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BLUE BOOK OF REAL ESTATE

中国房地产发展报告

No.10

ANNUAL REPORT ON THE DEVELOPMENT OF CHINA'S REAL ESTATE (No.10)

主　编/魏后凯　李景国

副主编/尚教蔚　李恩平　李　庆

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摘　要

《中国房地产发展报告 No. 10》秉承客观公正、科学中立的宗旨和原则，追踪我国房地产市场最新资讯，深度分析，剖析因果，谋划对策，展望未来。全书分为房地产发展总报告和专题报告两部分，总报告侧重于分析和展望房地产业和房地产市场的总体发展，专题报告重点研究房地产的主要次级市场发展和热点问题。

2012 年，欧债危机蔓延，发达经济体经济低迷、增长乏力，新兴经济体经济增速回落，国内经济上半年增速放缓，下行压力加大。面对国内外复杂经济形势的挑战，党中央、国务院对房地产市场坚持继续调控不放松，实施差别化信贷政策，抑制投资投机需求与支持自住需求"两手抓"，严厉调控的主要目标基本实现。同时，强调落实保障性住房的资金，并加大保障性住房管理和分配的透明度。

从全国范围看，房价增速基本得到控制，全国商品房均价增速略高于 2011 年。同时，受调控影响，房地产开发投资增速明显下降，商品房竣工面积增速和土地购置面积大幅下降，新开工面积呈负增长，商品房与住宅全年成交量增长缓慢。从 35 个大中城市看，2012 年商品房均价增速、投资增速与全国特点一致，商品房均价最高的城市为深圳、增速则西宁居首，房地产开发和住宅投资增速贵阳均为第一、南宁和北京最低且为负增长。商品房销售面积增速比 2011 年有较大幅度提高，太原最高，西宁最低。商品房、住宅竣工面积增速减缓，二者增速海口最高。土地购置面积为负增长并延续下降态势，杭州、宁波下降幅度达到 70% 及以上。新开工面积呈现负增长，西宁增速最高、海口最低。

展望 2013 年，中国经济有望逐步回稳复苏，国家经济政策将遵循党的十八大精神向促进城镇化、改善民生倾斜，房地产政策及调控也将围绕这一主题

展开。由于供需总量和结构矛盾积累多年，房地产市场利益分化将加剧，部分城市房价上涨压力依然较大，部分城市则存在一定的房地产泡沫化风险，调控难度进一步增大。2013 年房地产市场走势将取决于具体政策措施选择和执行力度，城市间房产市场分化将加剧：大都市区可能迎来较高的房价增长，多数中小城市房价走势可能相对平稳，少数甚至可能有所回调。

关键词： 房地产市场　房地产调控　保障性住房

Abstract

Based on the principals of objectivity, fairness scientific soundness and neutrality, *Annual Report on the Development of China's Real Estate* (*No. 10*) traces the latest information of real estate market of China, analyzes its driving forces and influences, offers possible policy suggestions, and forecasts its future development. This book is divided into two parts. general reports and special reports. General reports focus on the analysis and forecast of overall development of real estate industry and market in China, while the special reports emphasize on the fundamental secondary markets and hot topics.

In 2012, the debt crises spred in the whole European continent, the developed economies experienced depressed and sluggish growth, while the economic growth rates of emerging economies were declining. As to domestic aspects, economic growth slowed down in the first half of the year, and the downward pressure was increasing. Facing the challenges of complex domestic and international economic situations, CPC Central Committee and the State Council persisted in severe real estate regulation policies and differentiated credit policy. Government restrained the speculative and investment demand, and supported the owner-occupation demand as well. The main goals of real estate regulations have been achieved in general. Moreover, Chinese government highlighted the importance to fulfill the funds of affordable housing, and increased the transparency of management and distribution of affordable housing.

On the national level, the growth rate of housing prices has been controlled in general. The growth rate of national average price of commodity housing was slightly higher than that of 2011. Influenced by regulation policies, the growth rate of real estate investment decreased significantly; the growth rate of commodity housing completion volume and the area of land purchased declined substantially; the new construction area of commodity housing decreased; and the trading volume of commodity and residential housing increased slowly.

According to the statistical data of 35 megaand medium-sized cities in 2012, the growth rate of commodity housing price and real estate investment of 35 cities was consistent with that of the whole country. Shenzhen ranked first in the average housing price, while Xining was the city with the highest growth rate of housing price. As to the growth rate of real estate development and residential investment, Guiyang ranked first, while Nanning and Beijing ranked last with negative growth. The growth rate of commodity housing trading volume increased greatly compared with that of 2011, and Taiyuan ranked first while Xining ranked last. The growth rate of commodity and residential housing declined slowly with the highest rate in Haikou. The growth of area of land purchased was negative and this trend is likely to continue; Hangzhou and Ningbo experienced a decrease of 70% or more. New construction area declined in 2012 with the highest growth rate in Xining and the lowest rate in Haikou.

Looking forward to 2013, China's economy is expected to recover gradually and stably. Following the guiding principles of the 18th National Congress of the CPC, national economic policies will tend to promote urbanization and improve people's livelihood. Real estate policies and regulations will also focus on these themes. Because of the accumulated contradictions between supply and demand as well as structural contradictions, the interest differentiation of real estate market will be exacerbated: some cities will face upward pressure of housing prices, and some cities will confront the risk of real estate bubble to a certain extent. Therefore, the difficulty of real estate regulations will increase further. The general trend of real estate market in 2013 depends on the selection and enforcement of specific policies. The market differentiation among cities will be aggravated: in mega-cities, housing prices will increased significantly; in most medium-sized and small cities, housing prices are expected to be relatively stable; in few cities, housing prices may be callback.

Key Words: Real Estate Market; Real Estate Regulations; Affordable Housing

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总 报 告

General Reports

B.1
2012年房地产市场形势分析及2013年预测

总报告编写组*

2012年，欧债危机蔓延，发达经济体经济低迷、增长乏力，新兴经济体经济增速回落，国内经济上半年增速放缓，下行压力加大。面对国内外复杂经济形势的挑战，党中央、国务院对房地产市场坚持继续调控不放松，实施差别化信贷政策，抑制投资投机需求与支持自住需求“两手抓”，严厉调控的主要目标基本实现。同时，强调落实保障性住房的资金，加大保障性住房管理和分配的透明度。

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* 报告执笔：李景国、尚教蔚、李思平、董昕、景娟；审定：魏后凯、李景国。