

베트남 부동산 시장 현황 및 투자전략

HCMC Q3/2015

Savills Vietnam 윤 준선 이사

AGENDA



소개



경제분석



시장분석 및 전략

ECONOMIC OVERVIEW

6.5%

GDP in 9M/2015

최근 5년간 최고 수치



Retail Sales

~\$110 billion

9.1% , 5

Exchange rate

↑ 4%

14 3

Trade deficit

\$3.8Bil

In 9M/2015

**International
visitors**



> 5.7 Mil

-5.9% YoY

Registered FDI capital: **\$17.2 bil**, **↑ 53% YoY**

FDI disbursement(지출): **\$9.7 bil**, **↑ 8% YoY**

Remittances(), 2015F

\$13-\$14 billion

Real estate: 20% of total remittances

Credit Growth

↑ 6%

2014 12

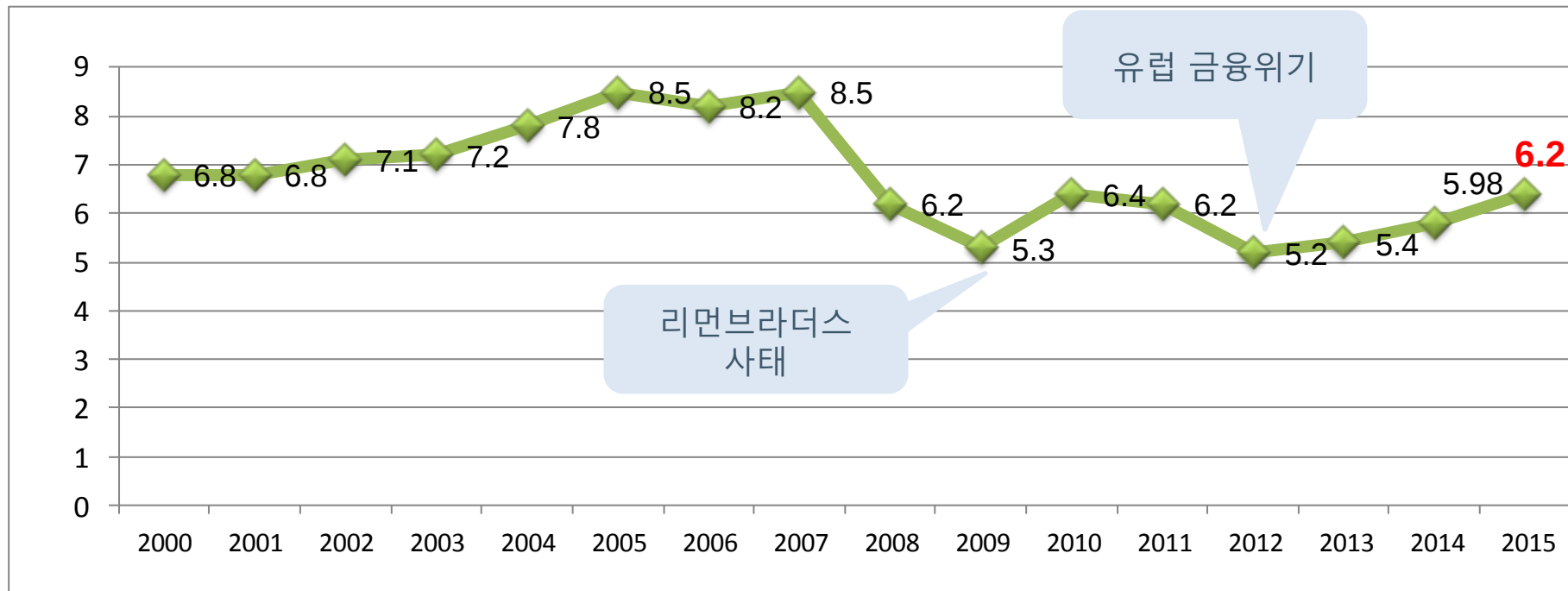
0.7%

CPI in 9M/2015

최근 10년간 최소수치



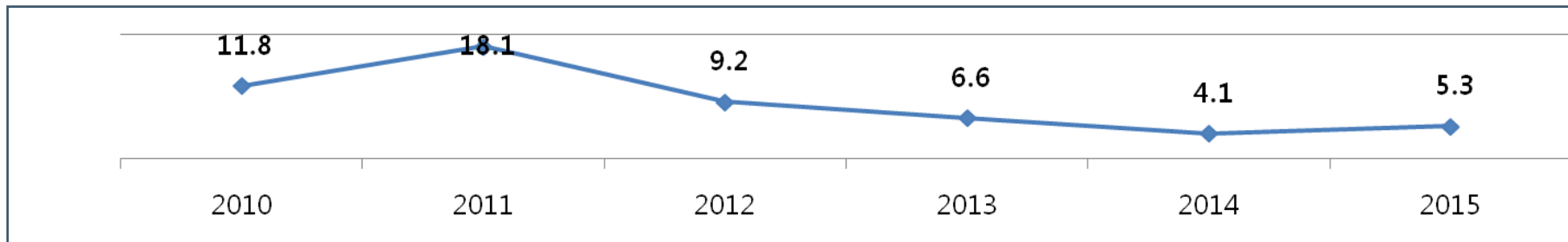
경제성장률 (단위 : %)



savills

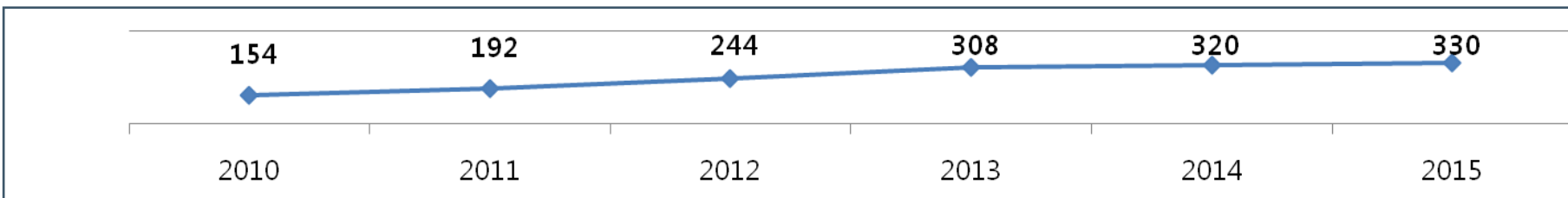
10 6.2% 6.5%

물가지수(단위 : %)



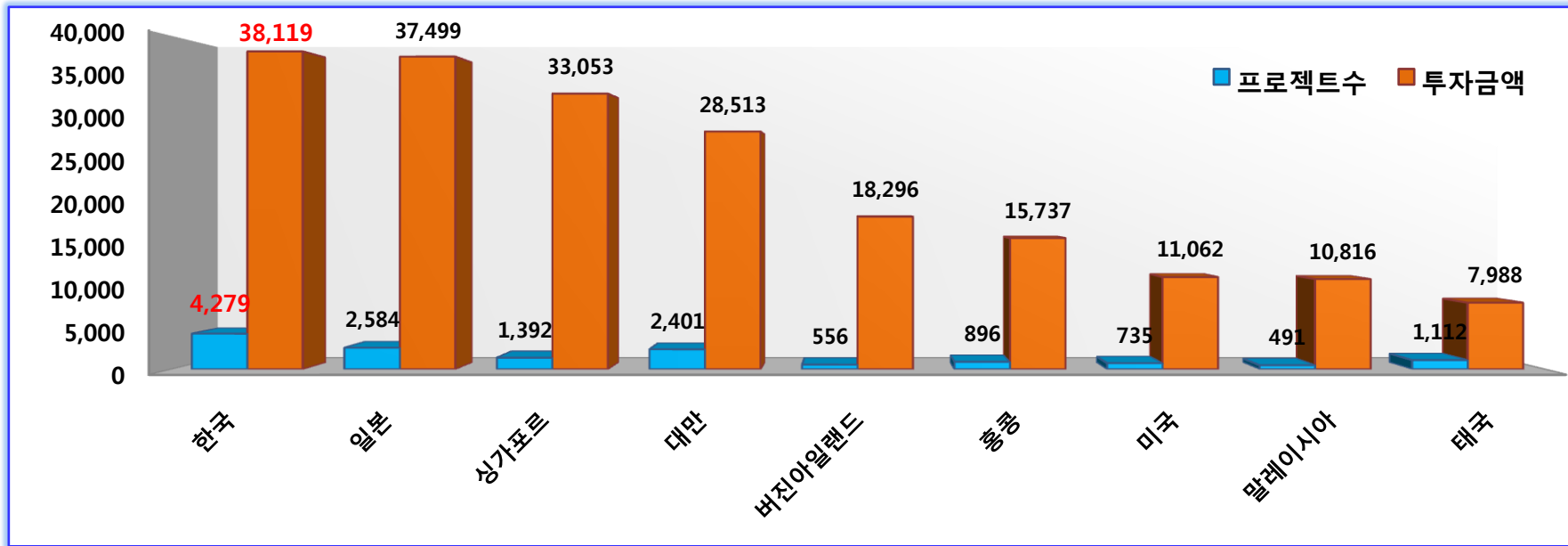
10 5.3% 4.6%

외환보유고 (단위 : 억불)



국가별 투자 현황

(단위: 건, 백 만불)



[자료원 : 베트남투자청]

	:	.	(56%) /	(19%) /	(4.5%) /	(4.4%) /
	:					
	:	Creed group – 2020	10	,	1	/
	:	Keppel land, capital land (		,		)
	:	Gaw capital (1		,		)

RETAIL

Supply

- 빈컴쇼핑몰 오픈(고밥)
- 전체면적: ~**948,000 m²**, **↑1% QoQ**, **↑11% YoY**

Market performance

- 평균임대율: **92%** (stable QoQ, **↑1 ppt YoY**)
- 평균임대비: US\$**59**/m²/mth, (**↓2% QoQ**, **↑1% YoY**)
 - 쇼핑센터: US\$**60**/m²/mth, (**↓2% QoQ**, **↓7% YoY**)
 - 백화점: US\$**61**/m²/mth, (stable QoQ, **↑1% YoY**)
 - 리테일상가: US\$**39**/m²/mth, (stable QoQ and YoY)

Outlook

- Q4/2015: > **114,000 m²**; **70%** 2군과 7군
- From 2016 onwards: > **1,350,000 m²**

Vincom Megamall Thao Dien



OFFICE FOR LEASE

Supply

- 1개의 Grade A, 1개의 Grade B 빌딩 공급: ~63,400 m²
- 전체면적: ~**1,500,000 m²** (stable QoQ, **↑**5% YoY)

Market performance

- 평균임대율: **94%** (**↑**1 ppt QoQ & YoY)
- 평균임대비:
 - Grade A: US\$46/m²/mth (**↓**2% QoQ, **↓**2% YoY)
 - Grade B: US\$28/m²/mth (**↑**1% QoQ, unchanged YoY)
 - Grade C: US\$18/m²/mth (**↑**1% QoQ, **↑**1% YoY)
- Office Index: **80.0**, (**↑**2.9 points QoQ, **↑**3.8 points YoY)

Outlook

- Q4/2015 - 2018: ~ 342,000m²



HOTEL

Supply

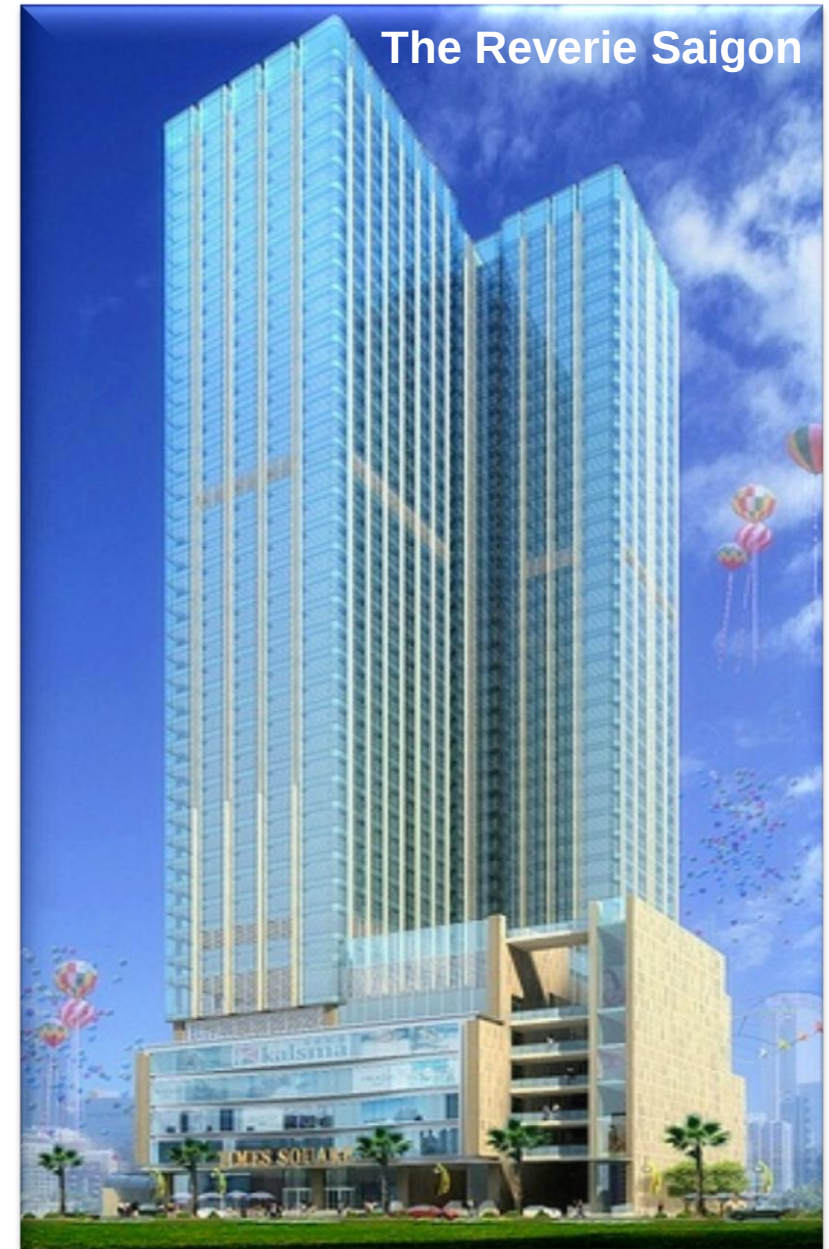
- 공급시장 변화:
 - 6개의 신규호텔 오픈: 480실
 - 기존호텔 객실증설: 215 실
 - 업그레이드 호텔: 230 실
 - 사용중단객실: 20 실
 - 전체규모: **>14,400 실** (↑4% QoQ, ↑14% YoY)
- 5-star (19), 4-star (21), 3-star (72)

Market performance

- 평균객실율: **62%** (↓2ppts QoQ, ↑5ppts YoY)
- 평균객실비:
 - 5-star: US\$115/room/night (↓3% QoQ, ↓1% YoY)
 - 4-star: US\$67/room/night (↓10% QoQ, ↑2% YoY)
 - 3-star: US\$43/room/night (↓4% QoQ, ↑1% YoY)

Outlook

- 2016 -2017: ~ 2,100 실
- Q4/2015: ~**350 실**



SERVICED APARTMENT

Supply

- 1개 Grade A공급 (89 units)
- 전체규모: **4,370** units (stable QoQ, **↑**6% YoY)
- Grade A (7), Grade B (23) and Grade C (53)

Market performance

- 평균임대율: **82%** (**↓** 3ppts QoQ & YoY)
- 평균임대비:
 - Grade A: US\$30/m²/mth (**↑** 1% QoQ, stable YoY)
 - Grade B: US\$25/m²/mth (**↑** 2% QoQ, **↓** 1% YoY)
 - Grade C: US\$17/m²/mth (**↑** 2% QoQ, **↑** 1% YoY)

Outlook

- 2016 -2017: ~ 2,200 units
- 2016: ~ 750 units

Intercontinental Asiana Saigon



APARTMENT FOR SALE

Supply

- **13** 신규프로젝트 공급
(~**9,550** units)
- Primary stock: ~**30,500**units (**↑**17% QoQ, **↑**78% YoY)
- Secondary stock: **91,300** units (**↑**6% QoQ)

Market performance

- 매매규모: **5.220** units (**↑**4% QoQ, **↑**59%YoY)
- 소진율: **17%** (**↓**2 ppts QoQ, **↑**2 ppts YoY)
- 등급별 매매규모:
 - Grade A: **↓**28% QoQ, **↑**24% YoY
 - Grade B: **↑**9% QoQ, **↑**142% YoY
 - Grade C: **↑**2% QoQ, **↑**20% YoY
- Apartment Index: 89.0 (-0.4 ppts QoQ, stable YoY)

Outlook

- Q4/2015-2017: ~57,500 units



VILLAS AND TOWNHOUSES

Villa/townhouse

- 5 개의 신규프로젝트 공급(~ 930 units)
- Primary stock: 1,680 주택 (↑ 47% QoQ and ↑ 142% YoY)
- 소진율: 25%, ↑ 3 ppts QoQ, ↓ 10 ppts YoY
- 매매규모: ↑ 5% QoQ, ↑ 75% YoY

Land plot

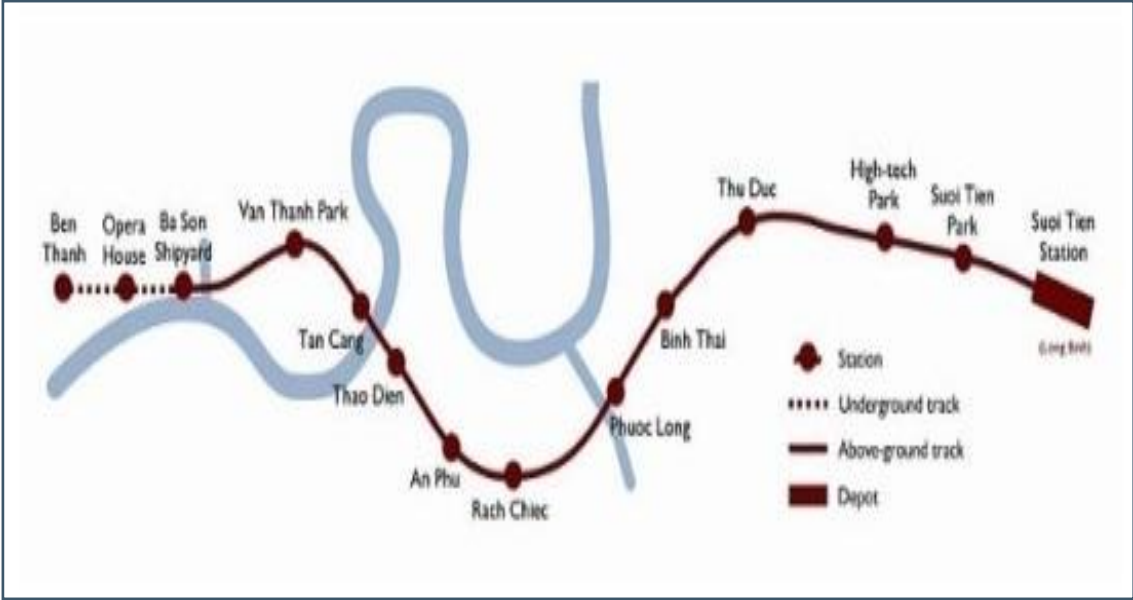
- 2 개 신규프로젝트 공급(~ 240 units)
- Primary stock: ~ 620 plots (↓ 19% QoQ, ↓ 60% YoY)
- 소진율: 52%, ↑ 1 ppts QoQ, ↑ 17 ppts YoY
- 매매규모: ↓ 17% QoQ, ↓ 40% YoY

Outlook

- Q4/2015: ~2,250 units

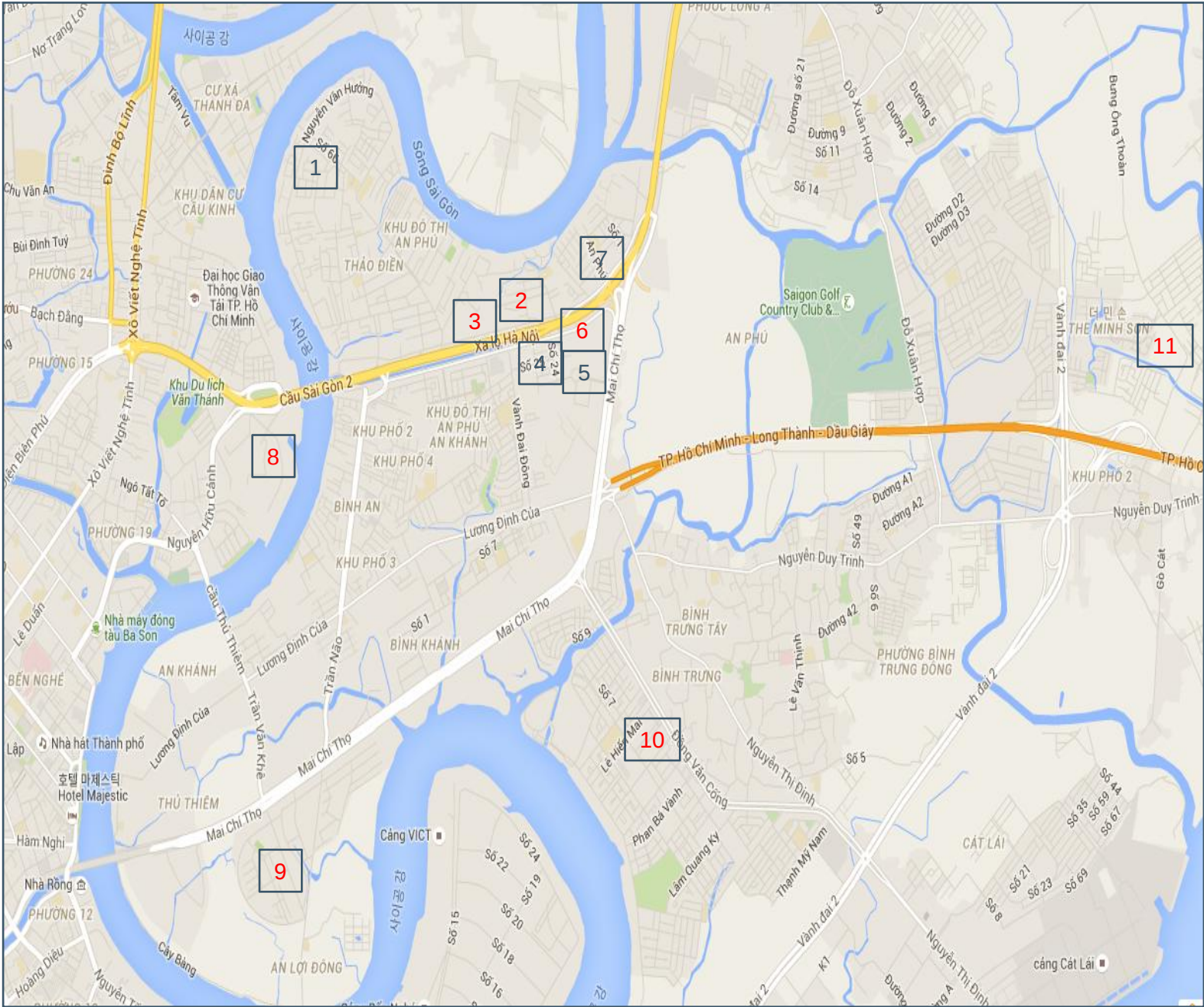


호치민 지하철 노선도



- 1 : 2020
- 1
- 2 (-) 60%
- 21 , (2022)

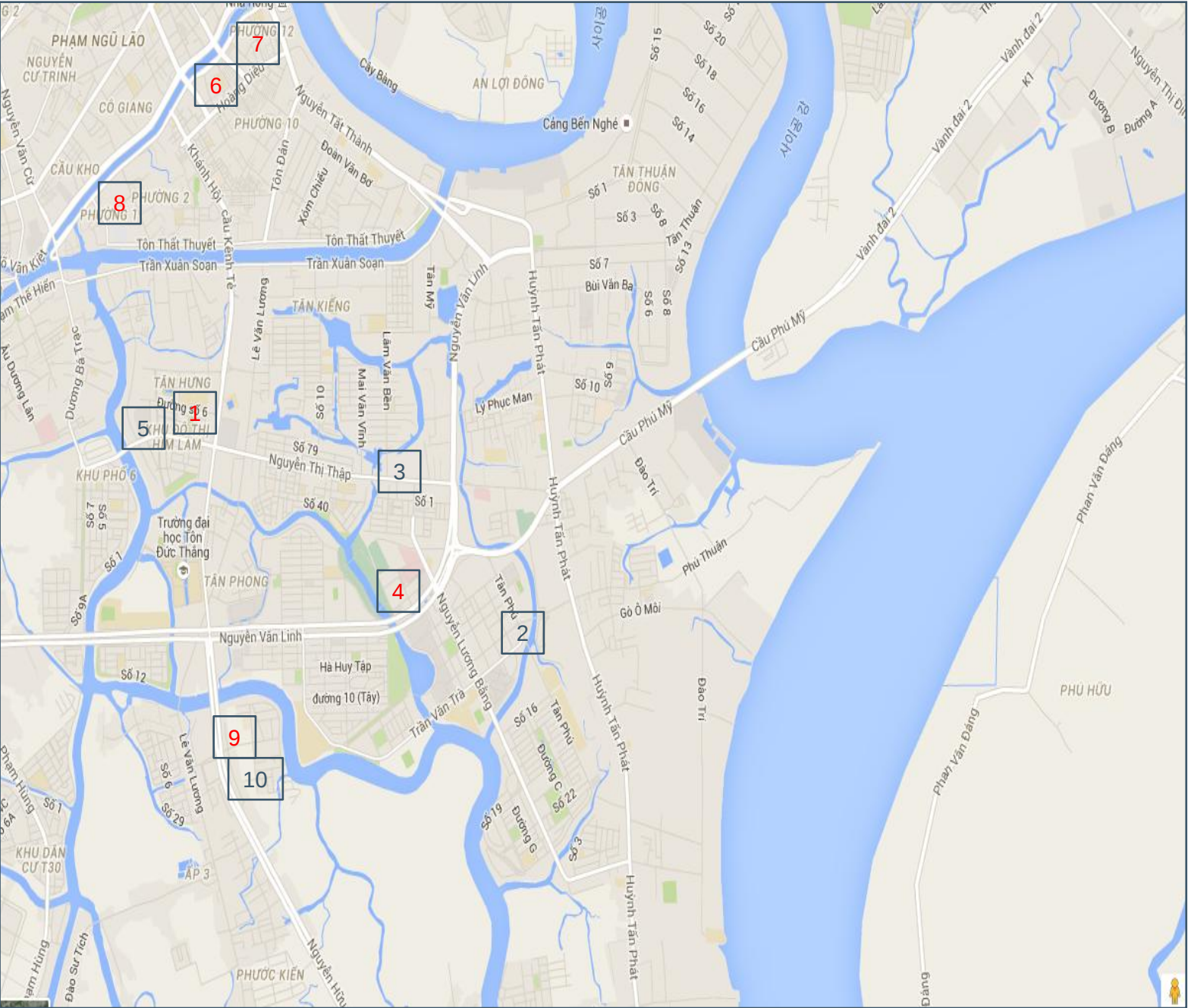
호치민 동부지역(2군, 9군) 아파트 현황



N	Project's name	Total units	Completi on year	Average price (US\$/sqm)
1	Xi Riverview	270	2,012	2,598
2	Gateway	194	2,017	1,867
3	Masteri	3,000	2,016	1,422
4	Cantavil Premier	200	2,014	1,945
5	Imperia An Phu	700	2,012	1,615
6	Estella Heights	462	2,017	1,790
7	The Vista	750	2,011	1,648
8	Vinh Home	11,500	2,017	1,800 /3,600
9	Sarimi	414	2,016	2,339
10	Vista Verde	794	2,017	1,405
11	Riverside MIK	544	2,017	900

- 2 1
- 9

호치민 남동부지역(4군,7군) 아파트 현황



#	Project's name	Total units	Completion year	Average price (US\$/sqm)
1	Sunrise City View	703	2018	1,233
2	Riviera point	540	2015	1,617
3	Docklands	356	2014	1,467
4	Scenic Valley	1,202	2017	1,300
5	Him Lam Riverside2	570	2015	1,328
6	River Gate Residence	368	2017	1,840
7	The Tresor	253	2017	2,475
8	The Goldview	1,759	2017	1,780
9	The Park Premier	296	2016	1,205
10	Dragon Hill	352	2013	1,317

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Novaland
- 7

투자 전략 및 유의점

- 2015 7 1 (65/2014/QH13)

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- - 1 ()

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- 2016

- - (A B)

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KEY FACTS

A Global Network

-
- , , 600
- 11
- 4 ,
-



600

Savills Global Network

savills

Over 600 offices and associates worldwide



KEY FACTS

Savills Vietnam

savills



20 years

1995년 사빌스베트남
설립

베트남최초의 국제적인
부동산서비스 회사

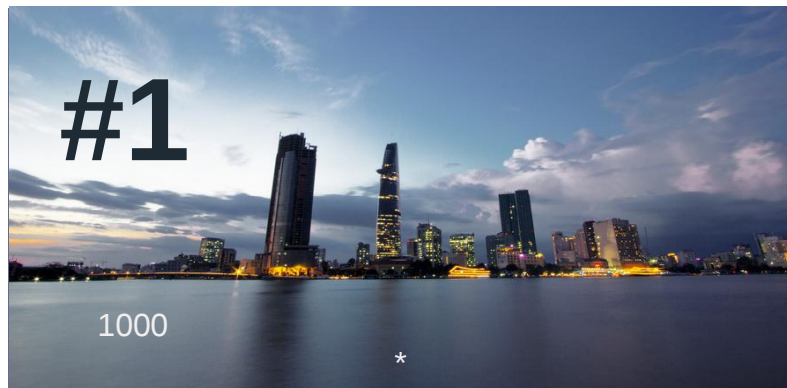


Over 2.5 M
sq m 자산관리중



전세계적으로 인정받는
사빌스 베트남

국제적 및 지역적으로
최고의 회사상 다수 수상



1,000명
이상 직원근무

다른 모든 경쟁업체 전체
인원보다 많은 인원.





Thank You 감사합니다

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