

建設産業情報  
2015年7月分

在外公館名 在ホーチミン日本国総領事館

記入日 2015年8月17日

1. 現地の建設・不動産市場に係る経済情報

資料名：ホーチミン市統計局作成「2015年7ヶ月間における社会経済状況」（ページ3と4）

URL：

[http://www.pso.hochiminhcity.gov.vn/c/document\\_library/get\\_file?uuid=e55a3c88-aa96-4c79-91ac-a3d141f9e320&groupId=18](http://www.pso.hochiminhcity.gov.vn/c/document_library/get_file?uuid=e55a3c88-aa96-4c79-91ac-a3d141f9e320&groupId=18)

● 2015年7ヶ月間の同市における建設投資総額は98兆ドン強で、前年同期比で6.6%増加である。このうち、同市の予算からの支出額は8兆9,550億ドン強で、前年同期比で4.7%増加である。

ホーチミン市における重要工事の進捗状況は、次のとおり。

▪ 「Tan Son Nhat – Binh Loi」環状線（Pham Van Dong 通り）の建設工事にし、始発区間（Truong Son 通り – Nguyen Thai Son 通り間）における立退き未完了。

▪ 「Ben Thanh – Suoi Tien」の都市鉄道（メトロ1号線）に、2区から9区までの区間において、インフラ建設工事を行っている。サイゴン橋からカット・ライ交差点までの区間において、2つの高架桁の架設を完成した。

● 2015年6月末時点で同市において付与した住宅建設承認書及び住宅修理承認書は25,427枚で、総床面積が約509万4千平方メートルである。このうち、住宅建設承認書は25,036枚で、総床面積が約505万6千平方メートルである。住宅修理承認書は391枚で、総床面積が約3万7千平方メートルである。承認書は前年同期に比べ6.3%上がり、床面積は前年同期に比べ8.3%上がった。

2. 建設業制度、入札契約制度、不動産業制度の改正動向

該当なし

3. 報道情報

	タイトル、概要	日付/掲載紙
1	<b>2023年にロンタイン国際空港を開業することを目標とする</b> 7月6日午後、交通運輸省がロンタイン国際空港に関する2015年6ヶ月間の概要を報告した後、ベトナム航空総会社（ACV）の Le Manh Hung（レ・マン・フン）代表取締役は、6ヶ月から8ヶ月の間で投資家を選び、15ヶ月か	2015/7/7 若者紙・第2面 【越語】

	ら17ヶ月の間で評価者を選んで、2019年に着工、2022年に完成、2023年に開業することを目標とすると述べた。	
2	<p><b>メコンデルタの交通インフラの改善のために、87兆ドルが必要</b></p> <p>交通運輸省によると、メコンデルタ地域における2016年から2020年までの交通インフラ改善のために、87兆ドルが必要であり、その多くの投資は道路建設のためだとのことである。重要な投資案件は My Thuan - Can Tho 高速道路、チャヴィン省とソクチャン省を結ぶ Dai Ngai 橋、第2段階南部海岸回路、Go Quao・ビントゥアン区間におけるホーチミン道路、国道91号、国道53号、国道54号、国道60号、国道61B号等である。</p> <p>URL:  <a href="http://english.thesaigontimes.vn/41836/Mekong-Delta-to-need-US\$4-billion-for-key-infra-projects-by-2020.html">http://english.thesaigontimes.vn/41836/Mekong-Delta-to-need-US\$4-billion-for-key-infra-projects-by-2020.html</a></p>	<p>2015/7/8</p> <p>The Saigon Times・第2面</p> <p>【英語】</p>
3	<p><b>ハイ副首相は都市鉄道1号線（ベントイン・スオイティエン間）を視察し、運用・技術スタッフを早期に訓練すべきだと発言</b></p> <p>7月16日、Hoang Trung Hai（ホアン・チュン・ハイ）副首相一行はホーチミン市の都市鉄道1号線（ベントイン・スオイティエン間）を視察した。市民劇場駅に関し、同市都市鉄道管理局 Bui Xuan Cuong（ブイ・スアン・クワン）局長によると、市民劇場及び近隣建物の建築に影響を与えずに、駅の狭い空間に合わせるように、地面から深さ40メートルに4階建の駅を建設し、駅の地下部分は約3メートルの高さとなるとのことである。現時点で壁及び真東は完成され、仮設の床は建設中で、本年末に完成する予定である。</p> <p>視察において、ハイ副首相は都市鉄道1号線（ベントイン・スオイティエン間）はホーチミン市の戦略的重要な案件だと発言し、進捗が遅れている問題に対して副首相は財政省に至急解決するように指示した。地震及び気候変動が起きても、影響を受けない設計を大切にすべきで、そうしないと、今後深刻な被害が生じる可能性が高いとも述べた。同市人民委員会にも2019年末から2020年初にベトナム初の地下鉄を完成させるために、指導するように指示した。運用に関しても、ホーチミン市は早期に運用・技術スタッフ</p>	<p>2015/7/17</p> <p>サイゴン解放紙・第3面</p> <p>【越語】</p>

	を訓練すべきだと述べた。交通運輸省は関係各省・局及び JICA と協力して、国際基準に合う一般的基準設定を完成する。都市鉄道 2 号線及び 5 号線は調整があり、進捗が遅れており、資金増となるため、同市は拡張部分の設計書類を完成し、次の国会会議で報告する。	
4	<p style="text-align: center;"><b>ニントゥアン省原子力発電所を移転</b></p> <p>商工省はニントゥアン省で建設予定の 2 ヶ所の原子力発電所を移転することを承認した。Thuan Nam 県 Phuoc Dinh 村における第 1 号原子力発電所は南西部へ 4 0 0 メートル移転され、総面積が 8 8 3 ヘクタール以上（土地面積：4 4 3 ヘクタール、海上面積：4 4 0 ヘクタール以上）となる。Ninh Hai 県 Vinh Hai 村における第 2 号原子力発電所は南西部へ 2 8 5 ～ 3 9 5 メートル移転され、総面積が 6 8 5 ヘクタール以上（土地面積：3 8 1 ヘクタール、海上面積：3 7 7 ヘクタール以上）となる。</p>	<p>2015/7/17</p> <p>若者紙・第 2 面</p> <p>【越語】</p>
5	<p style="text-align: center;"><b>Phu Lac (フー・ラック) 風力発電所建設案件へ約 1 兆 1 千億ドンを投資</b></p> <p>7 月 2 1 日午後、ビントゥアン省 Tuy Phong 県 Phu Lac 村においてビントゥアン風力発電株式会社は Phu Lac 風力発電所に着工した。案件の第 1 段階は 1 4 ヶ月間で、総投資金額が約 1 兆 1 千億ドンである。</p>	<p>2015/7/22</p> <p>サイゴン解放紙・第 3 面</p> <p>【越語】</p>
6	<p style="text-align: center;"><b>アマタグループはドンナイ省においてハイテク工業団地を建設</b></p> <p>7 月 2 2 日においてドンナイ省工業団地管理委員会 (DIZA) はロンタインアマタ都市株式会社にロンタインハイテク工業団地設立証明書及び投資証明書を渡した。2 億 8, 2 0 0 万米ドルの投資金額によりロンタイン県のタムアン村及びアンフック村におけるロンタインハイテク工業団地は 4 1 0 ヘクタール以上の面積に建設され、ドンナイ省初のハイテク工業団地となる。2 0 2 0 年に完成する予定である。</p> <p>URL:  <a href="http://english.thesaigontimes.vn/42144/Amata-to-build-hi-tech-industrial-park-in-Dong-Nai.html">http://english.thesaigontimes.vn/42144/Amata-to-build-hi-tech-industrial-park-in-Dong-Nai.html</a></p>	<p>2015/7/27</p> <p>The Saigon Times ・第 3 面</p> <p>【英語】</p>

#### 4. その他我が国の建設産業界にとって参考となりうる最近の動向

<p><b>第 2 四半期ホーチミン市不動産市場概要報告</b></p> <p>2 0 1 5 年 7 月 8 日、ホーチミン市においてベトナム Savills 社は第 2 四半期ホーチミン市不動産市場の概要を報告した。主な内容は以下のとおりである。</p> <ul style="list-style-type: none"> <li>■ 小売市場について</li> </ul>
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- オフィス市場について
- ホテル市場について
- サービスアパート市場について
- 販売のためのアパート市場について
- ヴィラ及びタウンハウス市場について

詳細は添付資料（英語）のとおり。

### 第1回ベトナム不動産博覧会

2015年7月31日から8月2日にかけてベトナム不動産協会（Vnrea）は2015年（第1回）ベトナム不動産博覧会を開催する。本博・展覧会の目的は販売者と購入者の結びを通して、持続的に不動産市場の開発を強化することである。

2015/7/14 建設省ウェブページ

URL（越語）：

[http://moc.gov.vn/en/trang-chi-tiet?p\\_p\\_id=vcmsviewcontent\\_INSTANCE\\_Z2jG&p\\_p\\_lifecycle=0&p\\_p\\_col\\_id=column-1&p\\_p\\_col\\_count=1&vcmsviewcontent\\_INSTANCE\\_Z2jG\\_struts\\_action=%2Fvcmsviewcontent%2Fview&vcmsviewcontent\\_INSTANCE\\_Z2jG\\_articleId=263556&vcmsviewcontent\\_INSTANCE\\_Z2jG\\_categoryId=63](http://moc.gov.vn/en/trang-chi-tiet?p_p_id=vcmsviewcontent_INSTANCE_Z2jG&p_p_lifecycle=0&p_p_col_id=column-1&p_p_col_count=1&vcmsviewcontent_INSTANCE_Z2jG_struts_action=%2Fvcmsviewcontent%2Fview&vcmsviewcontent_INSTANCE_Z2jG_articleId=263556&vcmsviewcontent_INSTANCE_Z2jG_categoryId=63)

# Briefing Retail sector

Q2/2015

## Supply

In Q2/2015, two new shopping centres and one new supermarket entered the market, increasing total retail stock 5% quarter-on-quarter (QoQ) to approximately 940,000 m<sup>2</sup>.

## Performance

The average occupancy was 92%; stable QoQ and increased 7 ppts year on year (YoY). The average rent decreased by 1% QoQ at 1.3 million VND/m<sup>2</sup>/ mth.

In a QoQ comparison, shopping centres' occupancy was stable at 92% and department stores were unchanged at 97 percent. Retail podium's occupancy was 82%, decreasing by -2ppts QoQ; this decrease had no impact to the market's overall occupancy.

The average rent of department stores increased by 1% QoQ, whilst shopping centres' rent decreased by -2 percent. Rent in retail podiums was unchanged.

In YoY comparison, the rent of department stores increased by 3% while shopping centres and retail podiums decreased by -2 percent.

## Demand

In 1H/2015, HCMC retail sales were approximately VND256 trillion, increasing by 11.8% YoY. Without inflation, real retail growth was 14.3% YoY, significantly higher than in 1H/2014 at 7.7% and higher than the national figure of 10.2 percent.

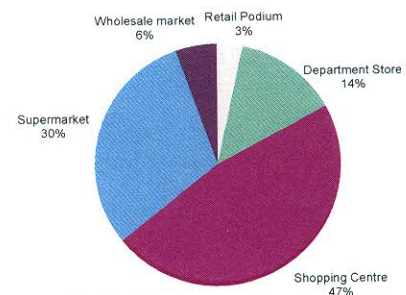
The increasing population and rising middle class in HCMC are driving the growth in retail demand.

## Outlook

The retail market is expected to expand to the secondary and suburban areas faster than the CBD due to upgrades in public infrastructure and new residential projects. In the next six months of 2015, total future supply of the secondary area accounts for 66%, followed by the suburban area with 27% and the CBD with 7 percent.

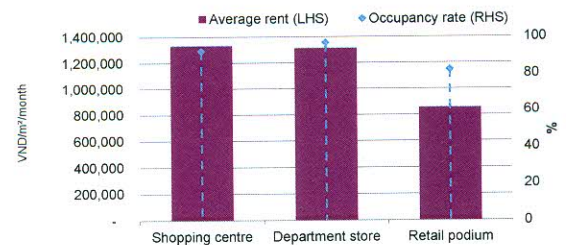
By the end 2015, the future supply will increase by 40% compared with 2014.

FIGURE 1  
Current supply



Source: Savills Research & Consultancy

FIGURE 2  
Market performance



Source: Savills Research & Consultancy

Note: the average gross rent per m<sup>2</sup> on the ground level of the shops that have areas equal to or 10m<sup>2</sup>, including service charges but excluding VAT.

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### Savills plc

Savills is a leading global real estate service provider listed on the London Stock Exchange. The company established in 1855, has a rich heritage with unrivalled growth. It is a company that leads rather than follows, and now has over 600 offices and associates throughout the Americas, Europe, Asia Pacific, Africa and the Middle East.

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# Briefing Office sector

Q2/2015

## Supply

In Q2/2015, one new Grade C project in district 3 providing 3,200 m<sup>2</sup> entered the market.

As of Q2/2015, there was approximately 1,472,000 m<sup>2</sup> from 224 projects. The total stock was relatively stable quarter-on-quarter (QoQ) and increased 3% year-on-year (YoY).

## Performance

In Q2/2015, the average occupancy was 93%, up 2 ppts QoQ and YoY. This was the highest occupancy in the last seven years. The average rent was VND 541,000/m<sup>2</sup>/mth (US\$25/m<sup>2</sup>/mth), stable QoQ and YoY.

Grades A and C had QoQ occupancy increase by 3 ppts and 2 ppts respectively.

There was a wide gap in rental between Grade B buildings in the CBD and non-CBD at 60%. Grade C CBD rent was 13% higher than non-CBD.

## Demand

In Q2/2015, the total office take-up was more than 25,500 m<sup>2</sup>, up 6% from the previous quarter. The demand for Grade C offices was high, accounting for more than 68% of total take-up this quarter.

Factors influencing demand such as economic growth, foreign direct investment and newly registered enterprises have increased YoY. These elements provide positive prospects for office demand.

## Outlook

By the end of 2015, one new Grade A project, three new Grade B and five new Grade C projects are expected to enter the market, supplying approximately 178,000 m<sup>2</sup>.

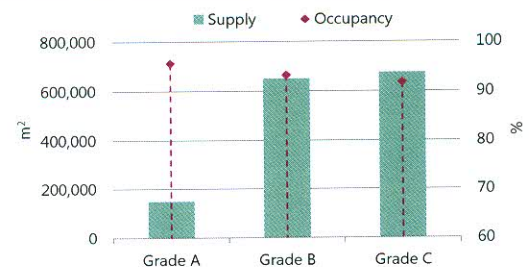
By 2017, the market will welcome approximately 504,000 m<sup>2</sup> of new supply, increasing by 36% compared with 2014.

FIGURE 1  
Market performance



Source: Savills Research & Consultancy

FIGURE 2  
Market performance by grade



Source: Savills Research & Consultancy

Note: the average gross rent was calculated based on net leasable area, including service charges but excluding VAT.

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# Briefing Hotel sector

Q2/2015

## Supply

In Q2/2015, the 3-star segment welcomed 540 rooms from six new and one refurbished hotel. The 5-star segment had 446 additional rooms from an existing hotel and an upgraded hotel. Another 3-star hotel closed 20 rooms for internal use.

As of Q2/2015, HCMC had 106 hotels supplying approximately 13,800 rooms, increasing 6% quarter-on-quarter (QoQ) and 10% year-on-year (YoY).

## Performance

The average occupancy in Q2/2015 was 64%, down 6 ppts QoQ due to the low tourism season; YoY the figure increased by 3ppts.

The 4-star average occupancy was higher than that of the 3-star and 5-star segment by 4ppts to 9ppts.

The ARR dropped -5% QoQ and -3% YoY to VND1.6 million/room/night (US\$78/room/night). This was the lowest ARR in the last five years due to a continuous increase in supply and fierce competition in the market.

## Demand

International arrivals to HCMC increased in the first six months of 2015 to approximately 2.2 million visitors. The yearly growth rate was positive at 3% YoY, compared with the negative figure nationwide of -11% YoY.

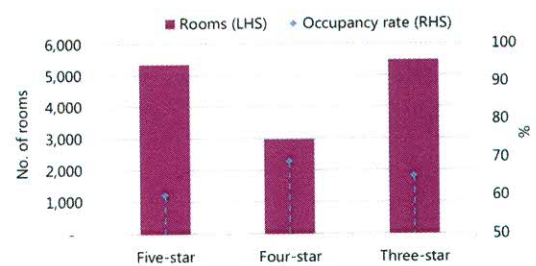
Visitors from the US, Japan, Korea and China were the main arrivals to HCMC.

## Outlook

As of Q2/2015, there were 27 three to 5-star hotel projects recorded in the future list, supplying approximately 5,600 rooms. Thirteen projects are being completed or are under construction.

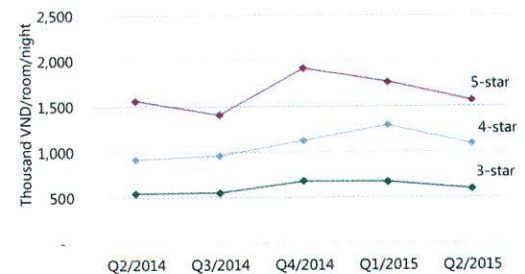
In the second half of 2015, nine hotels with more than 1,100 rooms are expected to come online. They include three 5-star hotels and six 3-star hotels ■

FIGURE 1  
Hotel performance, Q2/2015



Source: Savills Research & Consultancy

FIGURE 2  
RevPAR, Q2/2014 – Q2/2015



Source: Savills Research & Consultancy

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# Briefing

## Serviced apartment sector

Q2/2015

### Supply

One Grade C project in district 2 came online this quarter, adding 14 new units to the market.

As of Q2/2015, the total supply for HCMC's serviced apartment market was approximately 4,280 units from 82 projects, relatively stable quarter-on-quarter (QoQ) and increasing 5% year-on-year (YoY).

### Performance

In Q2/2015, the overall occupancy was 85%, up 3 ppts QoQ and YoY.

All three grades had improved occupancies compared with the previous quarter. Grade B achieved a QoQ increase of 3 ppts, followed by Grade C with 2 ppts and Grade A with 1 ppt.

The CBD continued to lead the market, with occupancy at 88%, 4 ppts higher than that of the non-CBD and 5 ppts than that of the new urban areas (NUA).

The average rental rate continued to decrease -1% QoQ and -3% YoY to VND 490,000/m<sup>2</sup>/mth.

### Demand

As of 1H/2015, HCMC has attracted US\$1.2 billion in foreign direct investment (FDI), up 33% YoY. The increased amount of FDI inflow to HCMC has had a positive impact on the serviced apartment market. In Q2/2015, take-up increased by 400% QoQ.

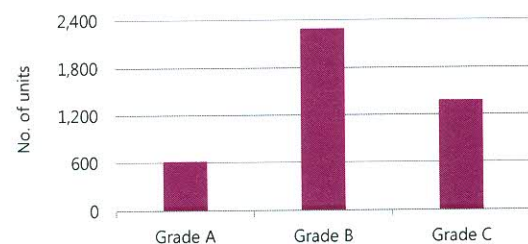
Serviced apartments have become an attractive alternative to the standard hotel product as they are a cost-effective option for a long-term stay.

Prime locations, international management and premium facilities from the Grade A segment and certain Grade B projects are crucial elements contributing to the appeal of serviced apartment market from prospective tenants.

### Outlook

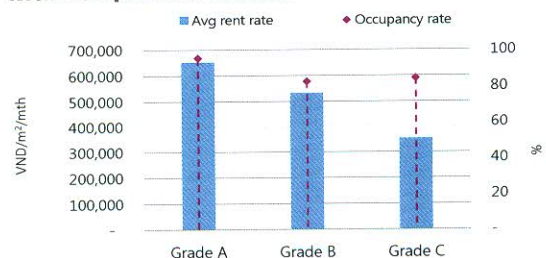
From 2H/2015 to 2017, eleven projects providing approximately 2,200 units are expected to enter the market. ■

FIGURE 1  
Current stock



Source: Savills Research & Consultancy

FIGURE 2  
Market performance



Source: Savills Research & Consultancy

Note: Estimated average rent inclusive of service charge, \*exclusive of VAT, on a net area basis\*.

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# Briefing Apartment sector

Q2/2015

## Supply

In Q2/2015, eleven new projects and new phases of eight active projects were launched, providing more than 9,700 units. This is an increase of 47% quarter-on-quarter (QoQ) and 138% year-on-year (YoY). This quarter had the highest amount of newly launched supply in the last five years.

As of Q2/2015, there were approximately 26,000 available units in the primary market, a significant increase of 27% QoQ and 72% YoY.

## Performance

The overall absorption rate was 19%, a decrease of -2 pts QoQ but an increase of 2 pts YoY. In Q2/2015, approximately 5,000 units were sold, up 17% QoQ and 96% YoY, the highest transaction volume since Q4/2010.

In Q2/2015, district 2 achieved the most sales with 28% of the total transaction volume, followed by Binh Thanh with a 15% share.

Grade B sales volume had a strong increase of 44% QoQ while Grade C maintained stable performance QoQ.

## Demand

In recently launched projects there has been a wide range of products such as options in terms of size, bedrooms and uses.

Projects with good standards, sufficient facilities and infrastructure have been popular.

End-users are strongly encouraged by competitive mortgage rates and good payment schemes, while small investors are confident in the good rental yield in HCMC.

## Outlook

From 2H/2015 to 2017, approximately 59,200 new units from 90 existing and future projects are expected enter the market. District 9 is a major future supplier.

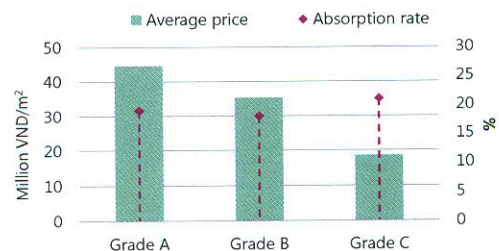
Recent legal reforms such as real estate law, housing law and developer guarantees to the residential market are expected to have positive impact on the performance of the apartment sector.

FIGURE 1  
Primary stock, Q2/2015



Source: Savills Research & Consultancy

FIGURE 2  
Market performance



Source: Savills Research & Consultancy

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Savills is a leading global real estate service provider listed on the London Stock Exchange. The company established in 1855, has a rich heritage with unrivalled growth. It is a company that leads rather than follows, and now has over 600 offices and associates throughout the Americas, Europe, Asia Pacific, Africa and the Middle East.

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# Briefing Villa/Townhouse sector

Q2/2015

## Supply

Three new villa/townhouse projects and the next phase of an existing project provided more than 470 dwellings to the primary market.

As of Q2/2015, the primary stock of the villa/townhouse segment was approximately 1,140 dwellings, an increase of 3% quarter-on-quarter (QoQ) and 216% year-on-year (YoY).

In the land plot segment, one new project and the next phase of an existing land plot project entered the market, adding more than 60 plots. The primary land plot market had approximately 760 plots, down -43% QoQ and -32% YoY.

Go Vap continued to be the largest supplier for the villa/townhouse market, district 9 contributed the most stock for the land plot segment.

## Performance

The villa/ townhouse market performed well due to the good performance of newly launched projects. The transaction volume of the villa/townhouse segment increased by 12% QoQ and 116% YoY. Townhouses dominated sales with 82% of transactions.

The absorption rate of this segment was 35%, up 3 pts QoQ but down sharply -16 pts YoY.

In the land plot segment, the transaction volume decreased by -36% QoQ and -21% YoY. District 9 and Thu Duc had the best performance, accounting for approximately 70% of sales.

## Demand

Purchasers are attracted to projects with premium products, a prime location and a wide range of facilities.

End-users are highly attracted to landed properties with moderate pricing and good connectivity to the city centre.

## Outlook

Future stock from 2H/2015 onwards is approximately 52,500 dwellings from 137 projects.

In 2H/2015, nine projects with 1,250 dwellings are expected to enter the market. District 9 is the largest supplier, accounting for 31% market share.

FIGURE 1  
Current stock

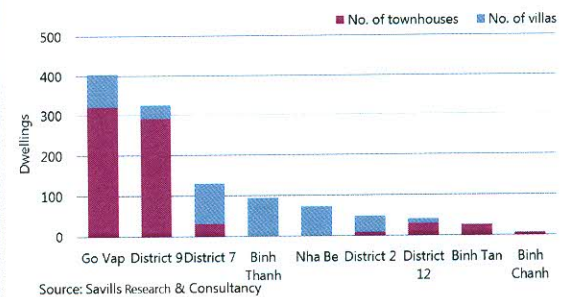
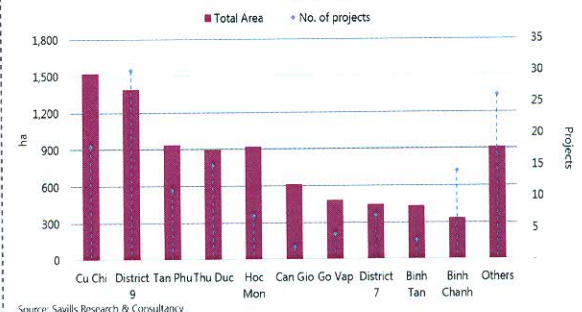


FIGURE 2  
Estimated future supply



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