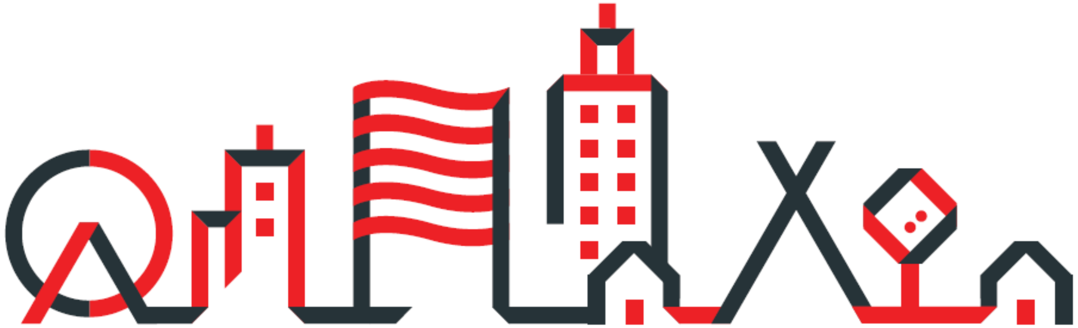
SECOVI SP
A CASA DO MERCADO IMOBILIÁRIO

Panorama do Mercado Imobiliário

Celso Petrucci

Economista-Chefe do Secovi-SP

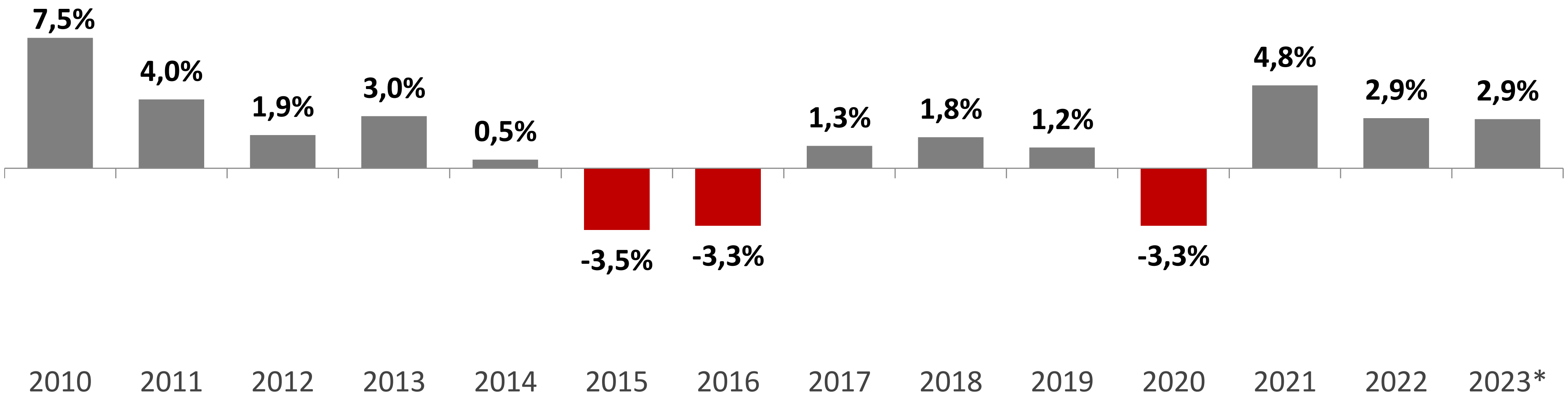
Economia



PIB - Brasil

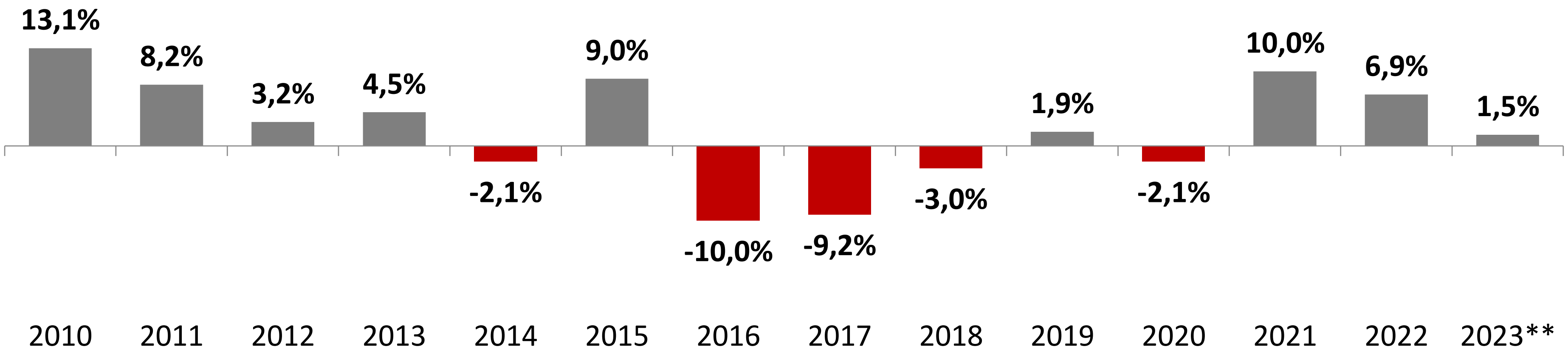
PIB Total

crescimento anual (%)



PIB Construção Civil

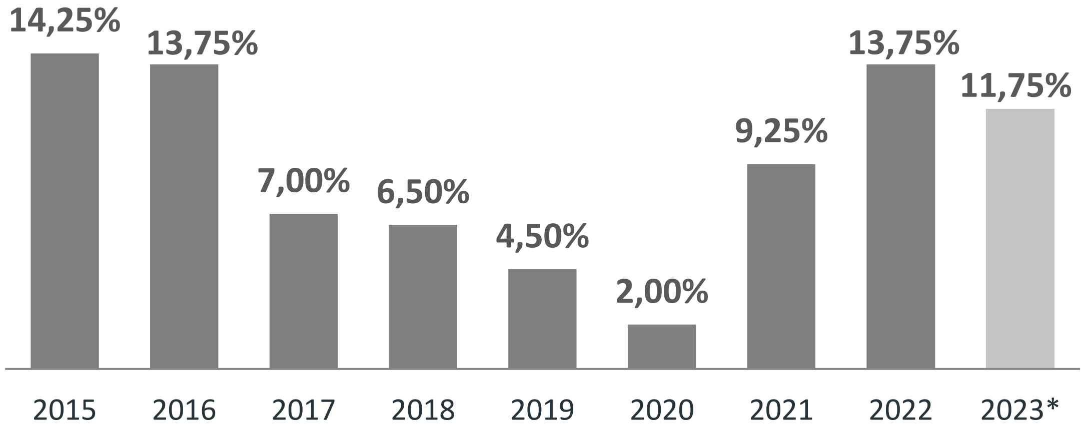
crescimento anual (%)



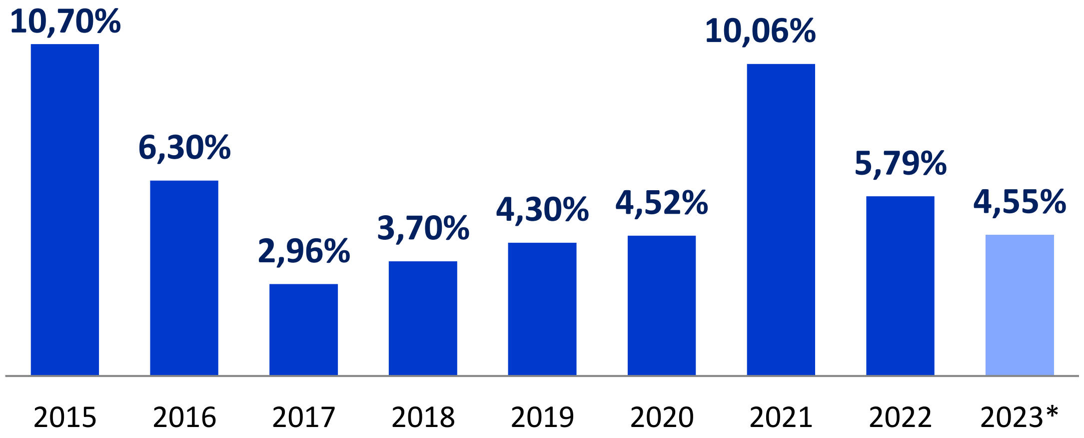
*Estimativa: Banco Central (17/11/2023)
** Estimativa CBIC (jul/2023)

Taxa de juros (Meta Selic) e Inflação (IPCA)

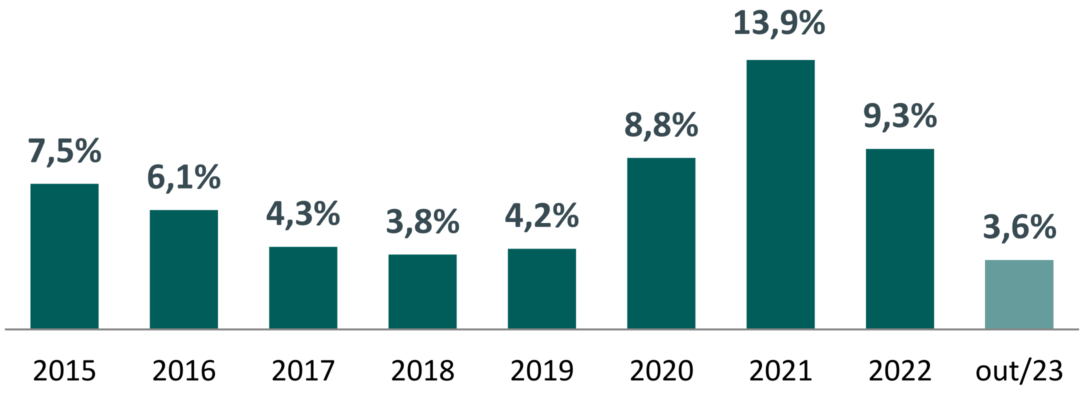
Taxa Selic



IPCA

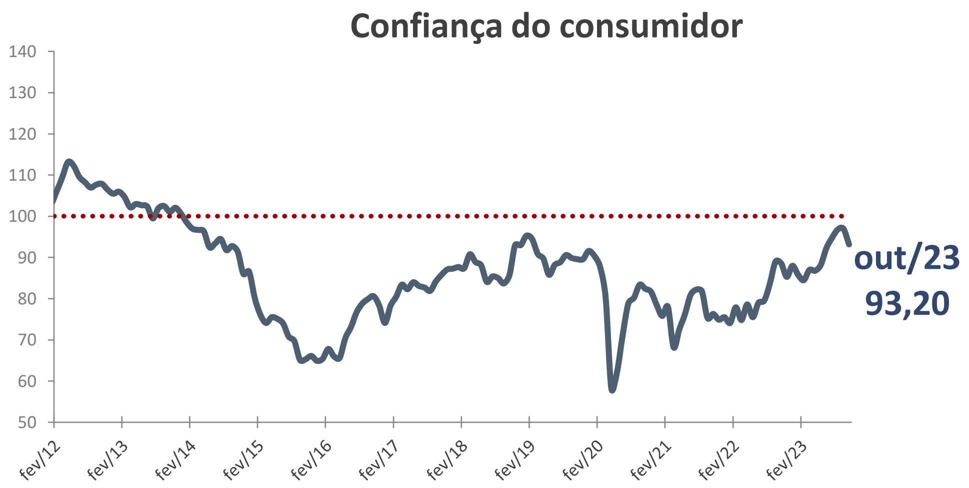


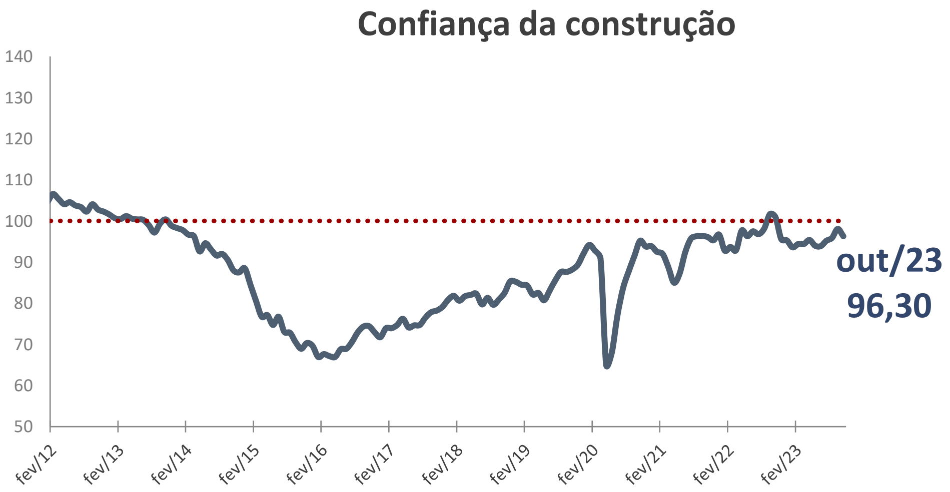
INCC – Índice de Custo da Construção

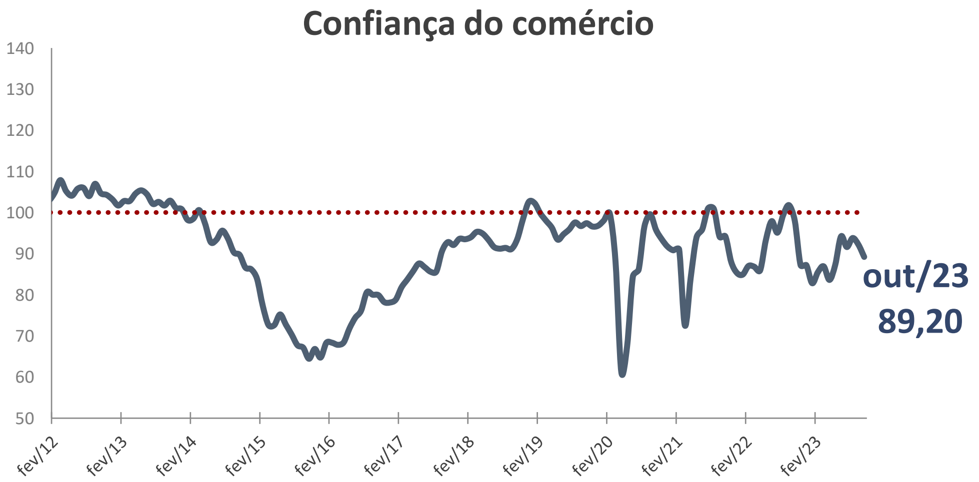


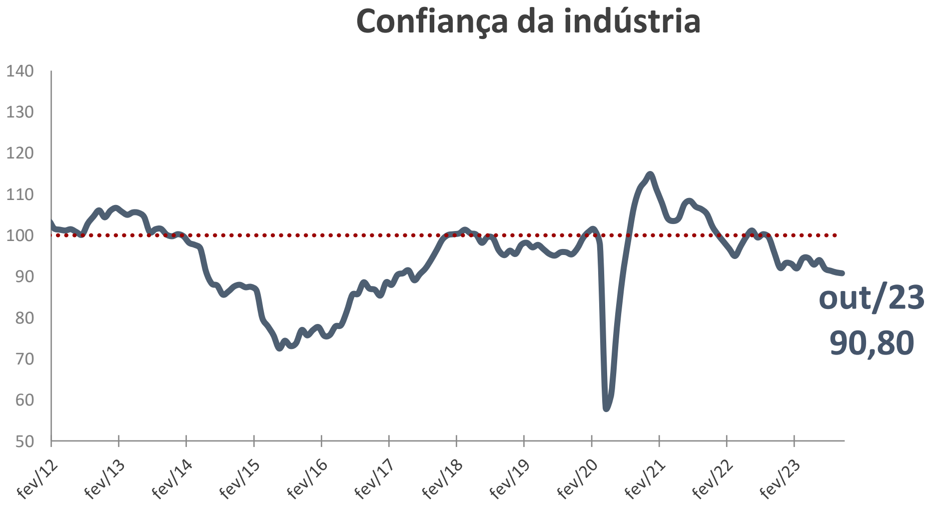
***Estimativa: Banco Central (17/11/2023)**

Índices de Confiança – com ajuste sazonal





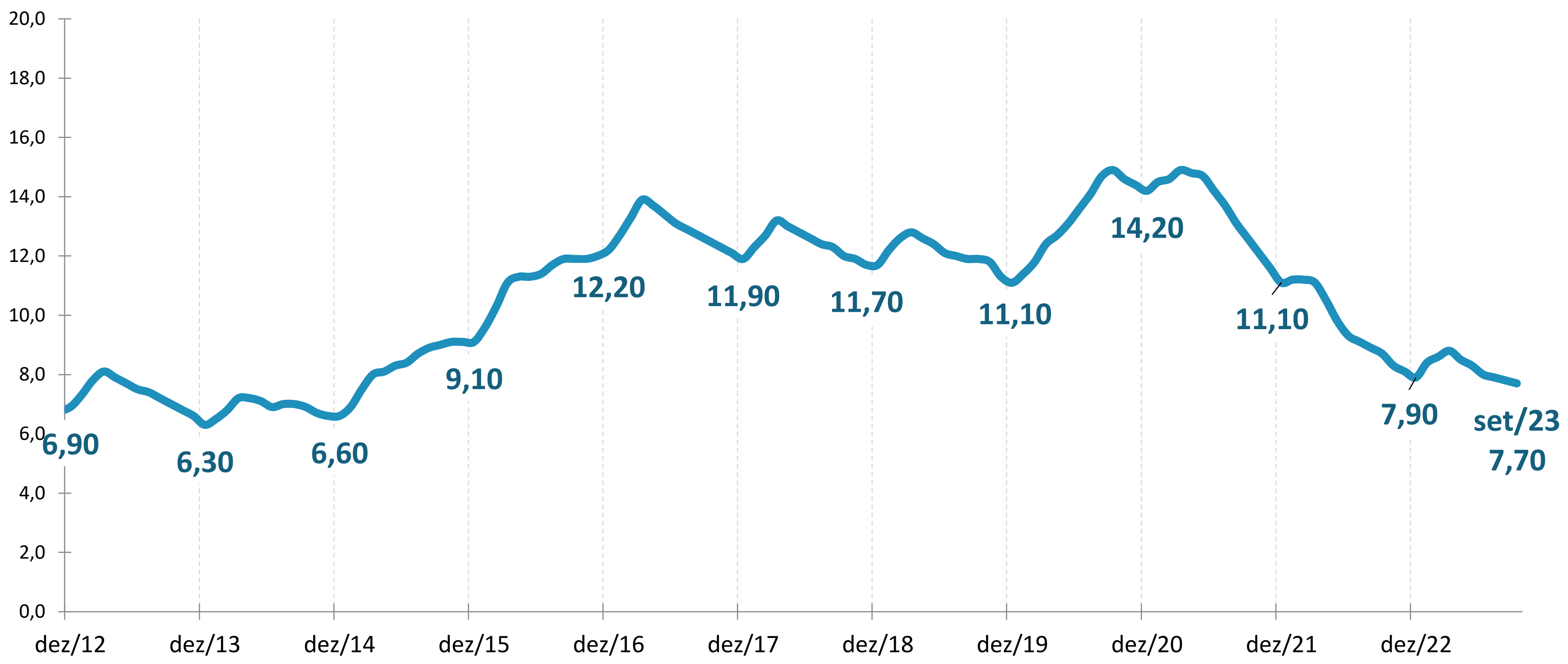




Fonte: FGV

Taxa de Desocupação

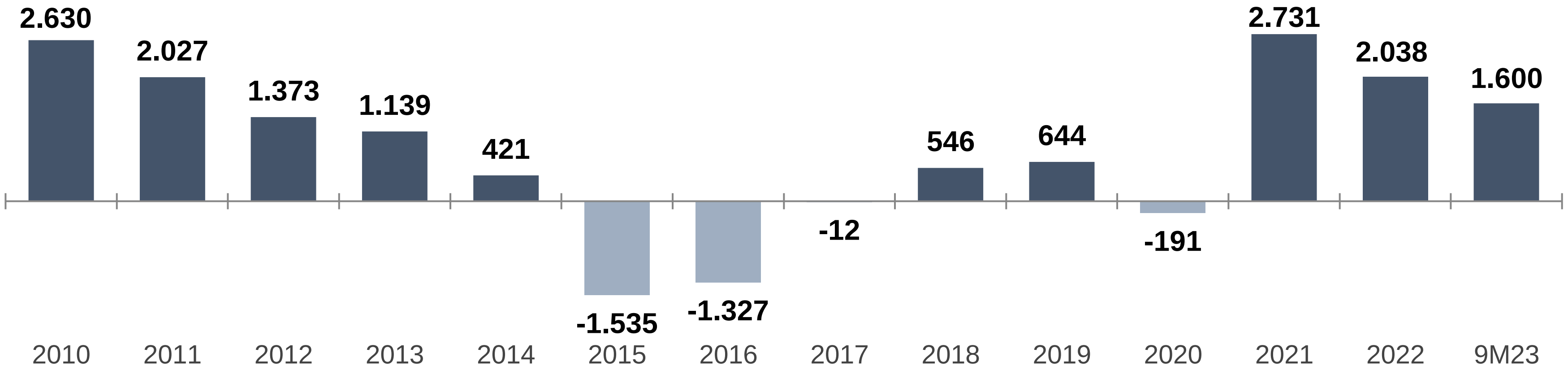
Em (%) média móvel trimestral



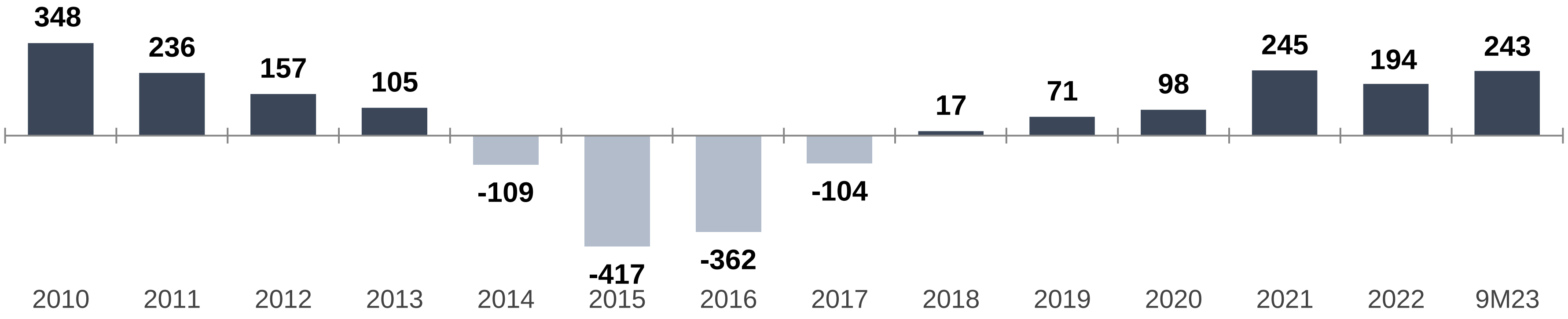
Saldo de Empregos Formais – Brasil

Em mil

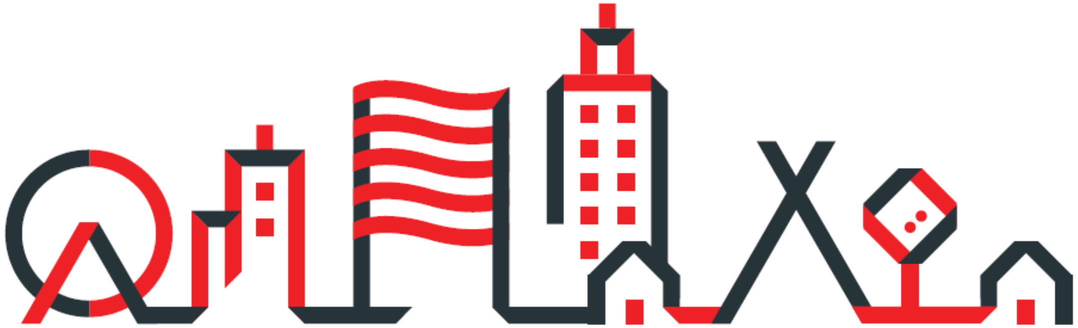
Total



Construção Civil

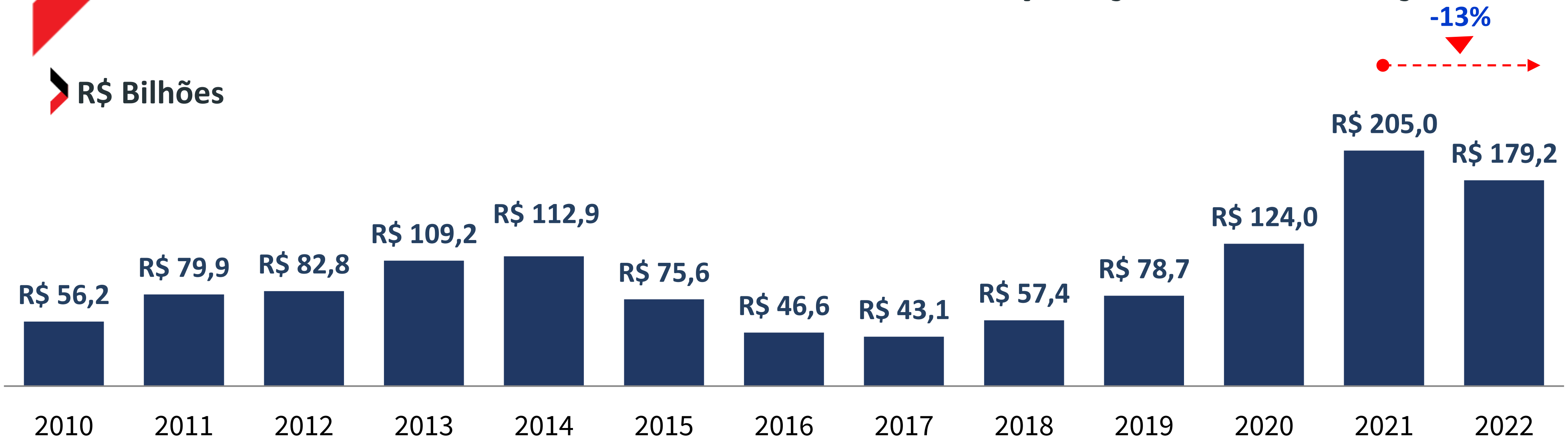


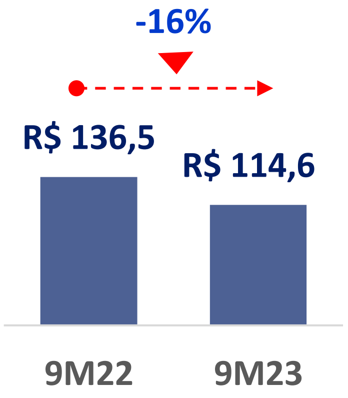
Financiamento Imobiliário



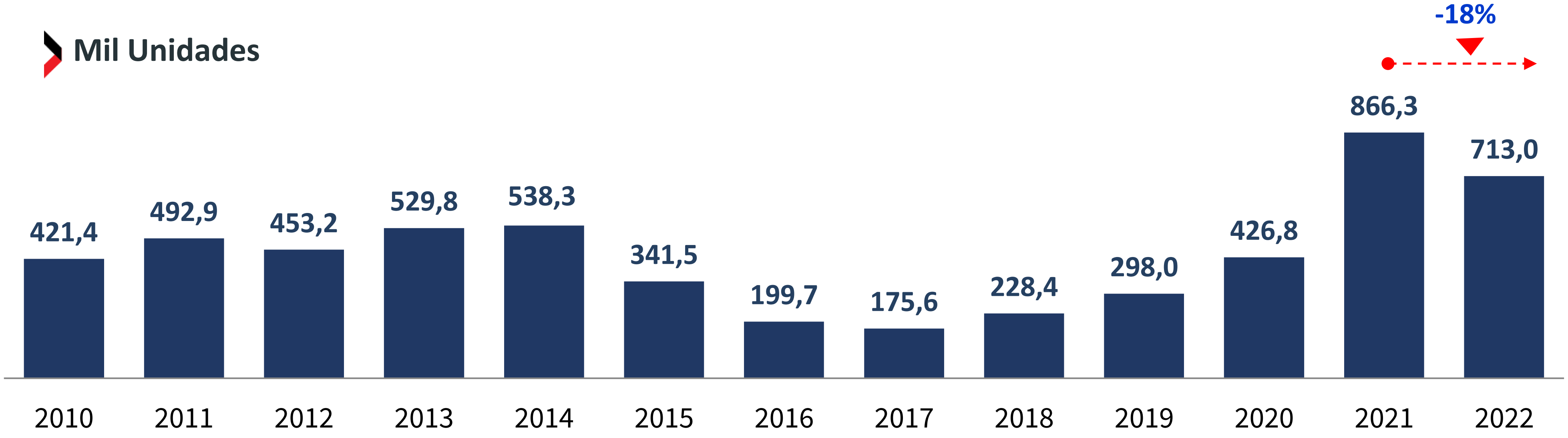
Financiamento Imobiliário SBPE – Total Aquisição e Construção

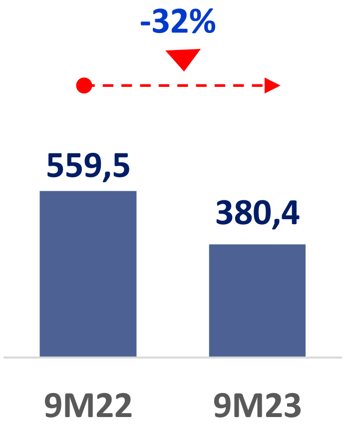
R$ Bilhões





Mil Unidades

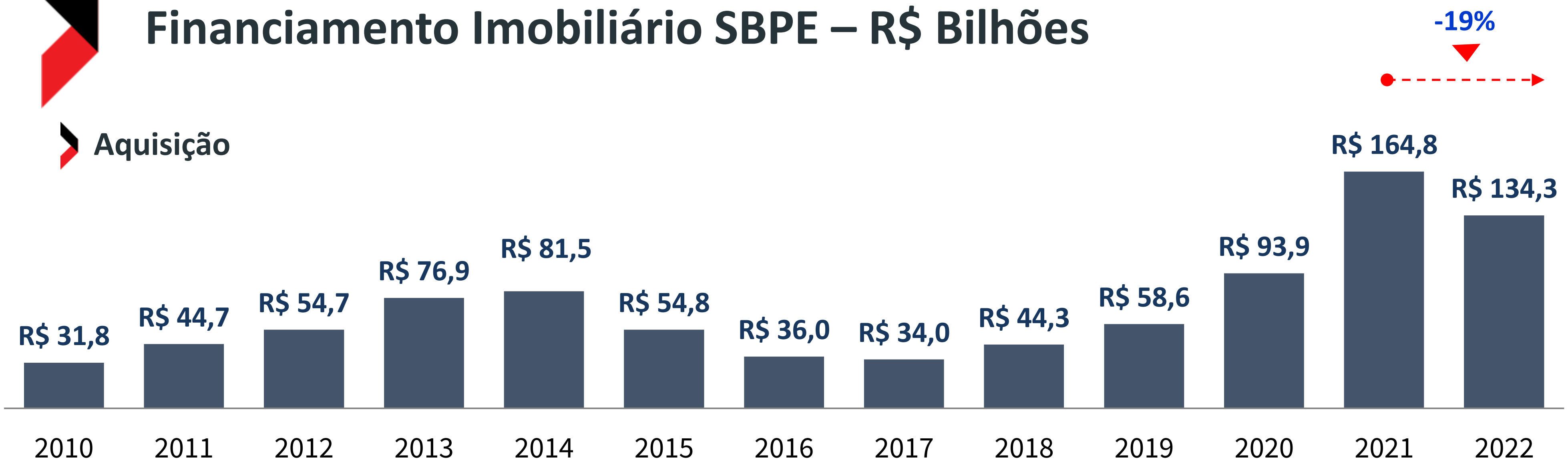


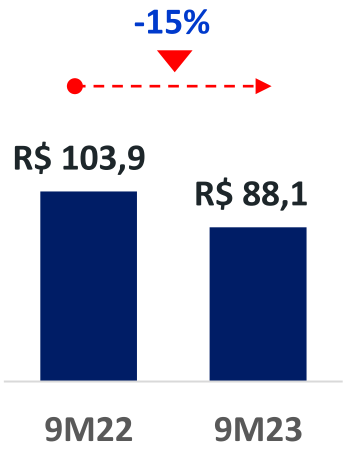


Fonte: Abecip

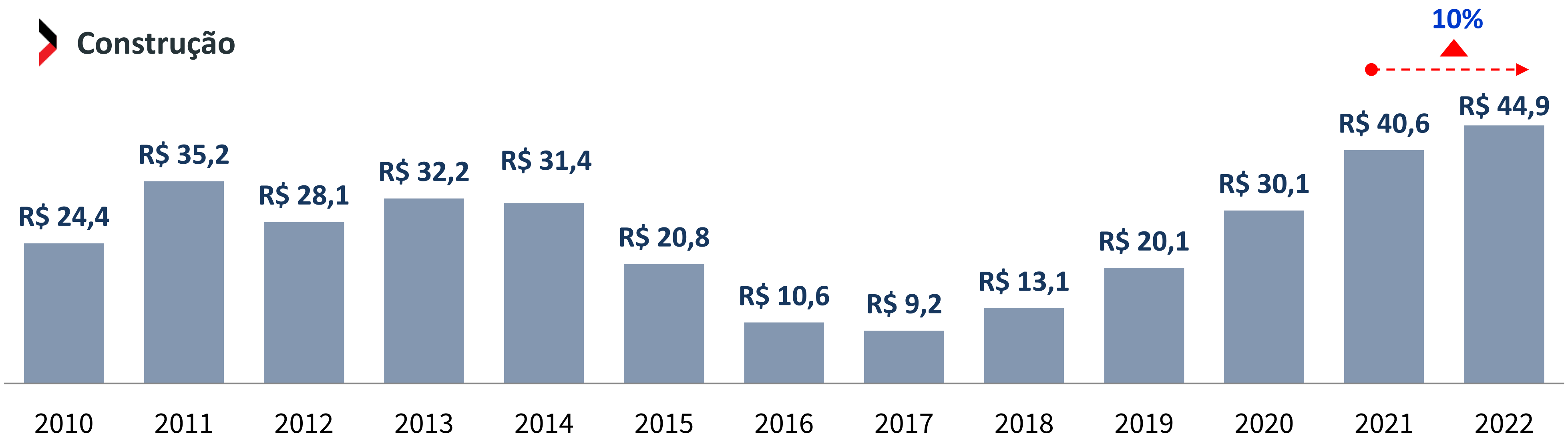
Financiamento Imobiliário SBPE – R$ Bilhões

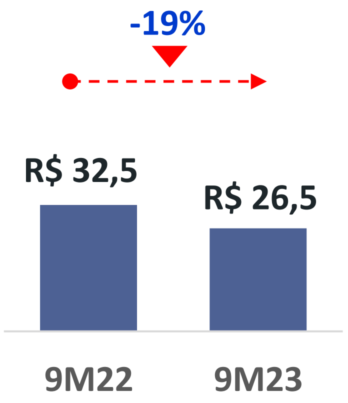
Aquisição





Construção

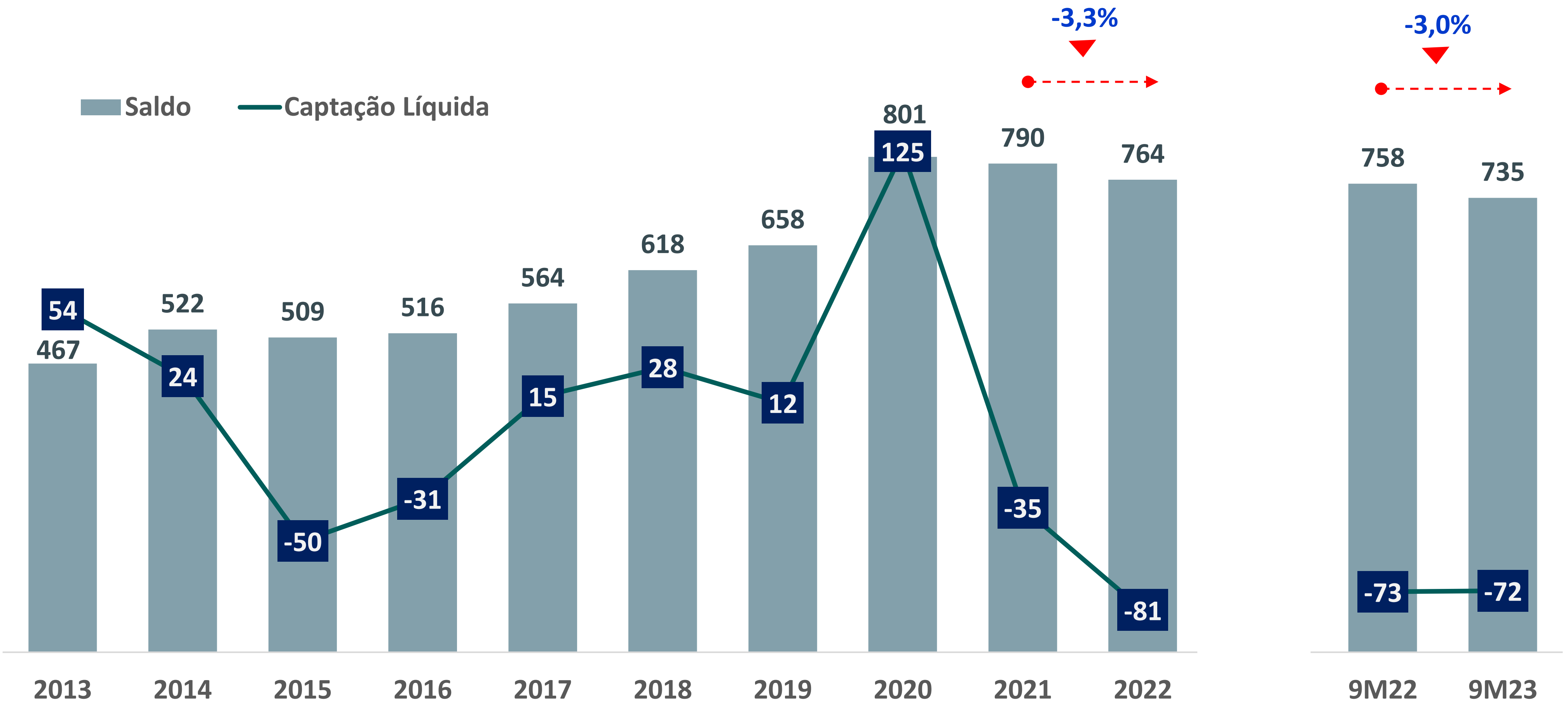




Fonte: Abecip

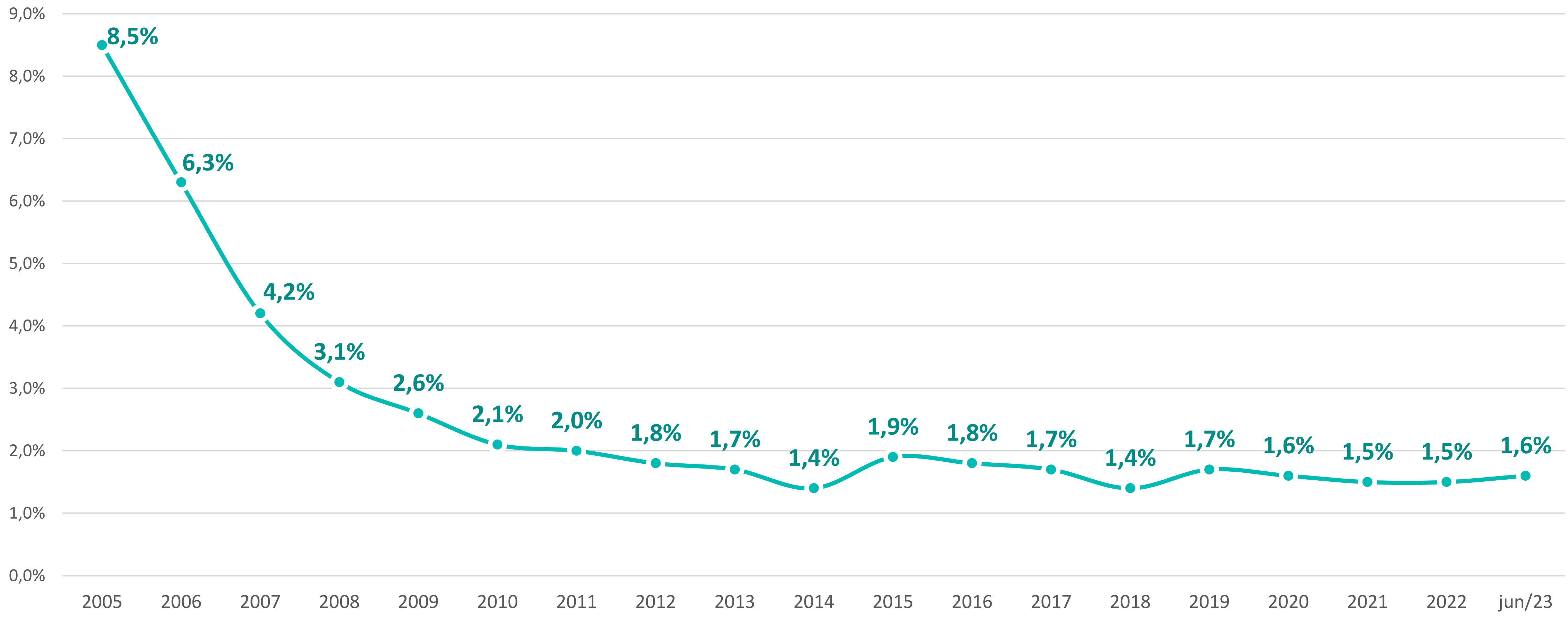
Poupança SBPE – Saldo e captação líquida

R$ Bilhões



Inadimplência - SBPE

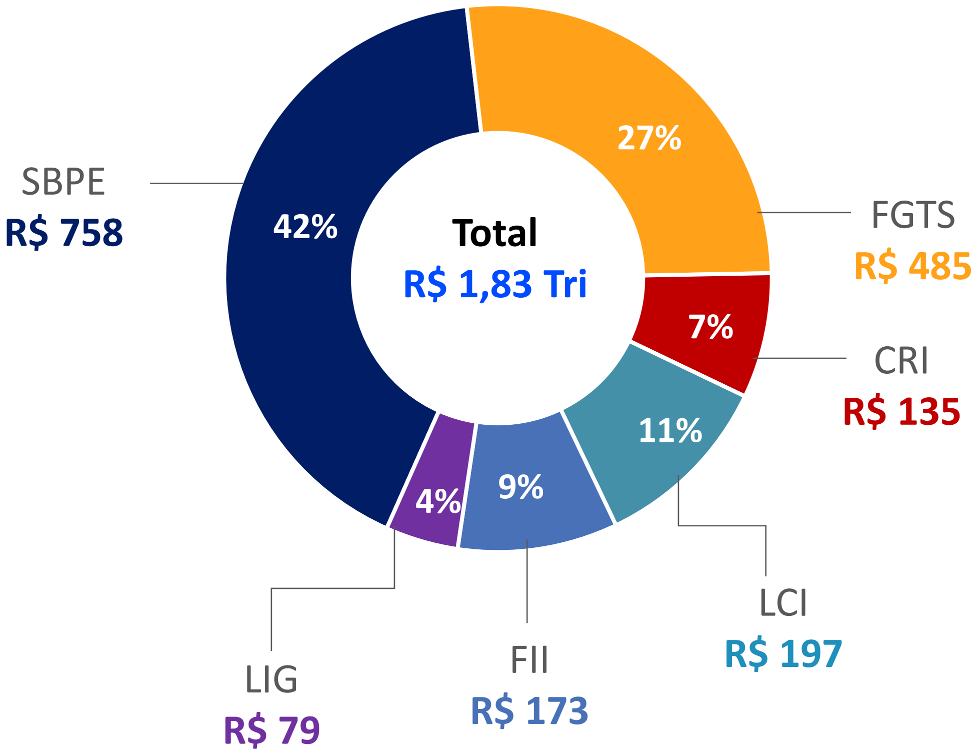
Contratos com mais de 3 prestações em atraso



Estrutura de Funding – R$ Bilhões

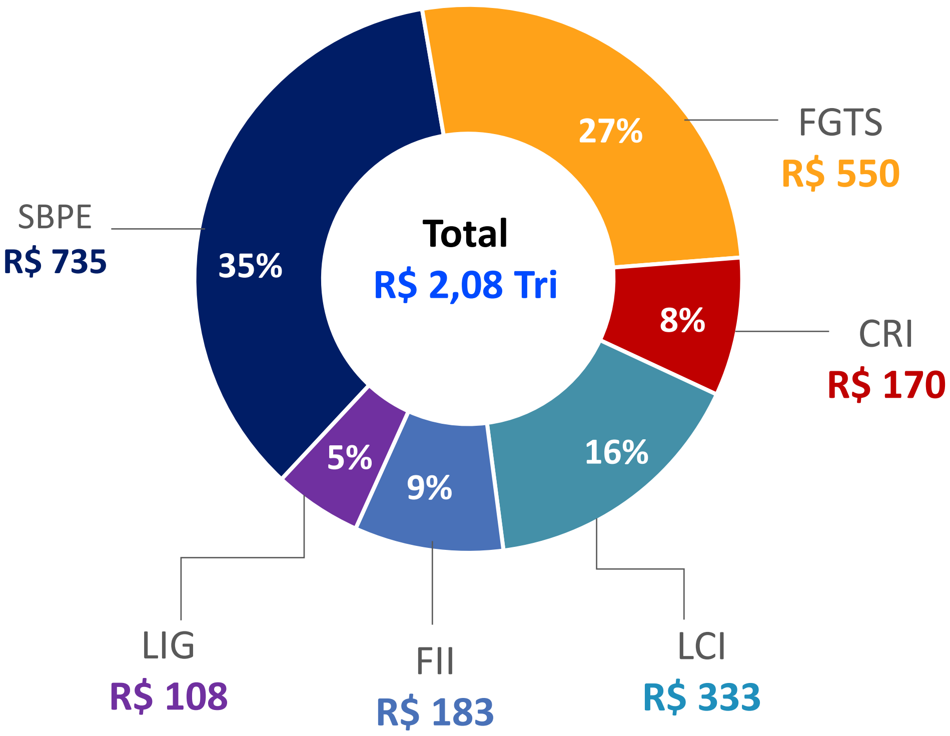
Setembro/2022

SFH = R$1.243 Bi (69%)



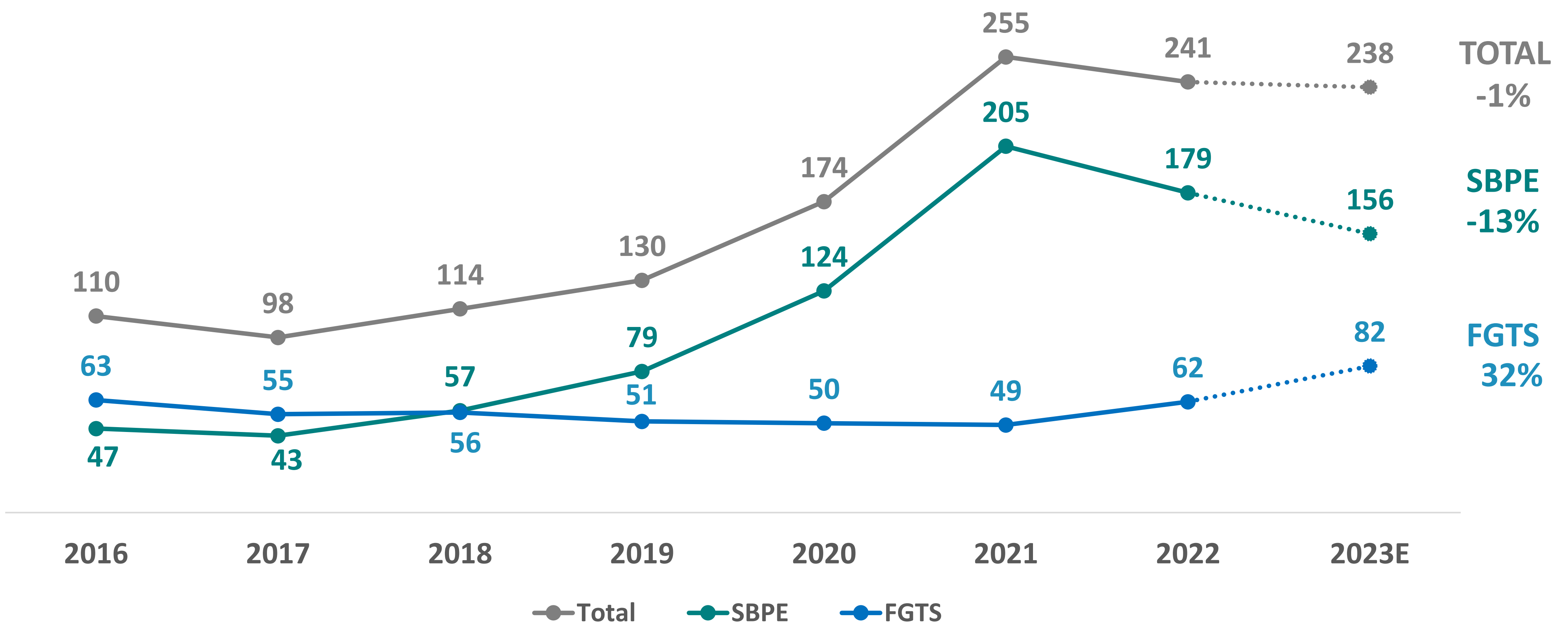
Setembro/2023

SFH = R$1.285 Bi (62%)



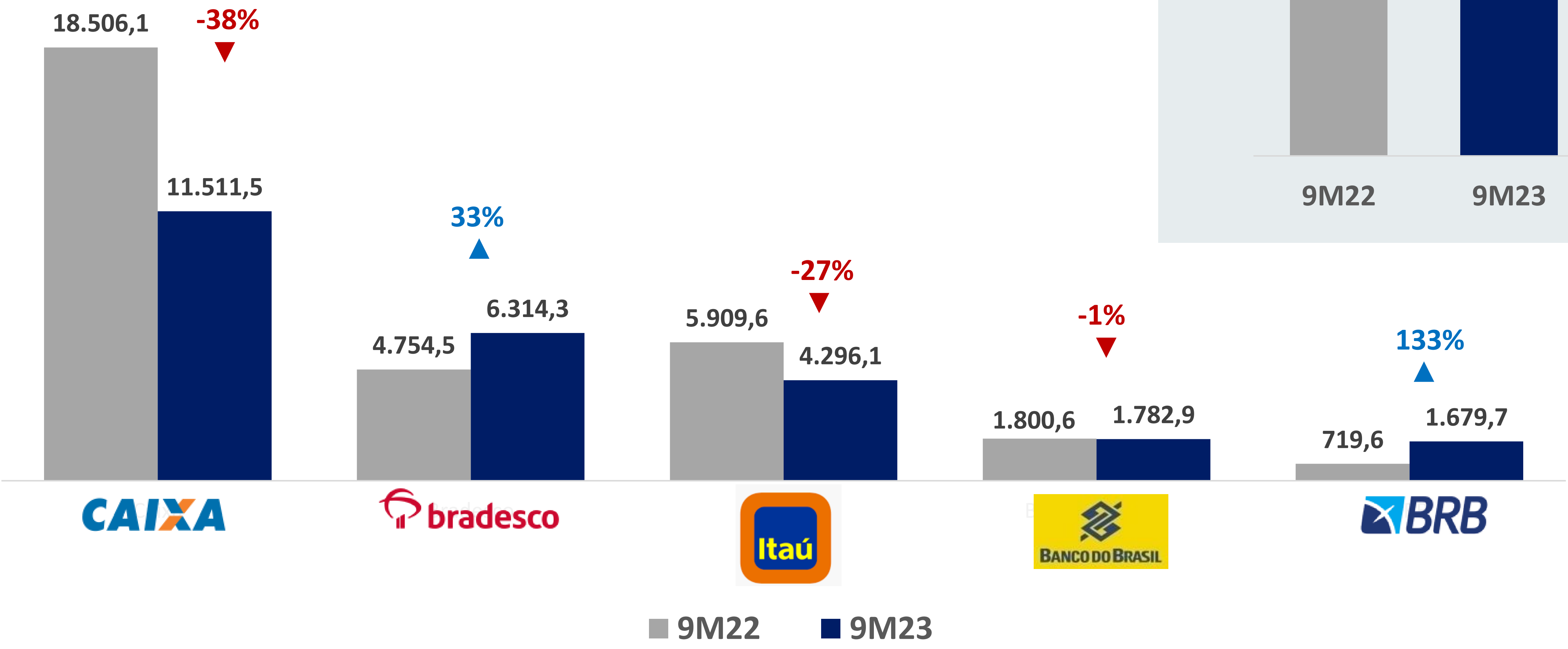
Fonte: Abecip/ [B]³

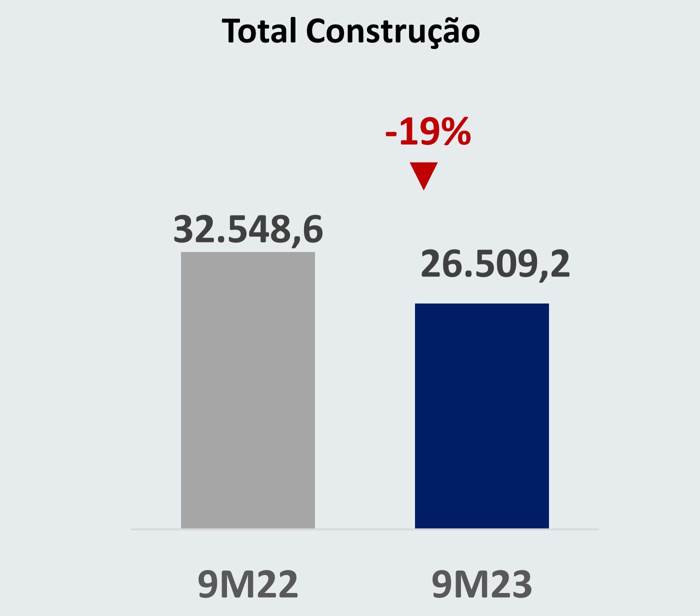
Expectativas – Financiamento Imobiliário (R$ Bilhões)



Crédito Imobiliário SBPE - Construção

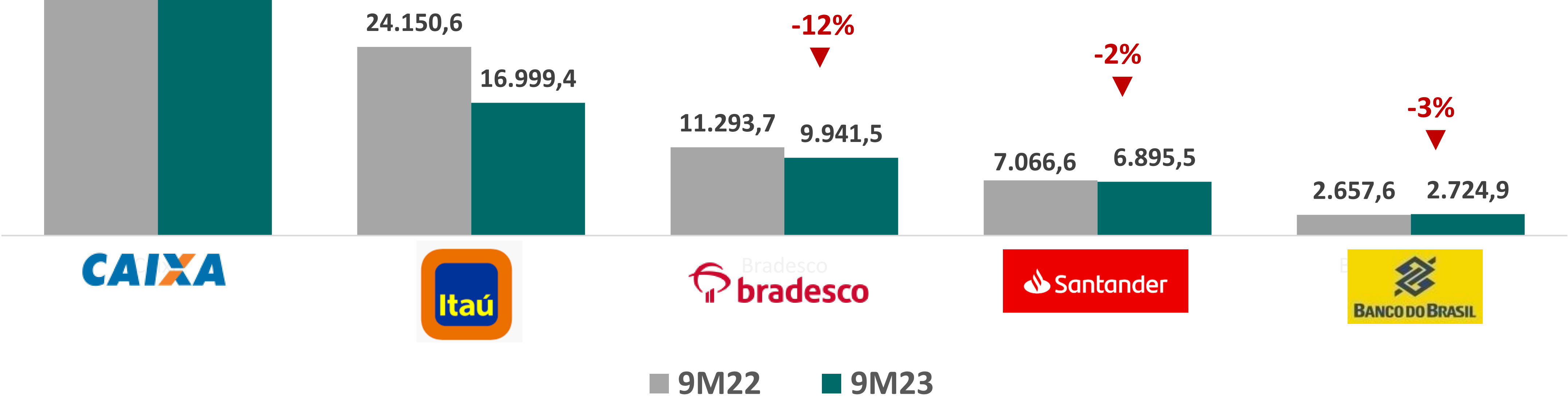
R$ Milhões

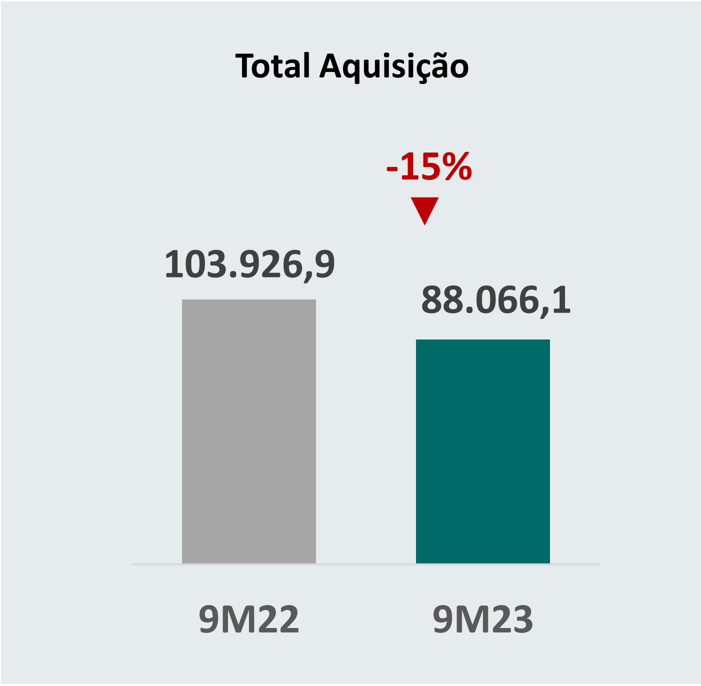




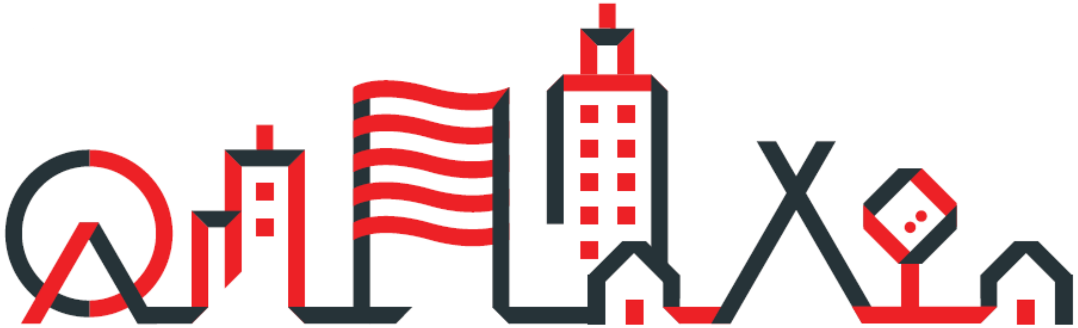
Crédito Imobiliário SBPE - Aquisição

R$ Milhões

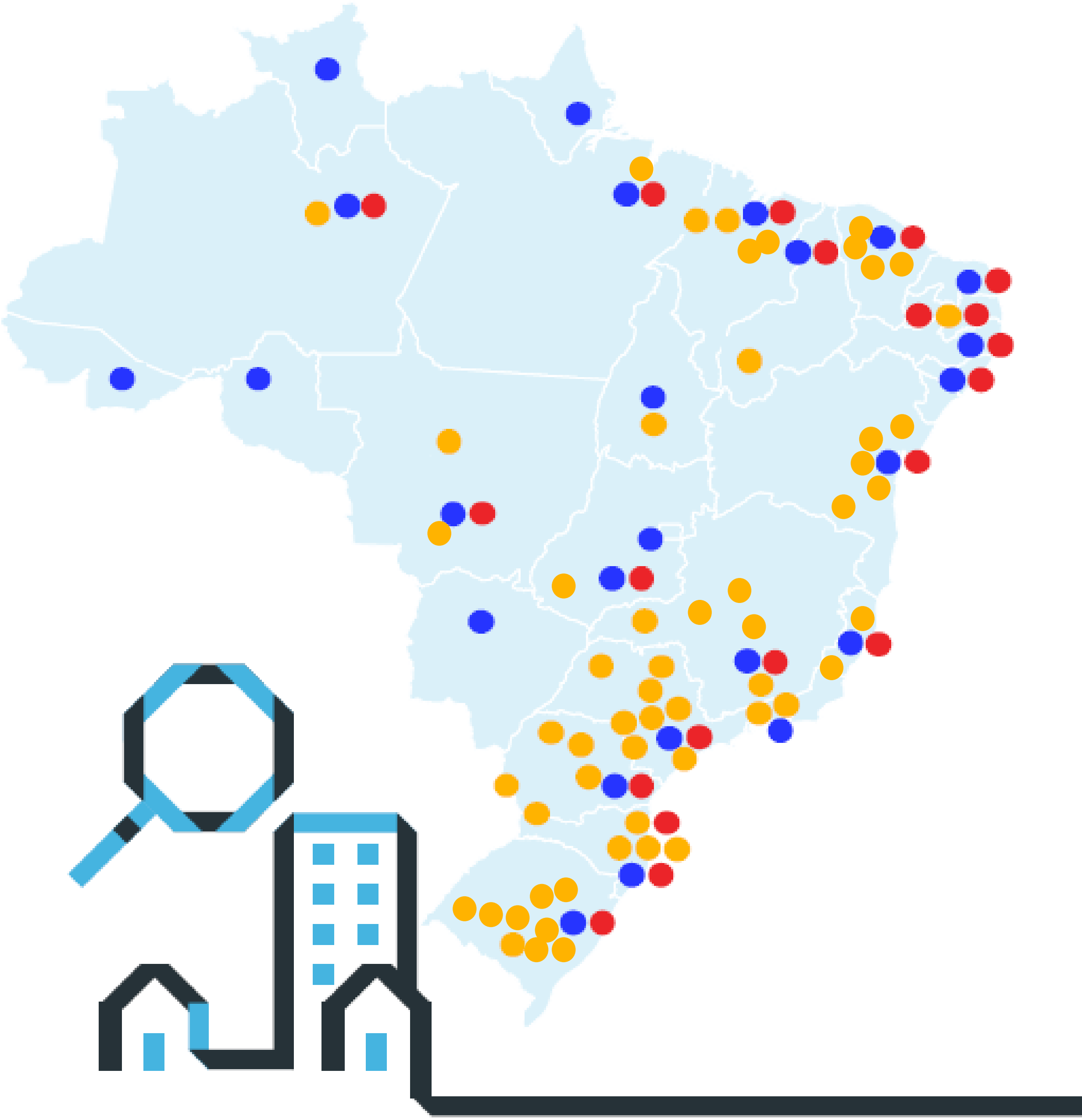




Mercado Imobiliário Nacional



Indicadores Imobiliários Nacionais 2T 2023



217 CIDADES

PESQUISADAS

Fonte: CBIC

Mercado Imobiliário Nacional

Unidades residenciais lançadas por região

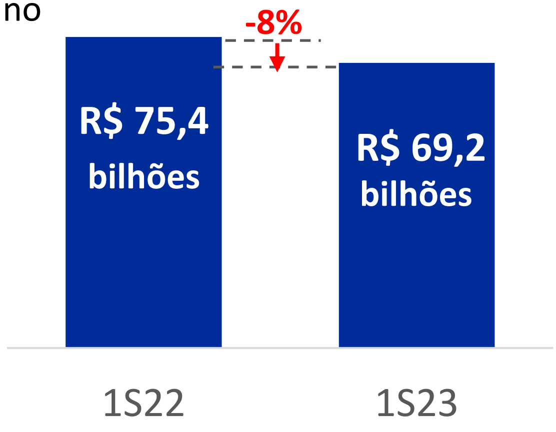
Região pesquisada	1S22	1S23	Variação (%)
Norte	3.576	4.413	**23,4%** ▲
Nordeste	25.661	20.720	**-19,3%** ▼
Centro-Oeste	11.589	10.190	**-12,1%** ▼
Sudeste	75.591	62.993	**-16,7%** ▼
Sul	31.884	21.591	**-32,3%** ▼
TOTAL	**148.301**	**119.907**	**-19,1%** ▼

Unidades residenciais vendidas por região

Região pesquisada	1S22	1S23	Variação (%)
Norte	3.938	3.917	**-0,5%** ▼
Nordeste	28.724	27.540	**-4,1%** ▼
Centro-Oeste	12.665	9.179	**-27,5%** ▼
Sudeste	79.850	77.907	**-2,4%** ▼
Sul	35.025	29.708	**-15,2%** ▼
TOTAL	**160.202**	**148.251**	**-7,5%** ▼

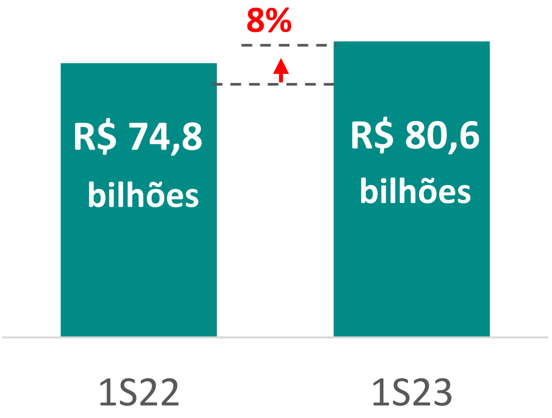
VGL

Acumulado no ano

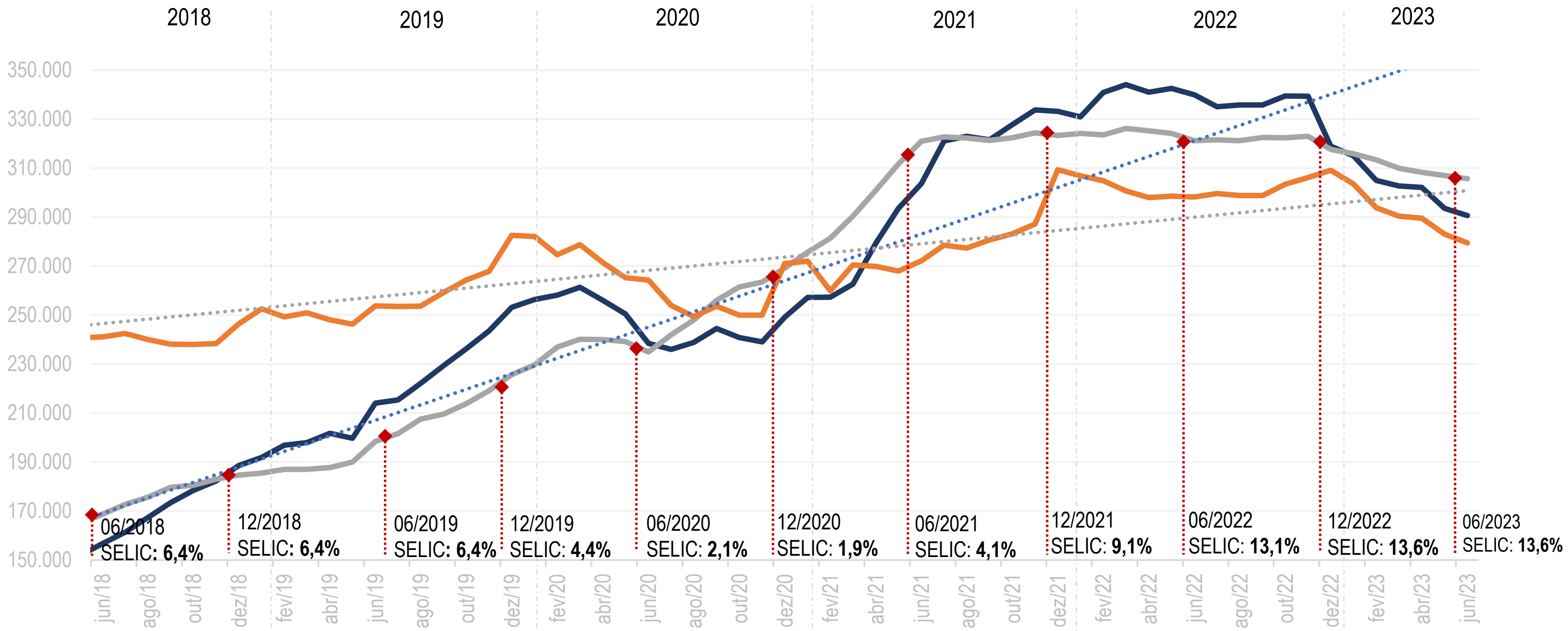


VGV

Acumulado no ano



Comparativo lançamentos, vendas e oferta final – Acumulado em 12 meses



	jun/18	jun/19	jun/20	jun/21	jun/22	jun/23
Lançamentos	156.617	214.062	238.429	303.615	339.893	290.615
Vendas	168.584	198.407	234.945	320.985	321.201	305.694
Oferta	241.083	253.723	264.317	272.132	298.204	279.535

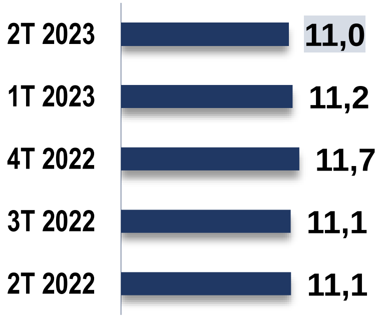
Lançamentos
290.615 unidades
▼ -14,5%

Vendas
305.694 unidades
▼ -4,8%

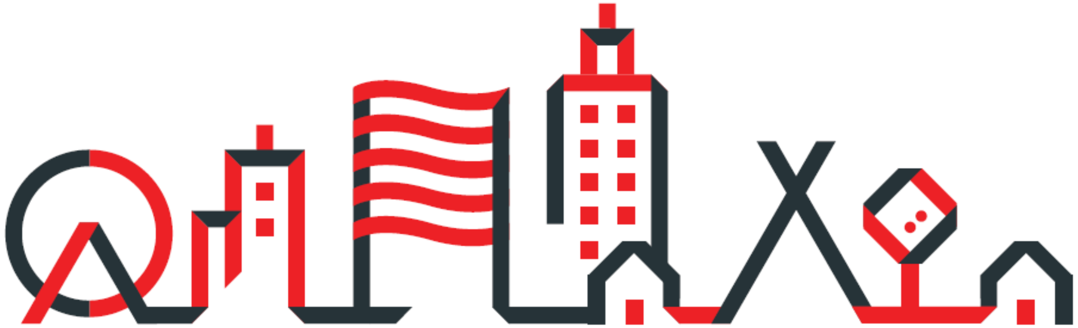
Oferta
279.535 unidades
▼ -6,3%

Número de meses para o escoamento da oferta

*Considerando a média de vendas dos últimos 12 meses, se não houver novos lançamentos, a oferta final se esgotaria em **11 meses**.*

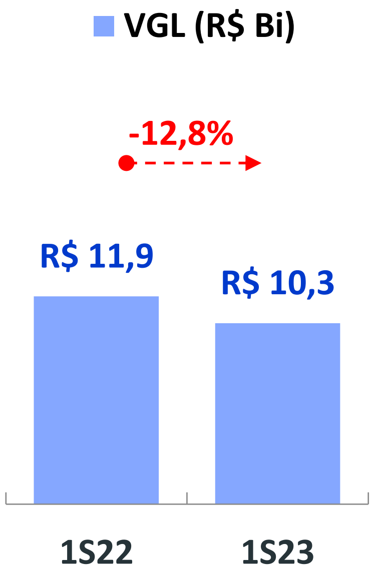


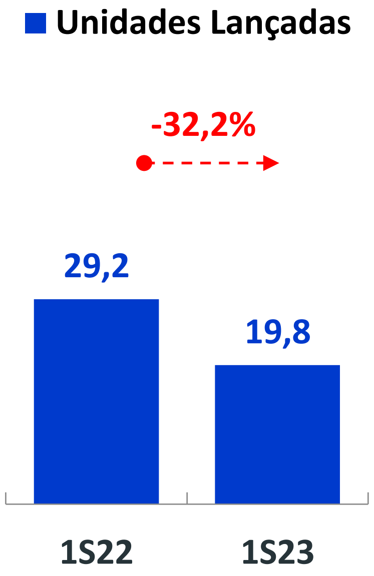
Mercado Imobiliário do Interior
(31 cidades)



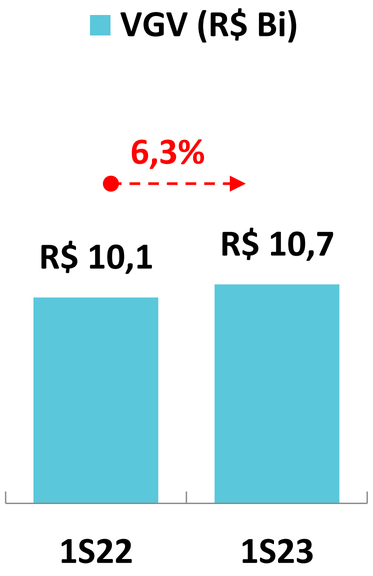
Interior – 31 cidades pesquisadas – 1S23

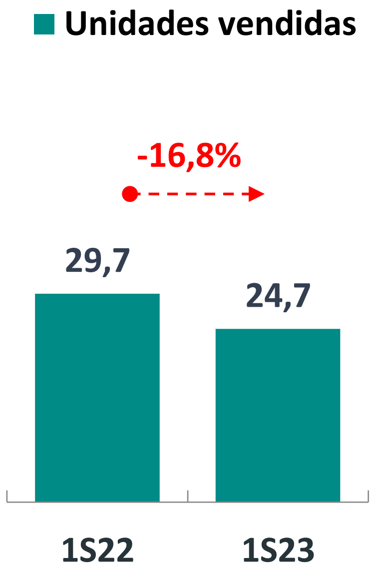
Lançamentos





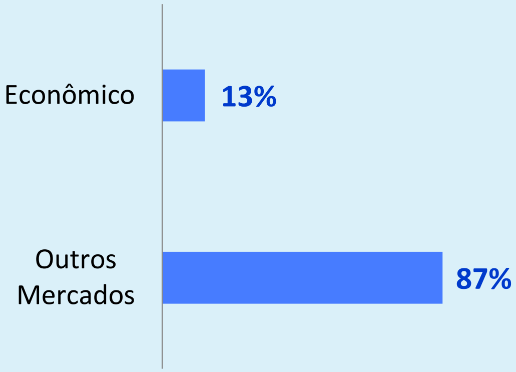
Vendas



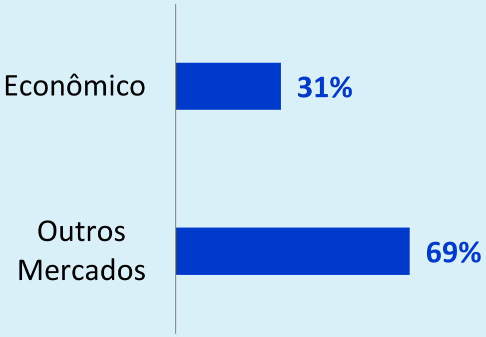


Interior – 31 cidades pesquisadas – 1S23

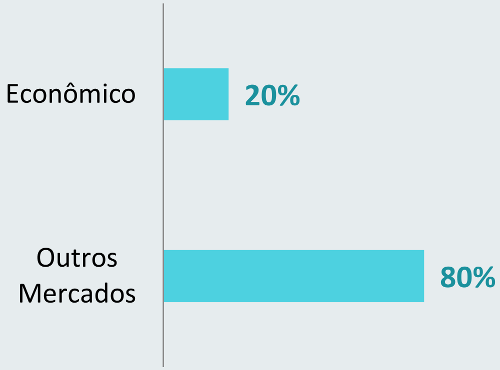
Valor Global Lançado
VGL R$10.328,4 MM



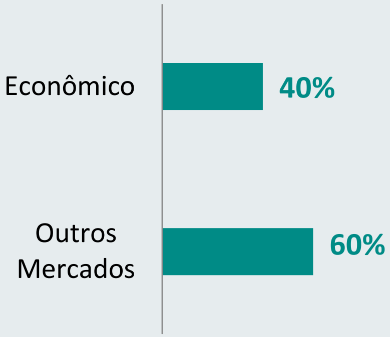
Unidades Lançadas
19.828 unidades



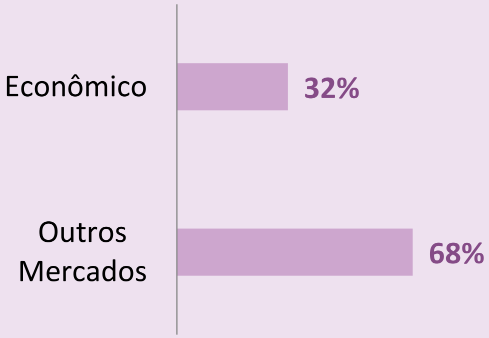
Valor Global Vendido
VGV R$ 10.704,2 MM



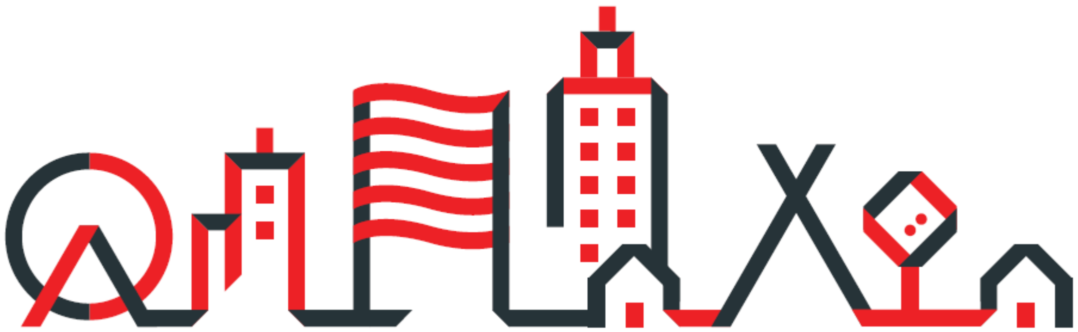
Unidades Vendidas
24.726 unidades



Oferta Final
49.460 unidades

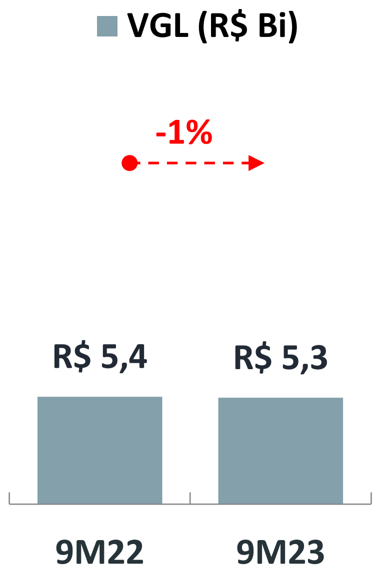


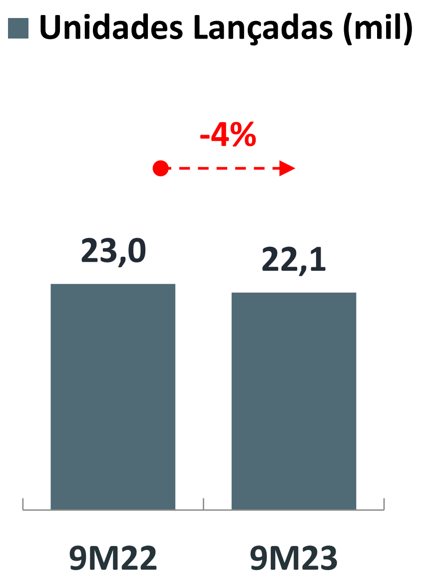
Mercado Imobiliário da Cidade de São Paulo



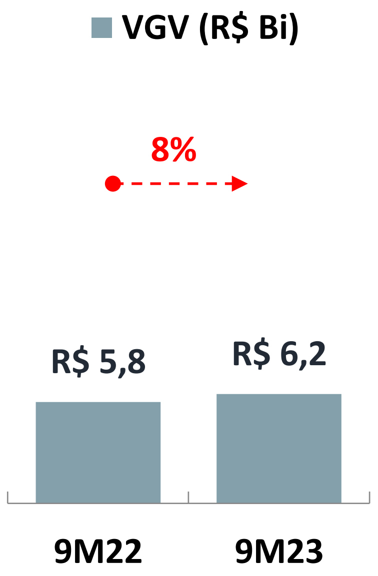
Imóveis Econômicos (MCMV) – Cidade de São Paulo

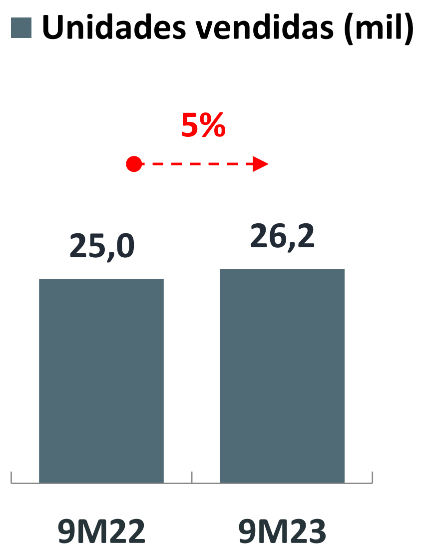
Lançamentos (Econômicos – MCMV)





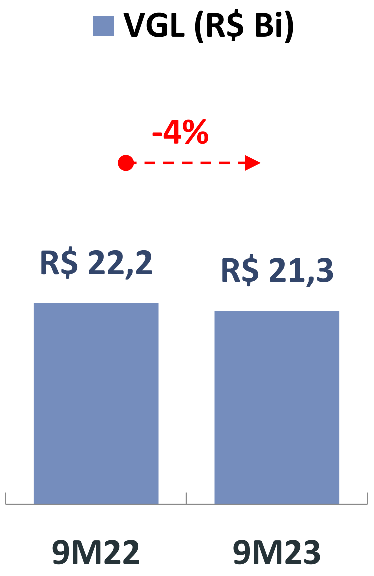
Vendas (Econômicos – MCMV)

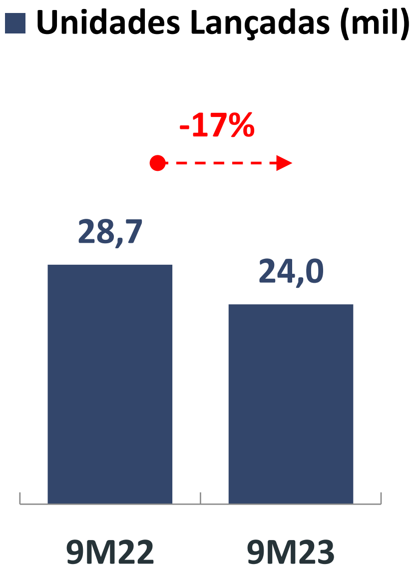




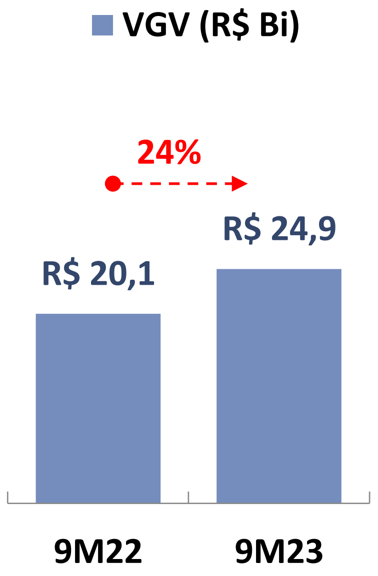
Imóveis de Outros Mercados – Cidade de São Paulo

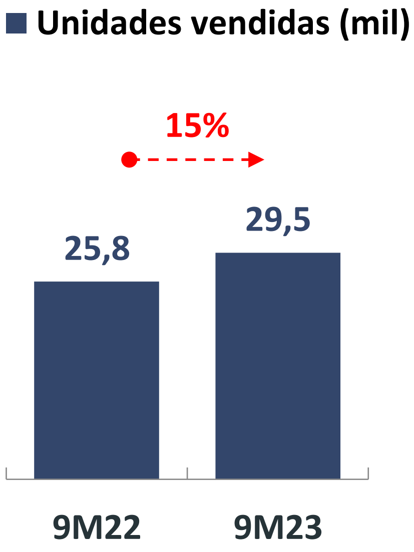
Lançamentos (Outros Mercados)





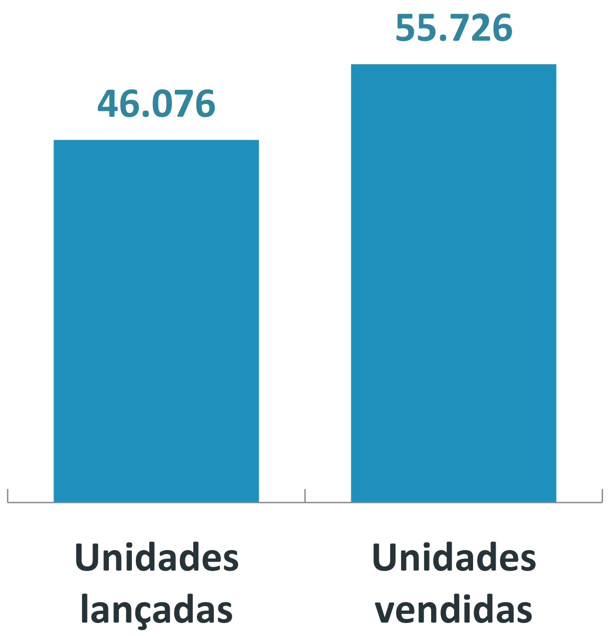
Vendas (Outros Mercados)





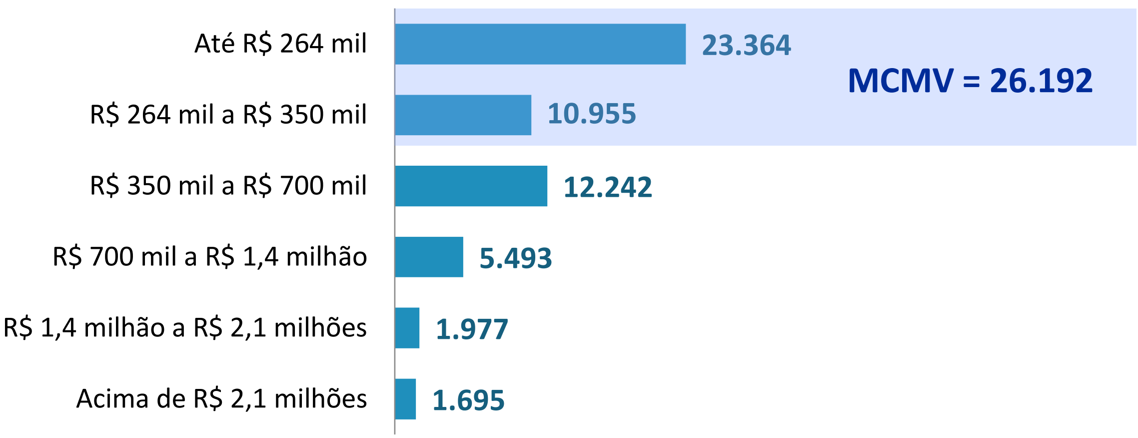
Comparativo lançamentos e vendas 9M23 – total cidade de São Paulo

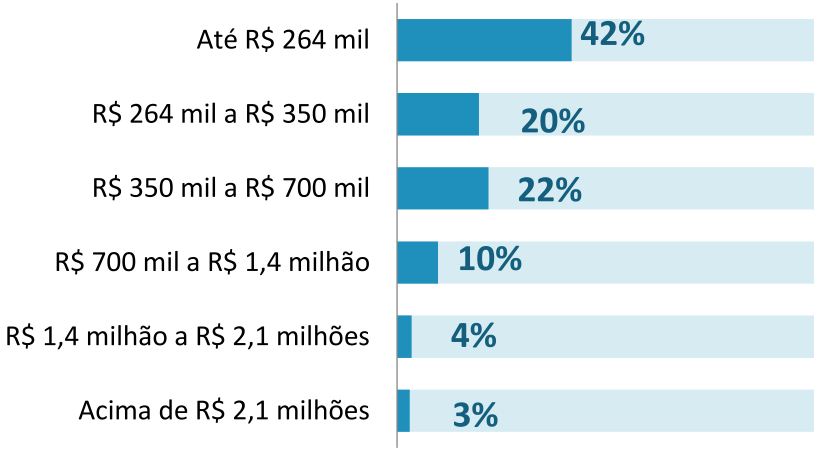
R$ milhões



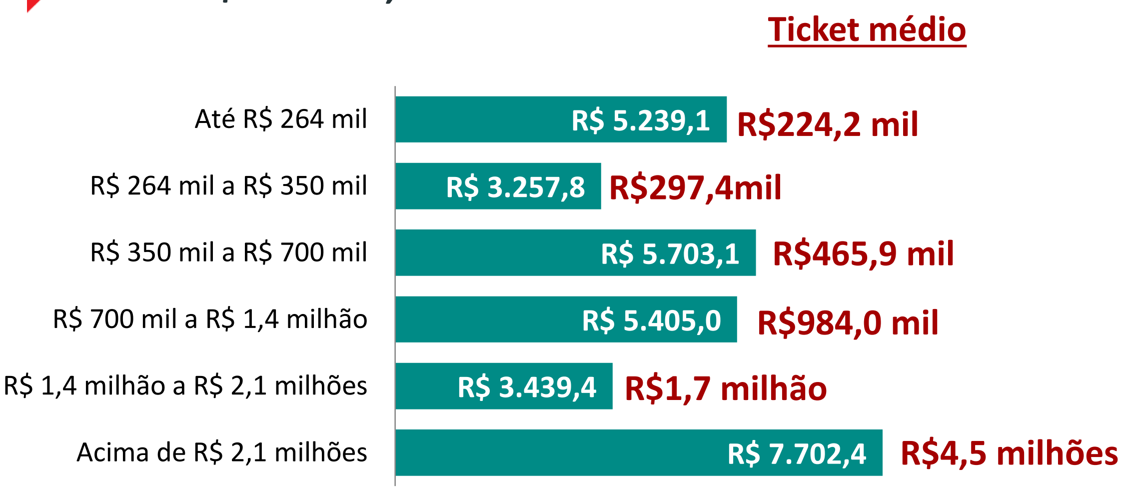
Vendas de imóveis residenciais – 9M23

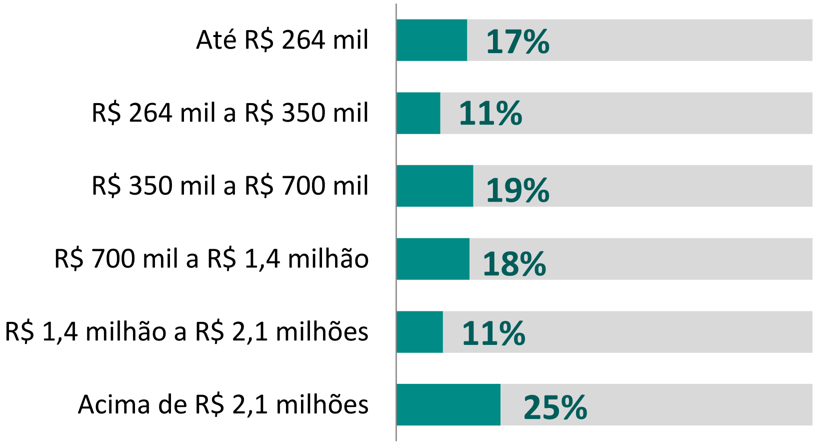
Unidades = 55.726



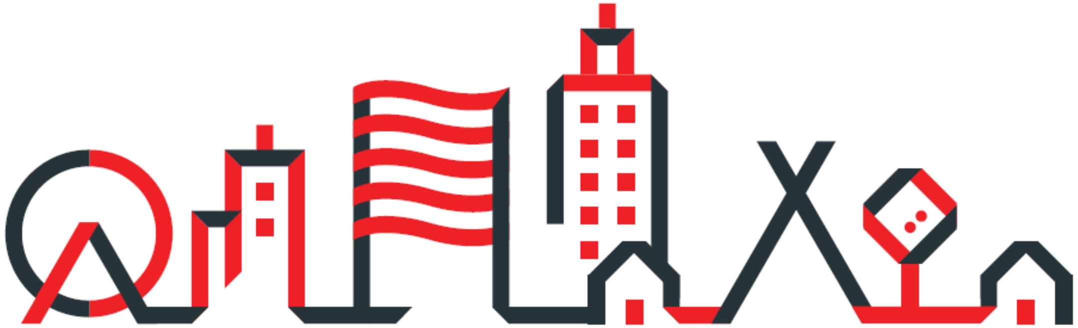


VGV = R$ 21.182,7 milhões



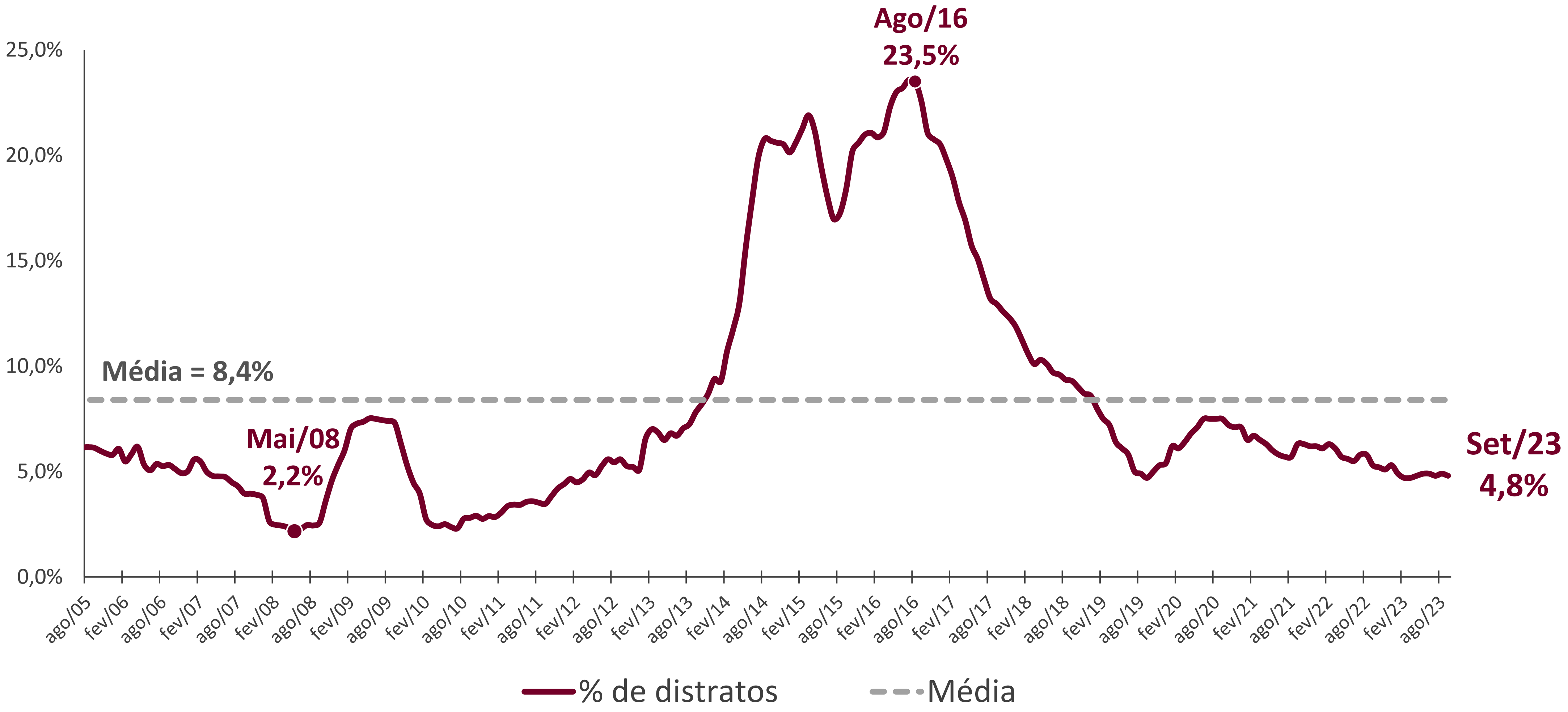


Distratos, VSO e Oferta Final

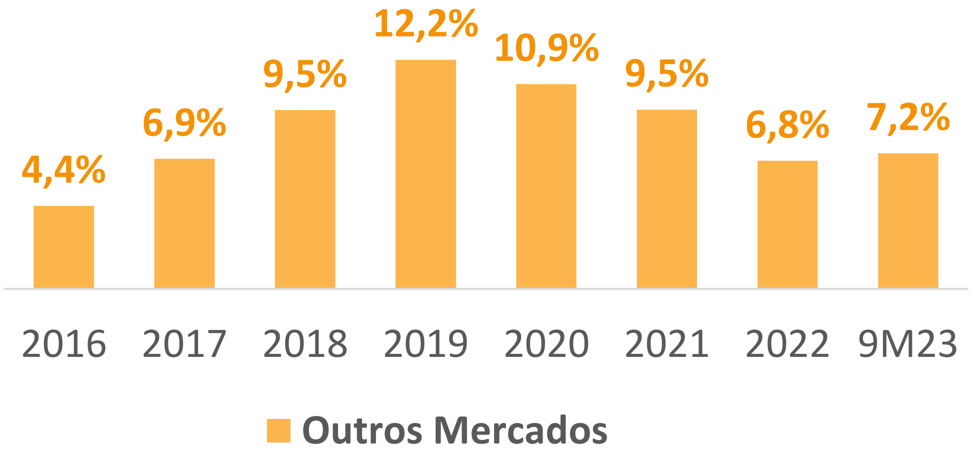


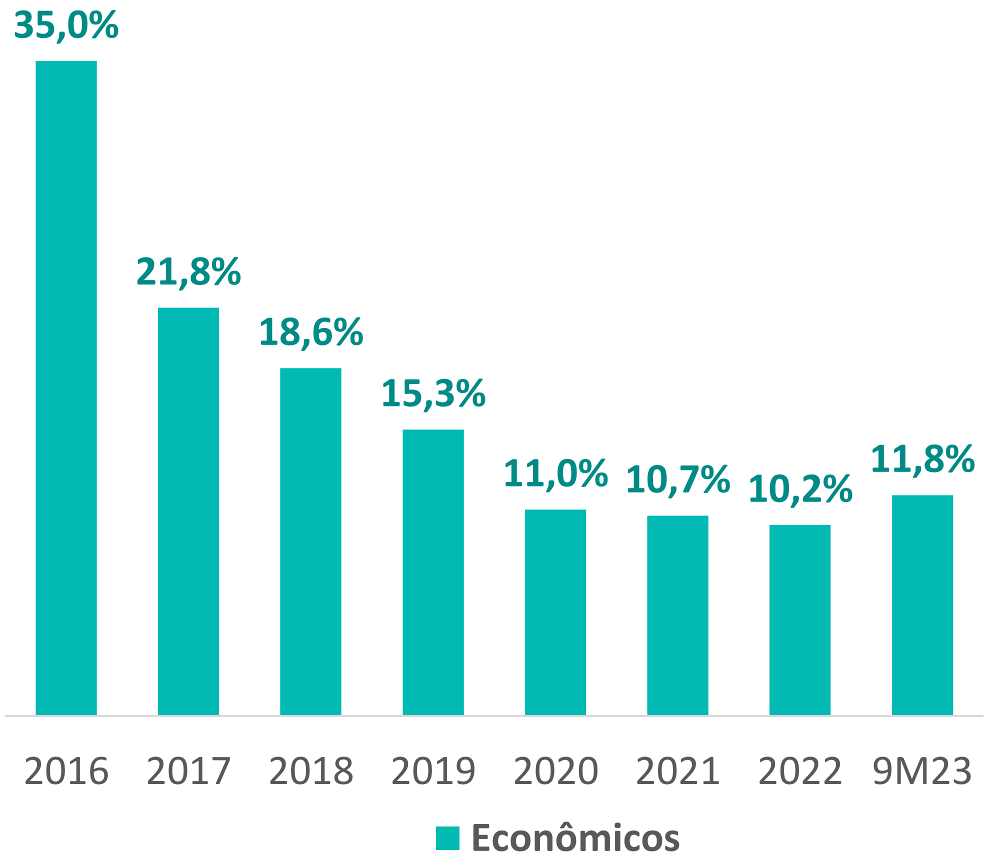
Porcentagem de Distratos sobre as Vendas da Amostra da PMI

Média dos últimos 12 meses – Cidade de São Paulo



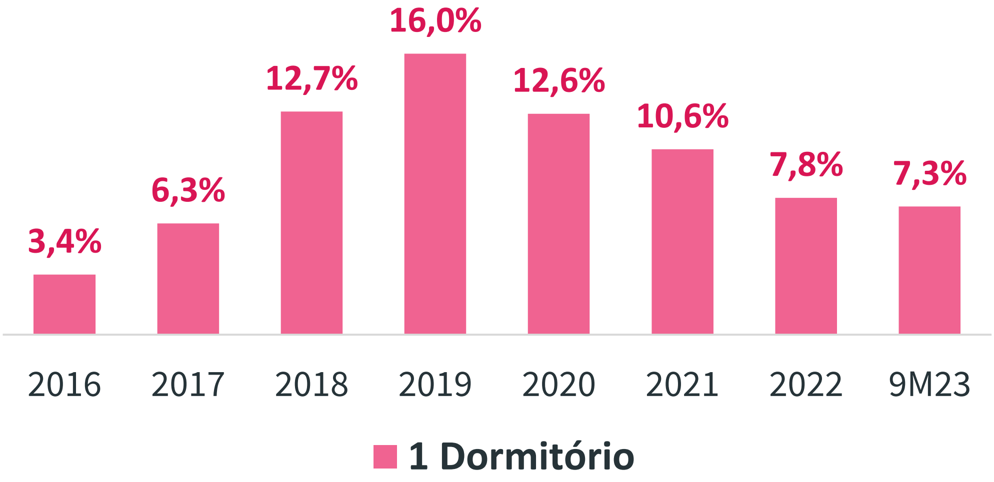
VSO (Velocidade de Vendas Sobre Oferta) mensal médio
Cidade de São Paulo

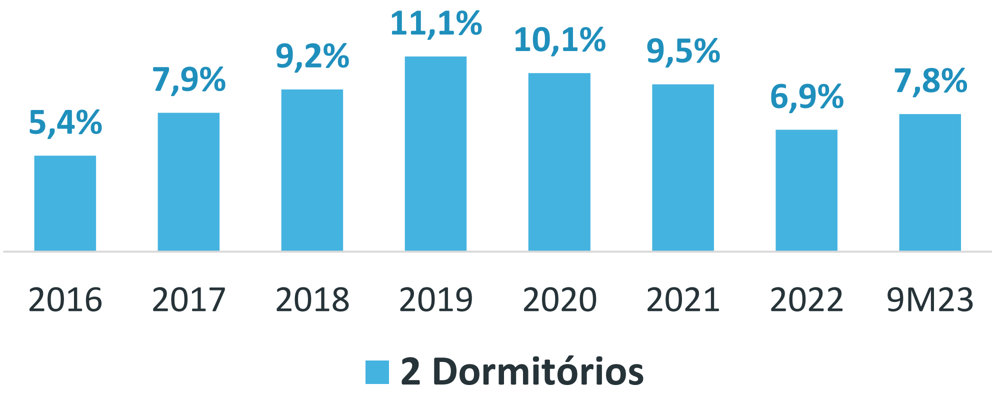


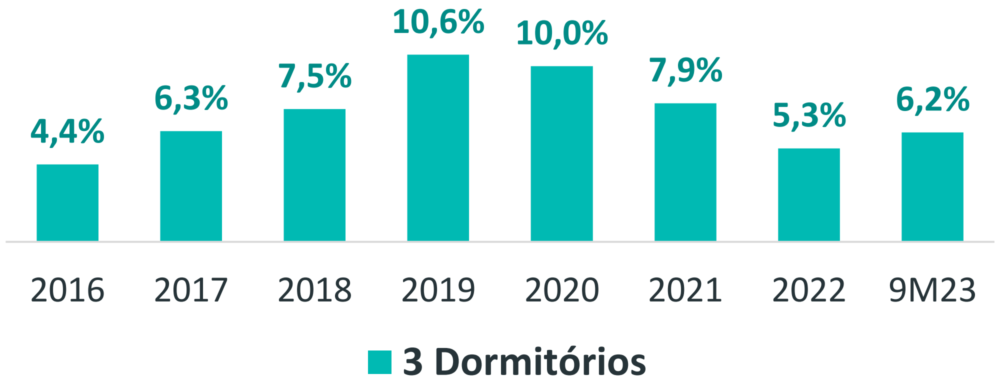


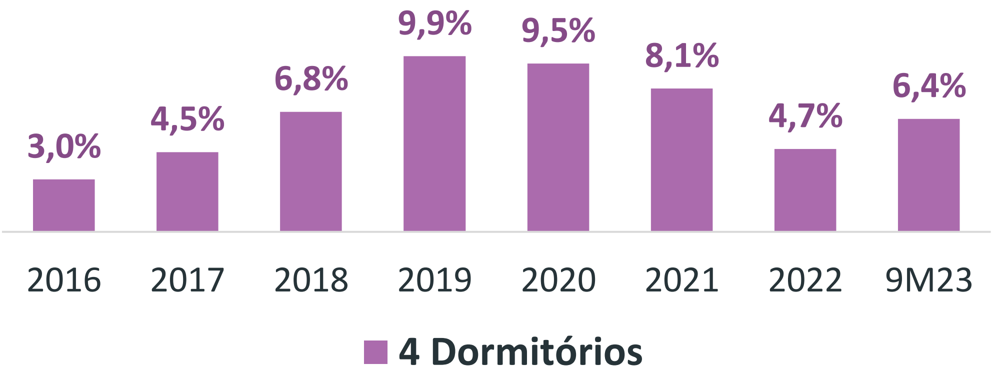
VSO = (Venda – Distrato) / (Oferta Inicial + Lançamentos)

VSO mensal médio – Outros Mercados



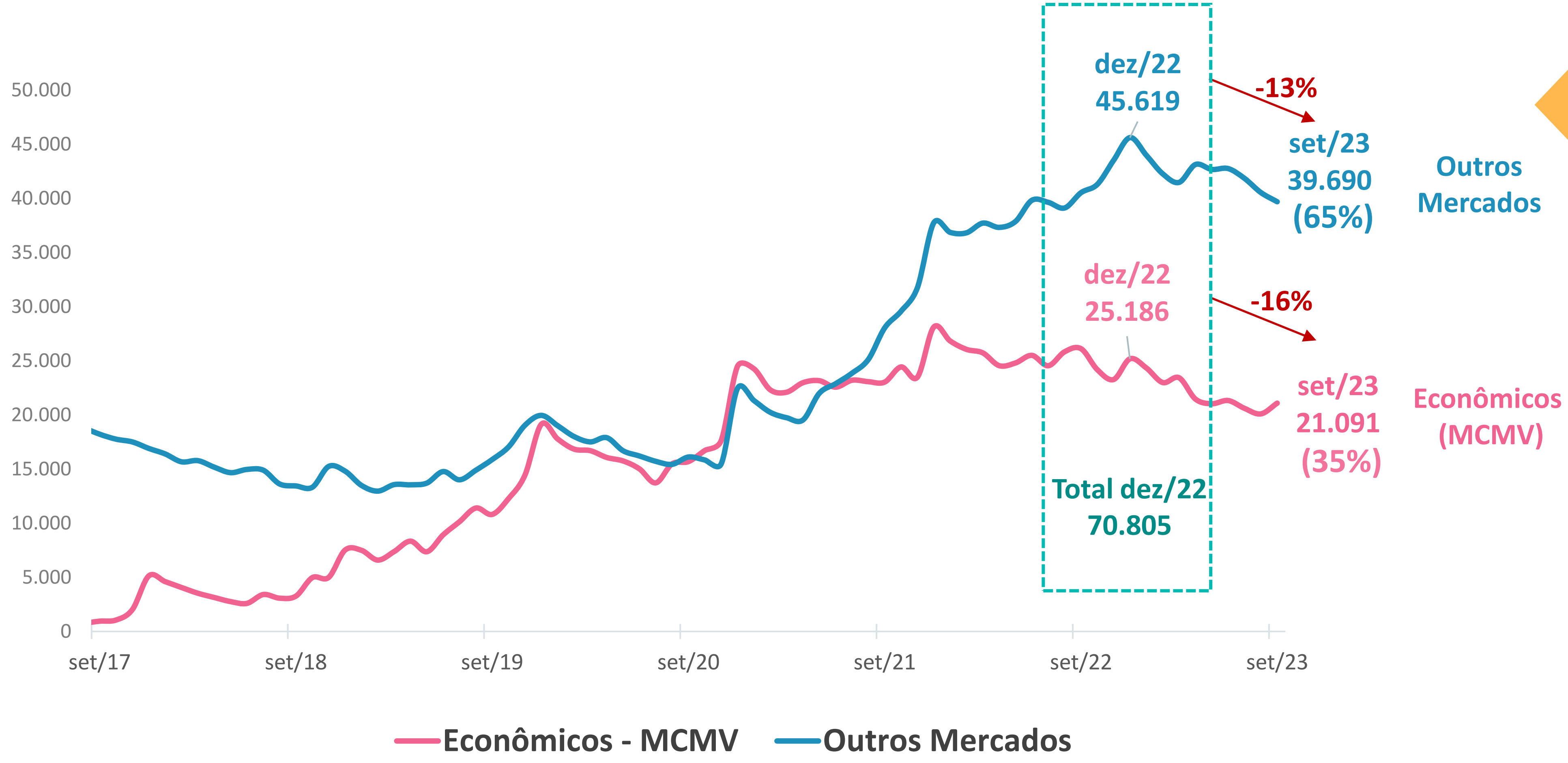






Oferta final econômicos e outros mercados – cidade de São Paulo

Em mil unidades



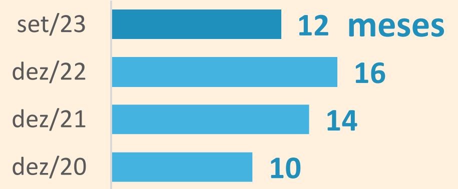
Em setembro

60.781 unidades

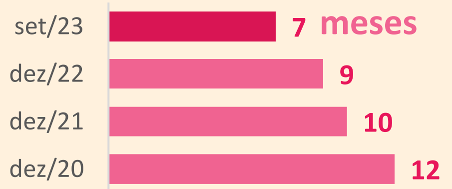
Estavam disponíveis para venda na capital paulista

Escoamento da Oferta

Outros Mercados



Econômicos (CVA)

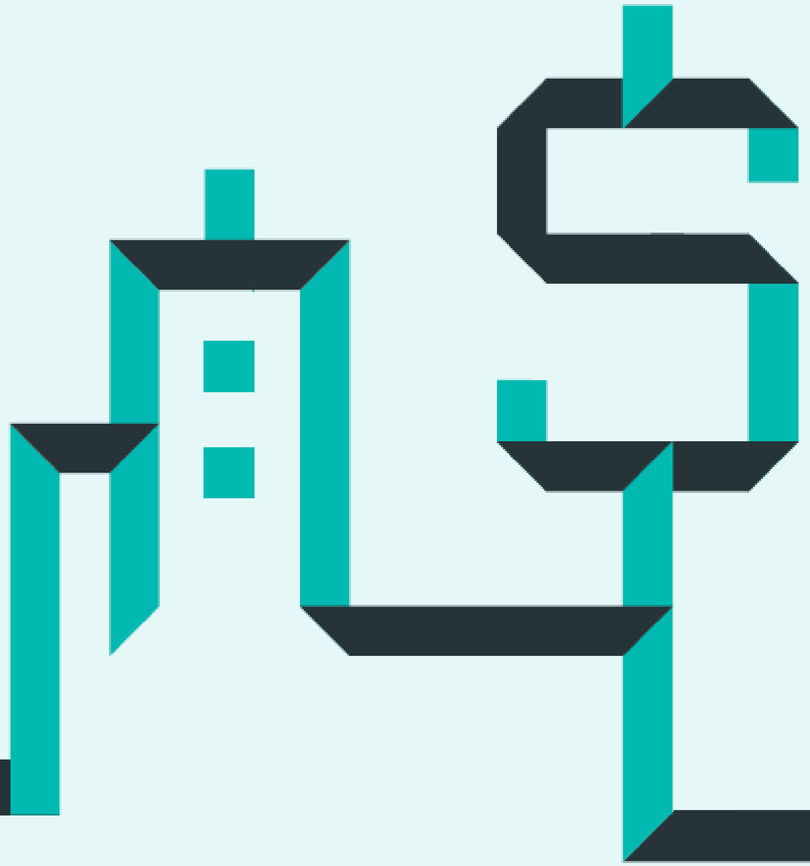


*Oferta Final- unidades não vendidas dos lançamentos feitos nos últimos 36 meses (planta, construção e prontos)

IGMI-R – Variação acumulada no ano (%)

Cidade	Acumulado 12 meses (até setembro)	2022	2021	2020
Belo Horizonte	9,03%	12,58%	8,24%	5,16%
Brasília	9,42%	16,77%	16,79%	9,70%
Curitiba	10,35%	16,31%	13,68%	10,98%
Fortaleza	9,45%	12,91%	7,83%	4,85%
Goiânia	10,12%	15,99%	12,29%	9,14%
Porto Alegre	11,21%	12,36%	12,61%	8,63%
Recife	9,61%	10,27%	6,70%	2,19%
Rio de Janeiro	10,51%	13,34%	16,75%	4,35%
Salvador	9,56%	16,62%	11,26%	9,64%
São Paulo	**9,40%**	**14,85%**	**21,09%**	**16,09%**
Brasil	**10,28%**	**15,06%**	**16,25%**	**10,28%**

Obrigado!



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