan dalam kadar penghunian
RM semalam
rumah bandar
rumah berkelompok
rumah berkembar setingkat
rumah kos rendah
rumah pangsa
rumah pangsa kos rendah
rumah sesebuah
rumah teres setingkat
sebelum perang
sesebuah
siap dibina
stok sedia ada
tarif
teres
tiada data
tiada maklumat
tidak dikelaskan
tingkat

Glossary

: Q1 - first quarter
: Q2 - second quarter
: Q3 - third quarter
: Q4 - fourth quarter
: division
: semi-detached
: number of buildings
: number of rooms
: room
: district
: total
: total supply
: total space
: total space occupied
: take-up rate
: occupancy rate
: average occupancy rate
: lock-up shop
: class
: flatted factory
: industrial complex
: shopping complex
: condominium
: above 6 ½ storeys
: location
: state
: golf course
: apartment
: service apartment
: purpose-built office
: city/town
: incoming supply
: planned supply
: change in occupancy rate
: RM per night
: town house
: cluster house
: single storey semi-detached house
: low-cost house
: flat
: low-cost flat
: detached house
: single storey terraced house
: prewar
: detached
: completion
: existing stock
: tariff
: terraced
: ND – no data
: NA – not available
: NR (not rated)
: storey

Cawangan JPPH Di Seluruh Negara / JPPH Branch Offices

IBU PEJABAT NAPIC

Pusat Maklumat Harta Tanah Negara (NAPIC)
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