

Dear All,

I have pleasure in providing you with the below Weekly Digest between 20 February to 5 March 2017 produced by **BDGH**.

I hope this market news update will be of particular interest to you.

Best Regards,



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a guarantee of independence, objectivity and core value

Weekly News

**RICS**

Qualification of Real Estate Valuation: National Class One Qualification of Land Valuation: Nationwide Grade A Regulated by RICS

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20 February to 5 March 2017



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Macro-economic

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Detailed information

Cold start damps 3 land plots sale

22 February 2017

Two land parcels sold at reserve prices in Shanghai on 21 February while a third one was bought at an 18.6 percent premium. The three residential plots located in remote Jinshan District were the second batch of land sites released in Shanghai after the Spring Festival holiday.

Beijing Construction Engineering Group paid RMB 1.44 billion, or an average gross



floor area price of RMB11,627 per square meter, for the 61,922-square-meter housing site in Binhai New City. The firm paid an 18.6 percent premium compared with its starting price of RMB 9,800 per square meter. Shanghai Construction Group bought the 71,671-square-meter plot in Fengjing Town for an average GFA price of RMB 9,800 per square meter. A joint entity of Huafang Co and NHU Real Estate got the 48,549-square-meter site in the industrial zone, the smallest of the three, for an average GFA price of RMB 9,500 per square meter.

As required by the land watchdog, 60 percent of the homes built on the site should be medium and small-sized apartments while 45 percent of the total space will be purchased by the government on completion for relocation purposes. New homes in the neighborhood now sell for between RMB 22,000 and RMB 25,000 per square meter while pre-owned properties cost around RMB 18,000 per square meter, according to the data.

(Source: Shanghai Daily, **BDGH** Research)

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Six parks coming up in Linkong area

21 February 2017

Changning District will have six parks in Linkong area by the end of 2018. The total area of the parks is about 420,000 square meters and connects the Suzhou Creek with Waihuan West River, Xinjing Pier, and Zongjing Pier, creating an ecological corridor in the west part of the city, district authorities said.

A skateboarding park, stretching 23,000 square meters, is being built along the Suzhou Creek and will stage extreme sports. A flea market is also being planned inside the park.

Also, the 99,000-square meters Linkong No.1 Park will boast a musical stage to hold concerts. The park will be lined with magnolia trees. About 70 percent of construction of the park will be completed in 2017. Linkong No. 2 Park, which is



already ready for use. Camphor trees, magnolia, privet, ginkgo and a wetland are some of the features of the park.

A natatorium and an underground gymnasium are being built on the 400-meter forest belt at Xupu Pier. The Zhongxinjing public green space will connect to the Fuyuan Temple, while folk activities will be held at the Xinjing Park.

(Source: *Shanghai Daily*, **BDGH** Research)

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China's housing market remains reined-in

22 February 2017

Rein-in policies to curb housing speculation in China's first and key second-tier cities continued to take effect in the first month of 2017 while inventory destocking process in tertiary cities carried on as expected, data released on 22 February by the National Bureau of Statistics showed.

The average new home prices remained flat in January in first-tier cities for the second consecutive month and edged up 0.1 percent in second-tier ones, down from a 0.2 percent growth in December, according to the bureau, which monitors prices in new and pre-occupied home markets in 70 major cities.

Residential prices continued to stabilize in the 15 major cities as differentiated tightening measures to cool the overheated market remained strictly implemented. Home prices in first and second-tier cities almost stopped growing while those in tertiary ones remained steady. Guangzhou was again the only one of the 15 cities to record a monthly gain. New home prices climbed 0.6 percent in January there, decreasing for the fourth straight month. Three cities recorded flat prices while the rest 11 all registered month-over-month price drops.

(Source: *Shanghai Daily*, **BDGH** Research)



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China sets 2017 GDP growth target at around 6.5%

5 March 2017

China has set its GDP growth target at around 6.5 percent for 2017, compared with a target range of 6.5-7 percent last year, a government work report said on the fifth session of China's 12th National People's Congress (NPC) in Beijing, capital of China, March 5, 2017.

This closely-watched target is a 25-year low, down from last year's actual growth of 6.7 percent. The previous low was a 6 percent target for the gross national product growth in 1992.



The projected target is in line with both economic principles and realities, the report said, adding that it will help stabilize market expectations and facilitate the country's structural adjustments. It will also contribute to achieving the goal of finishing the building of a moderately prosperous society in all respects by 2020.

(Source: Shanghai Daily, **BDGH** Research)

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RICS

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2017 年 2 月 20 日至 3 月 5 日



土地市场

上海金山成交三幅土地 **hot!**

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基础设施建设

长宁临空地区将建 6 大主题公园

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宏观经济

1 月份一二线城市房价进一步趋稳

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宏观经济

2017 年全国GDP增长目标为 6.5%

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新闻内容

上海金山成交三幅土地 **hot!**

2017 年 2 月 22 日

2 月 21 日位于远郊金山区的三幅住宅土地成交, 是春节过后释放的第二批土地。其中两幅土地以底价成交, 另一幅地块以溢价率 18.6%成交。

经过竞拍, 金山新城 JSC10502 单元 E22-02 地块被北京建工以 14.4 亿元竞得, 土地面积为 61,922 平方米, 楼板价 11,627 元/平方米, 与 9,800 元/平方米的起拍价相比, 溢价率 18.6%; 枫泾镇 JSFJ0101 单元 04-05、04-07 地块被上海建工以楼板价 9,800 元/平方米竞得, 土地面积为 71,671 平方米; 金山工业区 JSS3-0402 单元 11-01 地块土地面积最小, 为 48,549 平方米, 成交楼板价 9,500 元/平方米。

根据土地公告要求, 中小套型住宅建筑面积不得低于该地块住宅总建筑面积的 60.0%, 总面积的 45%将由政府购买, 用以动迁安置。根据数据显示, 现在周边新房的售价为



22,000-25,000 元/平方米，而二手房的售价约为 18,000 元/平方米。

(来源: 上海日报, BDGH 研究部)

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长宁凌空地区将建 6 大主题公园

2017 年 2 月 21 日

长宁区政府表示 2018 年底将在凌空地区建设六个公园，全面建成公园面积约 42 万平方米，连接苏州河与西外环河、新泾港、纵泾港，创建上海西部生态走廊。

苏州河 50 米绿带占地 2.3 万平方米，以春景秋色植物为主，突出“绿地+极限滑板+亲水平台”主题，并依托亲水平台种植特色水生植物，可举办极限滑板比赛和跳蚤市场活动。

凌空 1 号公园占地 9.9 万平方米，突出“绿地+音乐”主题，将于 2017 年建成 70%，在苏州河岸边主要种植玉兰科等植物防护绿化带，可举办玉兰花节和夏季草坪音乐会。凌空 2 号公园建成后保留香樟、广玉兰、女贞、银杏等大部分苗圃植物和原有生态湿地，突出“绿地+生态休闲等”主题，可举办植物科普节等，已建成投入使用。

东临外环西河、西靠许浦港的 400 米林带，突出“绿地+体育运动”主题，地下空间设置游泳馆、体育馆。中新泾公共绿地连接到抚远寺，而新泾公园可举行可举办民俗文化活动节。

(来源: 上海日报, BDGH 研究部)



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1 月份一二线城市房价进一步收紧

2017 年 2 月 22 日

2 月 22 日国家统计局公布的数据显示，在 2017 年 1 月，房地产调控政策在我国一线城市和主要的二线城市继续收紧，遏制房地产投机，三线城市将进一步去化库存量。

根据统计局公布的 2017 年 1 月 70 个大中城市住宅销售价格变动情况，一线城市新建商品住宅价格环比连续第二个月持平；二线城市新建商品住宅价格微涨 0.1%，涨幅比 12 月回落 0.1 个百分点。



15 个一线和热点二线城市因地制宜、因城施策实施房地产调控政策以来，市场变化明显，房价持续趋稳回落。一线城市和二线城市的房价几乎停止增长，而三级城市的房价则保持稳定。11 个城市 1 月份新建商品住宅价格环比下降，3 个城市环比持平，仅广州市环比上涨 0.6%，涨幅已连续 4 个月回落。

(来源: 上海日报, BDGH 研究部)

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2017 年全国 GDP 增长目标为 6.5%

2017 年 3 月 5 日

2017 年 3 月 5 日，在北京召开的中国十二届全国人民代表大会第五次会议政府工作报告中指出，2017 年我国 GDP 增长目标设定在 6.5% 左右，比去年 6.5-7% 的增长目标更低。

此次设定 GDP 目标备受关注，为近 25 年来最低，低于去年实际 6.7% 的增长，上一次国民生产总值最低目标为 1992 年的 6%。



工作报告中指出，此次设定的目标符合经济原则和现实情况，并将有助于稳定市场预期，促进国家经济结构调整，这也将有助于实现 2020 年底全面建设小康社会的目标。

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