Ci Report

Zone Report

District: Barreiro

Parish: UF Barreiro e Lavradio

ABOUT THE ZONE REPORT

The Zone Report aims to present the key property market indicators in a systematic way. It embraces a wide and integrated range of topics, with a 360 degrees view of the sector, using data exclusive to Ci, obtained directly from databases it manages or by methods of estimation and forecast that it has developed. The report stands out for its geographic detail, enabling a parish-by-parish analysis, as well as on a district/borough scale.

ABOUT CI

Ci- Confidencial Imobiliário is an independent entity, focused on meeting the information needs of property market professionals, within the context of decision making on investments and sales strategies. It specialises in producing and disseminating market analysis indicators, having exclusive databases and indexes on the supply and sales of properties at a detailed local parish level.

TIMEFRAME
2019/4

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Table 1 — Socio-Demographic Description   2018

		Parish		District		National
		Value	**Ranking**	**Value**	**Ranking**	**Value**
		(a)	(b)	(a)	(b)	(a)
Q1.1	Area (km²)	8	2.235º	36	271º	89.102
Q1.2	Population (No.)	21.877	98º	78.764	30º	10.047.621
Q1.3	Population Density (No./km²)	2.826	81º	2.164	9º	113
Q1.4	Families (No.)	9.338	92º	33.174	26º	3.869.188
Q1.5	Persons/Family (No.)	2	2.333º	2	221º	3
Q1.6	Purchasing Power Index (Portugal=100)			102	28º	101
Q1.7	Unemployed (No.)			3.128	26º	315.093
Q1.8	Unemployed- Pressure Index (PT=100)			127	58º	100

Source: Ci, Estimated by Ci, Infoportugal, INE, IEFP

Table 2 — Structure of the Housing Stock   2015

		Parish		District		National
		Value	**Ranking**	**Value**	**Ranking**	**Value**
		(a)	(b)	(a)	(b)	(a)
Q2.1	No. of properties	12.252	99º	41.682	32º	5.621.098
From Which:						
Q2.2	Properties of Seasonal Use	1.082	191º	3.633	93º	1.098.470
Q2.3	Dilapidated Properties	1.452	22º	3.593	11º	293.279
Q2.4	Regular Market (Habitable and housing)	9.718	97º	34.456	27º	4.229.349
Q2.5	Surplus Properties (No. Families - Regular Market)	380	239º	1.282	81º	360.663
Q2.6	% of Oversupply (Surplus/Regular Market)	3,9%	1.904º	4,1%	251º	8,5%

Source: INE, Estimated by Ci

Table 3 — Properties for sale   2019/4

		Parish		District		National
		Value	**Ranking**	**Value**	**Ranking**	**Value**
		(a)	(b)	(a)	(b)	(a)
Q3.1	No. of Properties in Supply	85	139º	283	42º	48.945
Structure of Supply per State of Use						
Q3.2	New Properties	2,4%		2,8%		27,3%
Q3.3	Used Properties	97,6%		97,2%		72,7%
Structure of Supply per Type						
Q3.4	Up to 1 bedroom apartments	1,2%		7,8%		13,4%
Q3.5	Two-bedroom apartments	49,4%		43,1%		25,5%
Q3.6	Three-bedroom apartments	34,1%		29,7%		21,5%
Q3.7	Four or more bedroom apartments	5,9%		4,2%		6,6%
Q3.8	Up to three-bedroom houses	8,2%		6,7%		17,6%
Q3.9	Four or more bedroom houses	1,2%		8,5%		15,4%

Source: SIR – Residential Information System

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Table 4 — Dynamic of New Development   2018

		Parish		District		National
		Value	**Ranking**	**Value**	**Ranking**	**Value**
		(a)	(b)	(a)	(b)	(a)
Q4.1	No. of houses in pipeline (Project) (2016-2018)	54	287º	128	120º	87.319
Q4.2	% Up to 1 bedroom	12,5%		6,9%		18,4%
Q4.3	% 2 bedroom apartments	30,4%		19,2%		23,2%
Q4.4	% 3 bedroom apartments	46,4%		51,5%		40,4%
Q4.5	% 4 or more bedroom apartments	7,1%		20,8%		15,5%
Q4.6	% With A or A+ energy certificate	14,3%		34,6%		41,7%

Source: Ci/ADENE

Table 5 — Asking Prices for Housing per Range   2019/4

			Low	Below Average	Average	Above Average	High
			Percentile 5	**1st Quartile**	**Average**	**3rd Quartile**	**Percentile 95**
			(a)	(b)	(c)	(d)	(e)
District:							
Asking Price/m²	Q5.1	No. of dwellings in supply	804€	1.027€	1.278€	1.431€	2.000€
	Q5.2	New Properties			1.511€		
	Q5.3	Used Properties	798€	1.022€	1.271€	1.431€	2.000€
	Q5.4	New dwellings asking price vs Used dwellings asking price			18,9%		
Asking Price/Dwelling	Q5.5	Up to 1 bedroom apartments	29.700€	49.250€	65.064€	75.000€	124.350€
	Q5.6	Two-bedroom apartments	50.750€	69.375€	89.010€	104.925€	138.775€
	Q5.7	Three-bedroom apartments	74.625€	97.500€	128.670€	149.500€	188.500€
	Q5.8	Four or more bedroom apartments		166.000€	182.125€	218.500€	
	Q5.9	Up to three-bedroom houses	30.000€	85.000€	156.737€	220.000€	348.000€
	Q5.10	Four or more bedroom houses	114.112€	245.000€	355.002€	388.750€	947.500€
Parish:							
Asking Price /m²	Q5.11	No. of dwellings in supply	862€	1.011€	1.333€	1.550€	2.341€
	Q5.12	New Properties					
	Q5.13	Used Properties	862€	1.005€	1.315€	1.516€	2.114€
	Q5.14	New dwellings asking price vs Used dwellings asking price					
Asking Price/Dwelling	Q5.15	Up to 1 bedroom apartments					
	Q5.16	Two-bedroom apartments	50.000€	64.975€	92.709€	110.625€	139.765€
	Q5.17	Three-bedroom apartments	70.000€	128.500€	141.007€	153.500€	238.750€
	Q5.18	Four or more bedroom apartments			188.600€		
	Q5.19	Up to three-bedroom houses			126.357€		
	Q5.20	Four or more bedroom houses					

Source: SIR – Residential Information System

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Table 6 — Dynamic of Valuation and Take-up   2018: Q6.1 2019/4: Q6.2 a Q6.13

		Parish		District		National
		Value	**Ranking**	**Value**	**Ranking**	**Value**
		(a)	(b)	(a)	(b)	(a)
Q6.1	Number of deeds	412	107º	1.272	35º	147.144
Q6.2	Take-up Time (months)	5	336º	5	155º	6
Demand Structure						
Q6.3	New Properties			0,2%		5,1%
Q6.4	Used Properties	100,0%		99,8%		94,9%
Q6.5	Up to 1 Bedroom apartments	8,6%		13,6%		12,9%
Q6.6	Two-bedroom apartments	57,0%		50,5%		34,8%
Q6.7	Three-bedroom apartments	28,1%		29,2%		25,1%
Q6.8	Four or more bedroom apartments	2,3%		1,7%		4,6%
Q6.9	Up to three-bedroom houses	3,1%		2,7%		14,4%
Q6.10	Four or more bedroom houses	0,8%		2,2%		8,3%
Valuation Index (Micro-Indices CI)						2019/1
Q6.11	Rate to 1 year			25%	6º	16%
Q6.12	Rate to 3 years			58%	10º	51%
Q6.13	Rate to 5 years			77%	13º	64%

Source: SIR – Residential Information System, Estimated by Ci, Micro-índices Ci

Table 7: Transaction Prices for Housing per range   2019/4

			Low Percentile 5	**Below Average** 1st Quartile	**Average** Average	**Above Average** 3rd Quartile	**High** Percentile 95
			District				
Value/m²	Q7.1	Total	526€	775€	958€	1.124€	1.398€
	Q7.2	New Properties					
	Q7.3	Used Properties	525€	775€	957€	1.124€	1.399€
			Parish				
	Q7.4	Total	524€	716€	932€	1.104€	1.421€

Source: SIR – Residential Information System

Table 8 — Residential Rental

		Parish		District		National
		Value	**Ranking**	**Value**	**Ranking**	**Value**
		(a)	(b)	(a)	(b)	(a)
Q8.1	No. of properties in supply/No of plots on offer	10	84º	31	22º	4.035
Q8.2	Rent/m² - Asking Price	9,2€	64º	8,8€	16,0º	11,8€
Q8.3	Implicit Gross Yield					6.7%

Source: SIR – Residential Information System

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Table 9 — Commercial Property   2019/1

	Parish		District		National
	Value	Ranking	Value	Ranking	Value
	(a)	(b)	(a)	(b)	(a)
Offices					
Q9.1 Monthly Rent/m²					10,1€
Q9.2 Supply Area (m²)					97.067
Street Shop Rental					
Q9.3 Monthly Rent/m²					9,1€
Q9.4 Supply Area (m²)					75.842
Warehouses/Logistics					
Q9.5 Monthly Rent/m²					3,3€
Q9.6 Supply Area (m²)					497.125

Source: Ci/Lojas.com.pt, Escritórios.com.pt, Industrial.com.pt

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METAINFORMAÇÃO:

About SIR: SIR is an exclusive service from Ci which collates information property by property on the commercial activity from a pool of more than 600 developers and estate agents, developing micro-statistics on supply and sales. In this way it generates indicators on transaction prices, review rates, discount rates and take-up times, locally, per segment and typology. Each company receives a tailor-made report benchmarked to the market. All the information is treated with respect under confidentiality rules and statistical secrecy, blocking the dissemination of a particular company's data. The reports can only be accessed by the companies who are members of the pool.

About the Ci Micro-Indices: Ci micro-indices enable the various of housing prices to be followed on a local/parish scale, dividing the market up between detached houses and apartments.
It is based on data from the site LardoceLar.com, but it has its own distinct methodology, which takes into account the geographical scope of the results. The Ci micro-indices benefit from historic information from Confidencial Imobiliário which have been producing indices since 1988.

About Ci/ADENE data: The Ci/ADENE statistics are a result of treatment made by Ci on data regarding the energy efficiency certificates issued by ADENE- Portuguese Energy Agency, more specifically the PCEs (Energetic Pre-Certificates). These documents include the municipal planning permission process for works, it not being permitted for a project to obtain planning permission without this document being produced by the developer. The producing of the PCEs is a legal requirement, there being a PCE issued per fraction. These indicators reflect the dynamics of investment intentions, being made up of information of a strategic nature for those planning new projects or developing some related commercial activity.

Variable Code	Variable / Topic	Concepts / Note on Methodology
Q1.1	Area (km2)	Source: Infoportugal
Q1.2	Population (No.)	Source: INE National Statistics Institute (Censos 2011)
Q1.3	Population Density (No./km2)	Ratio Q1.2/Q1.1
Q1.4	Families (No.)	Source: INE National Statistics Institute (Censos 2011)
Q1.5	Persons/Family (No.)	Ratio Q1.2/Q1.4
Q1.6	Purchasing Power Index (Portugal=100)	Purchasing Power Index 2015 Source: INE National Statistics Institute
Q1.7	Unemployed (No.)	Source: IEFP (Institute of Employment and Professional Training)
Q1.8	Unemployed- Pressure Index (PT=100)	Comparing the ratio Q1.7/Q1.2 in the district with the like-for-like ratio on mainland Portugal
Q2.1	No. of Properties in the Stock	Estimated by Ci. Base Information: Census 2011 Sources: INE National Statistics Institute, Ci
Q2.2	Properties for Seasonal Use	Source INE, Census 2011
Q2.3	Dilapidated properties or 2nd Home	Ci Estimated, based on the Census 2011, considering dilapidated buildings and the average number of properties per buildings per locality/parish
Q2.4	Regular Market (Habitable and housing)	Habitable market and permanently occupied (Q2.1-Q2.2-Q2.3)
Q2.5	Surplus Properties (Regular Market - No. Families)	Excess of habitable properties and 1st properties compared to the number of families (Q2.4-Q1.4)
Q2.6	Surplus Properties (Surplus/Regular)	Ratio Q2.5/Q2.4
Q3.1	No. of Properties in Supply	Source: SIR – Residential Information System
Q3.2 and Q3.9	Structure of Supply per State of Use	Source: SIR – Residential Information System - impact of each strata on total supply
Q4.1 to Q4.6	No. Houses in Pipeline (Project)	Source: Ci/ADENE- measures the portfolio of projects in the pre-planning permission phase (with DCR issued by ADENE)
Q5.1 to Q5.20	House Prices per Category	Source: SIR – Residential Information System
Q5.4 and Q5.14	New Values vs Used Values	Percentage difference between the average asking price of new dwellings and the average asking price of used dwellings
Q6.1	No. of deeds	Ci Forecast. Information basis: on the No. of buildings transacted and volume of local offer/supply Sources: INE, Estimated by Ci
Q6.2	Take-up Time (months)	Source: SIR – Residential Information System (Number of months between the property listing and the transaction moment)
Q6.3 to Q6.10	Demand Structure	Source: SIR – Residential Information System
Q6.11 to Q.13	Valuation Indices (Ci Micro-Indices)	Source: Ci Micro-Indices- measures the accumulated rise in property prices at 1, 3 and 5 years
Q7.1	Average Sale Price/m²	Source: SIR- calculation based on the sale price reported by the pool of developers and estate agents
Q7.2	Discount Rate	Source: SIR- measures the average difference between the last offer value and the final sale price
Q7.3	Discount and Review Rate	Source: SIR- measures the average difference between the initial offer and the final sale price
Q7.4	Take-up Time (months)	Source: SIR- time in months from the time the property came onto the market to the exchange of sale-purchase contract
Q8.1	No. of properties in supply/No. of plots on offer	Source: SIR – Residential Information System
Q8.2	Rent/m²/Month	Source: SIR – Residential Information System
Q8.3	Bid Yield (National Average)	Source: SIR – Residential Information System
Q9.1 and Q9.2	Office Rental	Source: Ci/escritorios.com.pt
Q9.3 and Q9.4	Street Shop Rental	Source: Ci/lojas.com.pt
Q9.5 to Q9.6	Warehousing/Logistics Rental	Source: Ci/industrial.com.pt