



Inteligência de Mercado



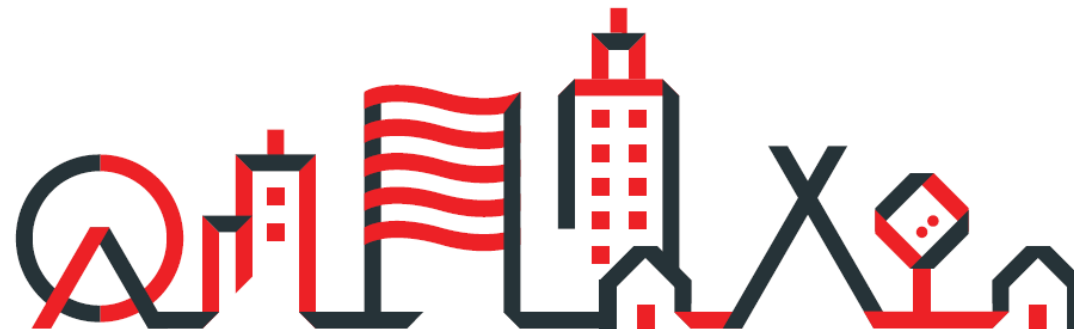
SECOVISP
A CASA DO MERCADO IMOBILIÁRIO



Reunião GEIS

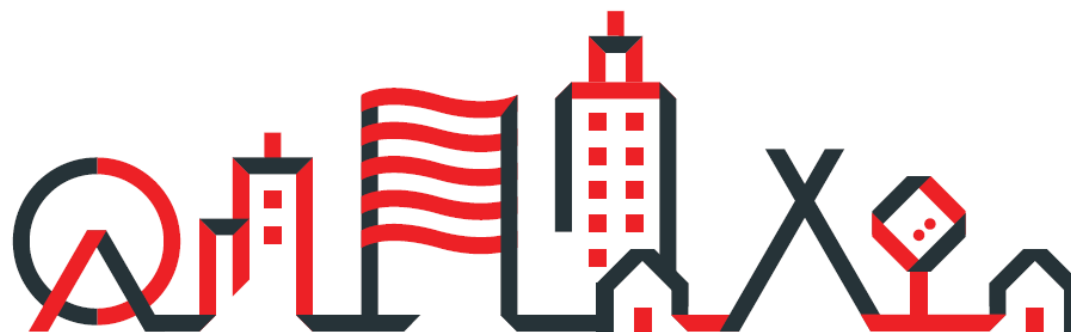


Mercado Imobiliário da Cidade de São Paulo





Vendas



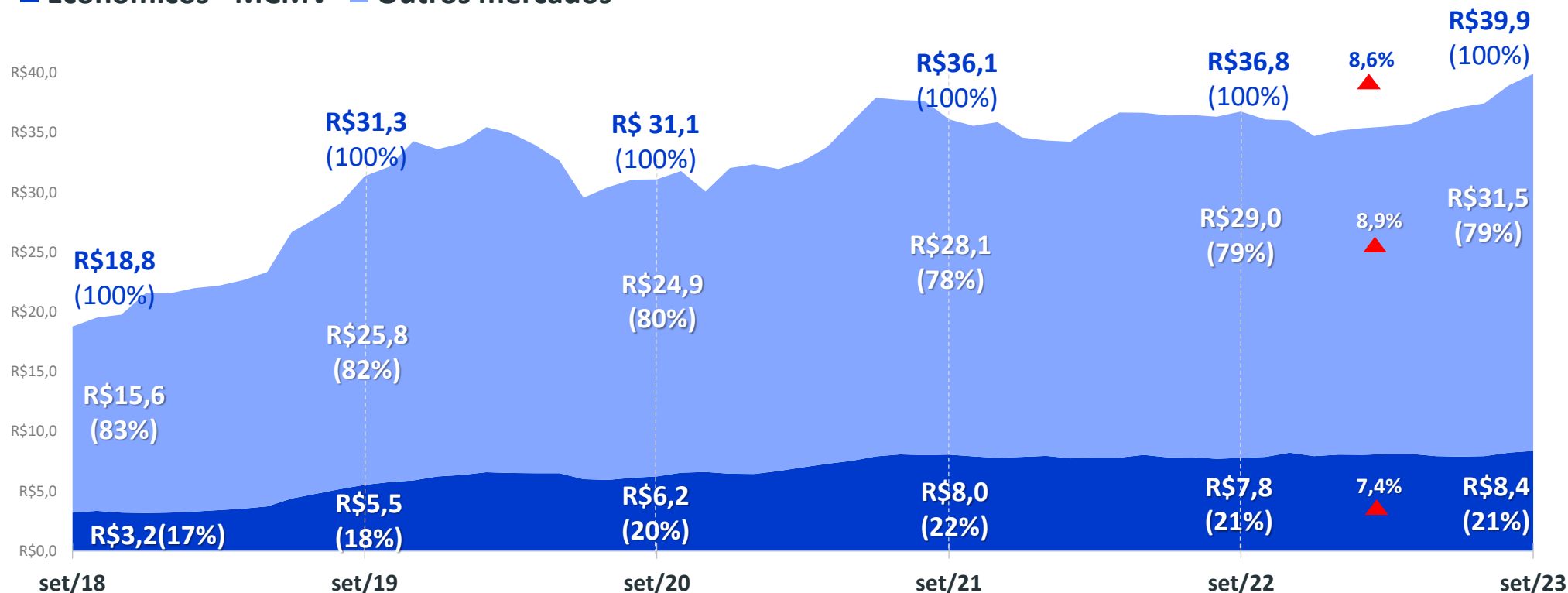


VGV (Valor Global Vendido) - acumulado em 12 meses

R\$ Bilhões - atualizado pelo INCC-DI de set/23



■ Econômicos - MCMV ■ Outros mercados



Em 12 meses

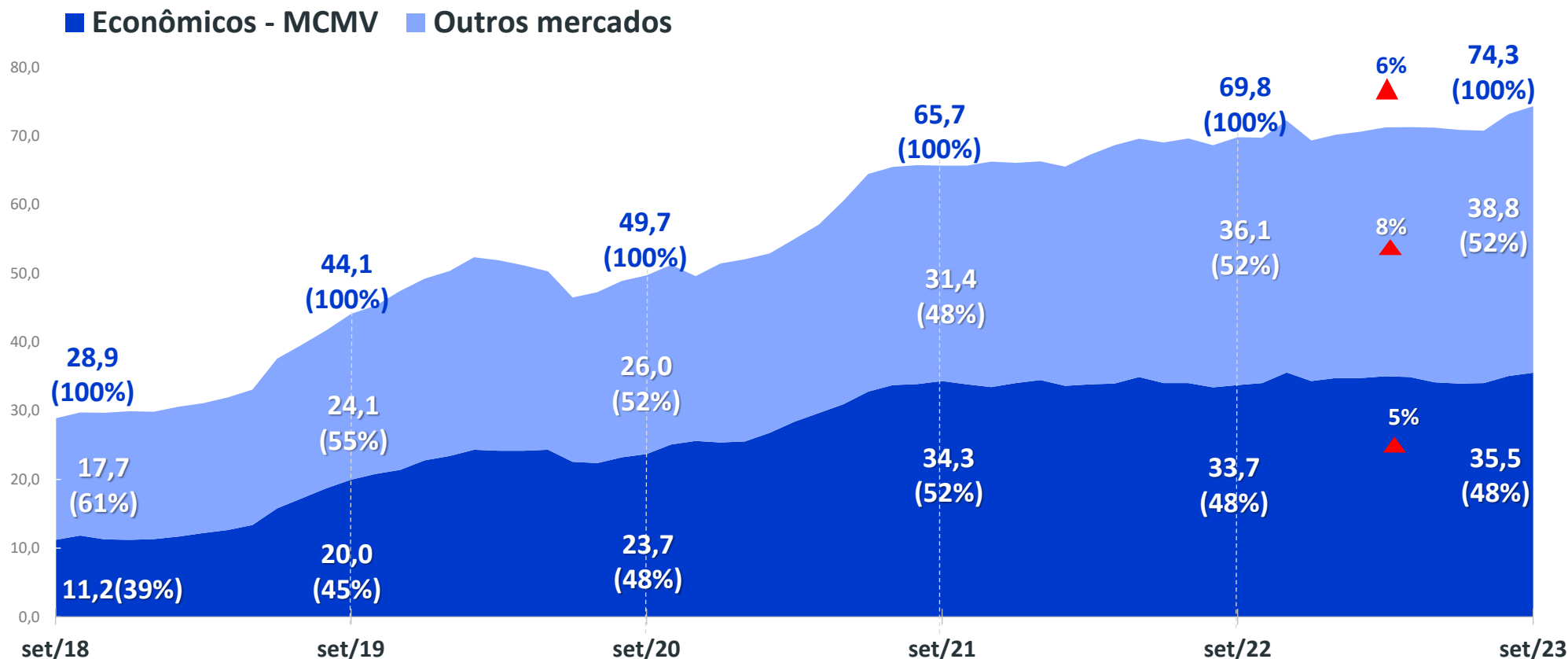
**R\$ 39,9
Bilhões**

Foi o total do VGV
na capital paulista
(outubro/22 a setembro/23)



Unidades residenciais comercializadas – acumuladas em 12 meses

Em mil unidades

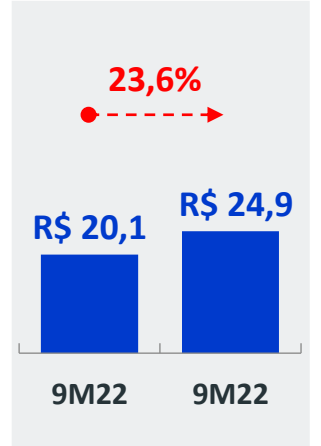
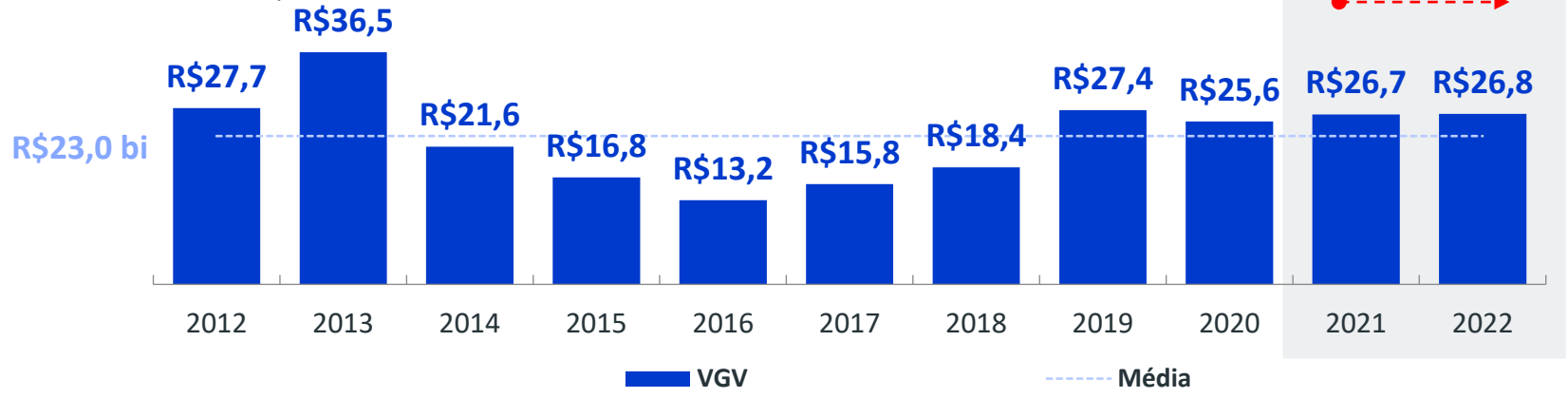




Outros Mercados – Cidade de São Paulo

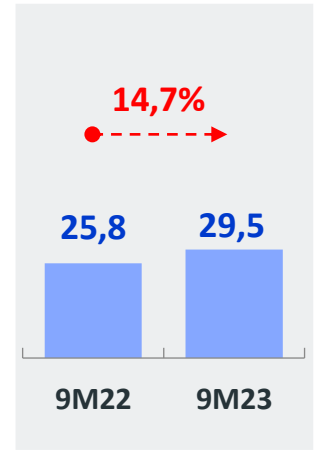
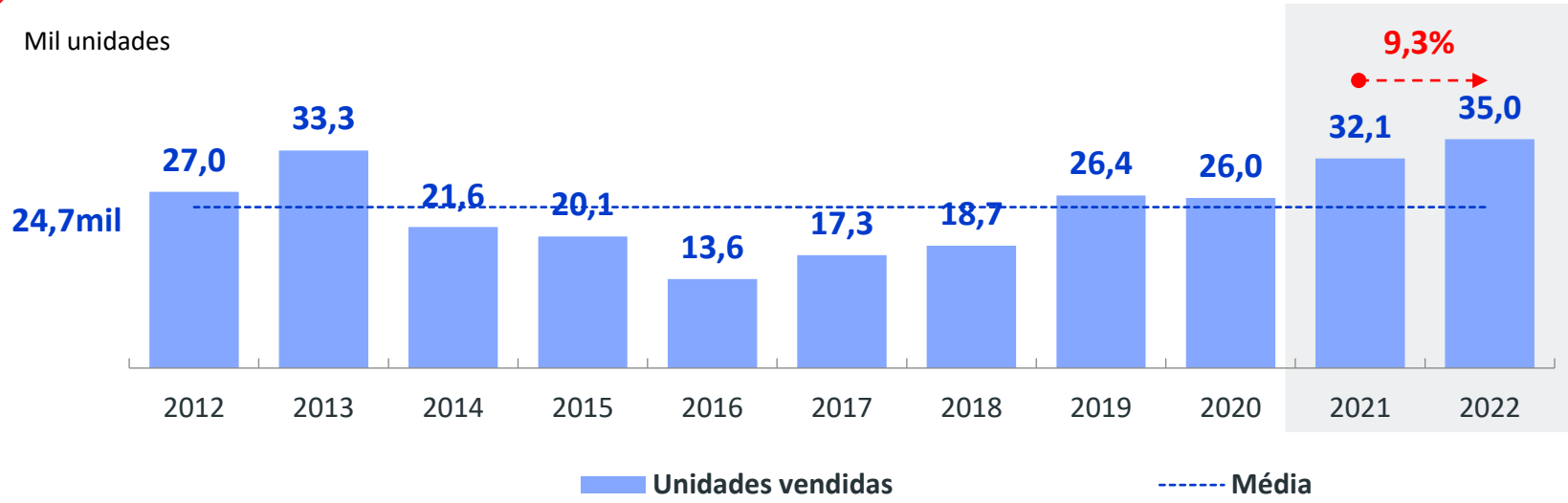
VG (Valor Global Vendido)

R\$ Bilhões - atualizado pelo INCC-DI de set/23



Unidades vendidas

Mil unidades

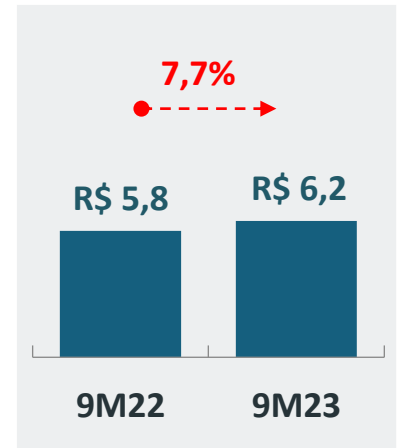
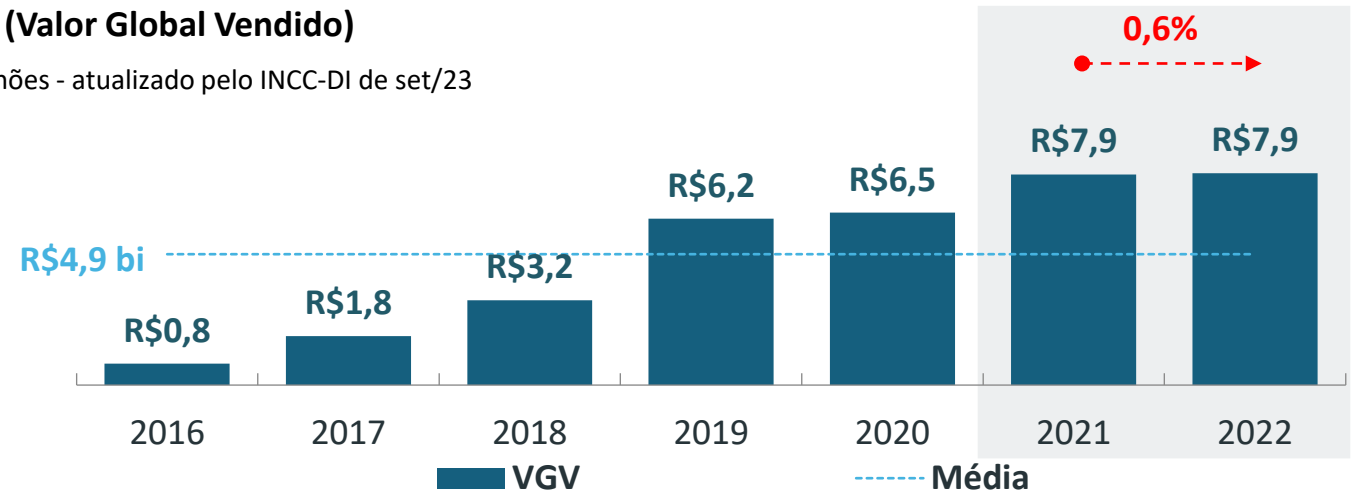




Imóveis Econômicos (MCMV) – Cidade de São Paulo

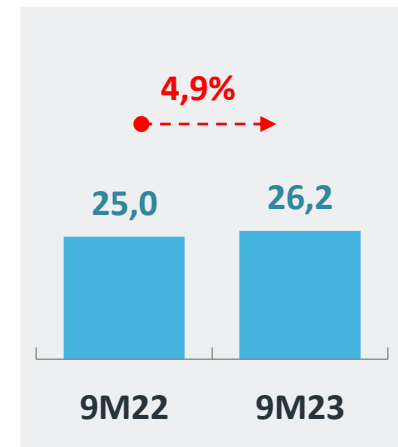
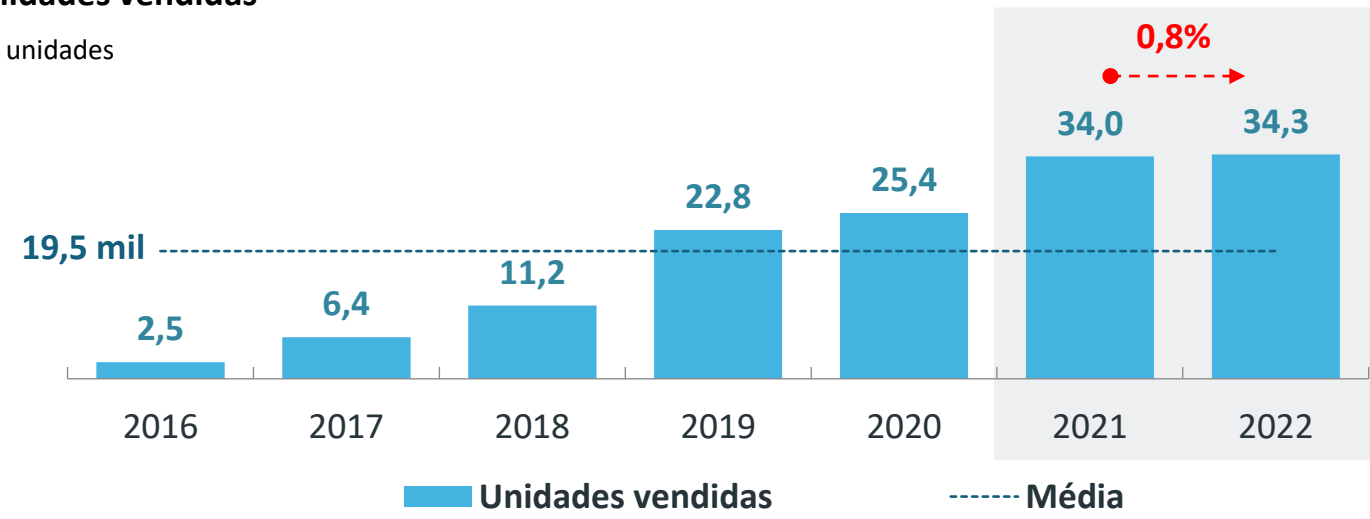
▼ VGV (Valor Global Vendido)

R\$ Bilhões - atualizado pelo INCC-DI de set/23



▼ Unidades vendidas

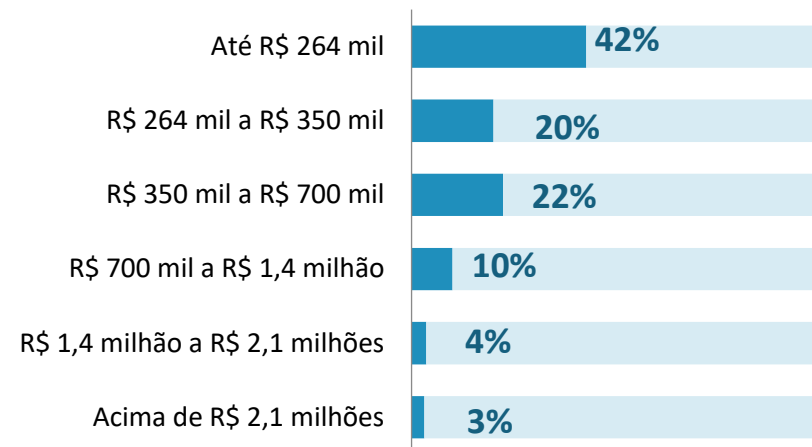
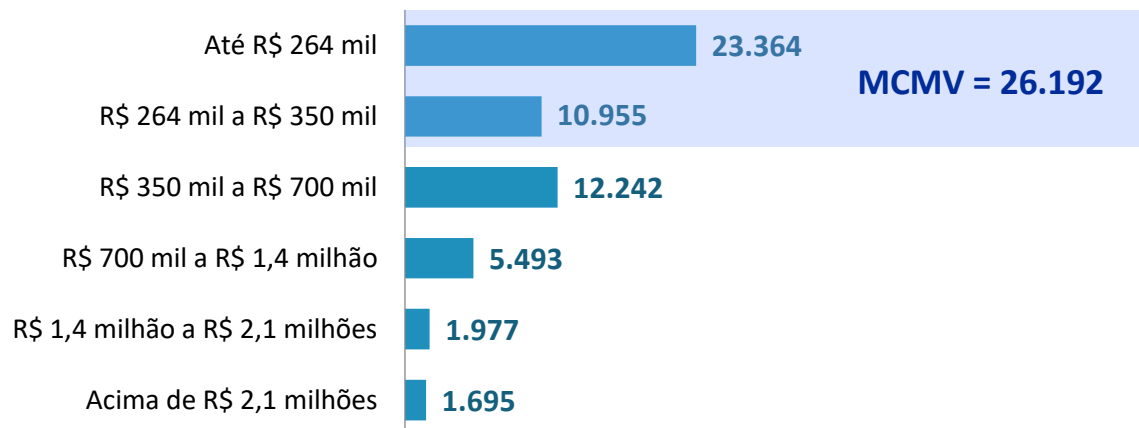
Mil unidades





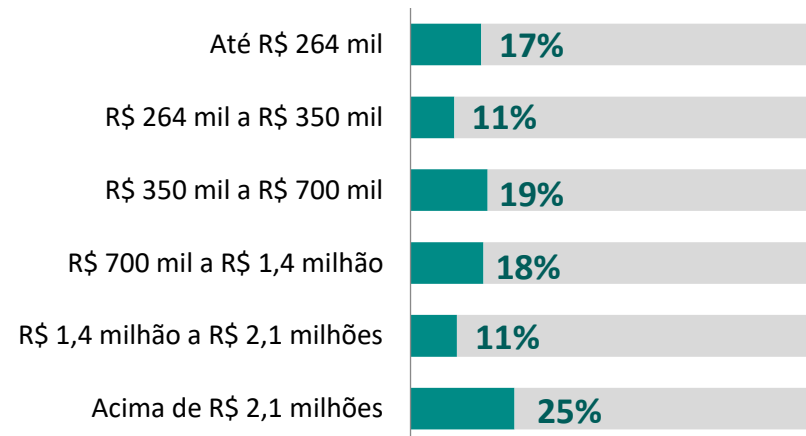
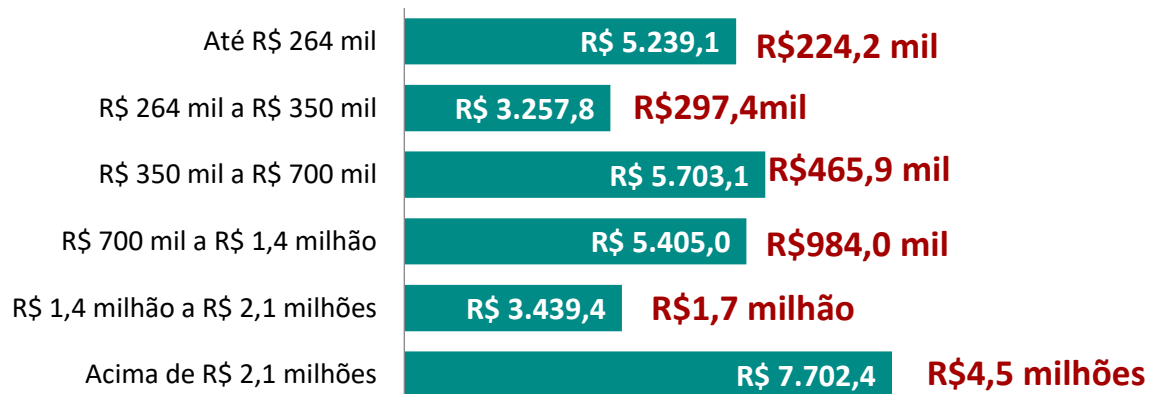
Vendas de imóveis residenciais – 9M23

Unidades = 55.726



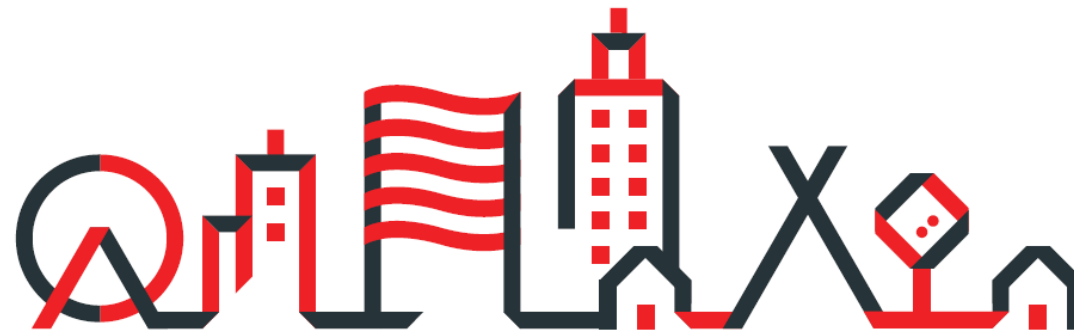
VGV = R\$ 21.182,7 milhões

Ticket médio





Lançamentos



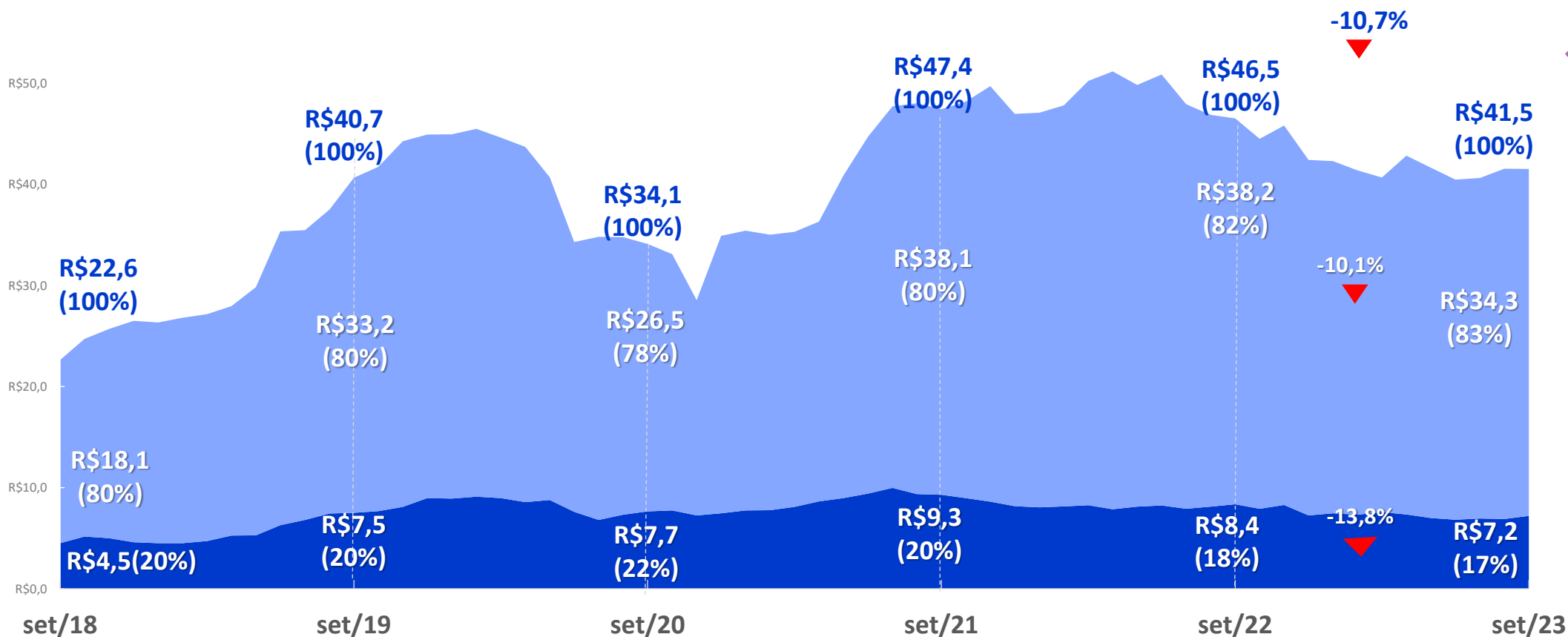


VGL (Valor Global Lançado) - acumulado em 12 meses

R\$ Bilhões - atualizado pelo INCC-DI de set/23



■ Econômicos - MCMV ■ Outros mercados



Em 12 meses

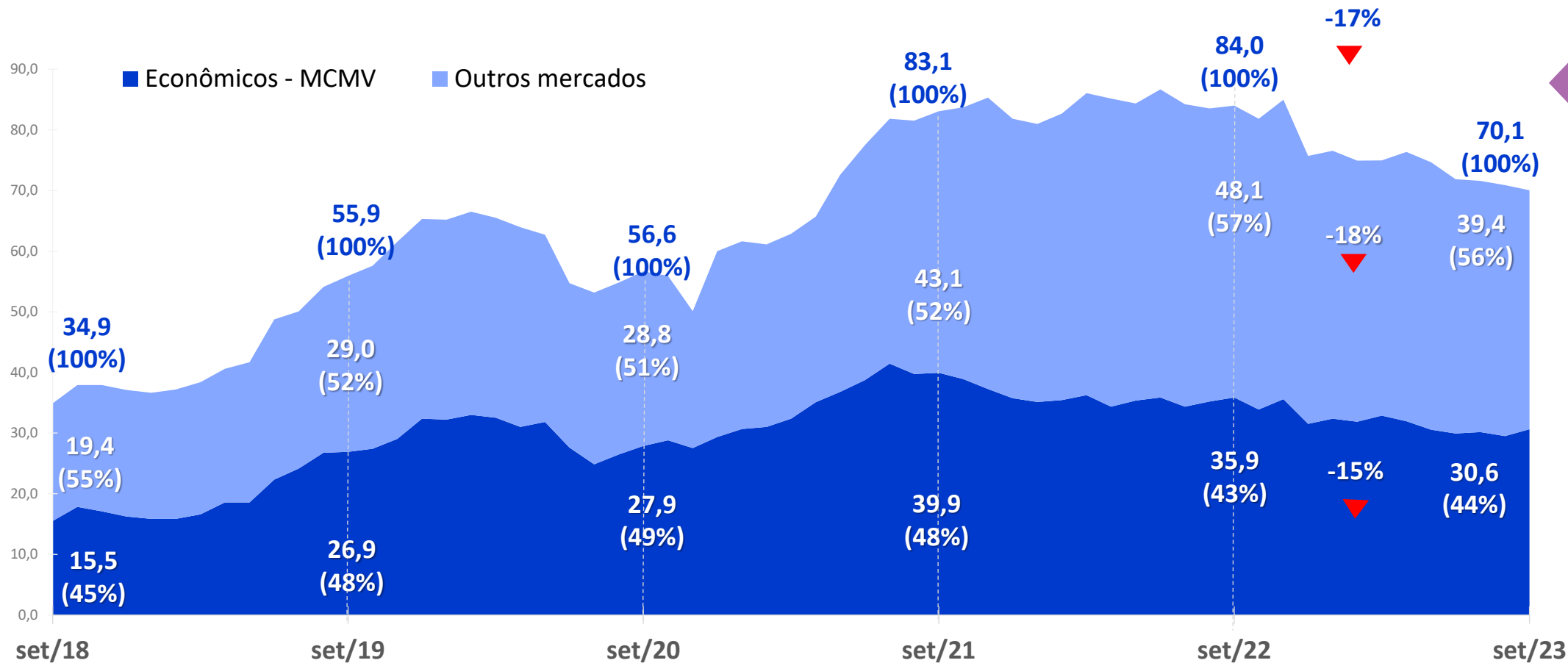
**R\$ 41,5
Bilhões**

Foi o total do VGL na capital paulista (outubro/22 a setembro/23)



Unidades residenciais lançadas – acumuladas em 12 meses

Em mil unidades



Em 12 meses

70.053
unidades

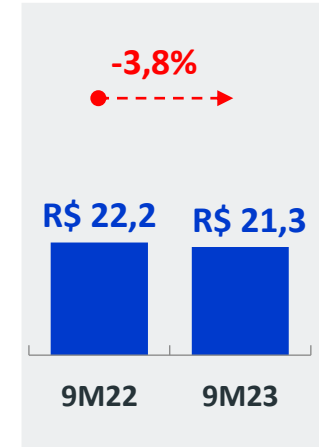
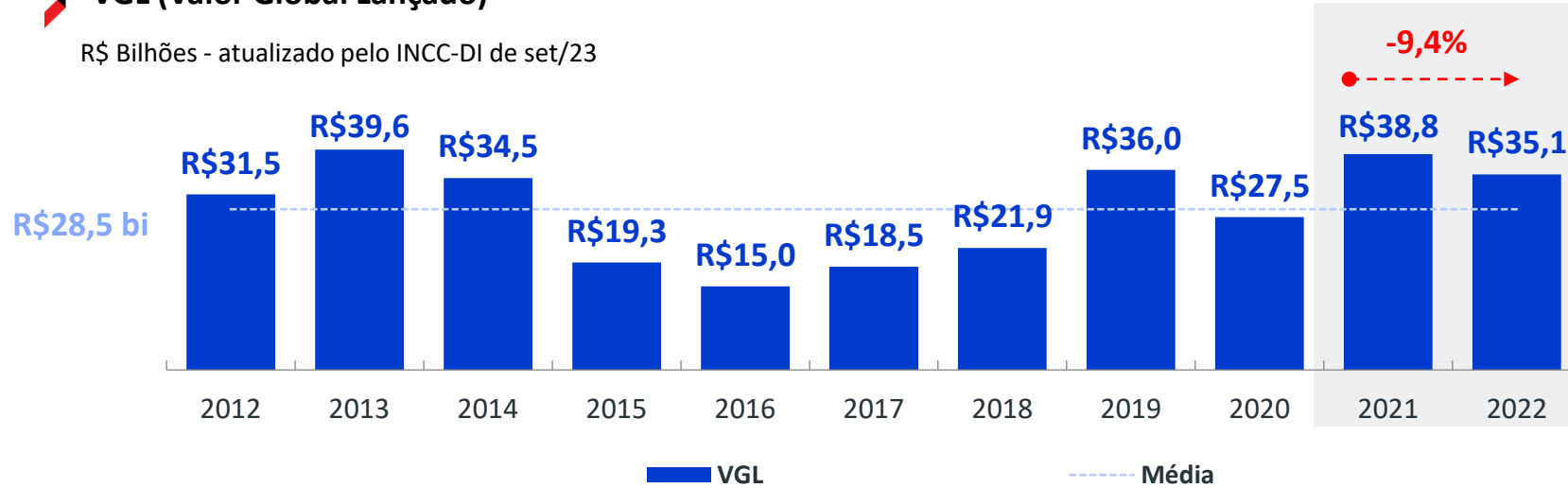
Foram lançadas na
capital paulista
(outubro/22 a setembro/23)



Outros Mercados – Cidade de São Paulo

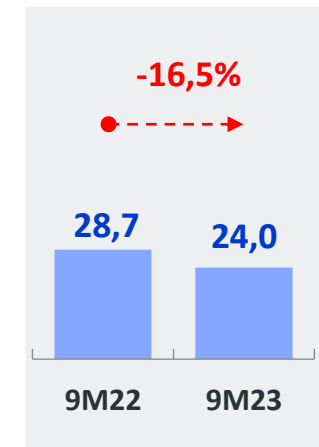
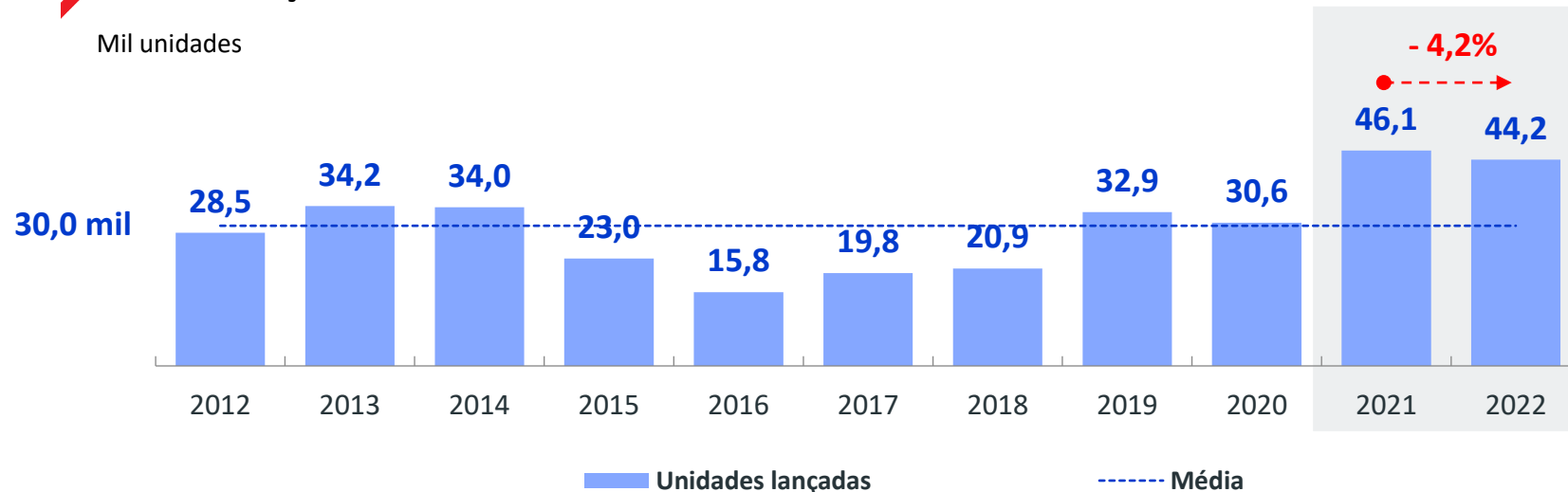
VGL (Valor Global Lançado)

R\$ Bilhões - atualizado pelo INCC-DI de set/23



Unidades lançadas

Mil unidades

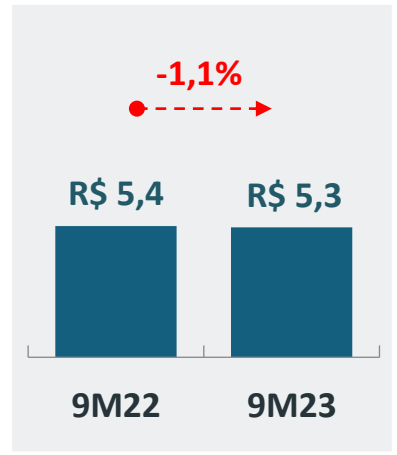
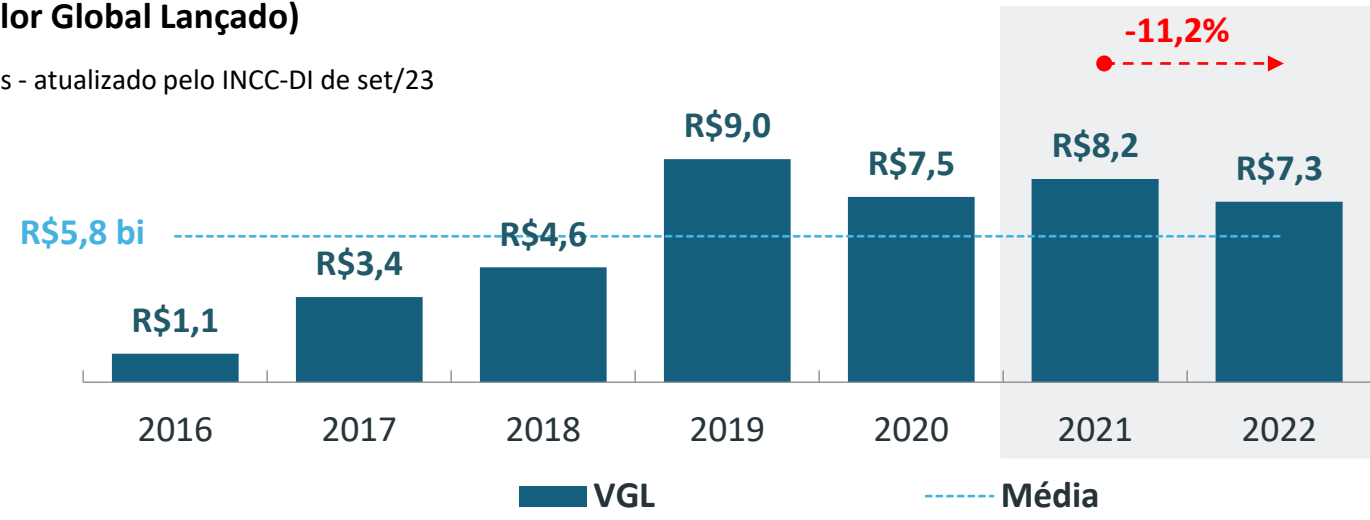




Imóveis Econômicos (MCMV) – Cidade de São Paulo

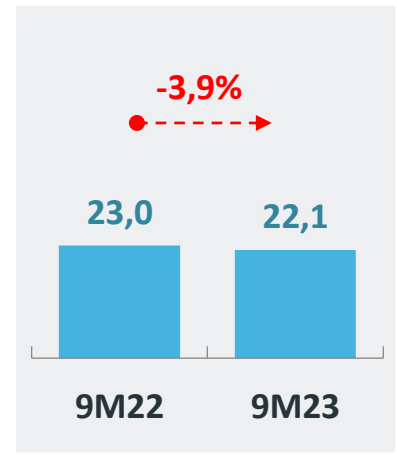
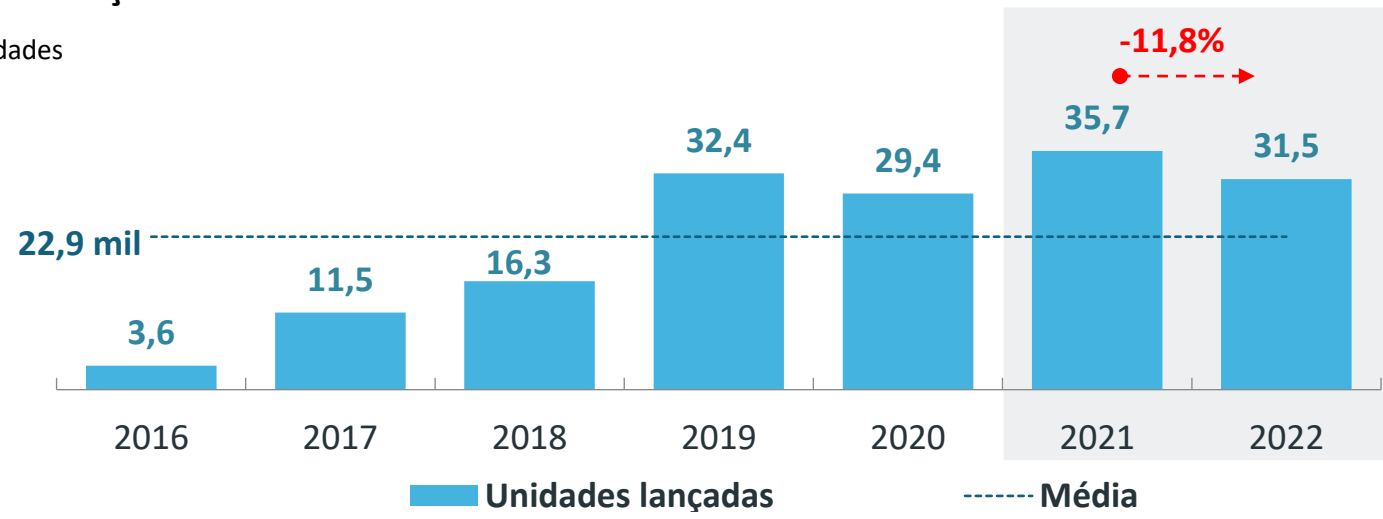
VGL (Valor Global Lançado)

R\$ Bilhões - atualizado pelo INCC-DI de set/23



Unidades lançadas

Mil unidades



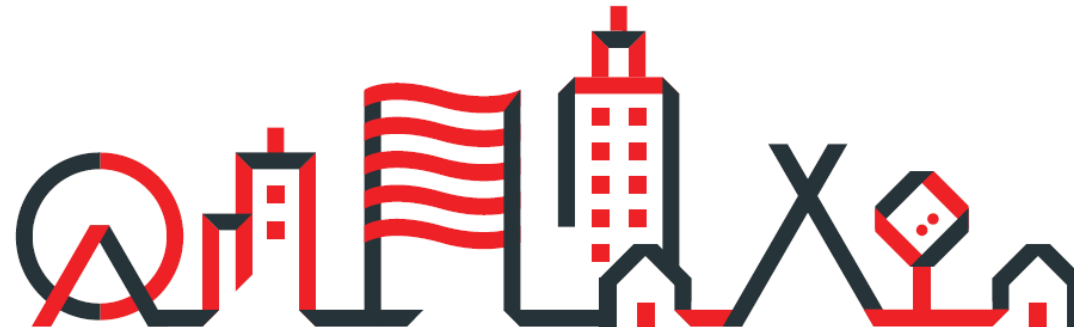


Comparativo lançamentos e vendas 9M23 – total cidade de São Paulo





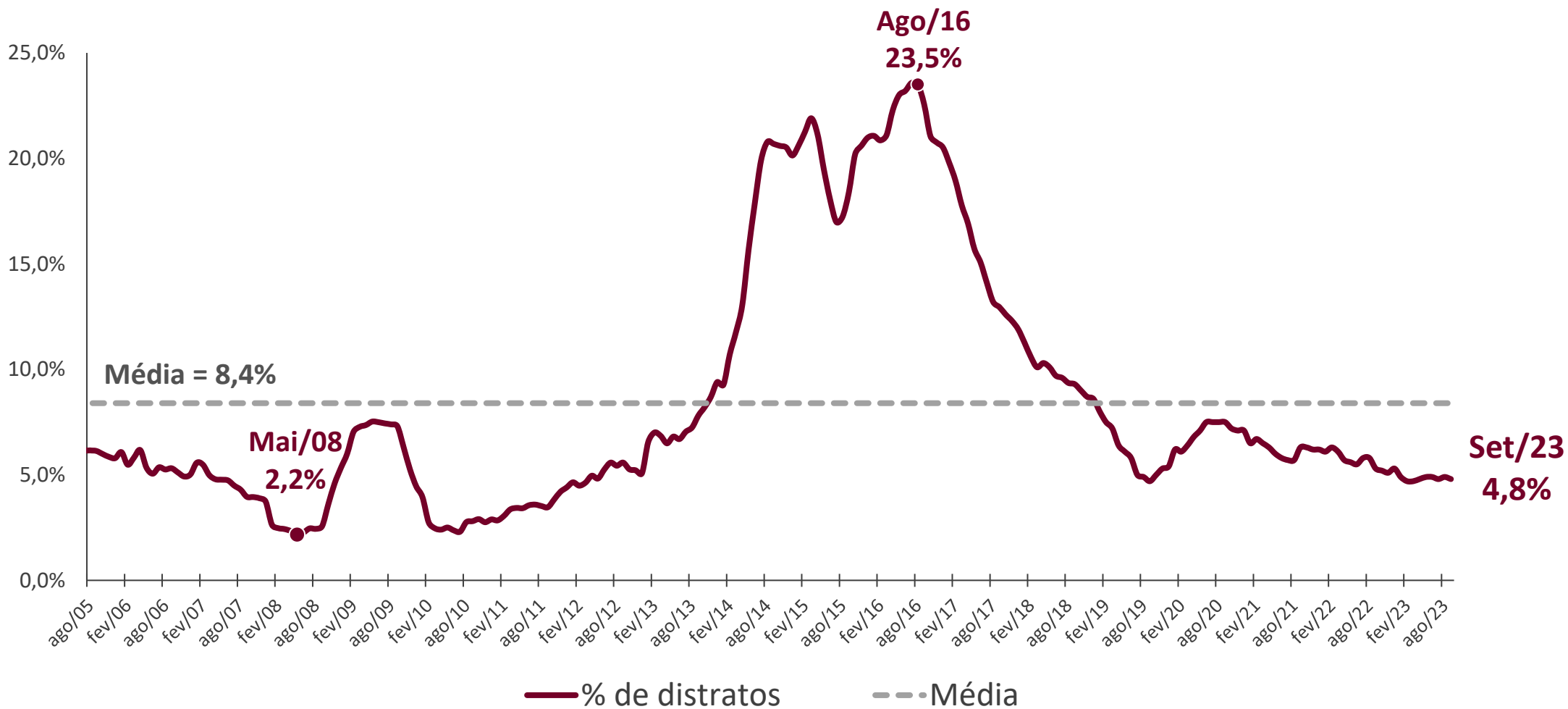
Distratos, VSO e Oferta Final





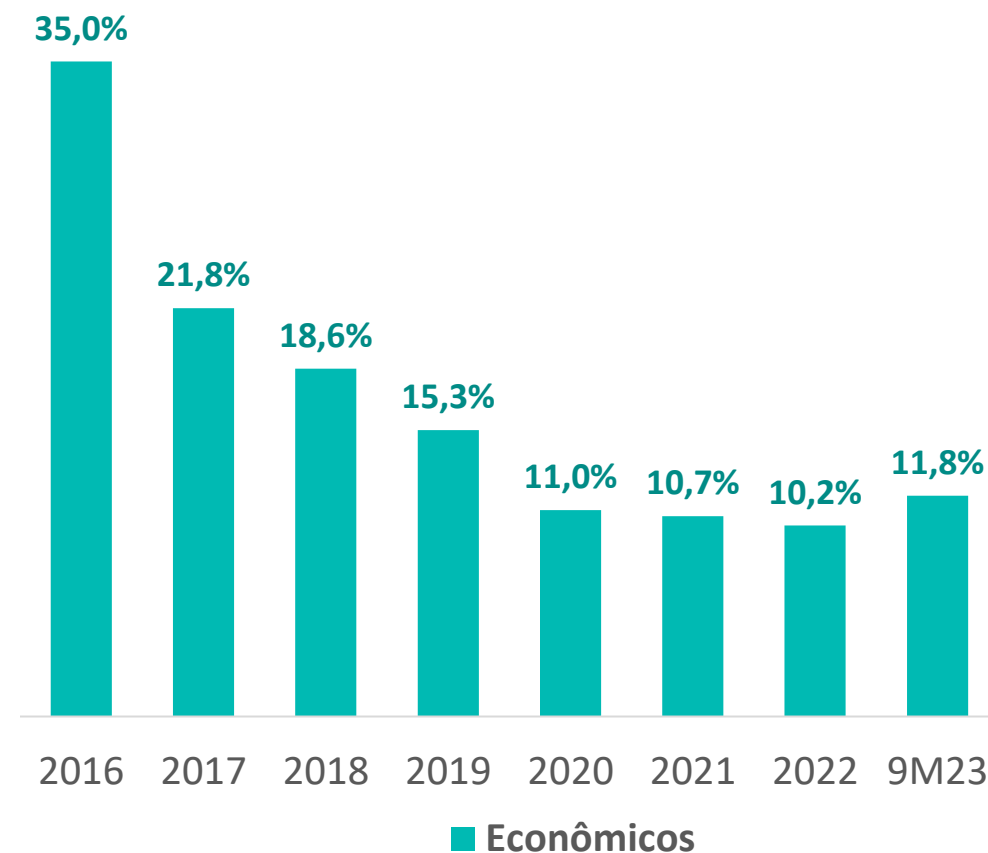
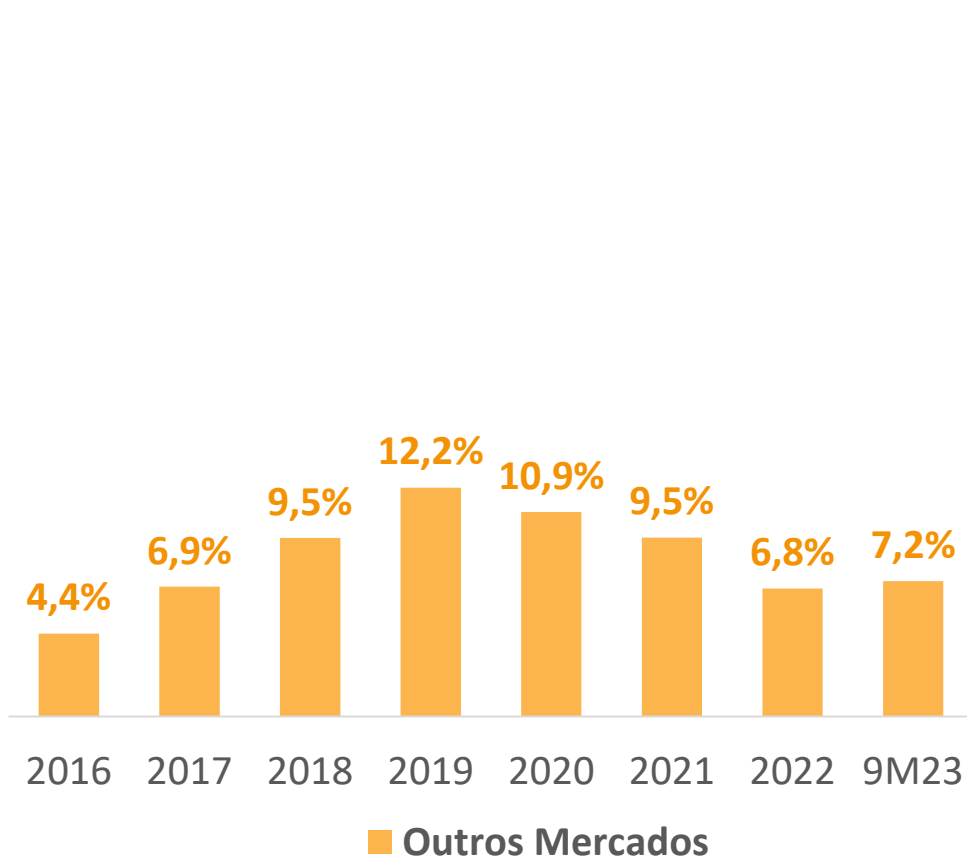
Porcentagem de Distratos sobre as Vendas da Amostra da PMI

Média dos últimos 12 meses – Cidade de São Paulo





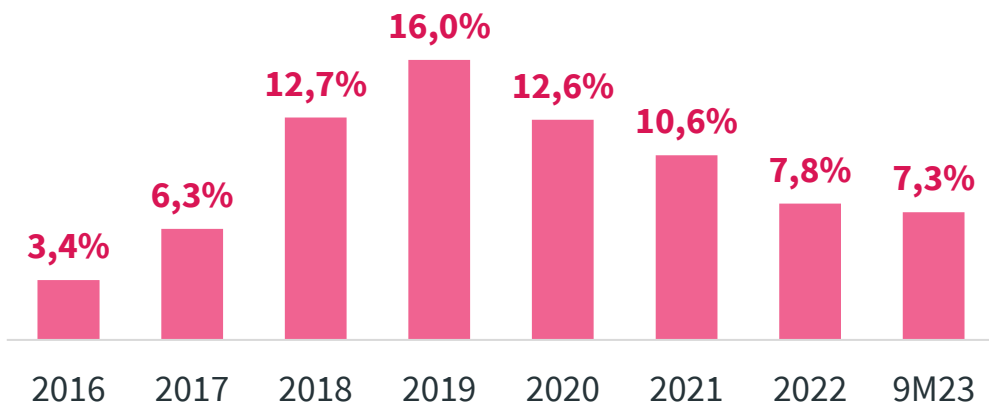
VSO (Velocidade de Vendas Sobre Oferta) mensal médio Cidade de São Paulo



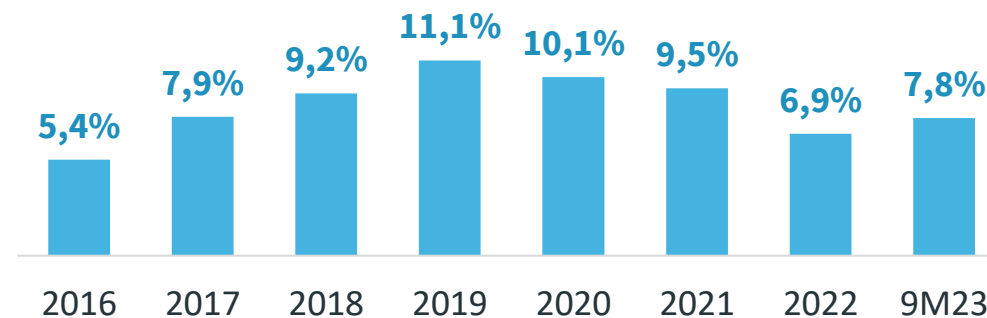
$$VSO = (Venda - Distrato) / (Oferta Inicial + Lançamentos)$$



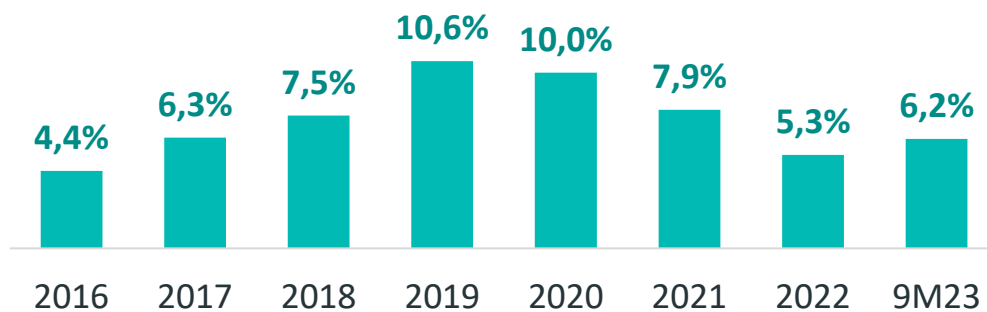
VSO mensal médio – Outros Mercados



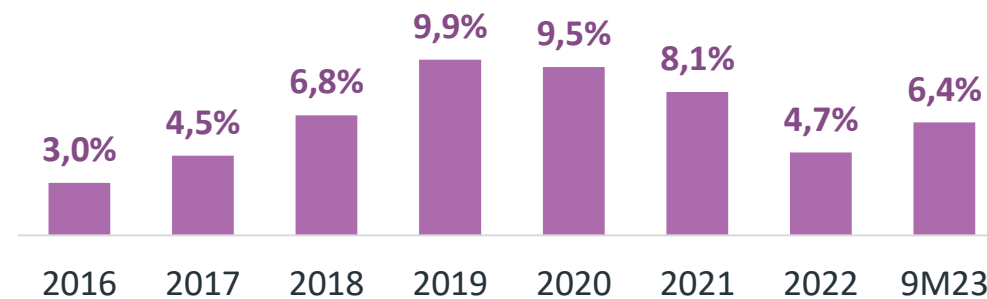
■ 1 Dormitório



■ 2 Dormitórios



■ 3 Dormitórios

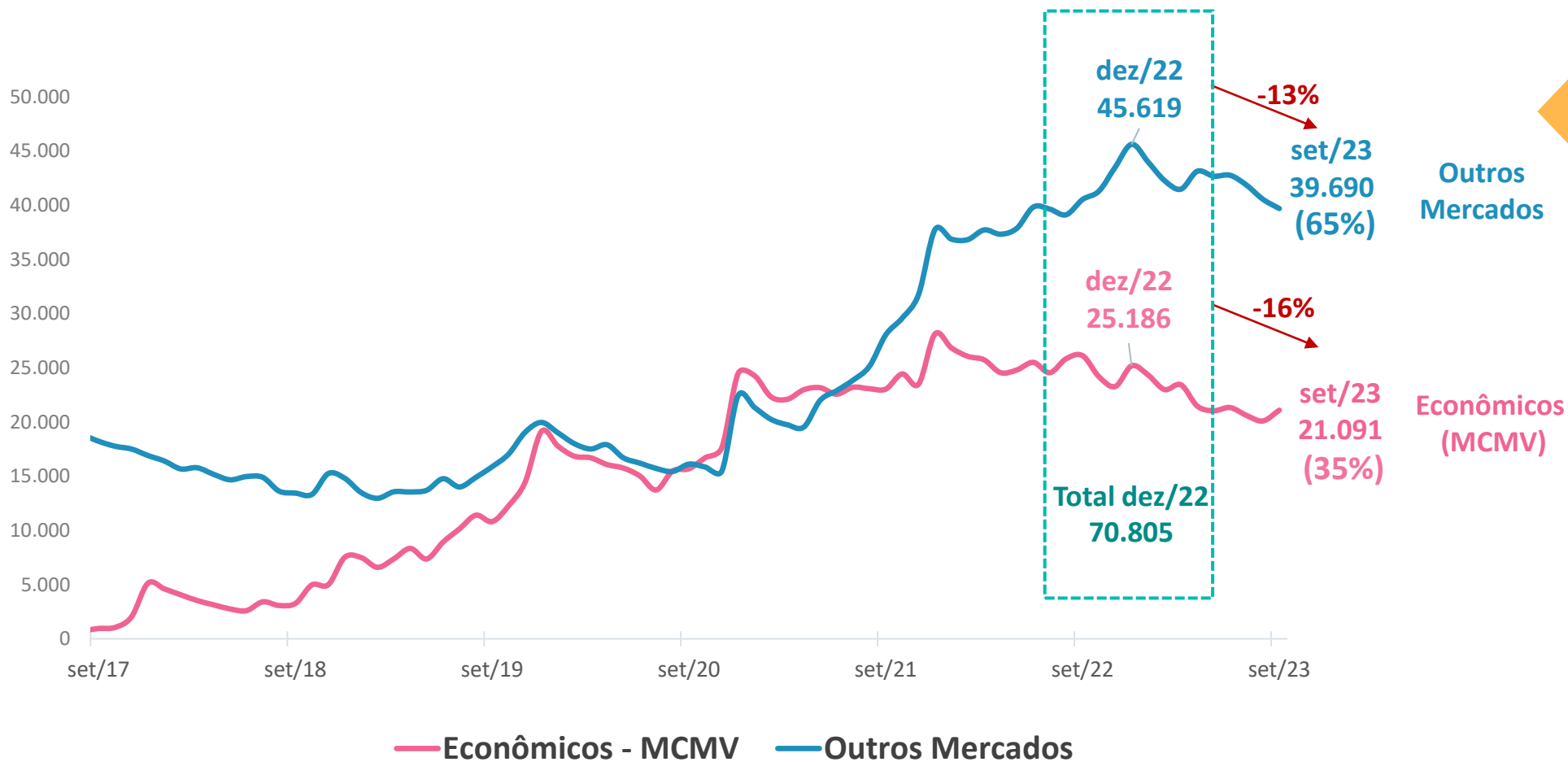


■ 4 Dormitórios



Oferta final econômica e outros mercados – cidade de São Paulo

Em mil unidades



Em setembro
60.781 unidades

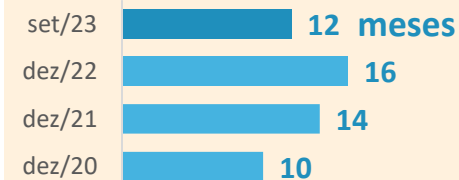
Estavam disponíveis para venda na capital paulista

Outros Mercados

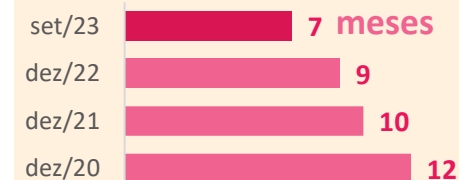
Escoamento da Oferta

Econômicos (MCMV)

Outros Mercados



Econômicos (CVA)




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

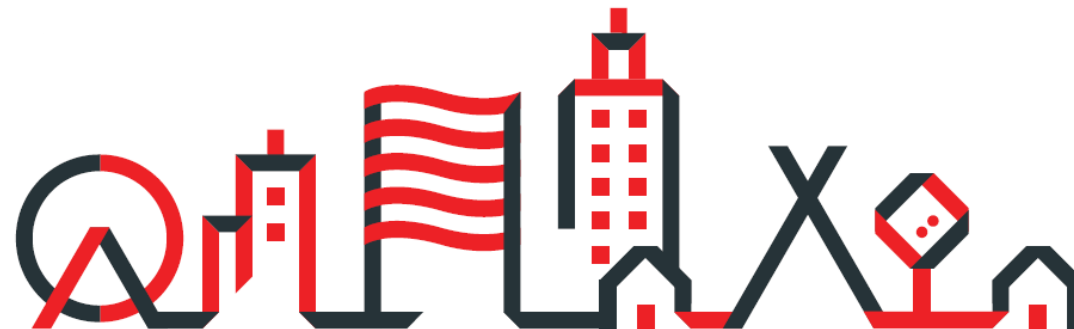



IGMI-R – Variação acumulada no ano (%)

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%



**Mercado Imobiliário da Interior
(31 cidades)
1º semestre de 2023**

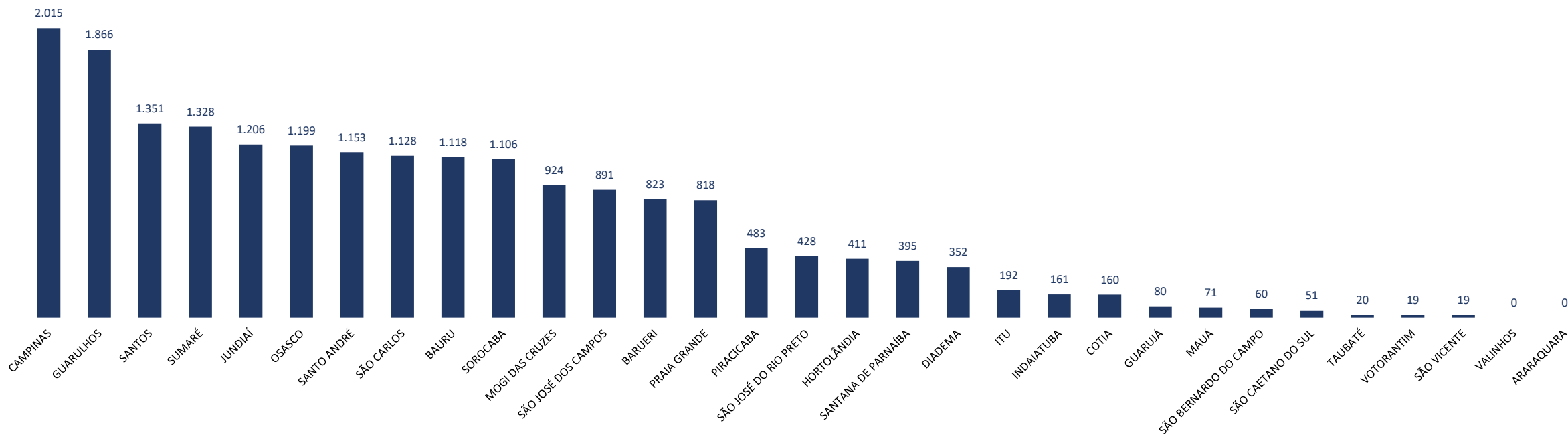


Interior – Lançamentos de Imóveis Residenciais Acumulado de Janeiro a Junho



Interior – Lançamentos de janeiro a junho de 2023

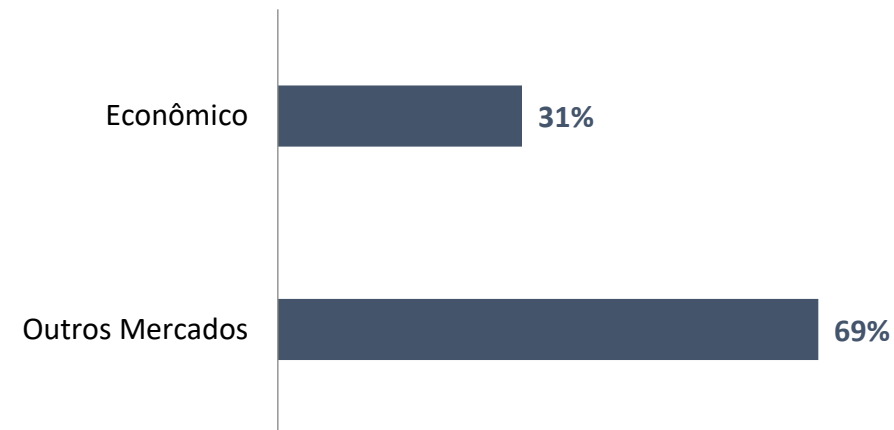
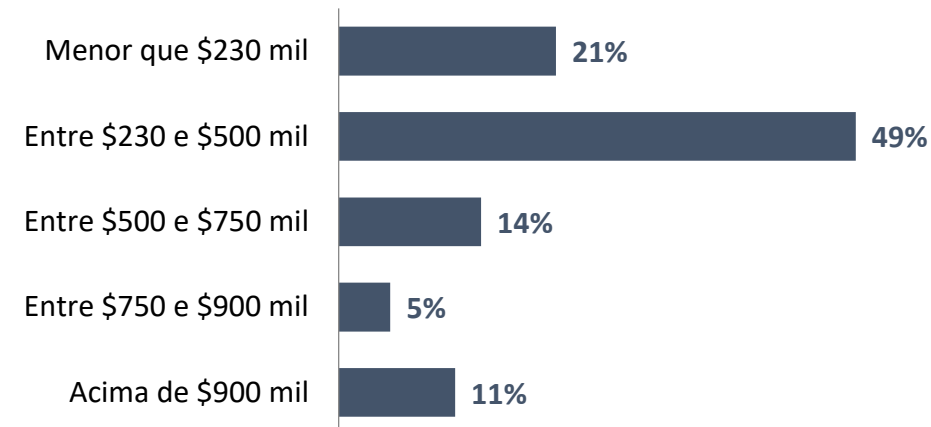
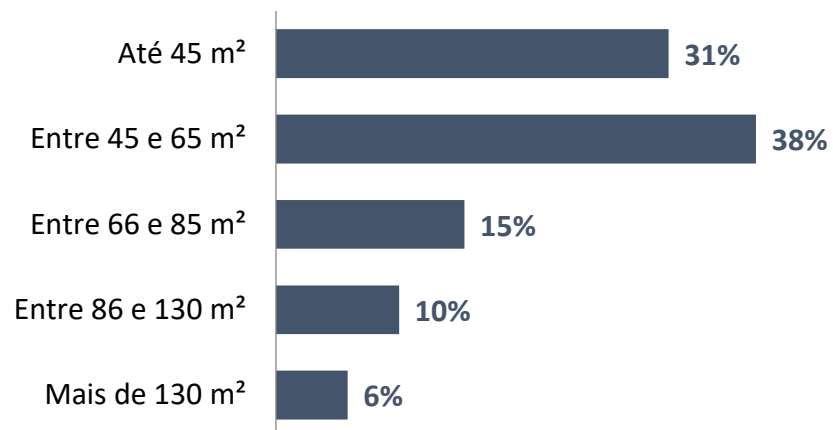
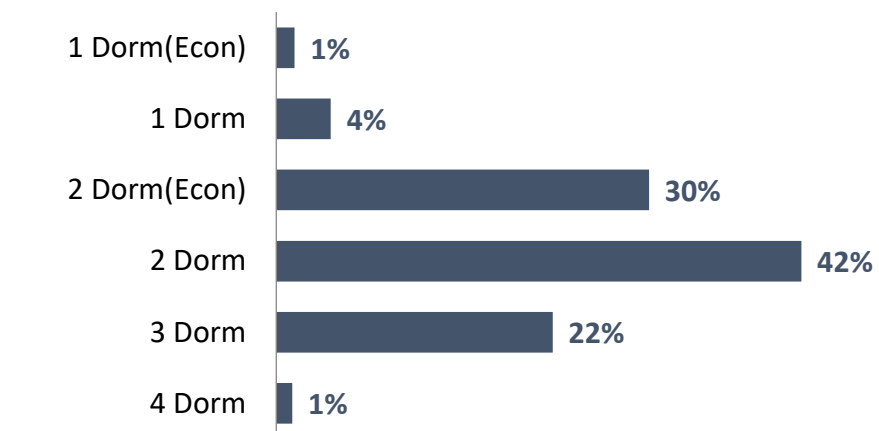
Em unidades



1523
19.828 unidades

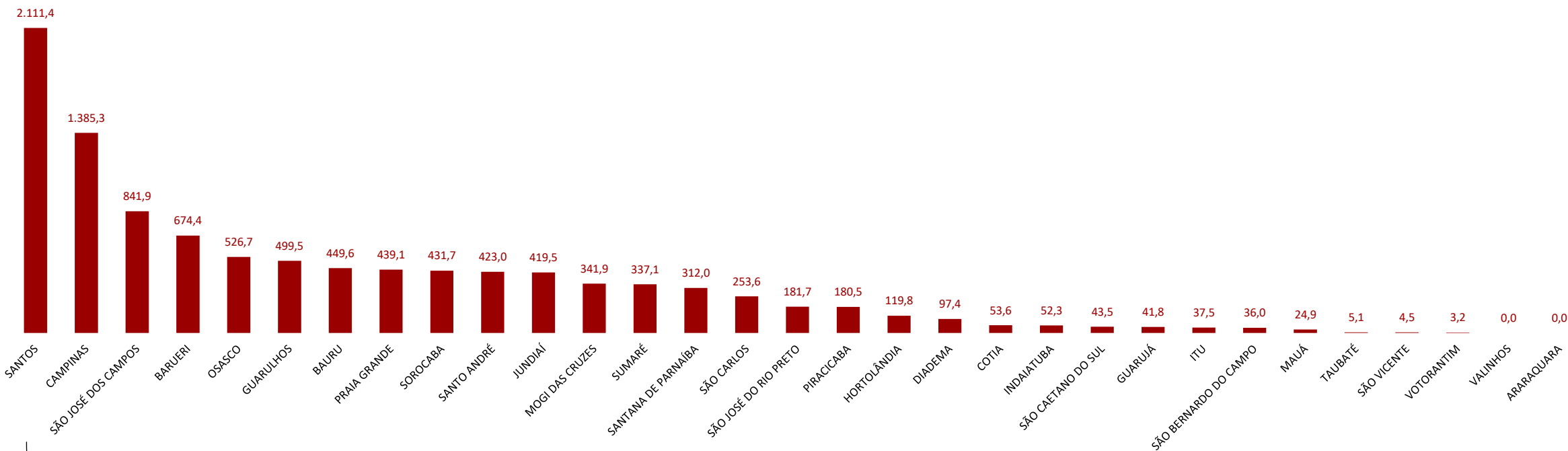
Interior – Lançamentos em unidades – janeiro a junho de 2023

lançamentos = 19.828 unidades



Interior – Lançamentos de janeiro a junho de 2023

*VGL (R\$ MM)

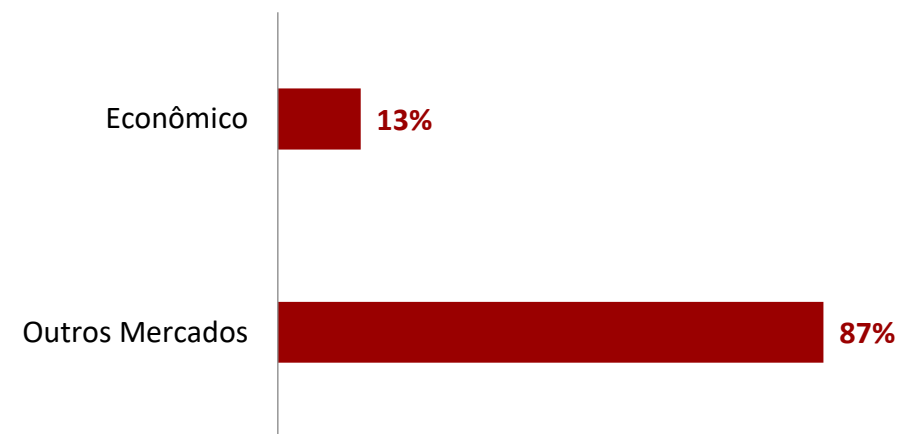
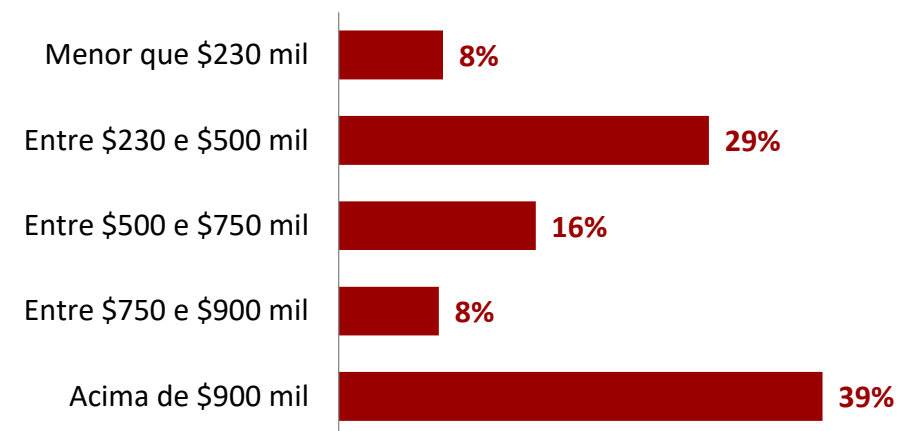
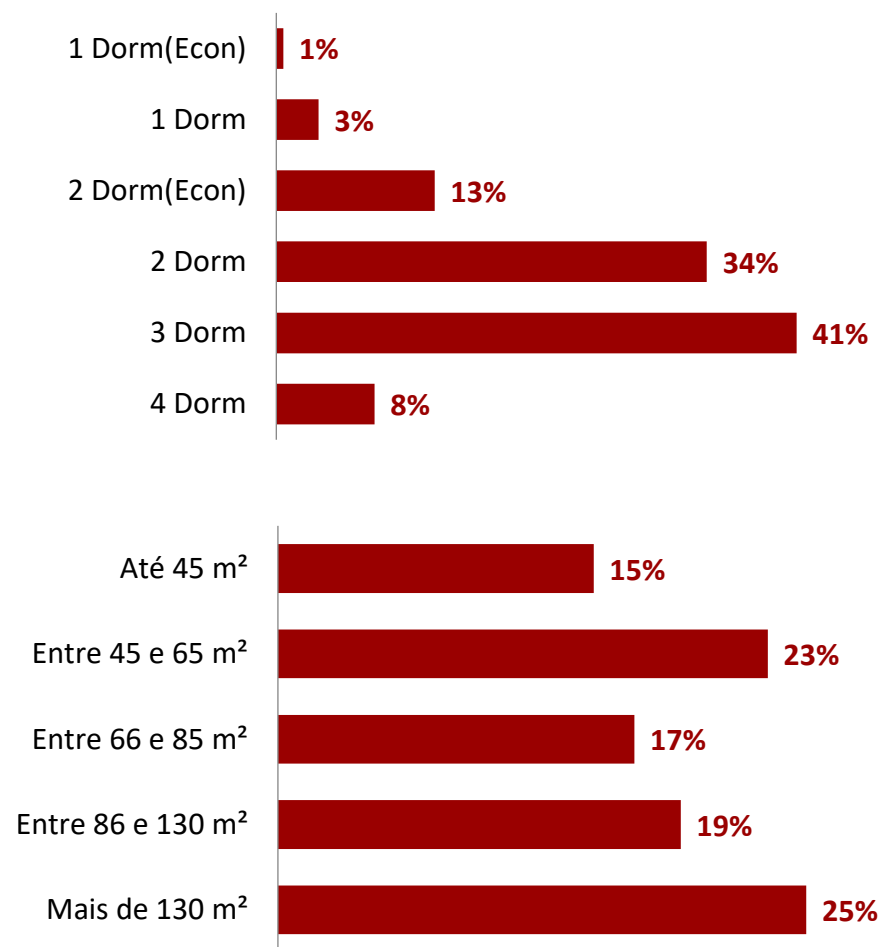


1523

R\$ 10.328,4 MM

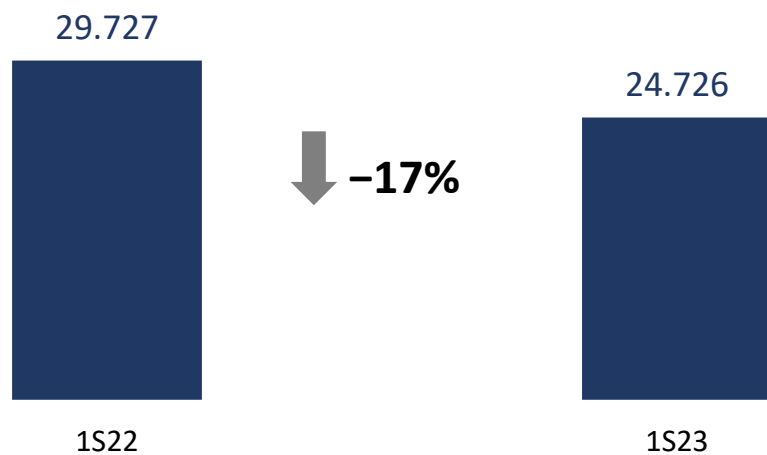
Interior – VGL em milhões (R\$) – janeiro a junho de 2023

*VGL = R\$ 10.328,4 milhões

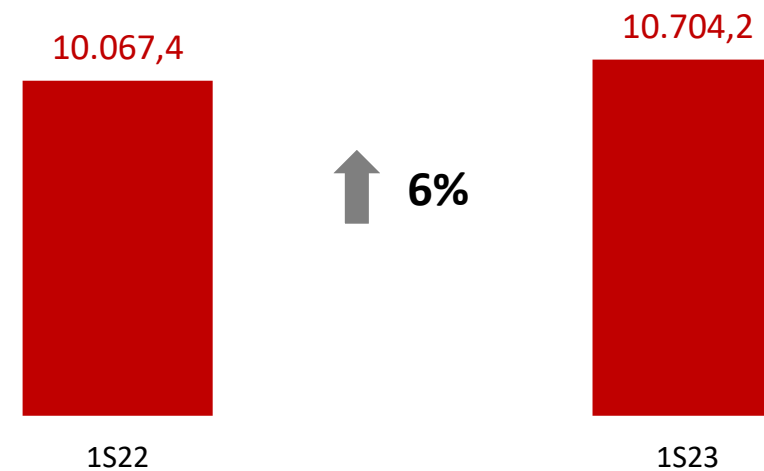


Interior – Vendas de Imóveis Residenciais Acumulado de Janeiro a Junho

Unidades



*VGV
Valores (R\$ MM)



Interior – Vendas de Imóveis Residenciais – janeiro a Junho de 2023

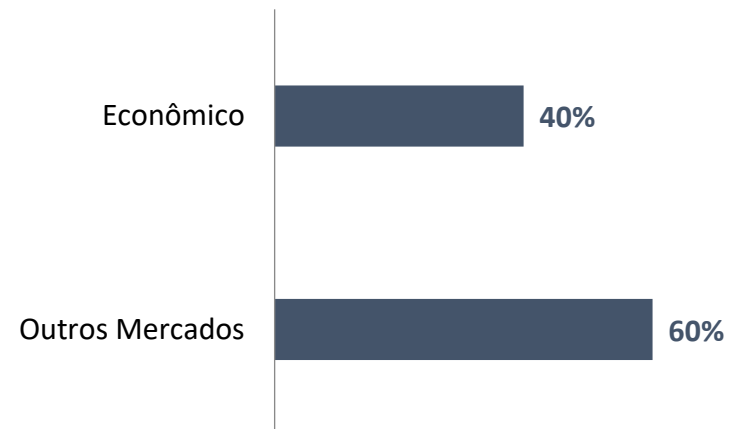
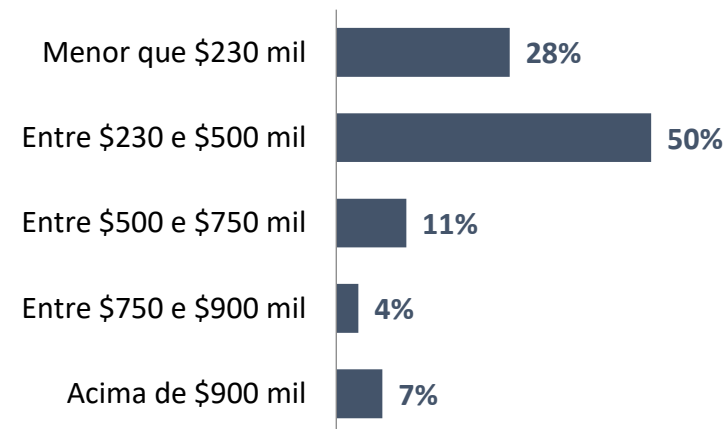
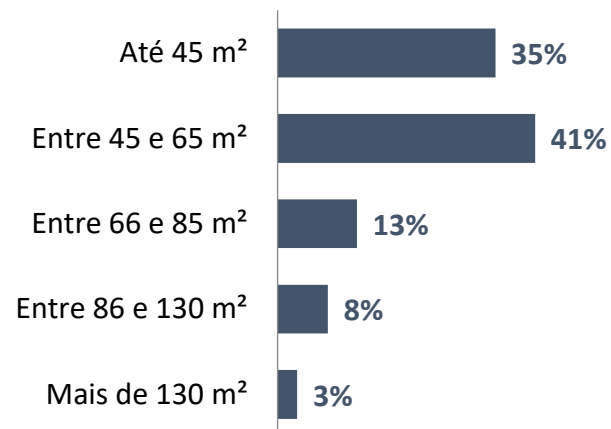
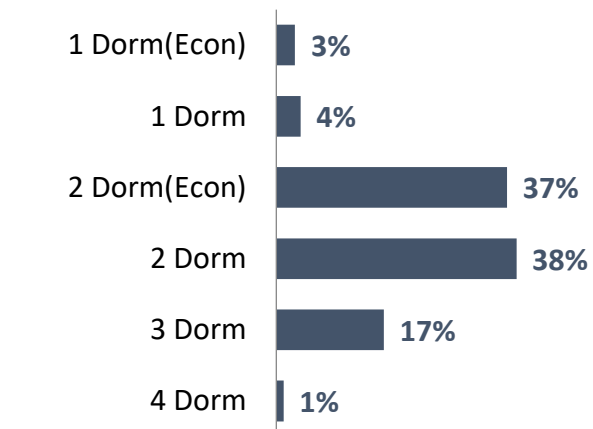
Em unidades



1S23
24.726 unidades

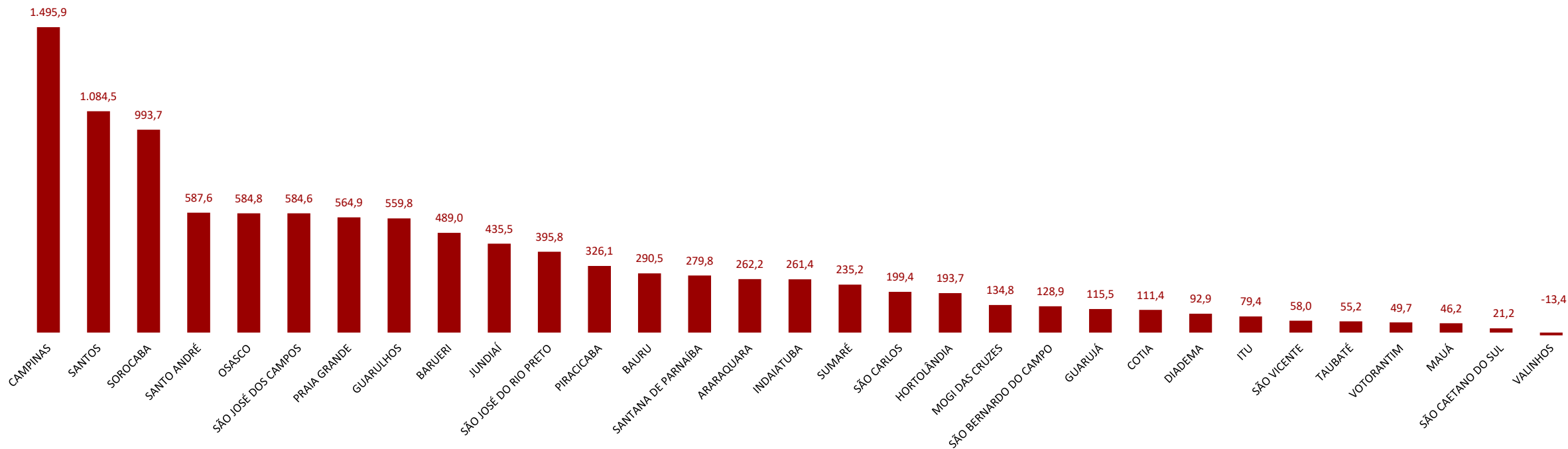
Interior – Vendas em unidades – janeiro a Junho de 2023

vendas = 24.726 unidades



Interior – Vendas de Imóveis Residenciais – janeiro a junho de 2023

*VGV (R\$ MM)

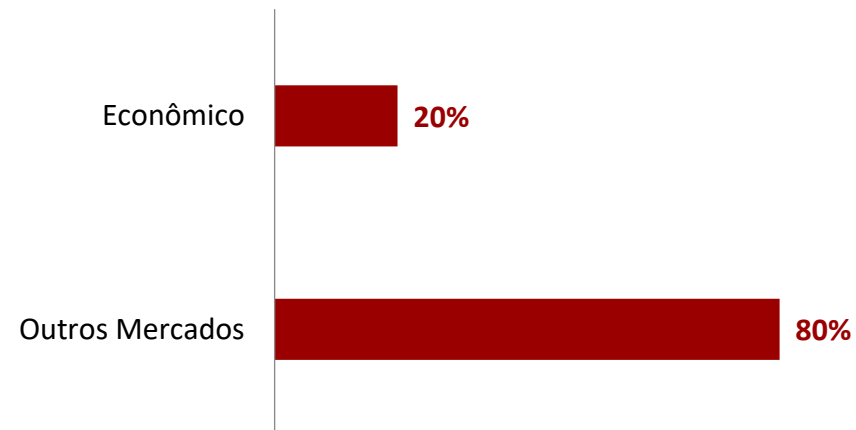
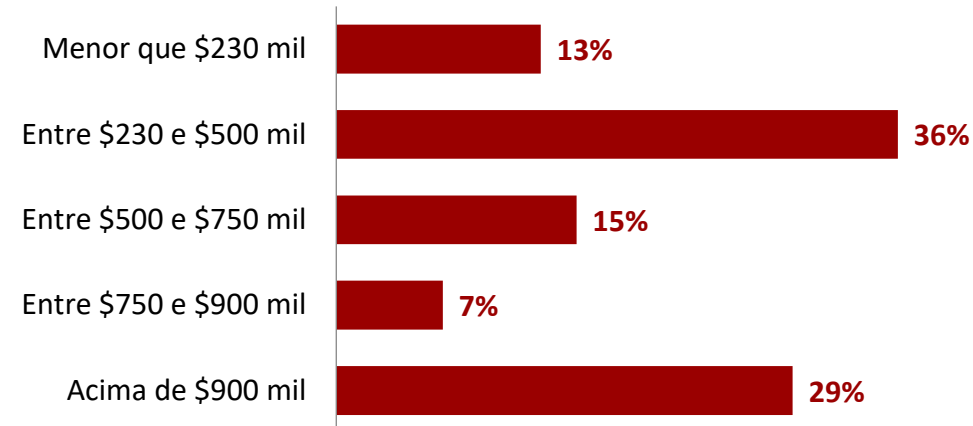
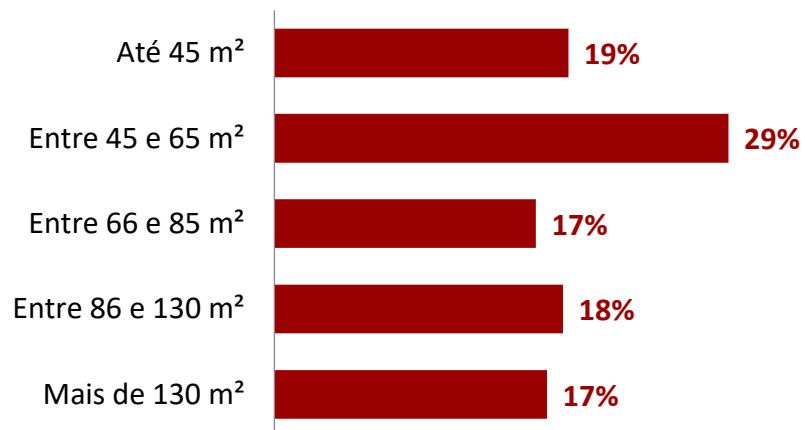
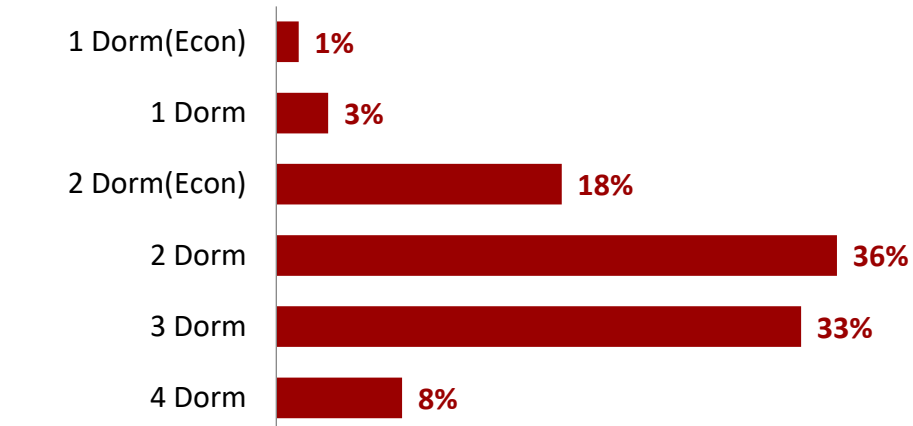


1S23

R\$ 10.704,2 MM

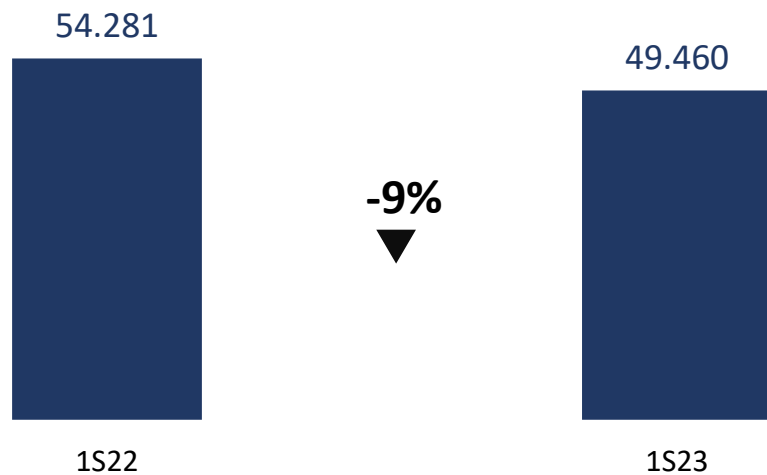
Interior – Vendas de Imóveis Residenciais – janeiro a junho de 2023

*VGV = R\$ 10.704,2 milhões

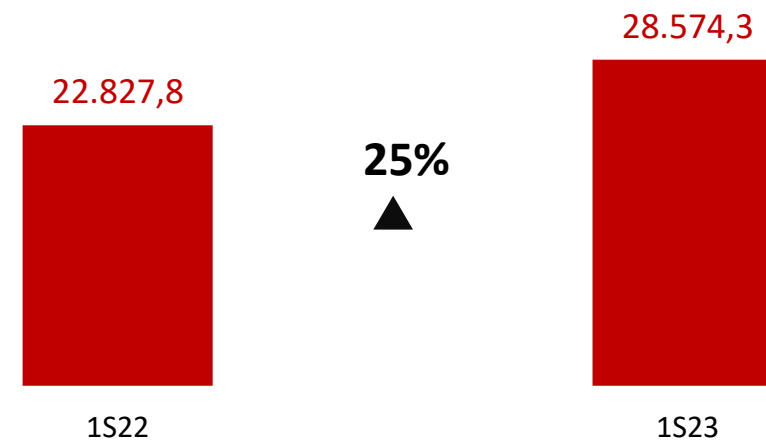


Interior – Oferta Final por Trimestre

Unidades

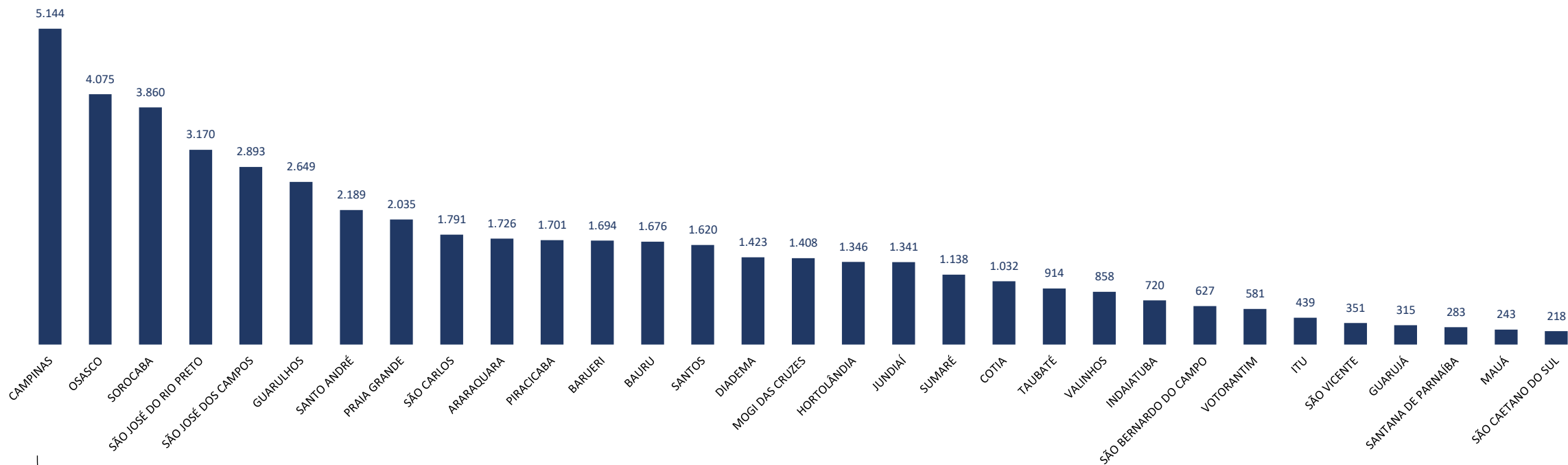


*VGO Valores (R\$ MM)



Interior – Oferta Final – junho de 2023

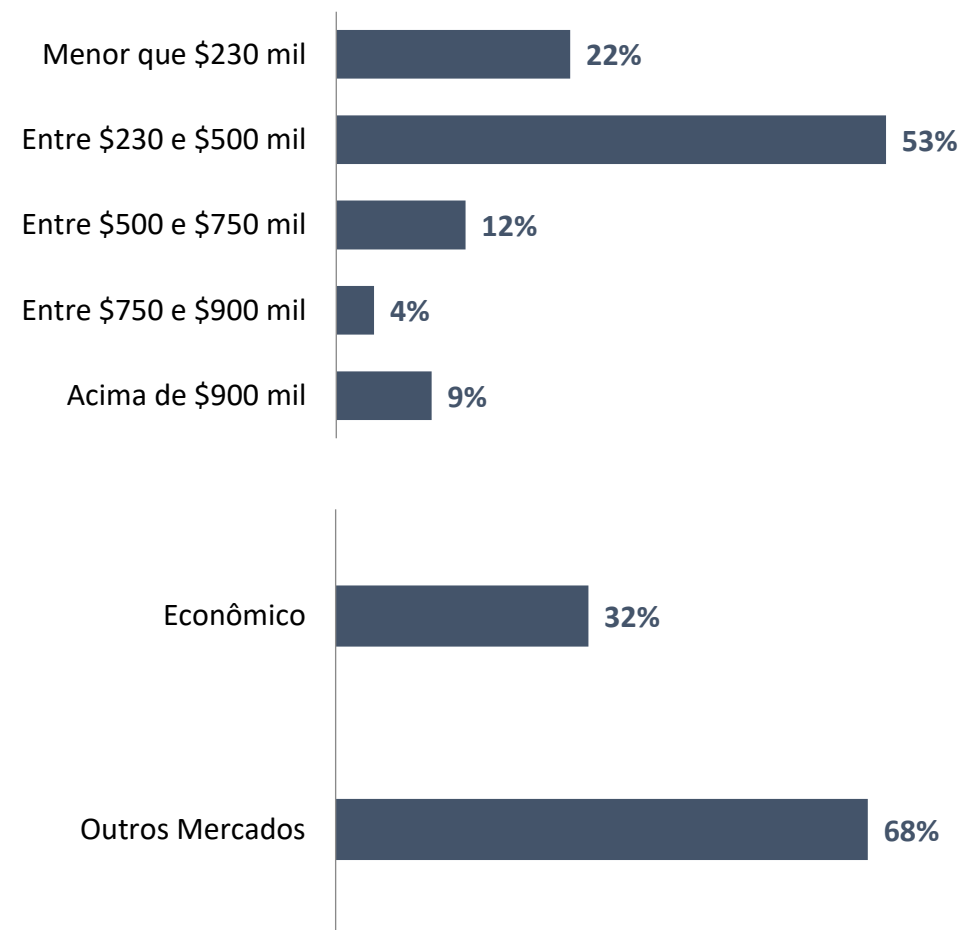
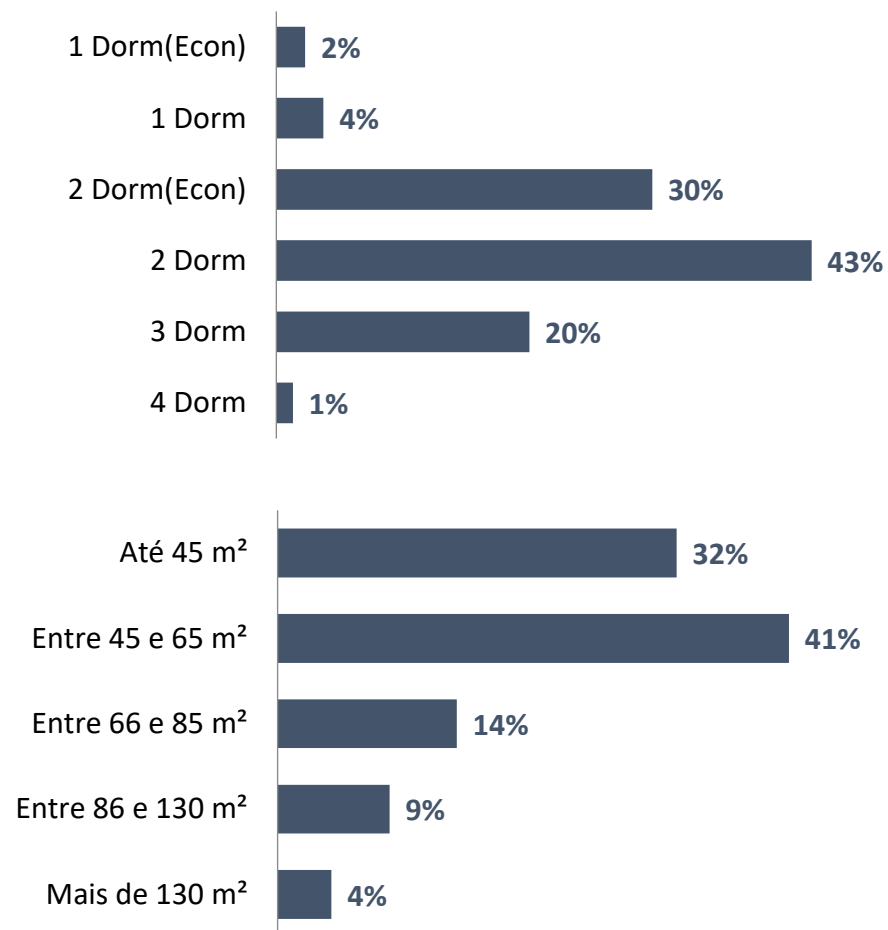
Em unidades



1523
49.460 unidades

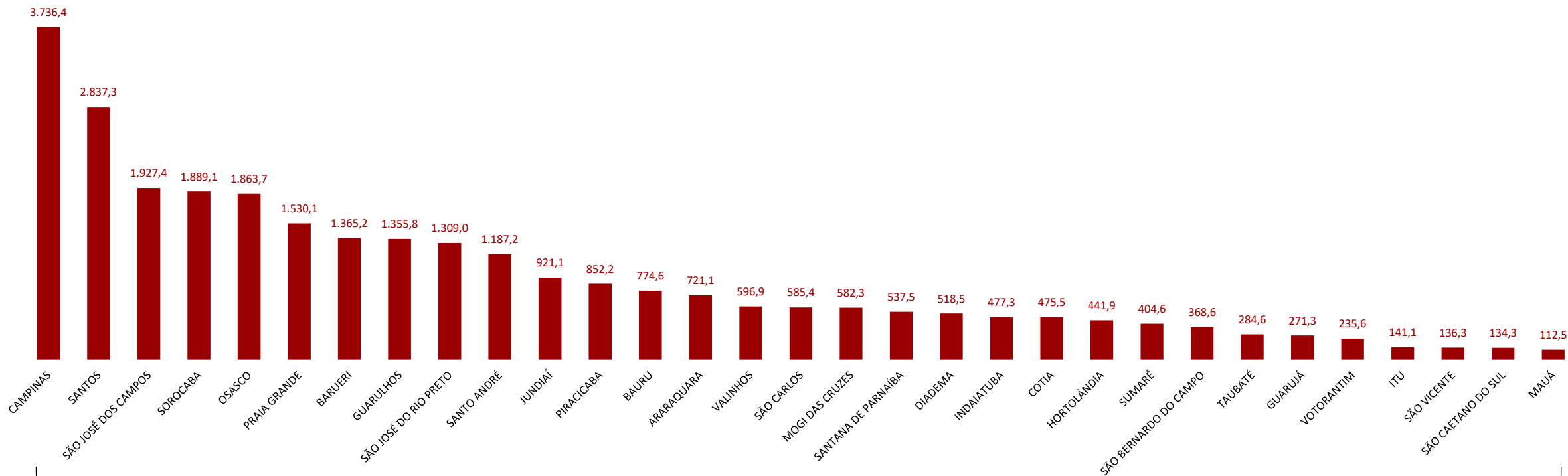
Interior – Oferta Final em unidades – junho de 2023

Oferta Final = 49.460 unidades



Interior – Oferta Final – junho de 2023

*VGO (R\$ MM)

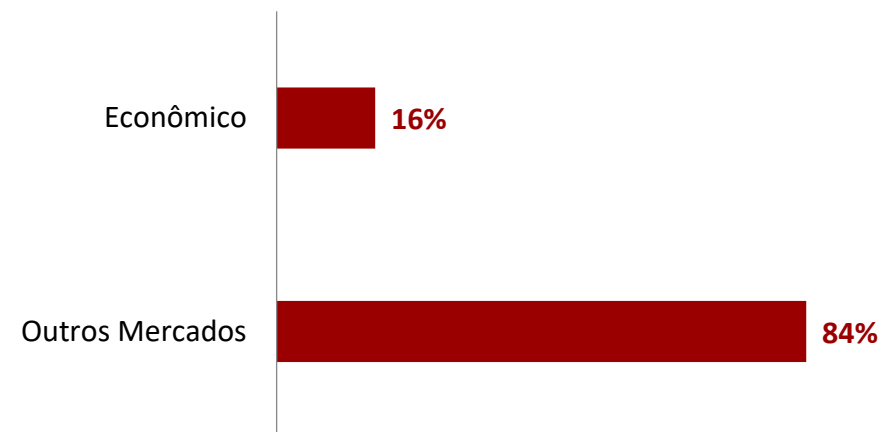
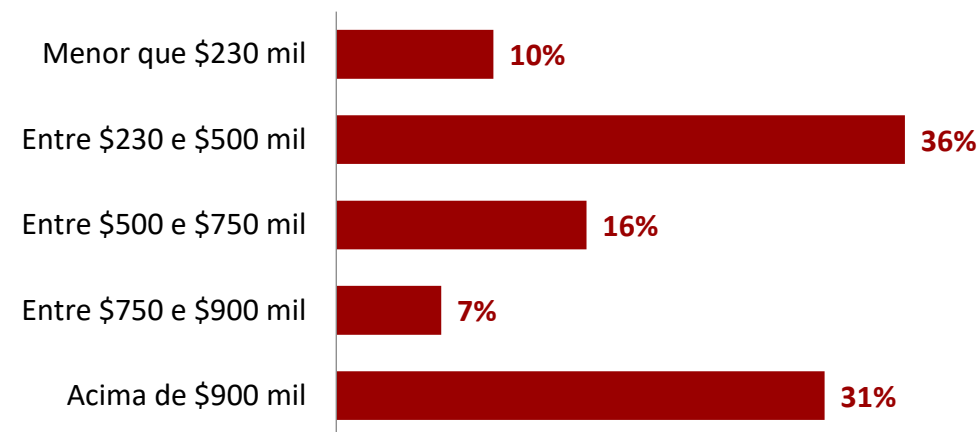
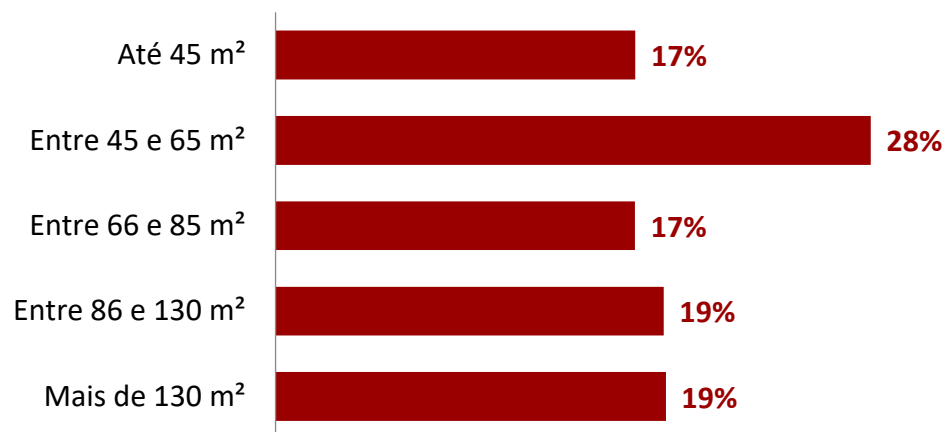
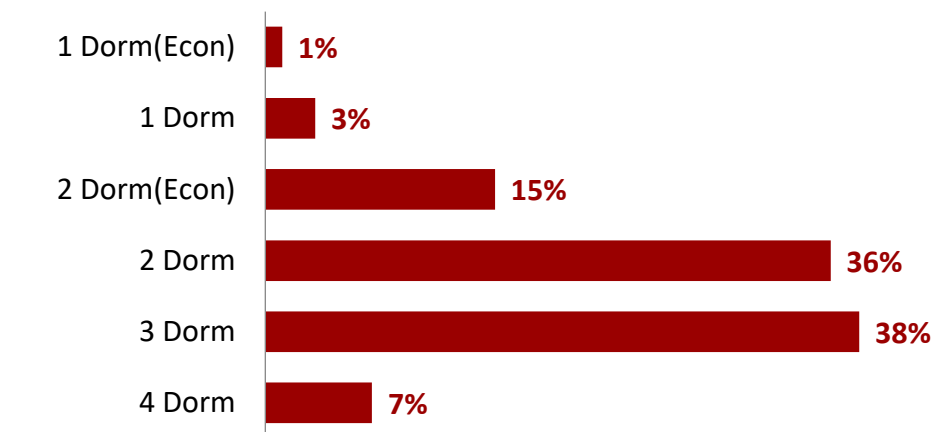


1S23

R\$ 28.574,3 MM

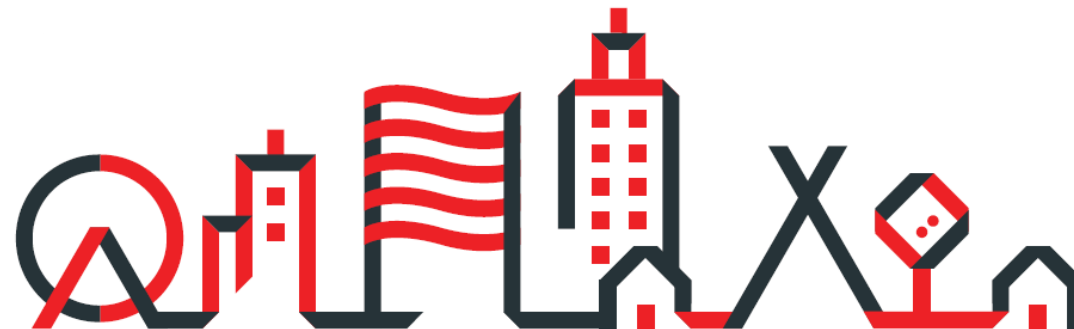
Interior – VGO em milhões (R\$) – junho de 2023

*VGO = R\$ 28.574,3 milhões





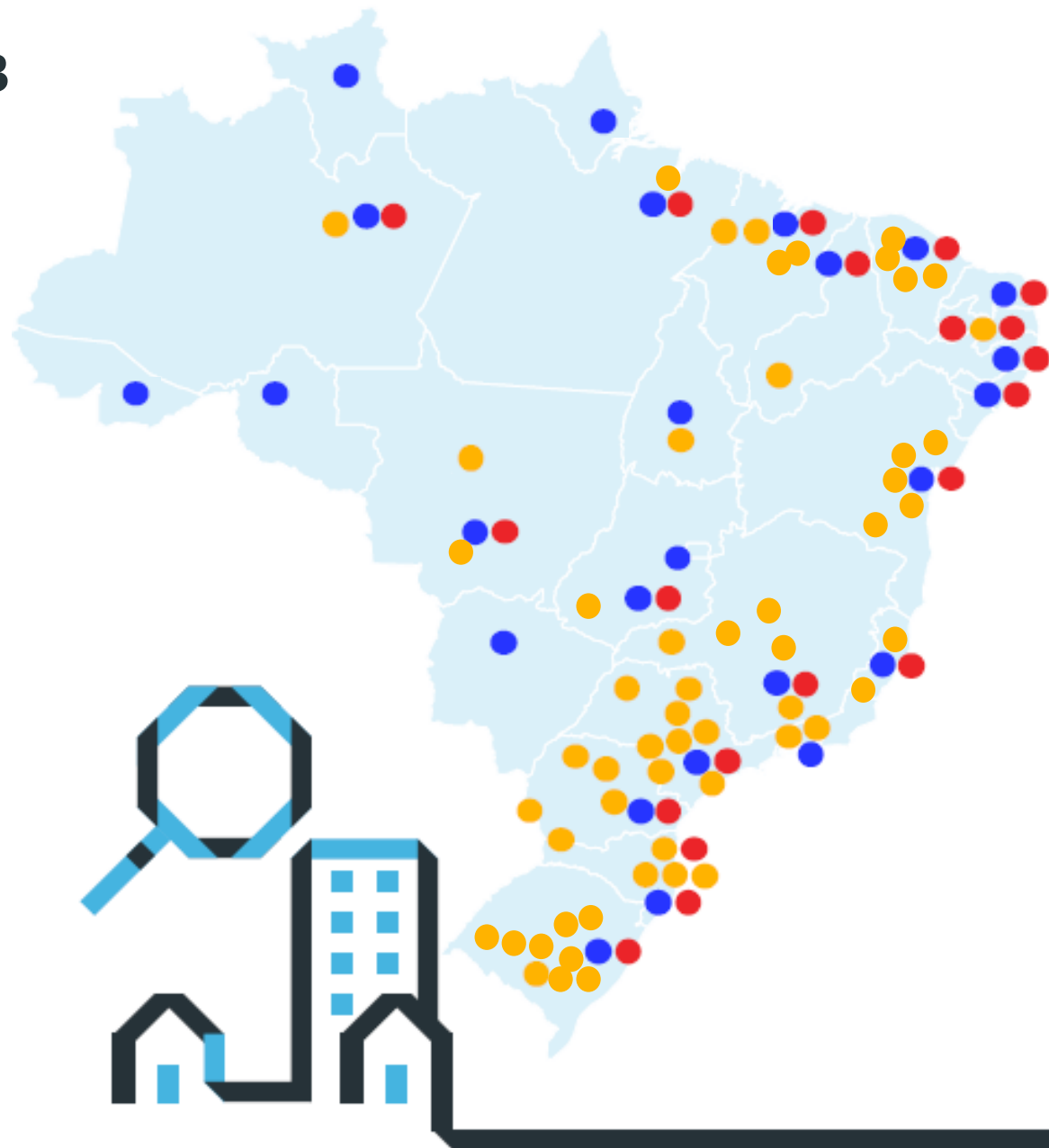
Mercado Imobiliário Nacional





Indicadores Imobiliários Nacionais 3T 2023

219 CIDADES
PESQUISADAS



Mercado Imobiliário Nacional

Unidades residenciais lançadas por região

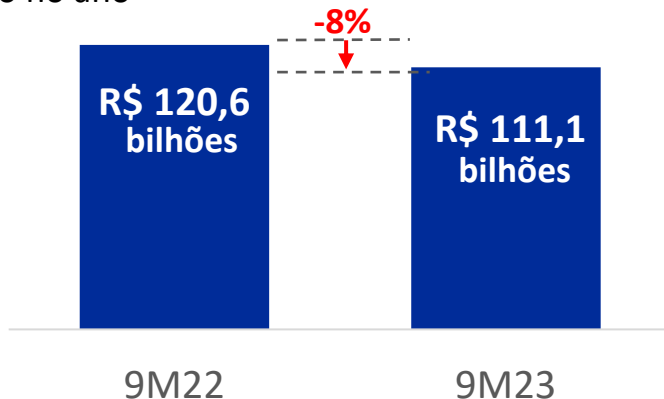
Região pesquisada	9M22	9M23	Variação (%)
Norte	7.102	7.023	-1,1% ▼
Nordeste	38.510	33.861	-12,1% ▼
Centro-Oeste	16.912	15.148	-10,4% ▼
Sudeste	119.990	102.958	-14,2% ▼
Sul	48.222	34.911	-27,6% ▼
TOTAL	230.736	193.901	-16,0% ▼

Unidades residenciais vendidas por região

Região pesquisada	9M22	9M23	Variação (%)
Norte	6.324	6.649	5,1% ▲
Nordeste	47.675	43.866	-8,0% ▼
Centro-Oeste	17.857	14.628	-18,1% ▼
Sudeste	119.808	124.931	4,3% ▲
Sul	50.563	44.838	-11,3% ▼
TOTAL	242.227	234.912	-3,0% ▼

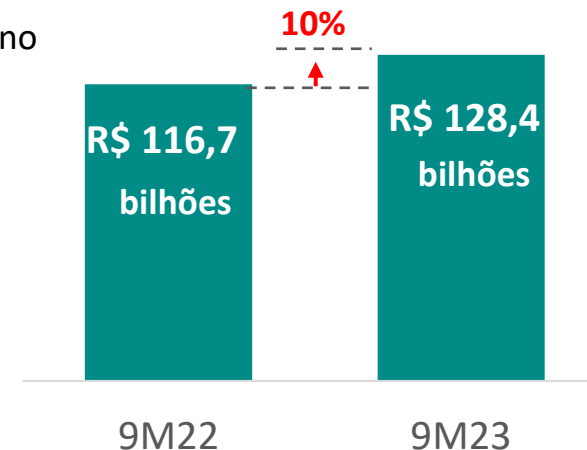
VGL

Acumulado no ano



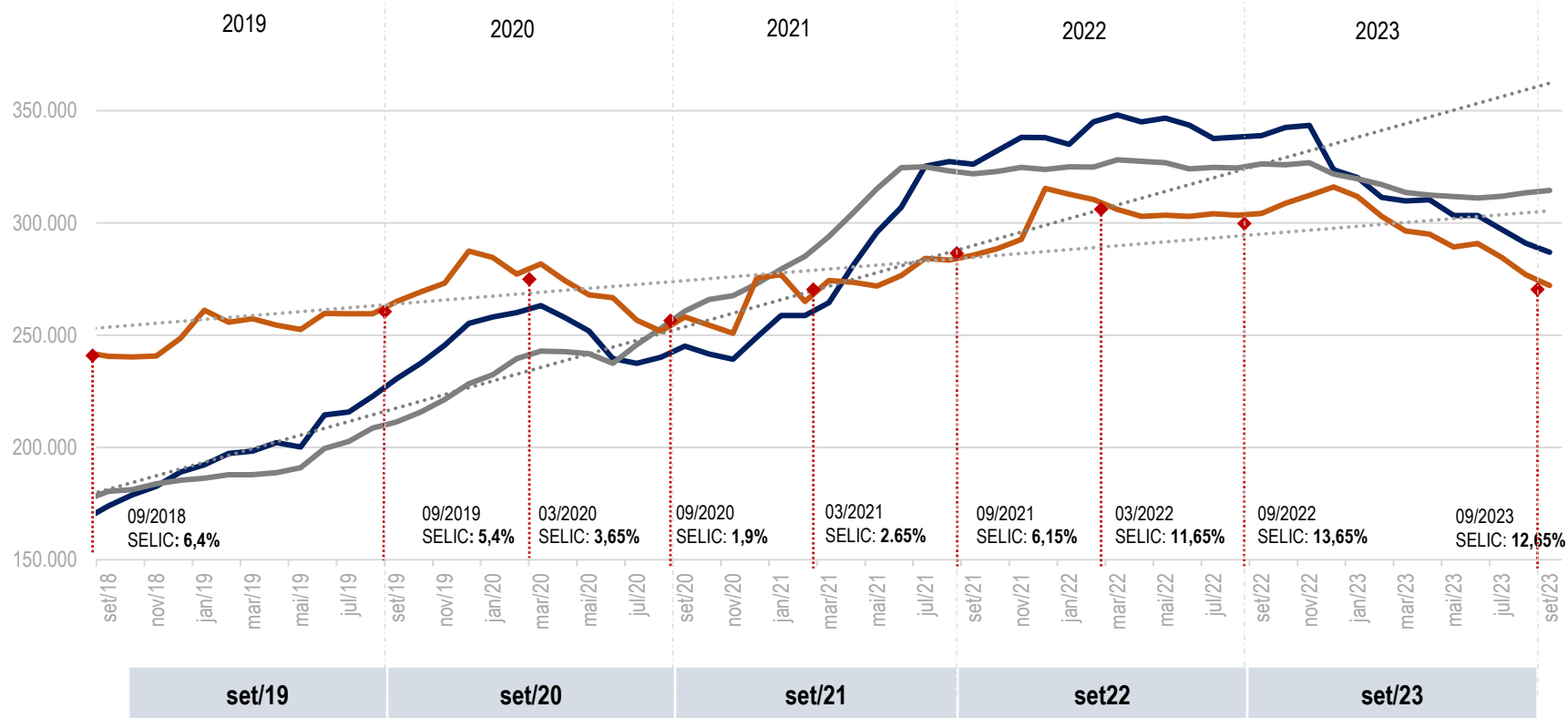
VGV

Acumulado no ano





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



Lançamentos
286.914 unidades

▼ -15,4%

Vendas
314.430 unidades

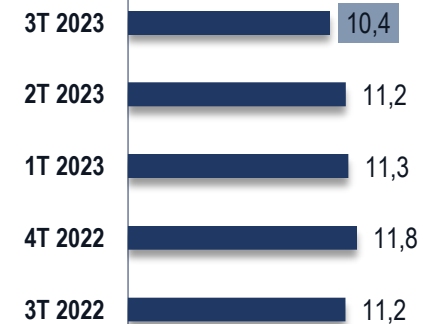
▼ -3,6%

Oferta
272.145 unidades

▼ -10,5%

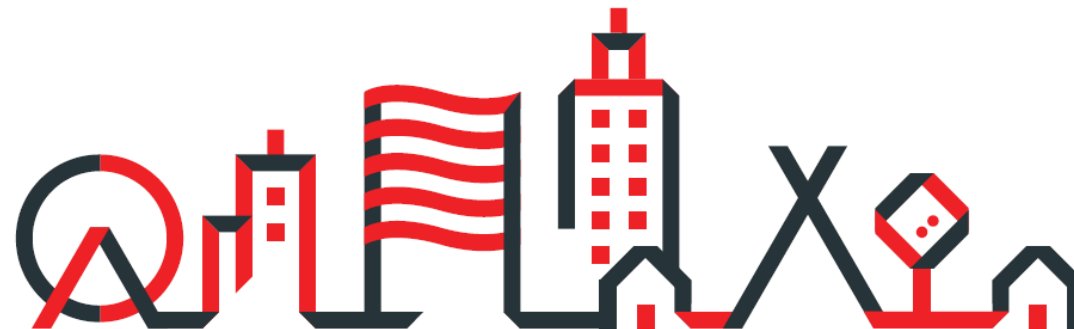
Número de meses para o escoamento da oferta

Considerando a média de vendas dos últimos 12 meses, se não houver novos lançamentos, a oferta final se esgotaria em **10 meses**.





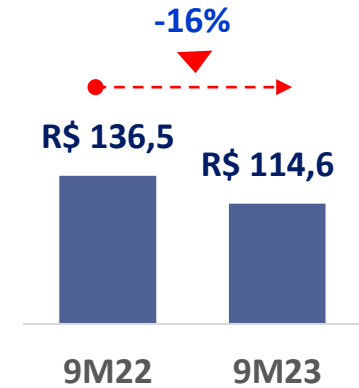
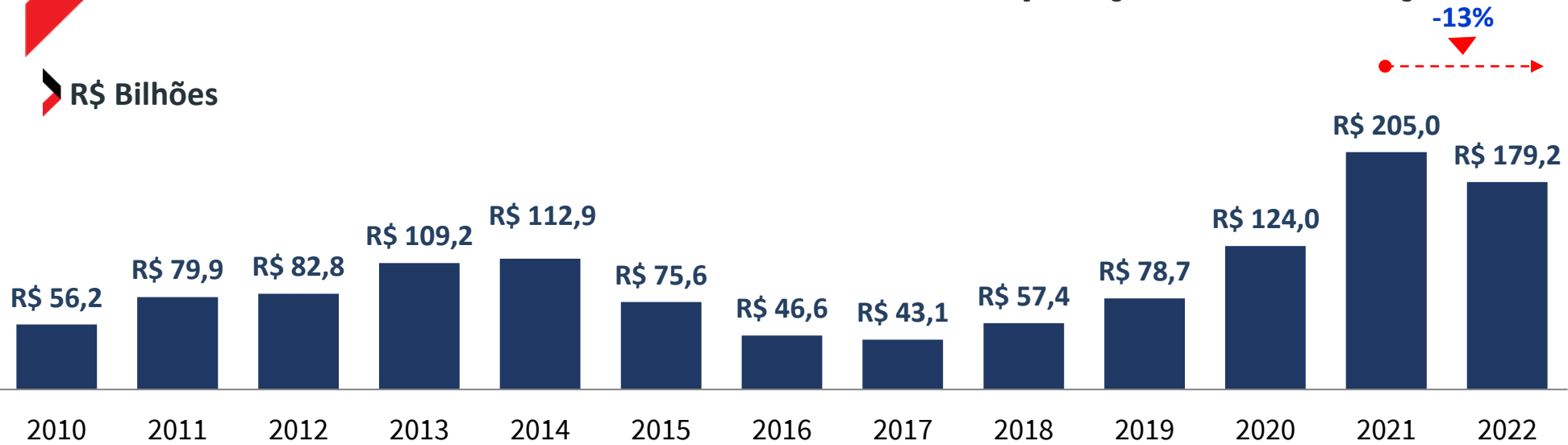
Financiamento Imobiliário



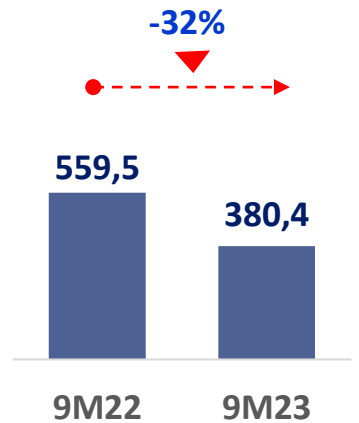
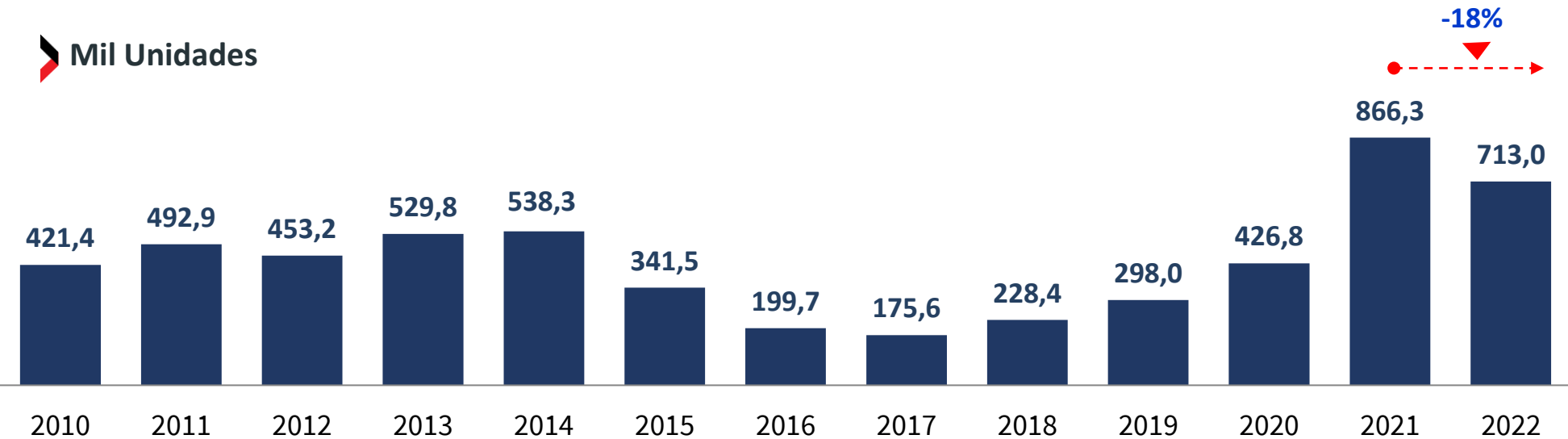


Financiamento Imobiliário SBPE – Total Aquisição e Construção

R\$ Bilhões



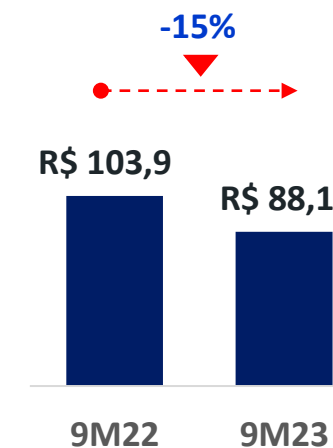
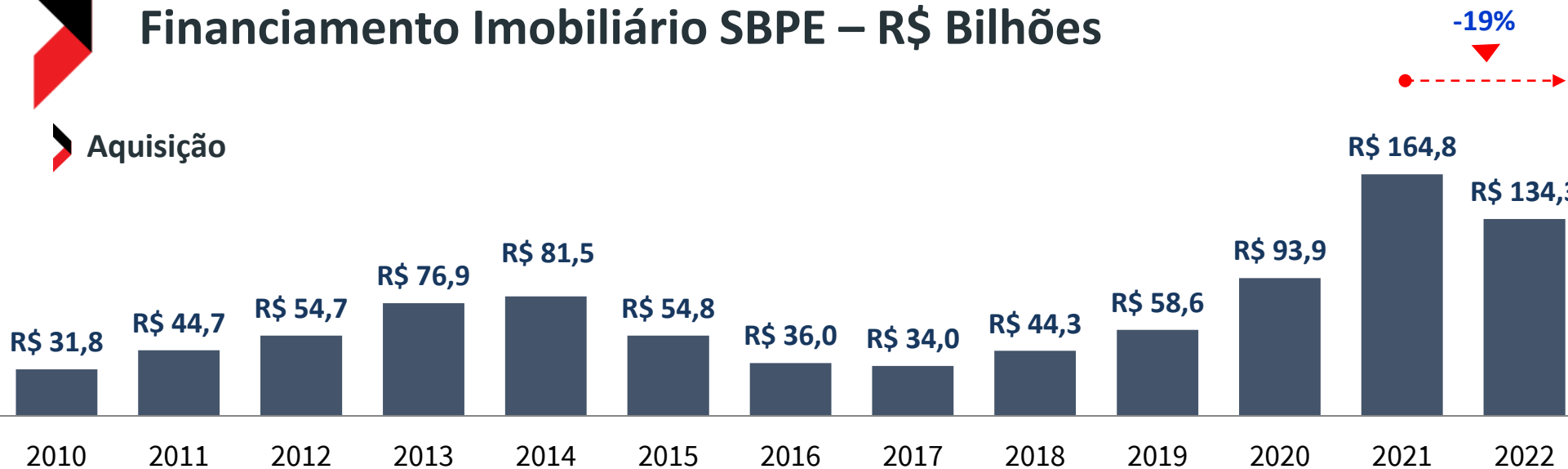
Mil Unidades



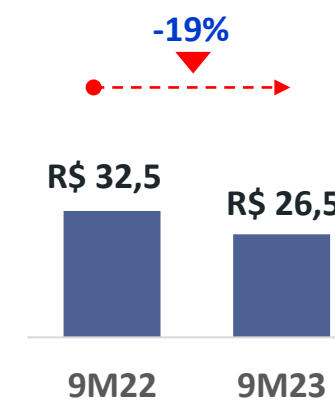
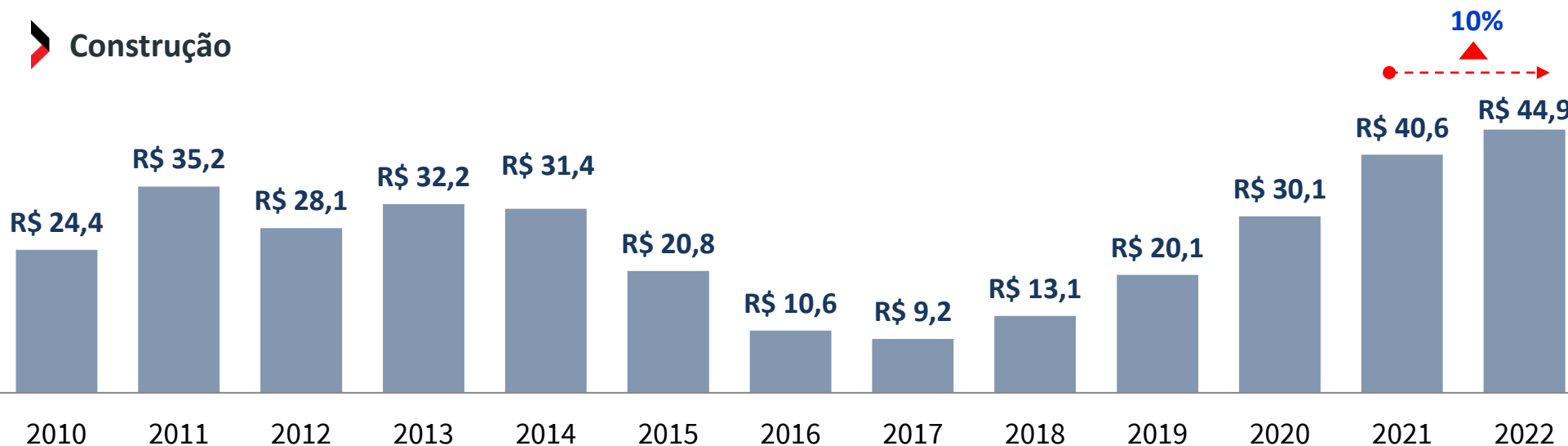


Financiamento Imobiliário SBPE – R\$ Bilhões

Aquisição



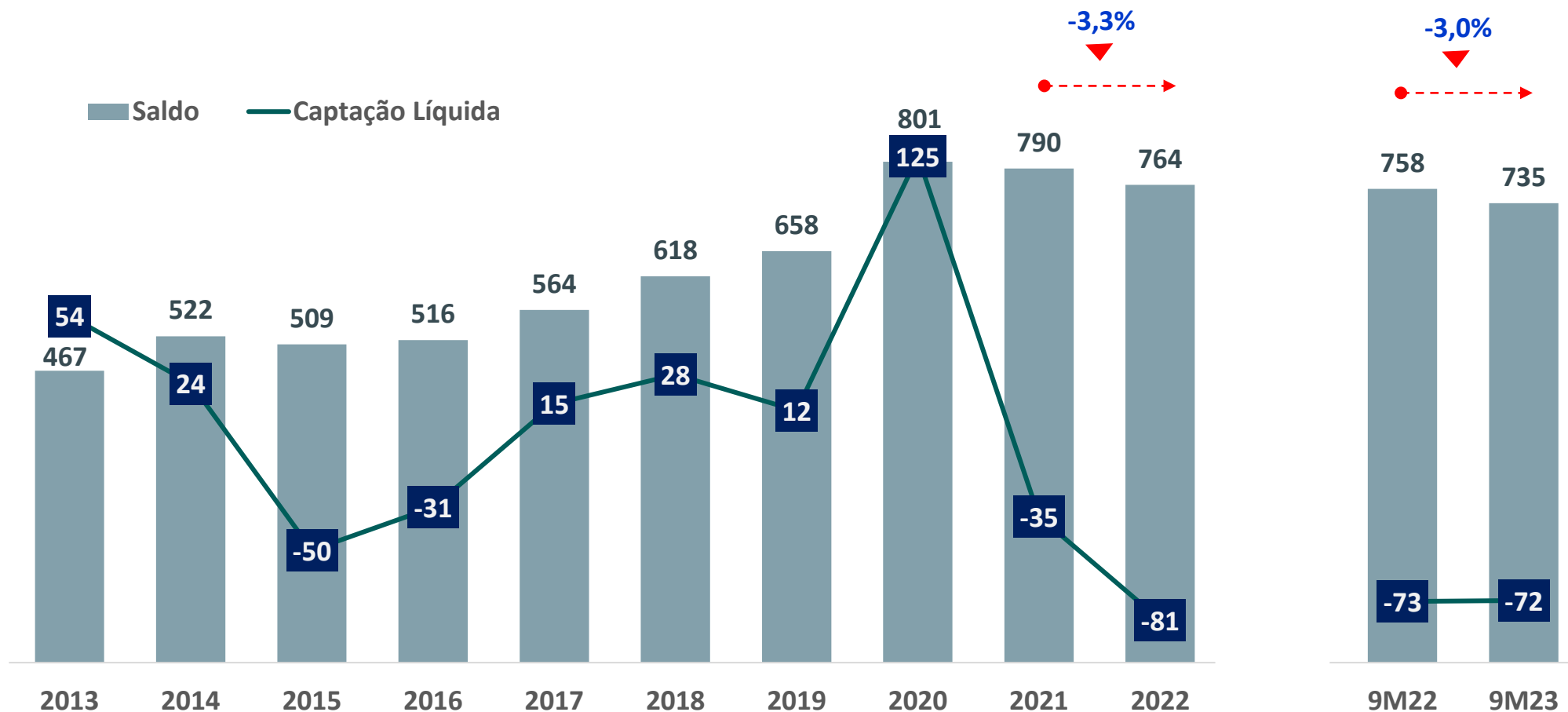
Construção





Poupança SBPE – Saldo e captação líquida

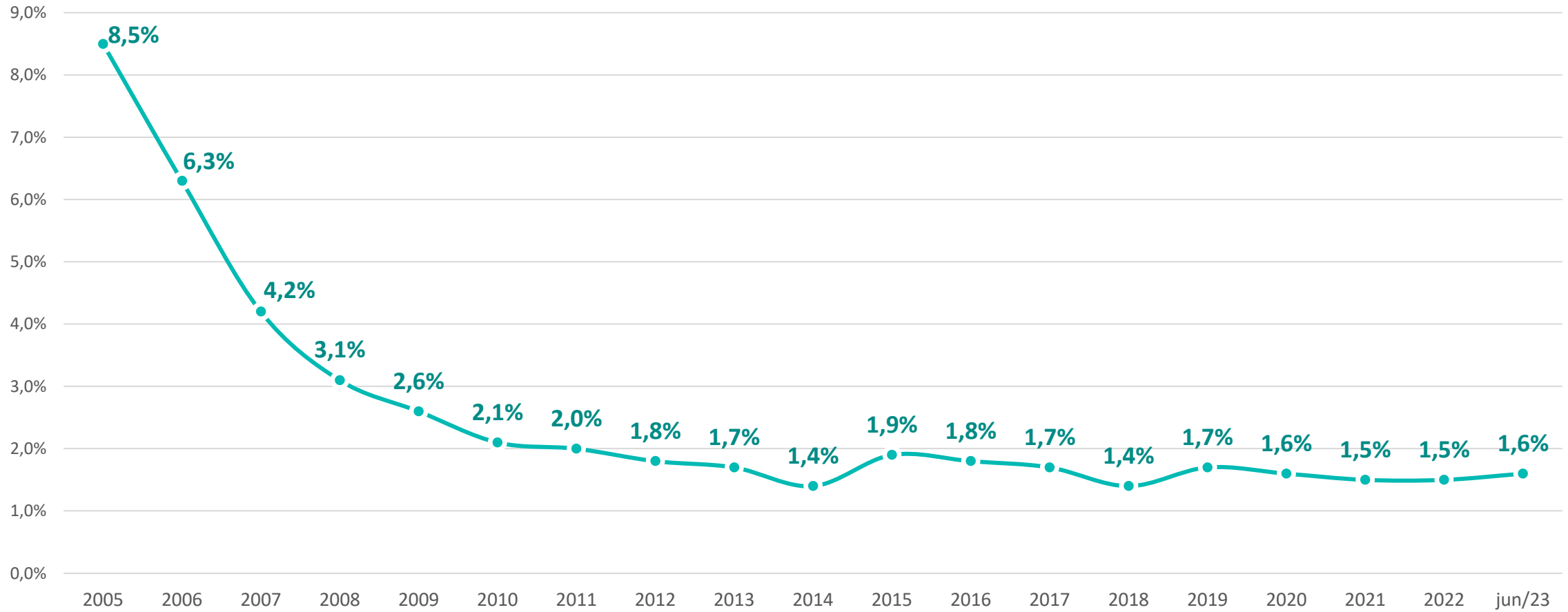
R\$ Bilhões





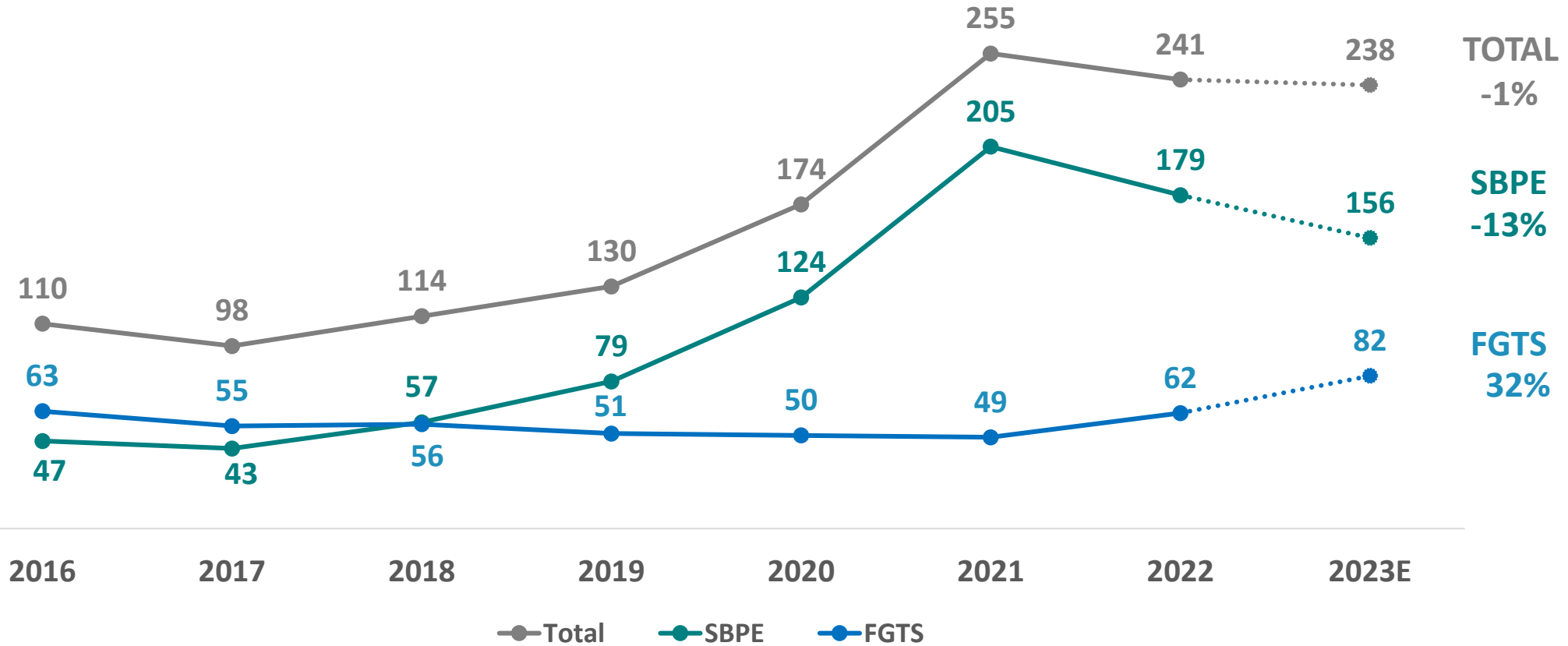
Inadimplência - SBPE

Contratos com mais de 3 prestações em atraso





Expectativas – Financiamento Imobiliário (R\$ Bilhões)



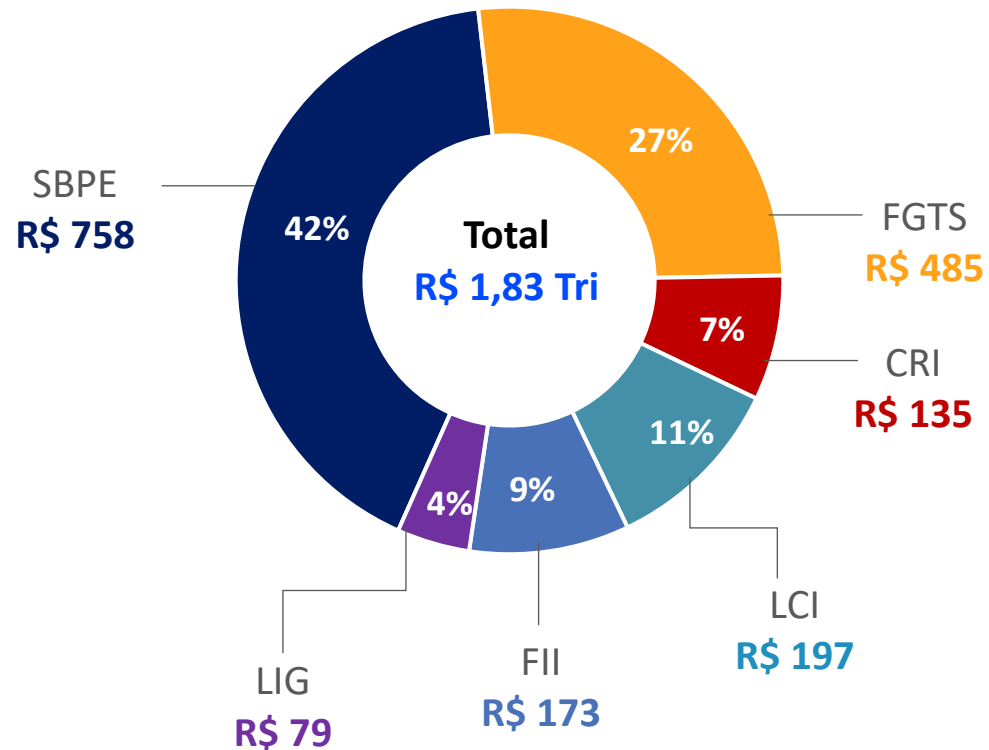


Estrutura de Funding – R\$ Bilhões



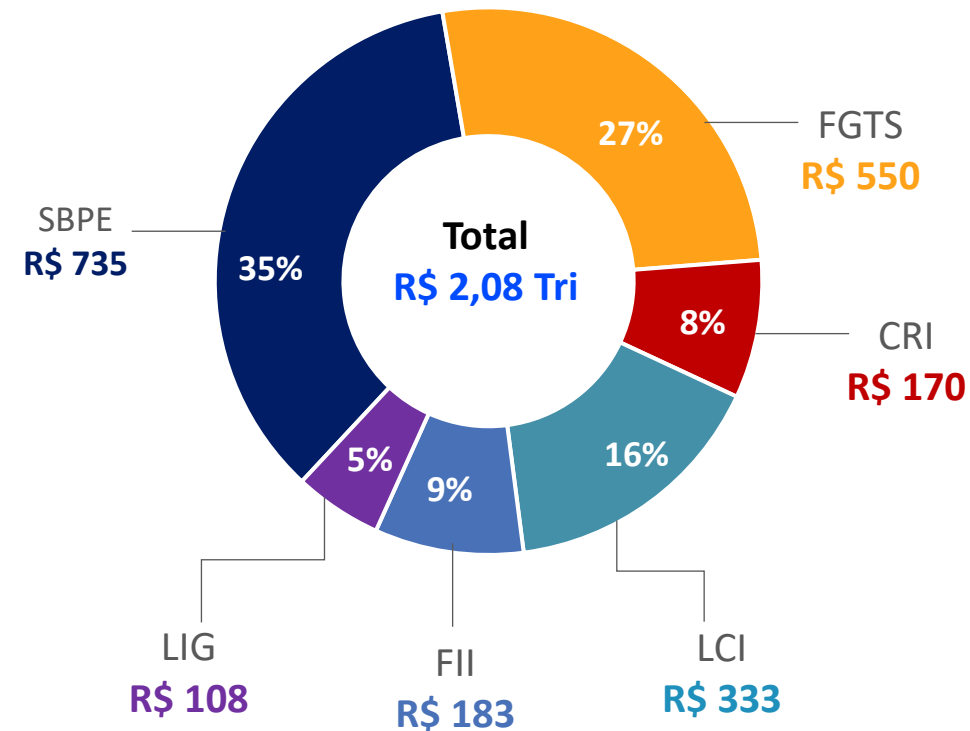
➤ Setembro/2022

SFH = R\$1.243 Bi (69%)



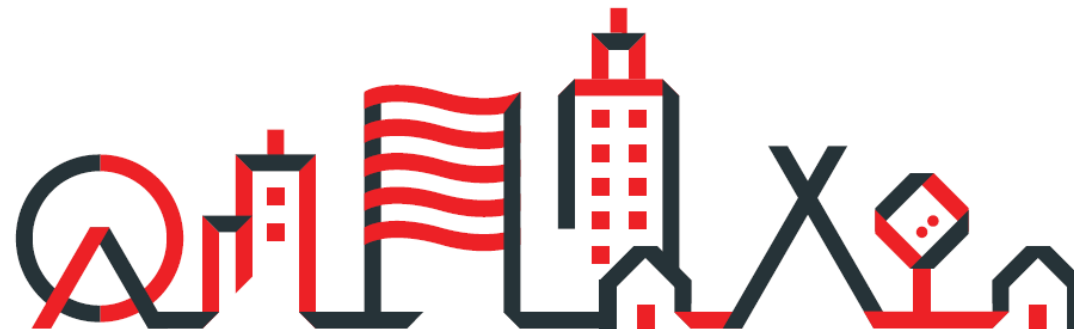
➤ Setembro/2023

SFH = R\$1.285 Bi (62%)



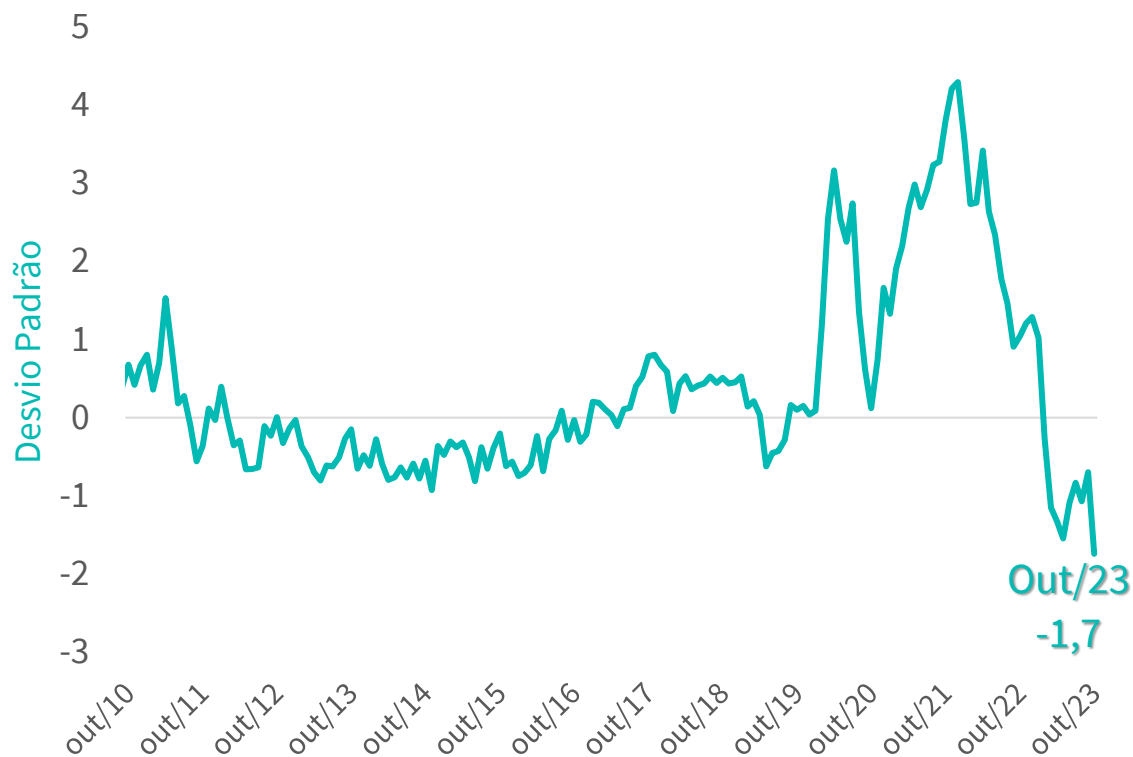
Cenário Econômico Global

**(Dados para serem utilizados
com características de
Inteligência de Mercado)**





Índice Global de Pressão na Cadeia de Suprimentos – Global Supply Chain Pressure Index (GSCPI)



O GSCPI é uma métrica usada para avaliar e medir as pressões e desafios que afetam as cadeias de suprimentos em escala global.

O índice utiliza dados dos setores de transporte e manufatura.

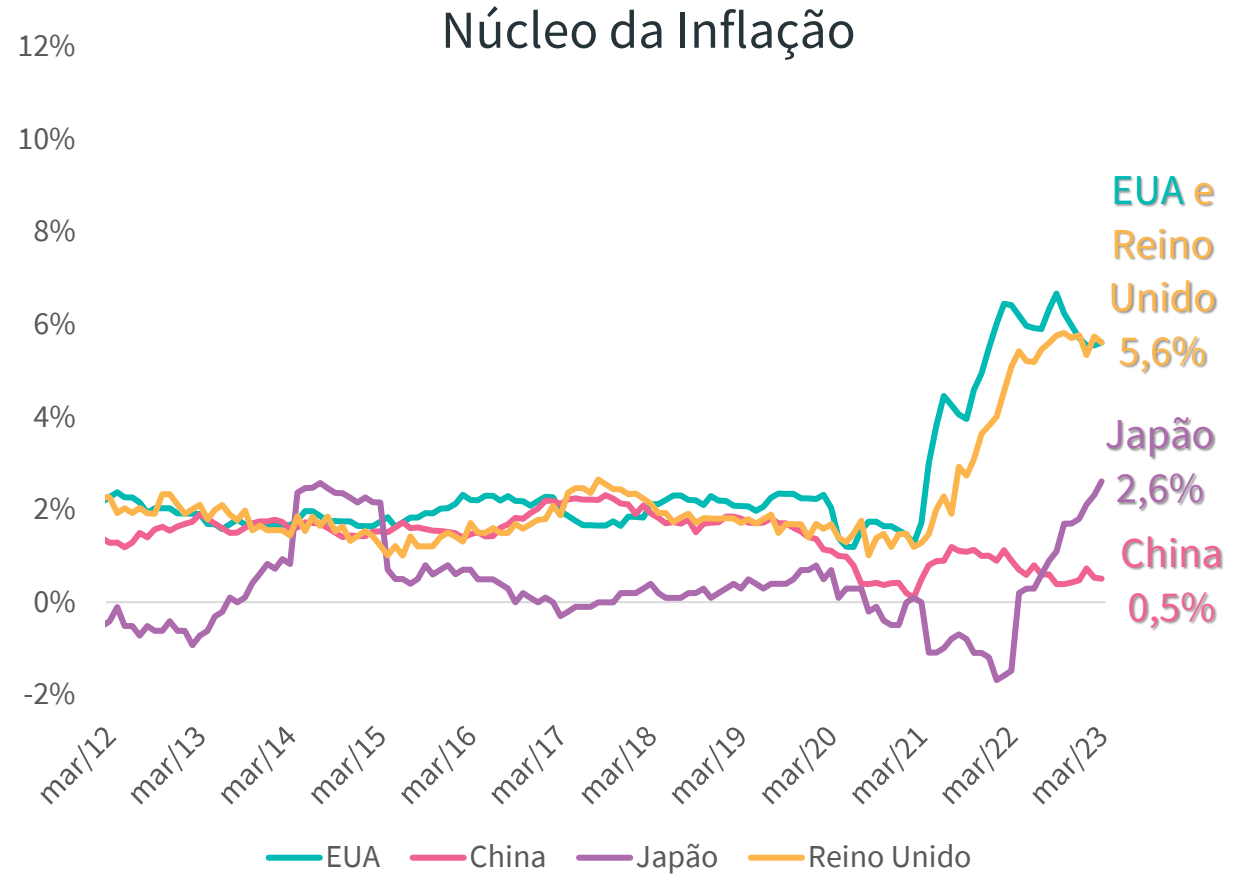
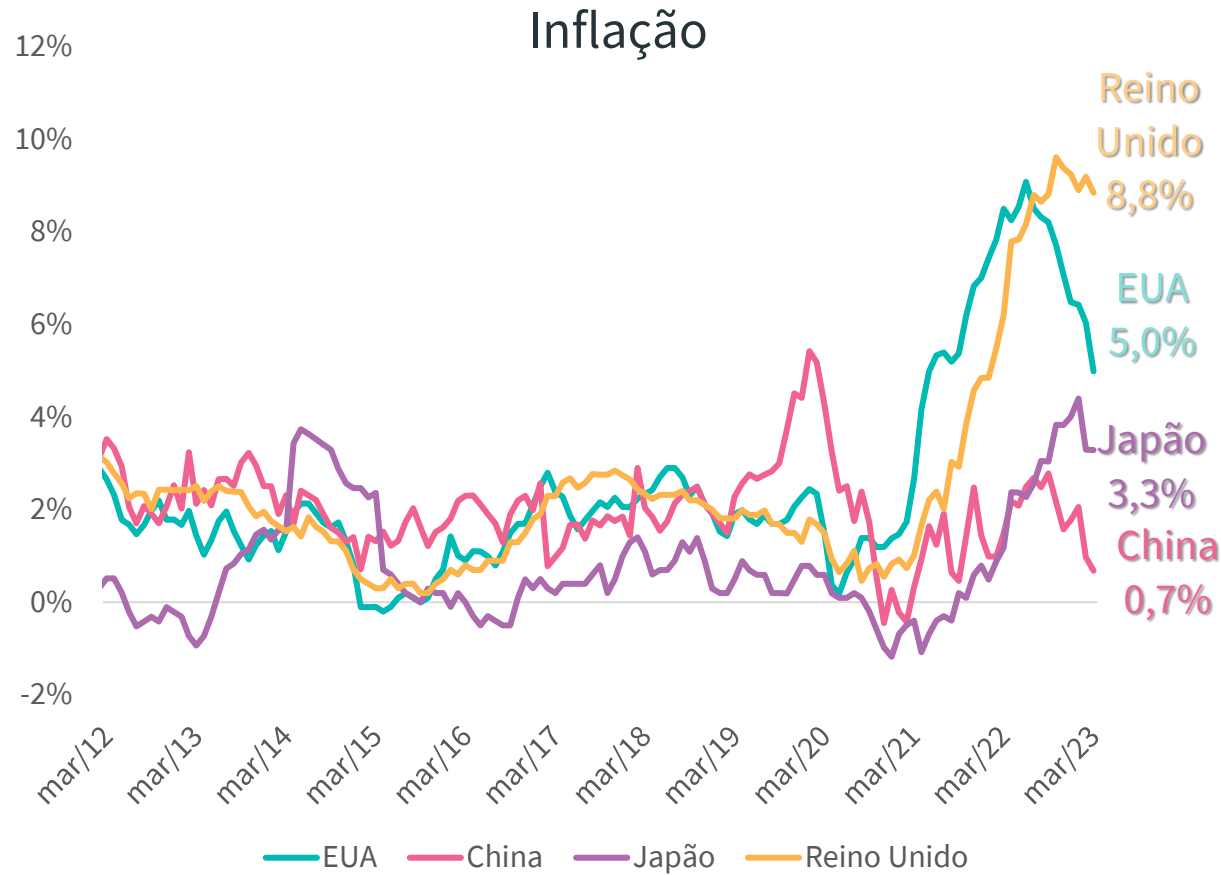
O gráfico demonstra os desvios padrão da média histórica do índice.

Fontes: Bureau of Labor Statistics; Harper Petersen Holding GmbH; Baltic Exchange; IHS Markit; Institute for Supply Management; Haver Analytics; Refinitiv; authors' calculations.



Inflação - % a.a.

Inflação desacelera, núcleo da inflação de forma mais lenta

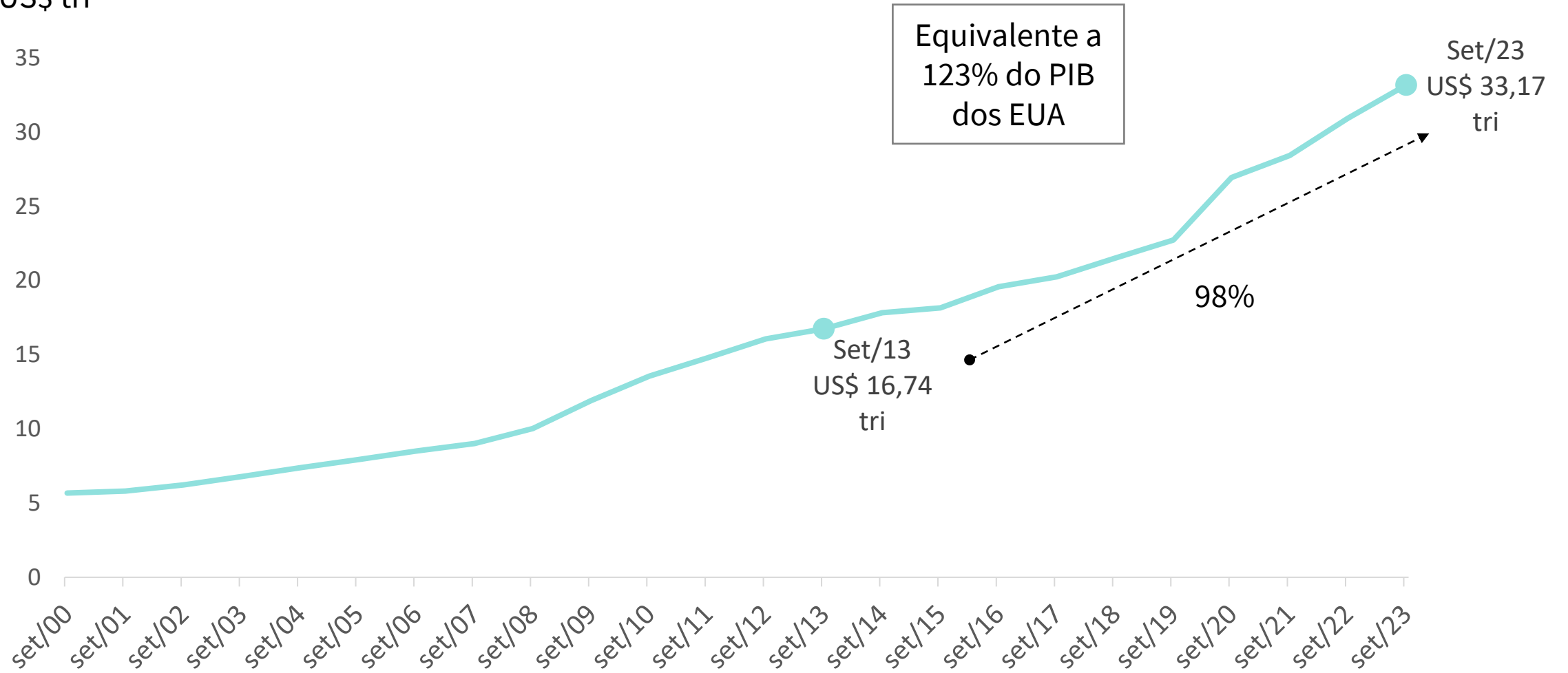


Fonte: World Bank



Histórico Dívida Total do Governo dos EUA

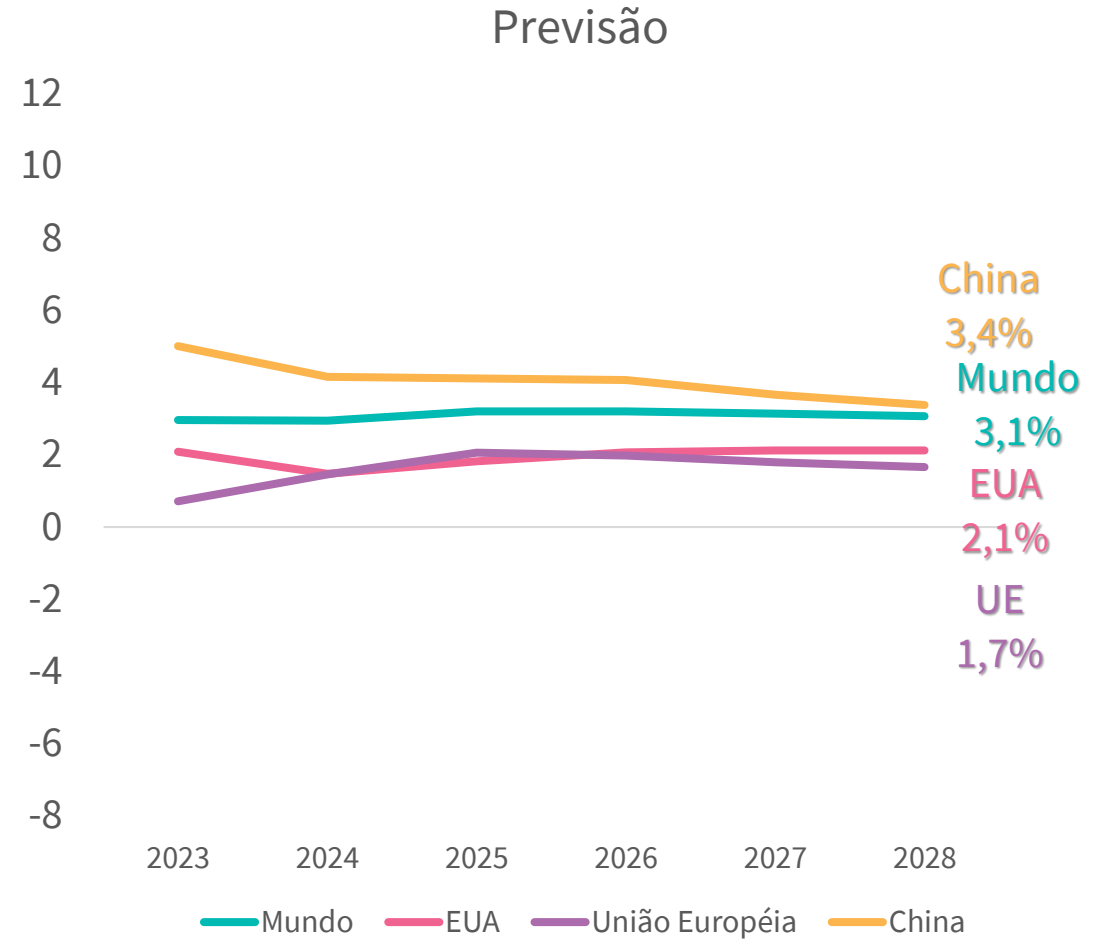
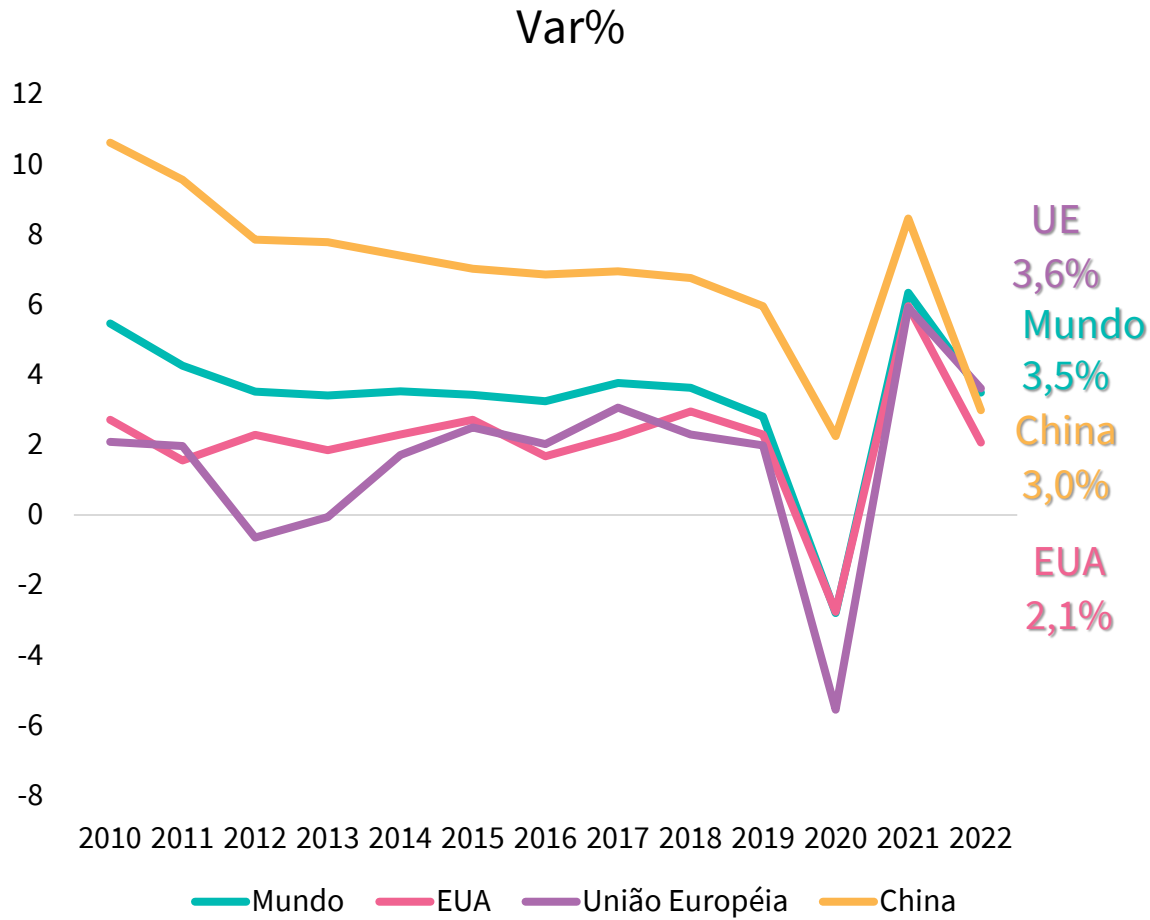
US\$ tri



Fonte: fiscaldata.treasury.gov



PIB mundial



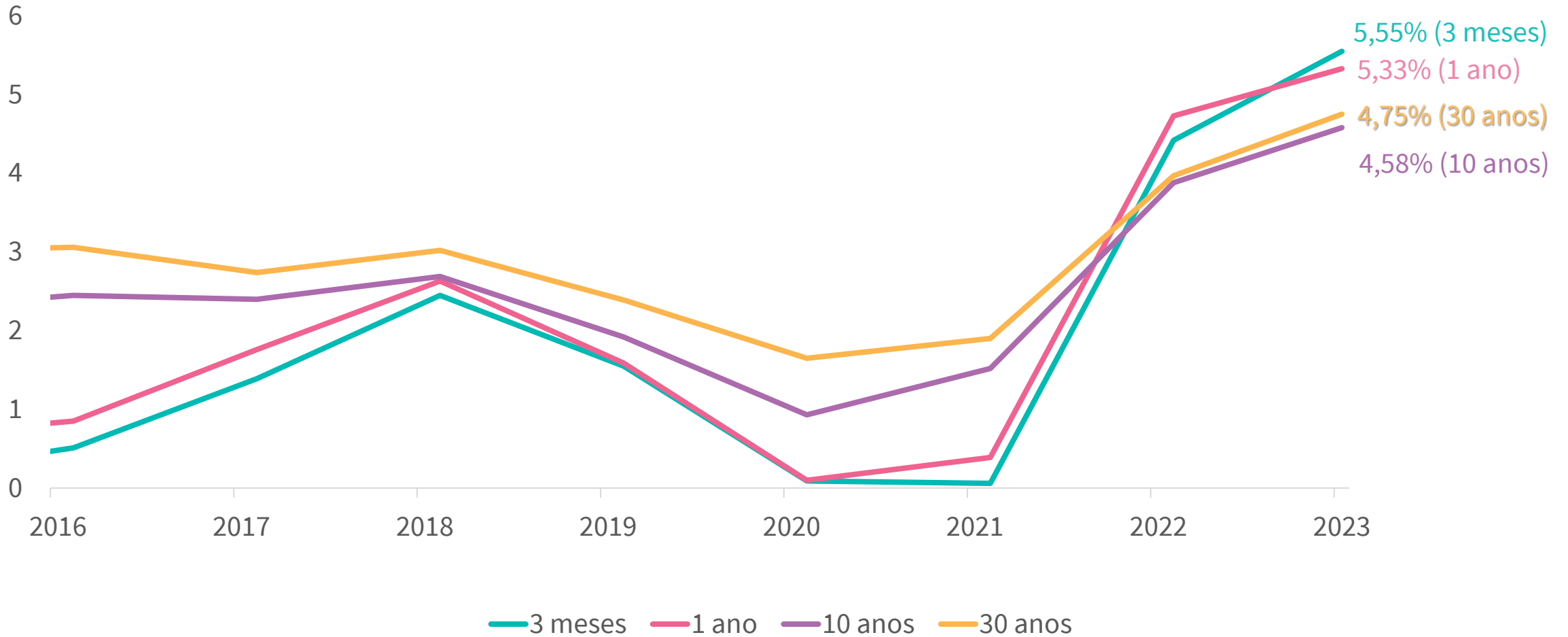
Fonte: FMI



Taxa de juros – EUA

(Títulos com vencimentos em 3 meses, 1 ano, 10 anos e 30 anos)

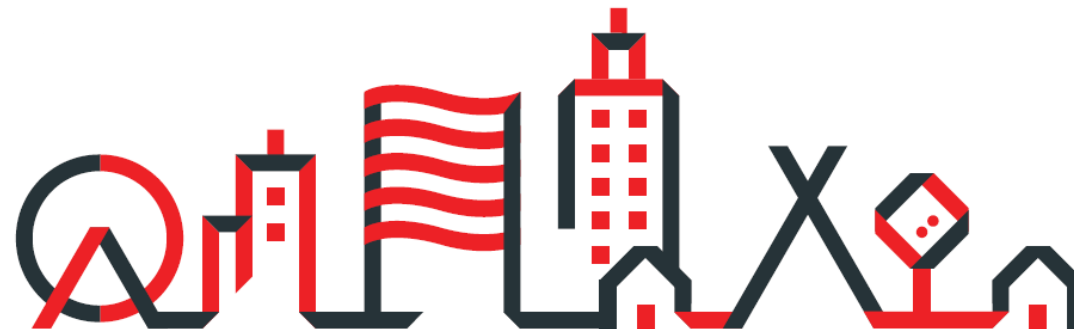
% a.a.



Fonte: FED

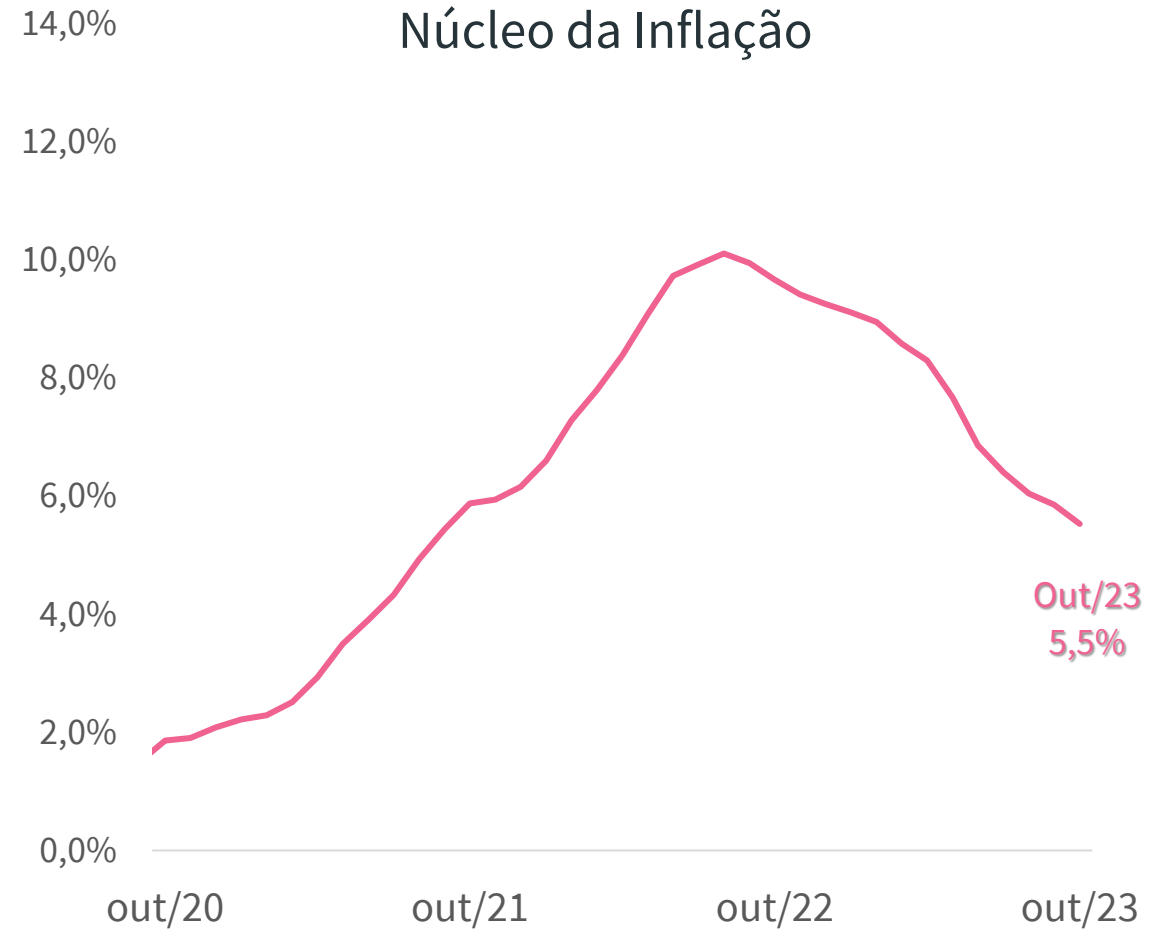
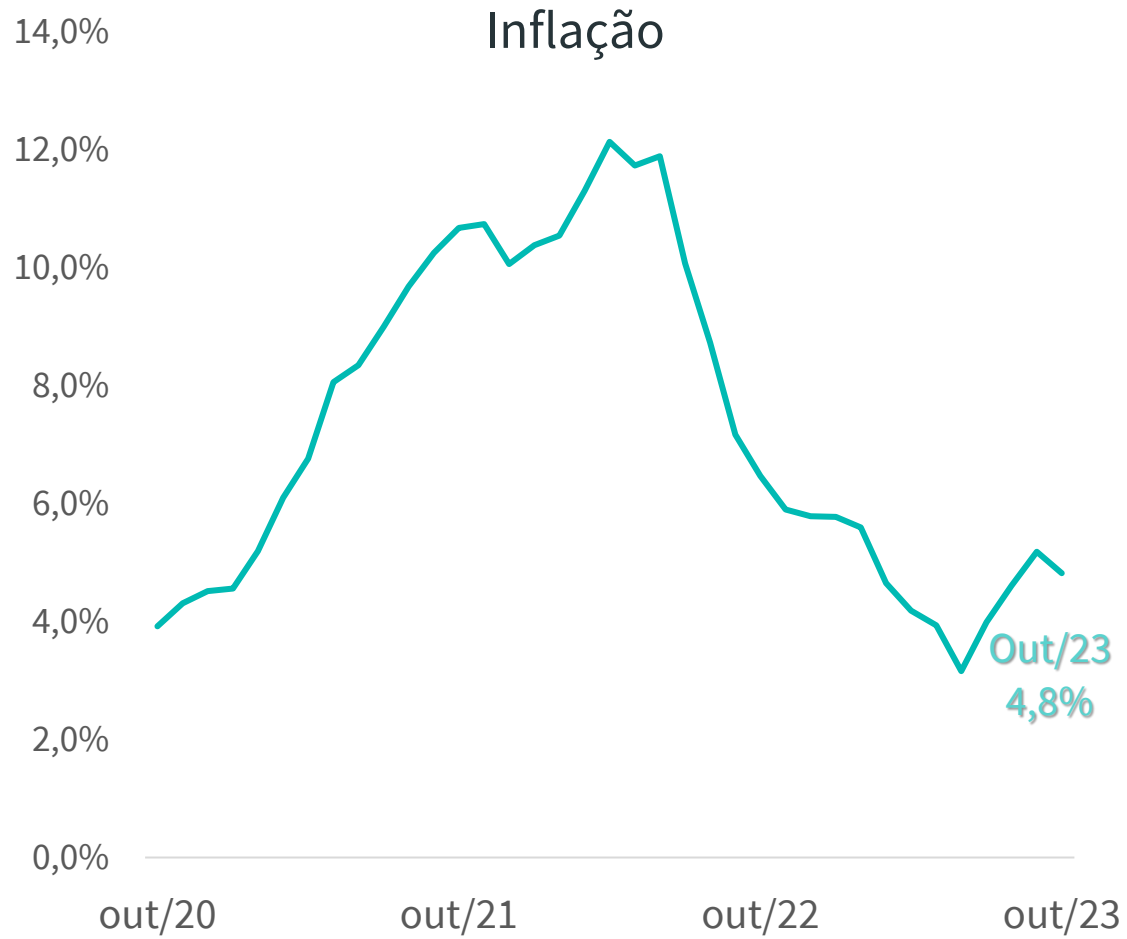


Cenário Econômico Brasileiro





Inflação IPCA – Brasil % a.a.



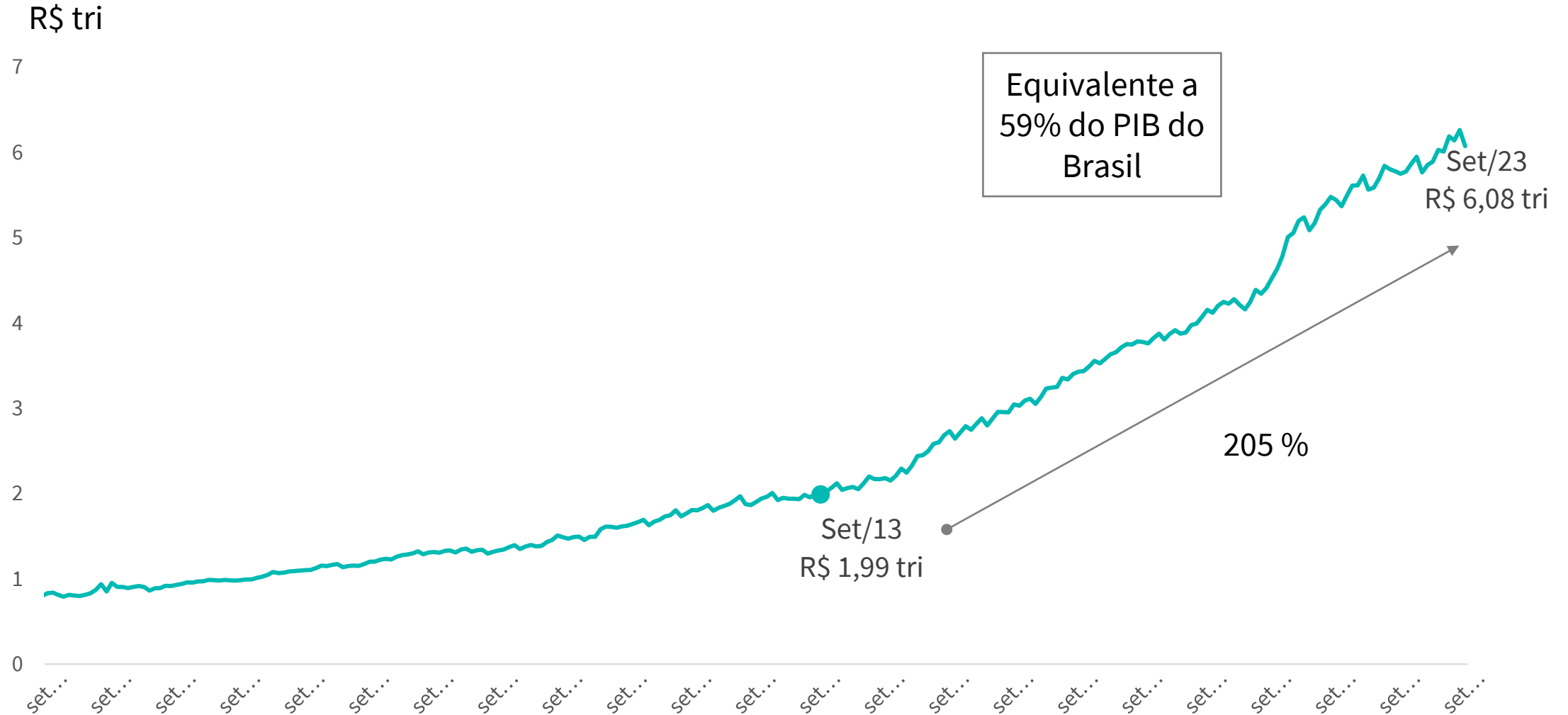
Fonte: IBGE / Bacen

— IPCA

— IPCA-EXFE



Dívida Pública Federal - Brasil



Fonte: www.tesourotransparente.gov.br

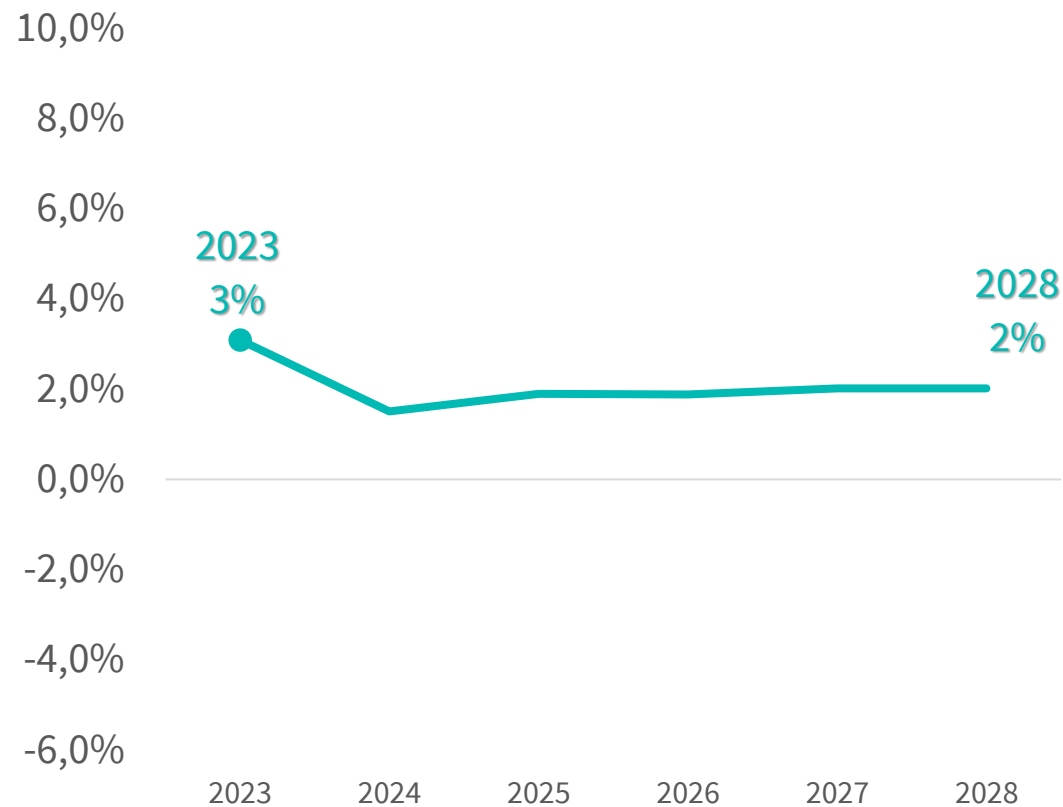


PIB - Brasil

Var%



Previsão

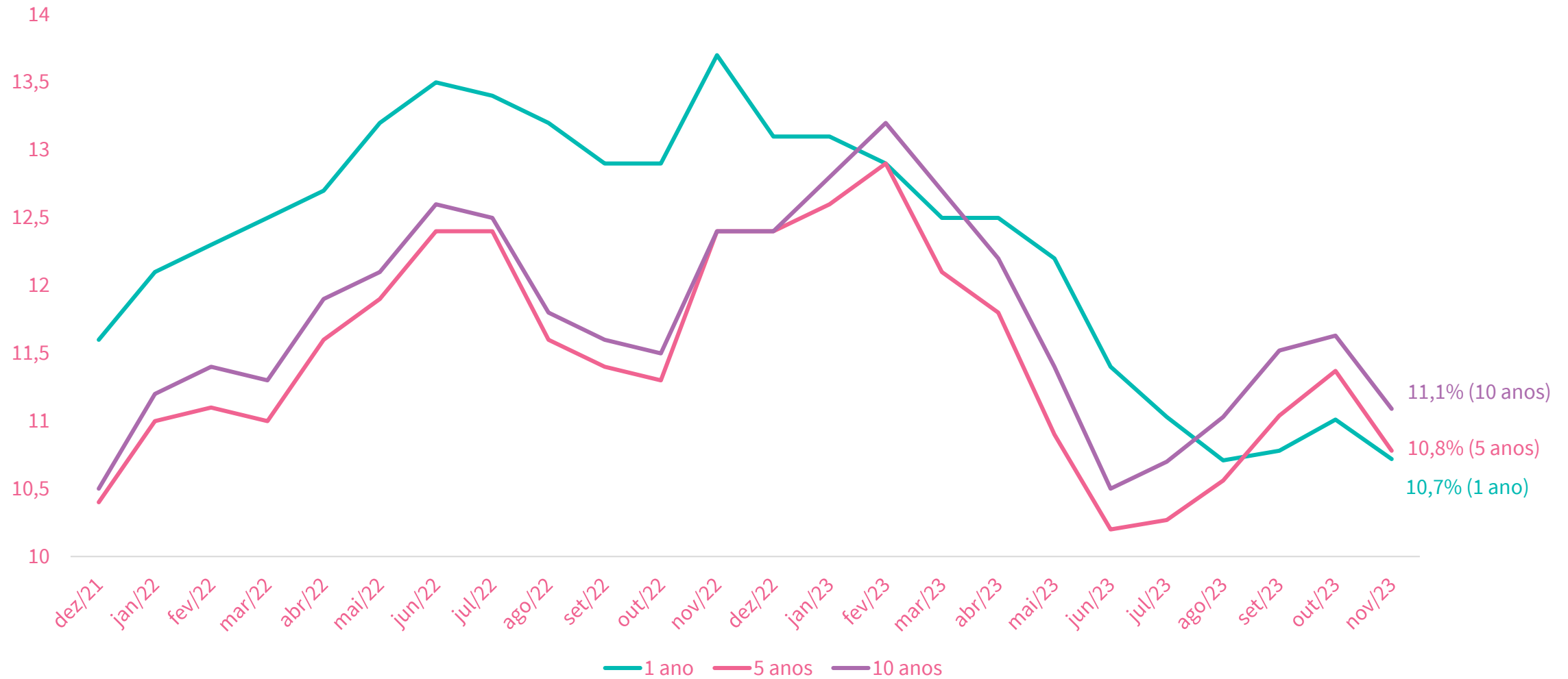


Fonte: IBGE

*Estimativa: FMI



Taxa de juros - % a.a.



Fonte: B3 / Abecip



SECOVISP
A CASA DO MERCADO IMOBILIÁRIO

