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EC OUTLOOK 2026



ROBUST DEMAND IN EC MARKET

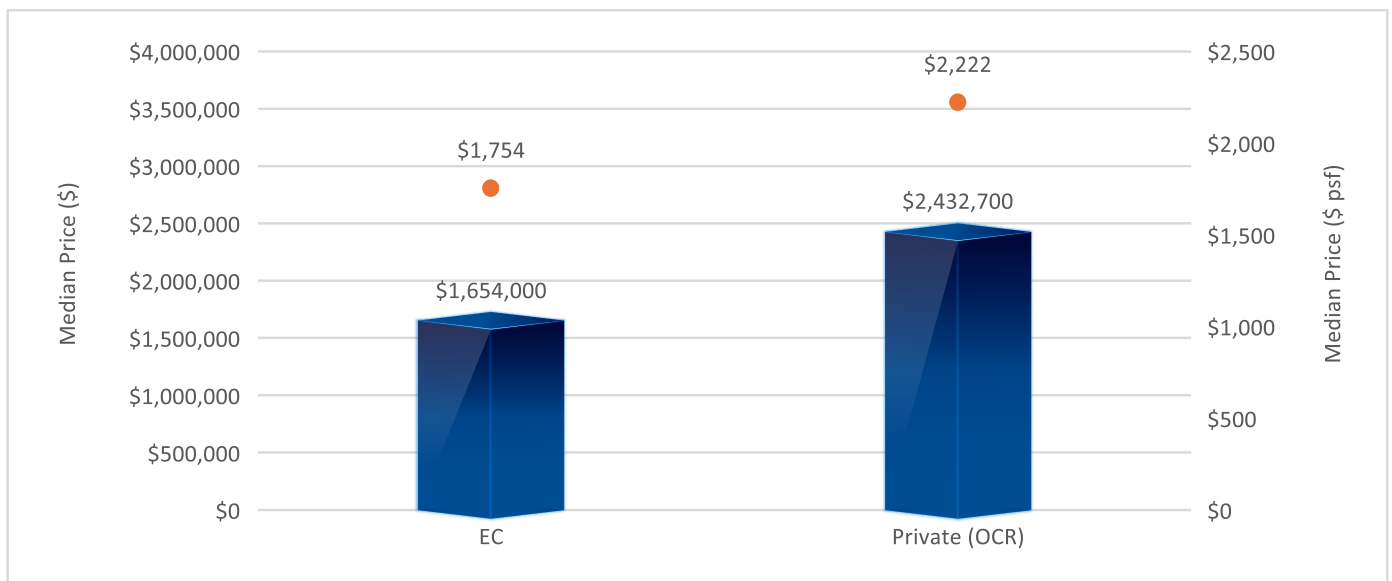
Developers launched 2 executive condominium (EC) projects in 2025 – Aurelle of Tampines and Otto Place.

Demand was extremely strong for these two EC projects because of their attractive price points and connectivity options.

ECs offered buyers similar lifestyle options to private residential projects at a very affordable quantum.

The median quantum for an EC sold in 2025 was \$1.654 million, 32% lower than that in the private non-landed residential market. The median psf for an EC was \$1,754 psf, 21.1% lower than the private non-landed residential market.

Figure 1: Comparison of EC and Private non-landed homes in OCR



* size of EC units sold to date ranges from 800 to 1,500 sq ft.
 Similar unit sizes in the private residential non-landed (OCR) market were used for comparison.

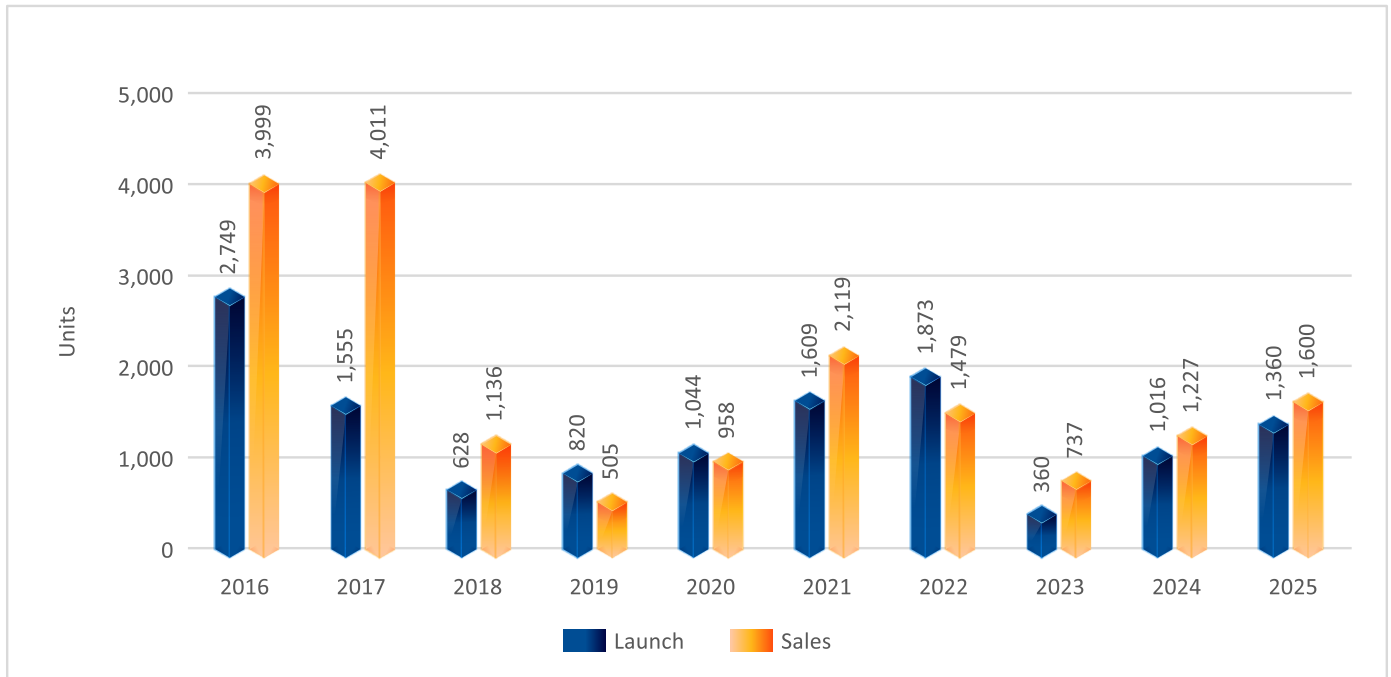
Source: URA, Huttons Data Analytics (data downloaded on 2 Dec 2025)

As Singapore’s rail network developed, more ECs are closer to a MRT station in recent years. Aurelle of Tampines is almost next to Tampines North MRT station while Otto Place is within a 5-minute walk to Bukit Batok West and Tengah Park MRT station.

Aurelle of Tampines sold 682 units while Otto Place moved 351 units during the launch weekend. Aurelle of Tampines is fully sold and less than 20 units are available for sale in Otto Place.

An estimated 1,600 uncompleted EC units were sold in 2025, the highest EC sales since 2021. Less than 20 EC units are estimated to be unsold as of 4Q 2025.

Figure 2: Launches and sales of EC Projects



Source: URA, Huttons Data Analytics (data downloaded on 1 Dec 2025)

The EC projects will see robust take-up in 2026 due to their location. New benchmark EC prices may be achieved in 2026 but there will still be a considerable gap with new private non-landed home prices which may also test new highs.

In 2026, there will be two EC launches, Coastal Cabana and Rivelle Tampines, both in the East. Both EC projects may see a take-up above 65% on launch day.

Coastal Cabana, the first EC in Pasir Ris in 12 years will open its sales gallery in Dec 2025 and book sales in Jan 2026. It will be the second EC in Pasir Ris to offer sea views. It will adopt the HDB balloting system where both first and second-timers are eligible to book their units on the same day.

Rivelle Tampines is adjacent to Pinery Residences, a mixed-use development which will be connected to Tampines West MRT station via an underground link.

The Government is reviewing the income ceiling for buyers of BTO flats. A revision to income ceiling for BTO flats will also lead to a revision in income ceiling for EC. If the monthly income ceiling for EC is revised upwards by \$2,000, more buyers can qualify to buy an EC.

The MSR of 30% should be reviewed as well. An increase of 5 percentage points to 35% will allow buyers to use more of their income to service the loan and potentially reduce the upfront cash component.



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