

上海人民出版社

上海市 房地产市场

上海市房屋土地资源管理局 上海市统计局 /



SHANGHAI MUNICIPAL HOUSING, LAND AND RESOURCES ADMINISTRATION BUREAU
SHANGHAI MUNICIPAL STATISTICS BUREAU

2006
SHANGHAI
REAL ESTATE MARKET

上海市房屋土地资源管理局
上海市统计局 / 编

上海市 房地产市场



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图书在版编目(CIP)数据

2006 上海市房地产市场 / 上海市房屋土地资源管理局,
上海市统计局编. ——上海: 上海人民出版社, 2006
ISBN 7-208-06693-0

I. 2... II. ①上... ②上... III. 房地产业-概况
-上海市-2006 IV. F299.275.1

中国版本图书馆 CIP 数据核字 (2006) 第 148197 号

责任编辑 / 张 珏
封面设计 / 蔡旭洲

2006 上海市房地产市场

上海市房屋土地资源管理局 上海市统计局 编

出 版 / 世纪出版集团 上海人民出版社

(200001 上海福建中路193号 www.cwen.cc)

发 行 / 世纪出版集团发行中心

印 刷 / 深圳宝峰印刷有限公司

开 本 / 889 × 1194 毫米 1/16

印 张 / 10.5

插 页 / 6

字 数 / 300,000 字

版 次 / 2006 年 12 月第 1 版 2006 年 12 月第 1 次印刷

ISBN 7-208-06693-0 / F·1520

定价 150.00 元

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前言

《上海市房地产市场》由上海市房屋土地资源管理局和上海市统计局联合编辑，采用中英文合版的方式，全面反映上海市房地产一、二、三级市场年度运行情况。所刊出的常规性市场数据均为政府管理部门的统计数据，对非常规性的统计数据则通过典型调查汇总而成。上述统计数据除总量和结构性数据载于正文外，另附有详细表式列明，以供读者查阅。

为了把握市场发展情况的历史延续性和空间完整性，本书对一些重要常规性指标列出最近10年的系统统计数据，以便纵向比较分析。其中，商品房的批准预售、实际预售的数据是根据当年所有楼盘批准上市和实际销售情况汇总而成，确保了数据的完整性和准确性。所不同的是，1997年以来的商品房交易数据均为个案到市、区（县）交易登记部门登记的数据，而在这之前则是根据开发单位直接填报的统计报表汇总而成，因而两者不能进行直接比较。

2001年7月起，上海实施了内销与外销商品住宅项目用地和销售对象的并轨，本书在保持原有体系内容和统计数据与历年相衔接的前提下，在内容和表式上作了相应的调整，将各类原内外销商品房市场的分述内容进行归并。

2003年3月1日起，上海取消全市国有土地上的商业、旅游、娱乐、金融、服务业、商品房等各类非居住房屋租售对象内外销之分，境内外单位、个人均可购买和租赁。

2004年8月31日后，上海的经营性用地完全实行招标、挂牌和拍卖的出让方式，本书在统计表中予以刊出。

2005年初至2006年8月，为了确保市场进一步健康有序地发展，中央政府和上海市政府继续出台多项市场调控性政策法规，本书在相关部分有针对性地重点介绍，并于附录中刊出其中主要政策法规目录，供广大读者索引。

有关主要专业用语定义、数据统计口径和方式载于第31至39页的“技术注解”栏目内，以方便读者应用数据。

各界人士均可转载本书有关内容，但在转载时，必须注明资料来源于本书。

Preface

“Shanghai Real Estate Market” is jointly edited and published by the Shanghai Municipal Housing and Land Resources Administrative Bureau and Shanghai Municipal Statistics Bureau in Chinese and English version. It thoroughly reflects the annual operation situation of the first, second and third tier market of the city’s real estate market. The published market data is obtained from the government administration departments, while the non-general statistics are established through standard survey. The said statistics, besides the total and structural data that are inserted in the text, detailed tables are also attached for readers’ reference.

In order to strengthen the continuity and the integrity of the history of the market development situation, a 10-year statistical data of certain important general index are listed out for the ease of analysis and comparison. For completeness and accuracy, the data of commodity housing approved for pre-sale and the actual pre-sale transaction data are summarized from the operation situation of all the developments over the years. Prior to 1997, the commodity transaction data is derived based on the information provided by the developers. Thereafter, the data is obtained from the registration record from the urban (county) transaction registration office. As a result, the data of the two periods cannot be compared directly.

Since the July of 2001, the land use of commodity buildings projects for domestic sales and overseas sales in Shanghai have merged. In order to maintain the original content and statistical data and to link them with those of the past years, certain changes have been made accordingly. The content of commodity buildings for domestic sales and overseas sales have been combined.

From March 1 2003, the borderline between domestic and oversea sale of the State-owned land used for non-living properties such as commercial, travelling, entertainment, finance, service and commodity was canceled. All the domestic and foreign companies and individuals could purchase and rent.

Commencing August 31 2004, Shanghai operational land entirely implemented tendering, listing and auction as transfer methods, which are mentioned in the attached tables in the book.

During the beginning of 2005 and August 2006, the Central Government and Shanghai Municipal Government issued a number of macro-control policies and regulations on real estate market to ensure the further healthy development of property market. The related chapters in the book introduce those policies and regulations. Major policies and regulations are listed in the attached tables for reader’s reference.

The definition of major relating professional terms, statistical data statement, layout and the ways the data are obtained are stated under P.31 to 39 of the section “Technical Notes” for easy reference.

Contents of the book can be replicated, however, the information sources must be clearly stated.



综 述 Summary

在经历了政策宏观调控和上一年高位运行后,2005年上海市房地产市场发生了变化:房地产开发投资建设各项指标增幅明显收缩,商品房标准预售面积、商品房预售登记面积、存量产权房交易面积出现不同程度下降,商品房成交价格升幅进一步趋缓。房地产市场呈现与宏观调控方向基本一致的态势。



上海博物馆
Shanghai Museum

2005年,上海市政府坚决贯彻国务院办公厅发出的《关于切实稳定住房价格的通知》(国办发〔2005〕26号,简称国办26号文),继续坚持“以居住为主、以市民消费为主、以普通住宅为主”的原则,对上海市房地产市场实行合理有效的调控,重点从优化市场供应结构、抑制需求过快增长,完善住房保障体系,规范房地产市场秩序,加强市场监管等方面入手,多管齐下,取得了预期效果。

经营性用地供应规模得到有效控制,用地供应结构依照城市发展规划和市场实际情况得到进一步调整。2005年以招标、拍卖、挂牌方式出让的经营性土地面积比上年增加42%,在供地结构中,加大普通住宅用地和重大工程配套用房用地供应的力度,住宅用地供应绝大部分都在外围区域,有效地控制了高档商品房供地量,停止了别墅项目用地供应。

在1000万平方米重大工程配套住宅用地和开发得以有效落实后,上海市为加快基础设施建设步伐,继续保持适当的城市动拆迁规模。2005年中心城区和浦东新区动迁居民户数为5.26万户,较上年增加1万余户。

After experiencing the macro-control policies and witnessed heightened levels of activities of previous year, Shanghai real estate market has had changed: Real estate development and investment indicators showed signs of contraction by a certain extent. Approved pre-sale area of commodity houses, approved registration area of commodity houses and transacted area of existing stratified houses all declined respectively. The growth rate of transaction price of residential properties continued to slow down. The real estate market showed a sign of situation that basically consistent with the macro-control policy.

In 2005, to further implement "the Notice on the Stabilization of the Prices of Residential Properties" (GBF (2005) No.26) issued by the State Council and adhere to the principle "for living first citizens demand first and ordinary house first", Shanghai municipal government took steps to property and effectively control the local real estate market, particularly focusing on optimization of market supply structure, restraining excessive growth of demand, improving housing system and regulating real estate market, strengthening market supervising system and thus achieving an anticipated effect.

The supply of operational land was effectively



南京西路绿地
A Piece of Greenery along West Nanjing Road

controlled, and the supply structure was further adjusted in accordance to the city development programme and the actual situation of the market. The operational land area in 2005 remised by public listing, auction and public bidding, increased by 42% as compared to the previous year. Land supply of ordinary residential use and large ancillary facilities project was strengthened. The supply of residential use was mostly located outside the town. Meanwhile, land supply for high-end residential projects was effectively controlled and land supply for villa projects was prevented.

After the implementation of 10,000,000 m² area which was used for large ancillary facilities project on residential land, Shanghai still maintains a proper volume of resettlement in order to speed up the infrastructure construction. In 2005, the total resettlement of the city centre and Pudong New District accounts for 52,600 households, a y-o-y increase of 10,000.

According to the requirements specified in the "GBF (2005) No.26" issued by the central government and intending to meet the need of the market consumption, regulate real estate market order and restrain speculation. In 2005, the local government classified the ordinary residential and non-ordinary residential properties on the basis of (1) gross floor area (2) unit price of which were classified as 3 regionally different unit prices involved, namely, within the inner-ring road region, between inner-ring road highway and outer-ring road region and outside the outer-ring road region. Through market supply segmentation and the comprehensive measures including finance, taxation, administration, laws and regulations, the demand growth has been slowed down effectively and annual transaction volume declined compared to the previous year. And the transaction structure was adjusted to satisfy the demand of purchasing for own living. Ordinary residential transaction volume and GFA accounted for 85% and 75% of the total amount respectively.

After the market speculation and short-term investment were controlled, the prices of commodity residences shows significant decline. In 2005, Shanghai commodity residences price index rose by 9.2%, dropped by 6.6 percentage points over last year. The areas that house prices over expend, returned to a moderate level.



按照国办26号文的具体要求, 2005年, 上海从“满足消费, 规范投资, 抑制投机”出发, 切实根据本地市场实际, 对普通商品住宅和非普通商品住宅作了具体划分: (1) 在户型面积上, 划分一个界限; (2) 在单价上, 分内环区域、内外环间区域、外环以外区域, 三个区域价格档次作了明确划分。通过这样划分, 并综合运用金融、财税、行政、法律等多种手段, 有效地抑制需求过快增长, 全年商品住宅交易量较上一年明显下降, 交易结构逐步向符合满足自住消费的需求方向调整, 全年普通住宅成交套数和面积分别占到总量的85%和75%。

抑制市场投机和短期投资行为以后, 商品住宅价格涨幅回落明显。2005年上海商品住房价格指数上升9.2%, 涨幅比上年下降6.6个百分点, 部分房价涨幅过大的区域价格已经回归, 地区间的价差重新回到相对合理的区间。



布局合理的城市中心区域
The Central Part of the City

2005年,由于金融税收政策对各类购房主体购房情况和各类商品住房的转让作了相应的规定,抑制了大部分投机炒作性的二手房交易,全年存量产权房交易过户面积为1970万平方米,较上年明显下降。



俯瞰宝山新住宅
Overlook of New Residences of Baoshan District

为进一步净化市场交易环境,不断规范市场秩序,2005年上海市政府的各相关管理部门整合执法力量,开展对房地产市场的专项整治工作,从对开发企业和中介企业的市场准入、市场交易行为、房地产价格和房地产中介服务收费等各方面进行系统整治,增强对违规行为查处力度,建立对重点楼盘销售跟踪监管制度,并着力加强制度建设,完善市场管理的长效机制。

随着市场不断规范,通过加强对市场监测逐步提高市场透明度,2005年上海已先后建立了新建商品房网上备案和二手房网上交易服务两大平台,在此基础上,2005年推出了房地产交易服务网,实现“加强管理,规范交易,服务百姓”的管理目标;进一步加强了市场监测,将市场供应和交易信息按区域结构、价格进行分类并发布,把重大工程配套商品住房的供应和销售情况也纳入信息发布体系。

2005年在合理调控商品住房市场的同时,加快了多层次住房保障体系的构筑,具体体现为:(1)对家庭收入和居住条件的“双困家庭”进一步扩大廉租住房受益面,年底受益家庭达到1.8万户,其中当年新增4500余户;(2)继续实行公有住房低租金和租金减免政策,符合条件的家庭受益面约8万户;(3)多途径地解决动迁家庭居住困难,继续推进旧住房综合改造,对低收入家庭实现购房贴息,同时鼓励市民通过租售并举改善住

Hence, the inter-local price differences returned to a proper range.

In 2005, the regulation on financial and fiscal policies to all kinds of purchasing status and housing transaction controlled most of speculative transactions of second-hand houses. The area of transacted houses in the existing stocks was recorded at 19,700,000 m², a significant drop as compared to the previous year.

To further transparentize the transaction environment and rule the market, in 2005, all relative management departments of Shanghai government made conformity on executing power to renovate the real estate market



塘桥公园
Tang Qiao Park

through each aspect including the permit of development corporation and agency, market transaction, real estate price system and the charge of agency service, strengthen the power of punishment to disobedient behavior and set up the track-inspection system for some substantial projects. The system set-up was strengthened to improve the management of market.

The market continued to be improved, by strengthening market supervision and further market transparency, new commodity residences record platform and second-hand residences transaction platform were set up in 2005, on which basement, the platform for transaction service was set up to reach the goal of “strengthen the management, rule the transaction, serve the people”; further strengthen market supervision, publish the supply and transaction information by regional structure and price.

The large ancillary facilities projects should be also included in the rule.

In 2005, the commodity residences were macro-controlled, at the same time, Housing Planning System was further enhanced and optimized. (1) enlarge the low-rent benefit range to the poor families which were hard on both income and living conditions. By the end of the year, 18,000 families had received the benefit, a y-o-y increase of 4,500. (2) the policies of low-rent and no-rent for public-owned houses continued to carry out. People who met the requirements were 80,000. (3) And necessary help would be given to families with moving difficulties, continued to integrative renovation of old housing, afforded the allowance to the purchasing of low-income families, meanwhile citizens were encouraged to improve their own living condition by renting and selling.

In 2005, Shanghai macro-control of real estate market had made phases progress. To make sure that the market develop stably and healthy, the government would continue adhere for the principle of "living first, citizens demands first and ordinary house first" and "encourage consumption, rule investment and control speculation". According to the requirements of "market leading and government control" and keep the effectiveness and stability of the policies, with improvement, 7 aspects are presented as follows:

1) Strengthen the structure adjustment of residences supply, continue to increase supply of ancillary, low and middle priced commodity residences; 2) Strengthen the structure adjustment of land supply, lead the development scale, structure and speed of the real estate market; 3) Strengthen the adjustment power of tax and creditability, encourage purchasing for living uses and structure the investment market to control the speculation; 4) Strengthen the renovation power of the market and further rule the market behavior; 5) Strengthen the management on housing demolition and control the demolition scale; 6) Strengthen the construction of Housing Planning System and further intensify the government function; 7) Strengthen the supervision of real estate development process, improve the management of each phase of real estate development and construction. Meanwhile, the real estate statistic and information public system should also be improved.



世纪大道
Century Boulevard

房条件。

2005年,上海房地产市场的宏观调控已取得了阶段性的成果,为了确保房地产市场能够持续稳定健康的发展,政府将继续坚持“以居住为主,以市民消费为主,以普通住宅为主”和“鼓励消费,规范投资,抑制投机”的原则,按照“市场主导,政府调控”的要求,保持政策的连续性和稳定性,并不断加以细化和完善。其主要举措有:(1)加大住房供应结构的调整力度,继续增加中低价位,中小套型普通商品住房供应量;(2)加大土地供应的调整力度,合理引导房地产市场发展的规模、结构和节奏;(3)加大税收和信贷政策的调节力度,继续鼓励自住性需求,合理规范投资行为,坚持抑制投机炒作;(4)加大房地产市场秩序的整治力度,进一步规范房地产市场行为;(5)加大房屋拆迁管理力度,继续适度控制房屋拆迁规模;(6)加大住房保障体系的建设力度,进一步强化政府的政府保障职能;(7)加强房地产开发建设全过程监测,对房地产开发建设的不同阶段实行精细化管理,同时完善房地产统计和信息披露制度。



静安区市貌
New Looks of Jing'an District



房地产市场发展环境 Development Environment of the Real Estate Market

2005年是实施“十五”计划的最后一年,上海经济平稳较快增长。全年实现上海市生产总值(GDP)9154.18亿元,按可比价格来计算,比上年增长11.1%,连续第14年保持两位数增长。全年第一产业实现增加值80.34亿元,比上年下降8.9%;第二产业实现增加值4452.92亿元,比上年增长11.5%;第三产业实现增加值4620.92亿元,增长11.1%。二、三产业共同推动全市经济增长。全年实现房地产业增加值676.12亿元,比上年下降4.1%。



永景住宅
Residence with Water View

2005年全市财政收入4095.8亿元,比上年增长13.9%。全年地方财政收入1433.9亿元,按可比口径计算,比上年增长20.7%。其中,全市房产税34.1亿元,比上年增长25.9%。消费市场销售稳中趋旺,全年完成社会消费品零售总额2972.97亿元,比上年增长11.9%。其中,餐饮业、家居和通信类商品消费增长强劲。

至2005年末,全市金融机构各项存款余额23320.86亿元,当年新增3142.83亿元;贷款余额16798.12亿元,当年新增1785.93亿元。个人消费贷款余额2814.16亿元,当年新增141.5亿元。其中住房按揭贷款余额2644.94亿元,当年新增199.4亿元。

Over 2005, the last year of the 10th Five-Year Plan, Shanghai economy continued to grow steadily and rapidly. The Gross Domestic Product (GDP) was recorded at RMB915.418 billion, a y-o-y growth of 11.1%, in terms of comparable price. Year 2005 was the 14th straight year of double-digit growth. In the whole year, the primary industry reached RMB8,034 billion, a y-o-y drop of 8.9%; the secondary industry reached RMB445.292 billion, a y-o-y growth of 11.5%; the tertiary industry reached RMB462.092 billion, increased by 11.1%. Shanghai economy was appreciated by the secondary and tertiary industry. Real estate industry reached RMB676.12 billion, a drop of 4.1%.

In 2005, the fiscal revenue was registered at RMB409.58 billion, a y-o-y increase of 13.9%. The local fiscal revenue reached RMB143.39 billion, a y-o-y increase of 20.7%, calculated by compatible criterion. Real estate tax reached RMB3.41 billion, increased by 25.9% comparing with last year. Consumer expenditures showed the rise in a fast rate with stability. Shanghai retail sales in 2005 was recorded at RMB297.297 billion, a y-o-y rise by 11.9%. F&B industry, house wears and telecommunication products continued to witness strong demand.

At the end of 2005, the total savings by financial institutions was at RMB2,332.086 billion, a y-o-y increase of RMB314.283 billion; the total debt was RMB1,679.812 billion, a y-o-y increase of RMB178.593 billion. Consumer consumption debt was RMB281.416 billion, a y-o-y increase of RMB14.15 billion, with RMB264.494 billion on housing mortgage, a y-o-y increase of RMB19.94 billion.

In 2005, fixed assets investment rose in a proper rate. Annual fixed assets investment reached RMB3,542.55 billion, a y-o-y growth rate of 14.8%, 11 percentage points less than last year. Fixed assets investment structure changed, the annual investment for infrastructure reached RMB88.574 billion, a rise of 31.7% compared with last year. In view of investors, state-owned investment accounted for 35% of the total fixed assets, recorded at RMB124.027 billion, a y-o-y growth of 29.9%; foreign, Hong Kong, Taiwan and AoMen investments made up 27.6% of the total investment, recorded at RMB64.031

billion, a y-o-y drop of 24.8%.

The construction of a functional urban infrastructure network made a new progress. Within the year of 2005, many items such as Yangshan Deep-water Port Ph.I, Pudong Railway Phase I, Metro Line 4, Xiangyin Road Tunnel, the renovation of Yangtze River Deep-water Route Phase II, Donghai Bridge etc. were completed. Xinwei Highway A6 and Tingfeng Highway A7 were completed; the whole length of the highway network was reached 560km.

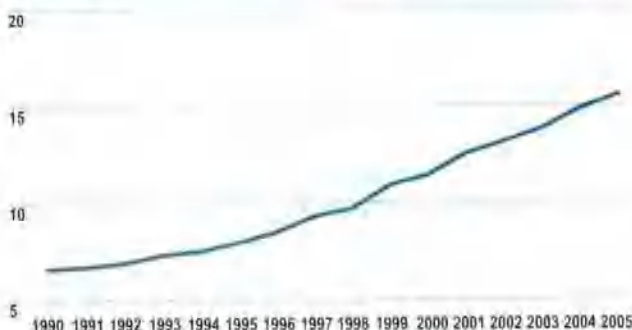
Urban traffic capacity continued to be improved with the enhancement of the construction of traffic facilities. During the year, 169 bus routes were newly-set or adjusted; the whole length of railway rose from 121.23km to 148km (including the Maglev Train). At the end of 2005, the number of bus routes reached 940 with total buses of 18,000; the number of taxis reached 48,000. Public transport flow reached 4.409 billion person-times during the year, an increase of 0.3%, y-o-y. Hereinto, rail transport flow was recorded at 594 million person-times, rose by 23.8% compared with 2004; bus flow reached 2.781 billion, a y-o-y drop of 2%. The renovation of urban traffic was on a fast pace. Four bus use only lines were newly set in city centre, the whole length was up to 21.6 km. 28 bottle-neck roads were renovated.

The city greenery had been further improved. Annual newly built greenery reached 2,100 hectares, 1,000 hectares of which was public green area. Within 2005, many public green areas in the city were completed including Jiuzi Park, Luocheng Road Greenery, Shanghai South-Station Plaza Greenery, New Jiangwan Town Greenery and several shore greenery along the Suzhou

上海市区人均居住水平变化

Per Capita Changes in Living Conditions in Urban Areas of Shanghai

单位: 平方米



资料来源: 上海市统计局
Source: Shanghai Municipal Statistical Bureau

2005年, 全市固定资产投资保持适度增长。全年完成全社会固定资产投资3542.55亿元, 比上年增长14.8%, 增幅比上年回落11个百分点。2005年全市固定资产投资结构发生新变化, 城市基础设施投资885.74亿元, 比上年增长31.7%。从投资主体看, 其中国有经济投资1240.27亿元, 比上年增长29.9%, 占全社会固定资产投资的比重为35%; 外商及港澳台投资640.31亿元, 比上年下降24.8%, 所占比重为27.6%。

枢纽型、功能性、网络化的城市基础设施建设取得新进展。年内洋山深水港一期, 浦东铁路一期, 轨道交通4号线, 翔殷路隧道、长江口深水航道治理二期, 东海大桥等重大城市基础设施项目相继建成。建成A6新卫, A7亭枫等高速公路, 高速公路网通车里程达到560公里。

公共交通设施不断完善, 城市交通运营效能继续提高。年内新辟和调整公交线路169条; 轨道交通运营线路长度由121.23公里增加到148公里(包括磁浮线)。至2005年末, 全市公交线路达到940条, 公交运营车辆1.8万辆, 运营出租车4.8万辆。全年市内公共交通客运量44.09亿人次, 比上年增长0.3%。其中, 轨道交通客运量5.94亿人次, 增长23.8%; 公共汽电车客运量27.81亿人次, 比上年下降2%。公共交通设施更新加快。年内中心城区新增4条总长21.6公里的公交专用道, 改造完成28个瓶颈、堵头道路。

城市绿化建设加快推进。全年新建绿地2100公顷,



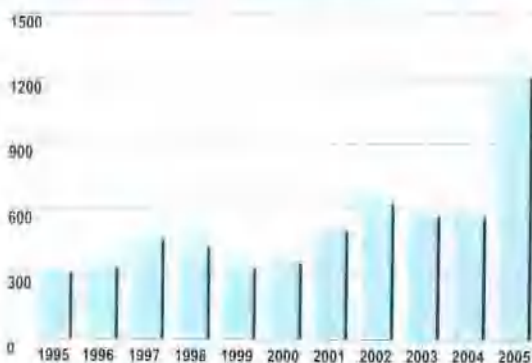
佳泰花园
Jia Tai Garden



动拆迁面积完成情况

Situation of Completion of Demolition and Resettlement

单位：万平方米

Unit: 10000 m²

资料来源：上海市房屋土地管理局

Resource: Shanghai Municipal Housing, Land and Resource Administration Bureau

其中公共绿地1000公顷。年内相继建成并开放了九子公园、罗城路绿地、上海南站广场绿地、新江湾城绿地以及苏州河沿线多块滨河绿地。全年新建居住区绿地422公顷。至2005年末，城市绿化覆盖率达到37%，人均公共绿地面积达到11平方米，全市实行免费开放的公园达到122座。

加大污染治理和环境保护力度，整体生态环境得到改善。2005年用于环境保护的资金投入281亿元，相当于全市生产总值的比例达到3.07%。苏州河环境综合整治二期工程基本完成。年内新建倒卧式河口水闸1座，泵站12座，改造泵站4座，苏州河水系有594家单位的污染源被截流，苏州河干流基本消除黑臭，主要水质指标已稳定达到景观水标准。全年整治中心城区河道76条（段）共60公里，中心城区河道水质明显改善。大气环境质量明显提高。全年空气质量优良天数达322天，空气质量优良率达到88.2%。年内新建1996个生活垃圾分类收集站和90个生活垃圾小型压缩站。

城乡居民收入持续增长。2005年全市职工年平均工资26823元，比上年增长9.9%；城市居民家庭人均可支配收入18645元，比上年增长11.8%；农村居民家庭人均可支配收入8342元，增长10.7%。全年城市居民人均消费支出13773元，比上年增长9%，其中服务性消费支出4447元，增长8.9%；农村居民人均消费支出7265元，增长14.8%，其中服务性消费支出2359元，增长13.7%。居民储蓄持续增加，2005年末全市居民储蓄存

River, 422 hectares new greeneries at residential communities were also completed. By the end of 2005, urban greenery coverage has reached 37%; public green area per capita has reached 11m² with 122 parks opening freely to the public.

The overall quality of the urban living environment has been greatly improved by strengthening the pollution prevention and environmental protection. In 2005, the input for environmental protection was accounted to RMB28.1 billion, equaling to 3.07% of GDP. Suzhou Creek Maintenance Project Phase II had almost completed. 1 up-down bayou floodgate and 12 pumping stations were newly set and 4 pumping stations were renovated. 594 pollution sources on Suzhou River were cut and the water quality reached standard level. 76 water ways with a total length of 60 km were cleaned up and water quality has been further improved. Meanwhile, the air quality was significantly improved. Air Quality Index was registered at Grade II or above, representing 88.2% days of the year reached good air quality standard, a total number of 322 days. By the year-end, 1996 classified rubbish collection stations and 90 small scale rubbish compression stations were built.

The income of urban and rural residents had been in an upward trend. In 2005, average annual salary was RMB26,823, an increase of 9.9% from the previous year. Per capita disposable income of urban households was RMB18,645, a rise of 11.8% comparing with last year; Per capita disposable income of rural households was RMB8,342, a rise of 10.7% comparing with last year. The average consumer consumption for people living in the urban area was RMB13,773, a y-o-y increase of 9%, among which RMB4,447 was for services use, a y-o-y increase of 8.9%; the average consumer consumption for people living in the rural area was RMB7,265, a y-o-y increase of 14.8%, among which RMB2,359 was for services use, a y-o-y increase of 13.7%. Residents' saving deposit continued to increase. At the year-end, the saving deposit balance of urban and rural residents reached RMB843,249 billion, a y-o-y increase of RMB147.135 billion.

Residential quality was continued to improve. In 2005, the investment in Shanghai residential development was RMB92.973 billion, an increase of 1.7% comparing

with last year. The completion of ancillary public facilities for residential housing covered an area of 2,446,000m². The renovation of obsolete areas was on the focus of the urban planning scheme, and to make sure the appropriate on the balance of resettlement and demolition. Annual approved resettlement area increased by 91.1% and recorded at 8,518,500m²; 74,500 households were resettled, increased by 34.5%, among which 17,900 households of Expo Section were resettled making up 96.9% of all the contracts.

By the end of 2005, gross floor area per capita increased by 0.9m² to 21.3m²; net floor area per capita rose by 0.7m² to 15.5m². 93% of residents lived in fully furnished houses.

The low rent housing system was further implemented and turned more perfect, from which a cumulative of 18,074 low-income families were benefited. 15,500,000m² of old houses were completely renovated, which further improved the living conditions of 413,000 families.

In 2005, Shanghai real estate investment continued to grow steadily. The total investment amount in real estate was RMB124.986 billion, a growth of 6.1% over last year, among which investment in residences accounted for 73.85% and recorded at RMB 92.084 billion. The construction area increased by 10.3%, recorded at 104,623,900 m², among which residences accounted for 77.3% and registered at 80,918,500m². New construction area descended by 4.4%, the first drop in the past 6 years, recorded at 30,554,700 m², among which residences accounted for 81.4% and recorded at 24,857,500m². The completion area descended by 10.1%, first drop since 2000, recorded at 30,957,400 m², among which residences accounted for 88.5% and recorded at 27,399,100 m².

款余额 8432.49 亿元, 当年新增 1471.35 亿元。

居民居住水平不断提高。2005 年全市完成住宅建设投资 929.73 亿元, 比上年增长 1.7%。建成住宅配套的公共服务设施面积 264.4 万平方米。旧区改造突出重点, 动拆迁保持合理规模。全年拆除住宅建筑面积 851.85 万平方米, 比上年增长 91.1%; 动迁居民 7.45 万户, 增长 34.5%, 其中世博园区完成居民动迁 1.79 万户, 总签约率达到 96.9%。

至 2005 年末, 城镇居民人均住房使用面积 21.3 平方米, 比上年末增加 0.9 平方米; 人均住房居住面积 15.5 平方米, 增加 0.7 平方米。居民住宅成套率达到 93%。

住房保障体系进一步完善, 廉租住房制度受益面扩大。至 2005 年末, 享受廉租住房政策的家庭达到 18074 户。年内完成平改坡综合改造 386 万平方米。完成旧住房综合整治 1550 万平方米, 使 41.3 万户家庭的居住条件进一步改善。

2005 年, 上海市房地产开发投资继续增长, 增幅趋缓。全市完成房地产开发投资额 1246.86 亿元, 比上年增长 6.1%, 其中住宅开发投资额 920.84 亿元, 占总量的 73.85%; 全市商品房施工面积 10462.39 万平方米, 增长 10.3%, 其中住宅施工面积 8091.85 万平方米, 占总量的 77.3%; 新开工面积 3055.47 万平方米, 近 6 年来首次出现回落, 同比减少为 4.4%, 其中住宅新开工面积 2485.75 万平方米, 占总量的 81.4%; 全市商品房竣工面积 3095.74 万平方米, 自 2000 年以来第一次出现减少, 同比降幅为 10.1%, 其中住宅竣工面积 2739.91 万平方米, 占竣工总面积的 88.5%。



云间水庄别墅
Yun Jian Shui Zhuang Villa

土地市场 Land Market

自1988年第一幅土地使用权有偿出让以来,到2005年底,上海市共有偿出让各类土地12707幅,总面积43666.37公顷。十多年来各类经营用地相继纳入有偿出让的轨道,依照土地供应总量控制和加强各类土地供应计划的原则,根据市场供求情况,继续实行各类用地供应结构的适度调控,土地供应和流转机制进一步完善,经营性土地出让形式改为招拍挂方式。



国际丽都城
International Lida City

2001年8月,上海市正式实施内销与外销商品住宅用地并轨,形成统一的大市场之后,上海土地市场进一步得以规范。2005年,上海市继续按照“优化结构,控制增量,盘活存量”的原则,不断调整土地供应的结构,土地供应继续向普通商品住房和配套商品房倾斜,当年推出1000公顷配套商品房用地,实现当年开工,当年销售,达到了预期目标。同时,严格控制高档商品住房的供地,停止别墅项目供地。

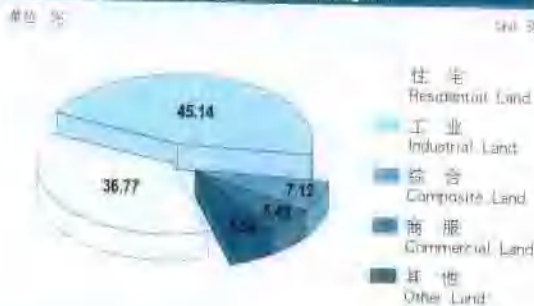
2005年,上海市出让土地1539幅,土地面积6491.35公顷,比上年减少9%。各类出让土地中,工业用地面积占据最大份额,为2930.47公顷,占45.1%,所占份额比上年减少2.3个百分点;住宅用地面积排在第二位,共2387.13公顷,占36.8%,所占份额比上年增加2.3个百分点。住宅用地中,普通住宅用地占了绝大部分。各区县中,松江区、闵行区、奉贤区和宝山区出让土地面积占全市比重均超过10%,分别以16.3%、16.2%、10.6%和10.1%,排在前四位。

Since the first grant of land use rights in 1988, the total number of plots of land granted for various usages in Shanghai was 12,707 with a total area of 43,666.37 hectares by the end of 2005. Over the past ten years, various types of operation land were systematically classified within the land grant system. According to the total land supply control policy and the enhanced land supply planning, the land granted for various usage of land was adjusted according to the market demand and supply conditions. The policy on land supply and transfer was further optimized, and the main mode of land transfer had changed to public bidding auction, and listing.

In August 2001, Shanghai domestic and overseas residential land market was merged. Upon merging of market, Shanghai land market became more standardized. In 2005, on the basis of "optimizing structure, controlling increase, activating existing stock", the macro-control policies were further enhanced, with an aim to optimize the land supply, increase the supply for common residences and ancillary commodity houses. 1,000 hectares area of ancillary commodity houses were provided. The expected goal to sale in the same year of launching was reached. Meanwhile, the supply for high-end residences was limited and the supply for villa developments was halted.

In 2005, the newly granted land in Shanghai was 1,539 plots with total area of 6,491.35 hectares, a drop of 9% as compared to last year. Among which, the largest part was 2,930.47 hectares for industrial land, representing 45.1% of the total area, a drop of 2.3% as compared to

2005年上海市出让土地面积用途比例
Classification of Land Grant Area in Shanghai



资料来源:上海市房屋土地管理局
Reference: Shanghai Municipal Housing Land and Real Estate Administration Bureau