

A wide-angle, high-angle photograph of Singapore at night. The image captures the city's skyline reflected in the water of Marina Bay. In the foreground, the Esplanade - Theatres on the Bay, with its distinctive spiky, dome-like roofs, is brightly lit. To the right, a multi-lane highway with glowing light trails from traffic stretches into the distance. In the background, the iconic Marina Bay Sands hotel, with its three towers and skybridge, stands prominently. Other skyscrapers of the city are visible on the right side of the frame. The sky is a deep blue, suggesting twilight.

ISSUE NO. 88 | MARCH 2020

# SINGAPORE REPORT

CONSTRUCTION MARKET  
QUARTERLY UPDATE







## KEY POINTS IN THIS ISSUE

Our Singapore Report for the first quarter of 2020 highlights trends in the Singapore construction sector within the present unprecedented economic crisis experienced both locally and globally from the COVID-19 pandemic.

- Singapore's economy contracted by 2.2 per cent year-on-year in the first quarter of 2020, according to flash estimates;
- The Singapore construction sector shrank 4.3 per cent year-on-year and 22.9 per cent on a quarter-on-quarter seasonally adjusted annualised basis, due to lockdowns, physical distancing and travel restrictions implemented by other countries in relation to the COVID-19 pandemic;
- Announcements in Singapore Budget 2020 pertaining to the construction industry include cuts to the S Pass Dependency Ratio Ceiling for the construction industry from 1 January 2021;
- Prices of basic construction materials continue to increase from the last quarter while global oil prices slump;
- Construction tender prices are projected to increase for 2020, in the order of 2 per cent to 5 per cent escalation as currently forecast by RLB;

Our key Singapore commissions include the LASALLE campus extension, Bay East Garden/ Founders' Memorial, New Science Centre, Mandai Park, Changi Airport Terminal 2 A&A, The M Condominium and other projects of interest.

We look forward to be of service to you and your organisations in Singapore and regionally in Indonesia, Malaysia, Vietnam, Myanmar and Cambodia.

## PARTNERS RIDER LEVETT BUCKNALL SINGAPORE

### BOTANIQUE AT BARTLEY ◀

#### SINGAPORE

CLIENT:	UOL Development (Bartley) Pte Ltd
ARCHITECT:	ADDP Architects LLP
SERVICE:	Quantity Surveying Services by Rider Levett Bucknall LLP
COMPLETION:	2019

Situated on the city fringe and within the Bidadari Estate, the Botanique at Bartley is a 797-unit high-rise condominium by UOL Group.

## SINGAPORE ECONOMY

Singapore's economy contracted by 2.2 per cent year-on-year (y-o-y) in the first quarter of 2020, according to flash estimates from the Ministry of Trade and Industry (MTI). On a seasonally adjusted annualised basis, Singapore's gross domestic product (GDP) shrank by 10.6 per cent quarter-on-quarter (q-o-q), a sharp contraction from the 0.6 per cent growth in the previous quarter.

The projected 2.2 per cent contraction marks the worst GDP y-o-y in over a decade since the first quarter of 2009, the aftermath of the global financial crisis, and the largest q-o-q fall since the third quarter of 2010. MTI has also downgraded Singapore's GDP growth forecast for 2020 to between -4 per cent and -1 per cent. Analysts described the latest figures as indicating that a recession for 2020 was inevitable.

The government has, to date, announced three budget support packages to help workers, businesses and households amid the dire economic outlook, totalling S\$59.9 billion. The Monetary Authority of Singapore (MAS) also eased its exchange rate-based monetary policy, setting the Singapore dollar on a weaker path.

Whilst prevailing political uncertainties appeared to have eased in the first quarter, the pandemic and economic headwinds have escalated, including the oil price war that brought the energy industry to its knees.

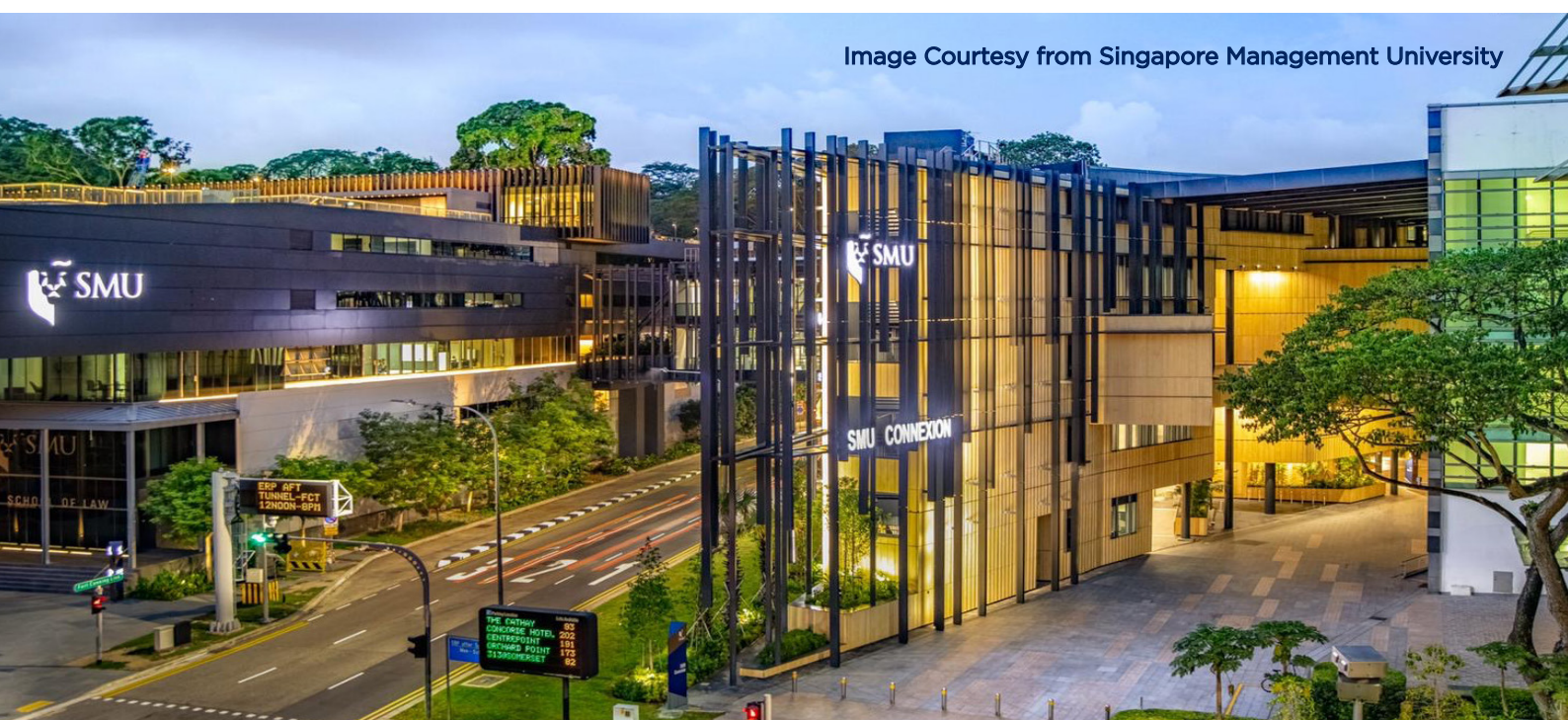
The global spread of the coronavirus COVID-19 has caused governments worldwide to put in place travel restrictions and implement varying degrees of economic lockdowns to contain the pandemic. The end of January and Lunar New Year holidays saw the lockdown of the Wuhan City and the beginning of prolonged supply chain disruptions worldwide as workplace activities were suspended for months in staggered fashion.

Economists opined that Singapore was likely to be one of the most impacted countries in the South-East Asia region due to the significant volume of export trade from China. Internally, the sharp decline in tourist arrivals and a fall in domestic consumption saw sectors such as air transport, accommodation, food services and retail trade sectors shrink.

MAS Core Inflation for February fell into the negative territory for the first time since January 2010. Headline inflation registered lower at 0.3 per cent y-o-y, compared to 0.8 per cent in the preceding month on the back of lower core inflation and private transport inflation.

The first quarter figures for total employment in Singapore reflected the early impact of the COVID-19 pandemic, recording its sharpest drop since the SARS outbreak in 2003. Singapore's labour market conditions are expected to worsen in the second quarter with the implementation of the "circuit breaker" lockdown which begun in April 2020.

Image Courtesy from Singapore Management University





## SINGAPORE CONSTRUCTION MARKET

The Singapore construction sector took the largest hit in the first quarter of 2020, shrinking 4.3 per cent y-o-y. This is a reversal from the 4.3 per cent of growth of the previous quarter. On a q-o-q seasonally adjusted annualised basis, the sector contracted 22.9 per cent, compared to a 5.3 per cent expansion in the preceding quarter.

The MTI has attributed the sharp contraction to the lockdowns, physical distancing and travel restrictions implemented by Singapore and regional countries in relation to the COVID-19 pandemic, which had disrupted the supply chain and delayed the return of foreign workers, thereby adversely affecting the progress of construction projects. Construction growth was also weighed down by a decline in private sector construction activities.

It is anticipated that projects will face significant delays arising from the cumulative impact of a series of chain events starting from the delayed return of foreign workers to the implementation of movement control order in Malaysia. This has seriously disrupted the supply and delivery of pre-fabricated components and construction materials to project sites.

Following the tightening of the Dependency Ratio Ceiling (DRC) in services industry announced in last year's Budget, cuts to the S Pass DRC for the construction industry was announced in Budget 2020. The first phase will tighten the S Pass workers from 20 per cent to 18 per cent on 1 January 2021 and further to 15 per cent on 1 January 2023. It was also announced that there will be no changes to the foreign worker levy rates for 2020.

Private sector construction demand will continue to be supported by existing mega projects. These include recreational developments at Mandai Park, the Changi Airport new taxiway and berth facilities at Jurong Port and Tanjong Pagar Terminal. Many other projects that were slated for the year have yet to commence as developers take a more prudent wait-and-see approach in light of the current economic uncertainty. Construction demand in the private sector is therefore expected to be adversely affected in the near term.

The overall price index for private homes shrank 1.0 per cent q-o-q in the first quarter of 2020, as compared with the 0.5 per cent increase in the previous quarter, based on data released by the Urban Redevelopment Authority. Developers launched 2,093 uncompleted private residential units (excluding executive condominiums) for sales in the first quarter, registering a drop of 6.0 per cent from the previous

quarter. This was prior to the suspension of all show flat galleries in early April.

Property investment sales in Singapore fell 37 per cent in the first quarter of this year as the COVID-19 outbreak took its toll on investor sentiment. Big ticket commercial transactions were absent and sales were dominated by the residential sector, mainly from the award of previously bid government land sale sites.

Metal prices remain reasonably stable within a small range. However, crude oil prices rose by 1 per cent q-o-q for the fourth quarter of 2019 but dropped to its lowest in nearly two decades in April 2020. Oil prices slumped following the oil price war between Russia and Saudi Arabia and the sharp contraction in global oil demand due to the current travel restrictions imposed by governments worldwide.

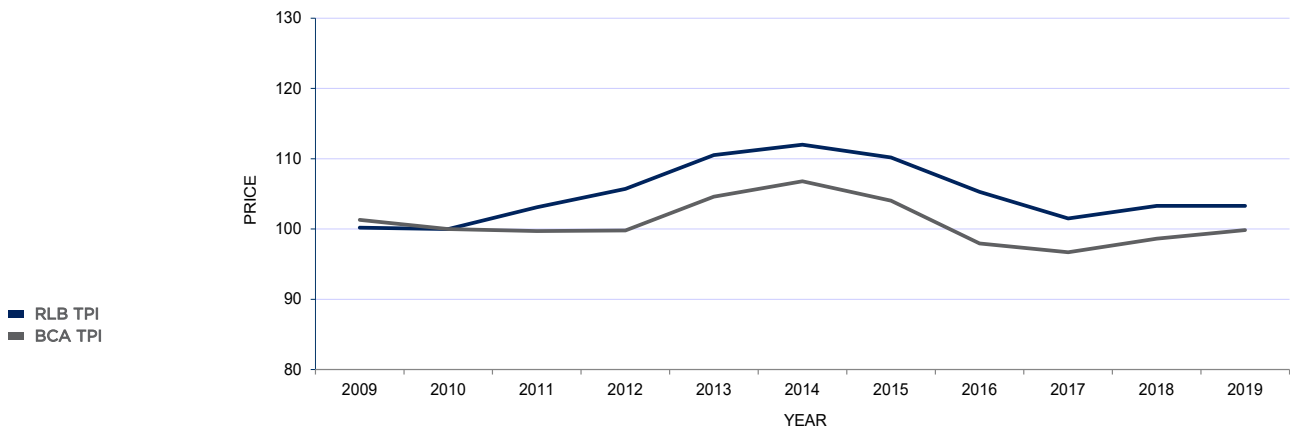
Prices of basic construction materials have continued to increase q-o-q in the fourth quarter of 2019, with concreting sand increasing the most at 4.8 per cent. Granite, cement, and ready mixed concrete increased by 4.7 per cent, 1.9 per cent and 0.9 per cent respectively in the same quarter. By comparison, labour prices are expected to rise by 15 to 20 per cent this year, in the light of current circumstances.

Volatile currency exchange rates in the first quarter of 2020 are likely to impact the cost of imported plant and equipment in the near term. While the Singapore Dollar appeared to have largely stabilised against the greenback in April 2020 compared with the preceding months, it still presents a 4.5 per cent depreciation from the fourth quarter of 2019.

Given the present COVID-19 measures implemented, the suspension of construction site works, and resource issues arising from the widespread foreign worker dormitory infections, it is anticipated that contractors are likely to adopt a more conservative approach to tendering to mitigate their risks. This will result in an escalation of tender prices in 2020. Based on the aforesaid implications of the pandemic, present cost and price trends, RLB estimates that Singapore construction tender prices are projected to see an increase in the order of 2 per cent to 5 per cent for the year of 2020.

# TENDER PRICE TRENDS

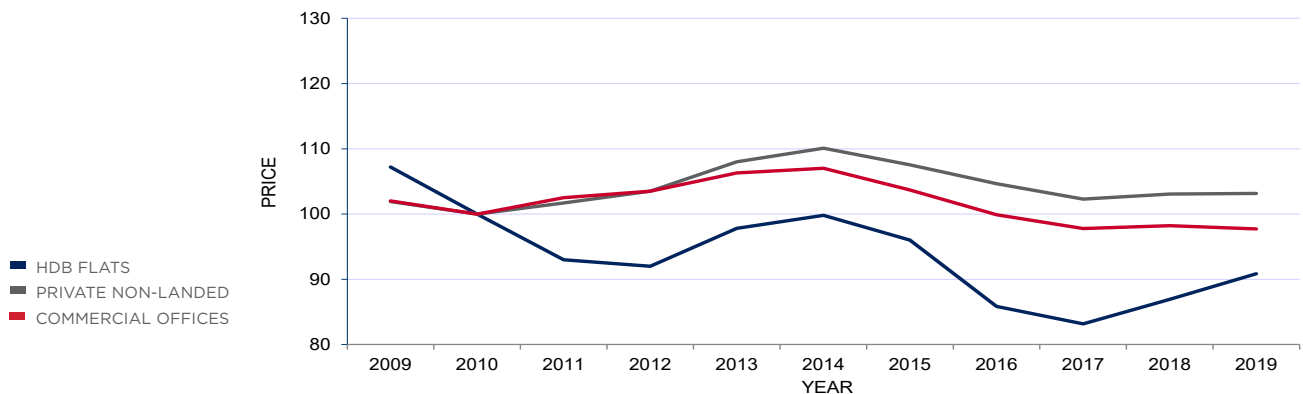
## BUILDING TENDER PRICE INDICES



	Annual change 2019		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
RLB TPI	0.0%	↔	100.2	100.0	103.1	105.7	110.5	112.0	110.2	105.3	101.5	103.3	103.3
BCA TPI	1.2%	↑	101.3	100.0	99.7	99.8	104.6	106.8	104.0	98.0	96.7	98.6	99.9

Data Sources: BCA and RLB  
P: Preliminary

## BCA TENDER PRICE INDICES



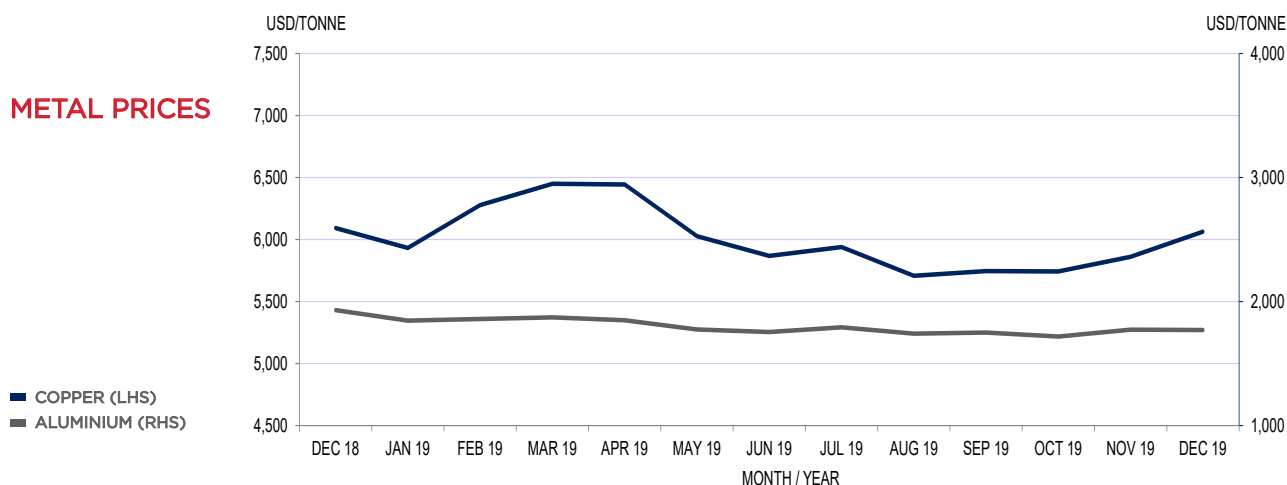
	Annual change 2019		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
HDB Flats	4.5%	↑	107.2	100.0	93.0	92.0	97.8	99.8	96.0	85.8	83.2	86.9	90.9
Private Non-Landed	0.1%	↑	101.9	100.0	101.7	103.5	108.0	110.1	107.6	104.7	102.3	103.1	103.2
Commercial Offices	-0.5%	↓	102.0	100.0	102.5	103.5	106.3	107.0	103.7	99.9	97.8	98.2	97.7

Data Sources: BCA  
P: Preliminary

**NOTE:** Variances between the RLB and the BCA Tender Price index arise from differences in the index derivation methodology, the basket of items and weightages used for each index and the variety of building projects utilised. The index basket here excludes piling works and Mechanical & Electrical services. **Base Year 2010 = 100**

# COMMODITY PRICE TRENDS

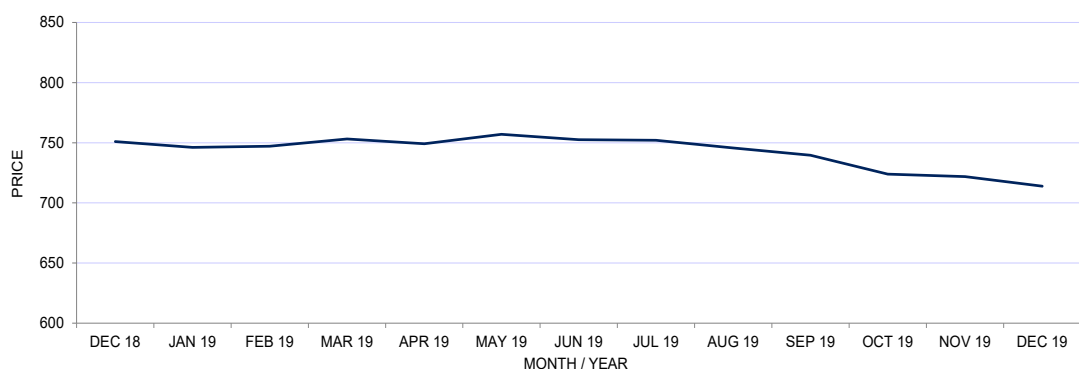
## METAL PRICES



	AVG 3Q'19/ 4Q'19 CHANGE	DEC 2018	JAN 2019	FEB 2019	MAR 2019	APR 2019	MAY 2019	JUN 2019	JUL 2019	AUG 2019	SEP 2019	OCT 2019	NOV 2019	DEC 2019
Copper	1.6% ↑	6093	5931	6277	6450	6444	6027	5868	5939	5707	5745	5742	5860	6062
Aluminium	-0.4% ↓	1931	1845	1859	1872	1848	1775	1753	1792	1740	1749	1718	1772	1770

Data Sources: London Metal Exchange (LME)

## STEEL REINFORCEMENT (16 - 32MM HIGH TENSILE) SUPPLY PRICES



	AVG 3Q'19 / 4Q'19 CHANGE	DEC 2018	JAN 2019	FEB 2019	MAR 2019	APR 2019	MAY 2019	JUN 2019	JUL 2019	AUG 2019	SEP 2019	OCT 2019	NOV 2019	DEC 2019
Steel	-3.5% ↓	751	746	747	753	749	757	753	752	746	740	724	722	714

Data Sources: BCA

## CRUDE OIL PRICES

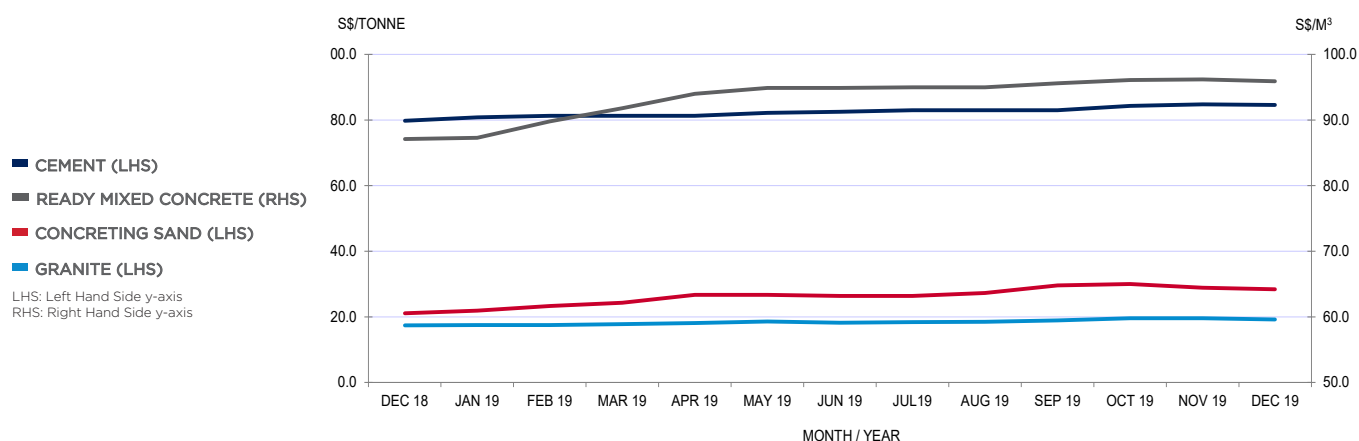


	AVG 3Q'19 / 4Q'19 CHANGE	DEC 2018	JAN 2019	FEB 2019	MAR 2019	APR 2019	MAY 2019	JUN 2019	JUL 2019	AUG 2019	SEP 2019	OCT 2019	NOV 2019	DEC 2019
Crude Oil	1.0% ↑	54	57	61	64	69	67	60	61	58	60	57	60	63

Data Sources: IndexMundi

# MATERIAL PRICE TRENDS

## BASIC CONSTRUCTION MATERIALS



			AVG 3Q'19 / 4Q'19 CHANGE	DEC 2018	JAN 2019	FEB 2019	MAR 2019	APR 2019	MAY 2019	JUN 2019	JUL 2019	AUG 2019	SEP 2019	OCT 2019	NOV 2019	DEC 2019
CEMENT	1.9%	↑		79.8	80.8	81.3	81.3	81.3	82.2	82.5	83.0	83.0	83.0	84.3	84.8	84.6
READY MIXED CONCRETE	0.9%	↑		87.1	87.3	89.8	91.8	94.0	94.9	94.9	95.0	95.0	95.6	96.1	96.2	95.9
CONCRETING SAND	4.8%	↑		21.1	21.9	23.3	24.3	26.7	26.7	26.4	26.4	27.3	29.6	30.0	28.9	28.4
GRANITE	4.7%	↑		17.4	17.5	17.5	17.8	18.1	18.6	18.2	18.4	18.5	18.9	19.6	19.6	19.2

Data Sources: BCA

### Note:

- Prices of rebar other than 16-32mm dimensions may be subject to surcharge.
- Prices of granite and concreting sand exclude local delivery charges to concrete batching plants.
- The market prices of rebar (without cut & bend) are based on fixed price supply contracts with contract period 6 months or less.
- The market prices of ready mixed concrete are based on contracts with non-fixed price, fixed price and market retail price for Grade 40 Pump.

## CURRENCY EXCHANGE RATES

CURRENCY			UNITS PER USD						
			UNIT	JUL 19	AUG 19	SEP 19	OCT 19	NOV 19	DEC 19
Singapore Dollar	\$	SGD	1	1.36	1.39	1.38	1.37	1.36	1.36
Euro	€	EUR	1	0.89	0.90	0.91	0.91	0.90	0.90
U.K. Pound Sterling	£	GBP	1	0.80	0.82	0.81	0.79	0.78	0.76
Australian Dollar	\$	AUD	1	1.43	1.48	1.47	1.47	1.46	1.45
Chinese Yuan	¥	CNY	1	6.88	7.06	7.12	7.08	7.02	7.02
Malaysian Ringgit	RM	MYR	1	4.12	4.19	4.19	4.19	4.16	4.15
Japanese Yen	¥	JPY	100	1.08	1.06	1.07	1.08	1.09	1.09
Myanmar Kyat	K	MMK	1000	1.49	1.49	1.51	1.51	1.50	1.48
Indonesian Rupiah	Rp	IDR	1000	14.03	14.23	14.09	14.12	14.06	14.01
Vietnamese Dong	đ	VND	1000	23.11	23.13	23.13	23.10	23.11	23.09

Data Sources: IMF, Oanda

Note: Exchange rates above are expressed in terms of currency units per US Dollar; averaged monthly from daily unit rates.



# SINGAPORE CONSTRUCTION PRICES

DEVELOPMENT TYPE	COST PER CFA	COST PER GFA
	S\$/m <sup>2</sup>	S\$/m <sup>2</sup>
<b>OFFICE</b>		
Standard (outside CBD)	2,000 - 3,200	2,500 - 4,100
Standard (within CBD)	2,050 - 3,300	2,950 - 4,350
Prestige (within CBD)	2,950 - 4,150	4,100 - 5,400
<b>HOTEL (INCLUDING FF&amp;E)</b>		
Serviced Apartment	3,050 - 3,550	4,050 - 4,650
Three Star	3,250 - 3,650	4,050 - 4,750
Four Star	3,550 - 4,400	4,650 - 5,800
Five Star	4,250 - 5,500	5,400 - 7,300
<b>RETAIL</b>		
Medium Quality	2,000 - 2,850	3,000 - 3,600
Good Quality	2,950 - 3,350	3,700 - 4,400
<b>CONDOMINIUM</b>		
Medium Quality Condominium	1,950 - 2,600	2,600 - 3,350
Good Quality Condominium	2,500 - 3,150	3,350 - 4,300
Luxury Quality Condominium	3,200 - 4,350	4,350 - 5,900

DEVELOPMENT TYPE	COST PER CFA
	S\$/m <sup>2</sup>
<b>LANDED RESIDENTIAL</b>	
Terrace House	2,300 - 2,700
Semi-detached House	2,400 - 3,250
Detached House	3,400 - 5,600
Cluster Housing	2,400 - 2,950
<b>INSTITUTIONAL</b>	
Institution of Higher Learning	2,750 - 3,450
Medical Institution	4,000 - 5,450
<b>INDUSTRIAL</b>	
Single Storey Warehouse	1,100 - 1,600
Light Industrial Building	1,200 - 1,700
Heavy Industrial Building	1,450 - 2,000
<b>CAR PARK</b>	
Above Grade Car Park	700 - 1,400
Basement Car Park	1,500 - 2,250
<b>HEALTHCARE</b>	
Nursing Home	1,700 - 3,150
Medical Centre	2,900 - 3,300
Hospital	3,500 - 4,000

All Singapore construction prices stated herein are as at 4th Quarter 2019, and include a general allowance for foundation, car-park and external works. The price ranges herein are indicative and due consideration should be given to the impact of varying design, specifications, size, location and nature of each project when utilising this information. Prices described here may not fully reflect the extent of current market forces and tendering conditions on any specific project.

**Note:**

**CFA: Construction Floor Area** is the area of all building enclosed covered spaces measured to the outside face of the external walls including covered basement and above ground car park areas.

**GFA: Gross Floor Area** is the area of building enclosed covered spaces excluding car park and driveway areas calculated for purposes of planning submissions.

**Exclusions:** • Land cost • Legal and professional fees • Development charges • Authority fees • Finance costs • Loose furniture, fittings and works of art (unless otherwise stated) • Tenancy work • Site infrastructure work • Diversion of existing services • Green Mark cost premiums • Resident site staff cost • Models and prototypes • Future cost escalation • Goods and Services Tax

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Post-Contract Services  
Variation Valuation  
Value Management  
Financial Reporting and Management  
Final Accounts  
Life Cycle Costing  
Green Building Costing  
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Facilities Management Consulting  
Litigation Support  
Risk Mitigation  
Procurement Strategies  
Construction Market Research  
Cost Escalation and Cost Benchmarking by Sector  
Industry Trend Analysis

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Clemena Ballard



# OUR GLOBAL NETWORK

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Gaborone  
Saint Pierre  
Maputo  
Cape Town  
Johannesburg  
Pretoria

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Cayman Islands  
St. Lucia

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Calgary  
Chicago  
Denver  
Guam  
Hilo  
Honolulu  
Las Vegas  
Los Angeles  
Maui  
New York  
Orlando  
Phoenix  
Portland  
San Francisco  
Seattle  
Toronto  
Tucson  
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Hangzhou  
Hong Kong  
Jeju  
Macau  
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Nanning  
Qingdao  
Seoul  
Shanghai  
Shenyang  
Shenzhen  
Tianjin  
Wuhan  
Wuxi  
Xiamen  
Xian  
Zhuhai

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Cebu  
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Iloilo  
Jakarta  
Kuala Lumpur  
Laguna

Metro Manila  
Singapore  
Yangon

## EUROPE

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Bristol  
Cumbria  
Leeds  
Liverpool  
London  
Manchester  
Sheffield  
Thames Valley  
Warrington/Birchwood  
Welwyn Garden City

### Euro Alliance

Austria  
Belgium  
Czech Republic  
Finland  
Germany  
Hungary  
Ireland  
Italy  
Luxembourg  
Netherlands  
Norway  
Poland  
Portugal  
Russia  
Spain  
Sweden  
Turkey

## MIDDLE EAST

### Oman

Muscat

### Qatar

Doha

### Saudi Arabia

Riyadh

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Dubai

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Perth  
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Queenstown  
Tauranga  
Wellington



