

Worker Dormitories in Singapore

H1 2025

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A Joint Report by the Dormitory Association of Singapore Limited and Knight Frank Singapore

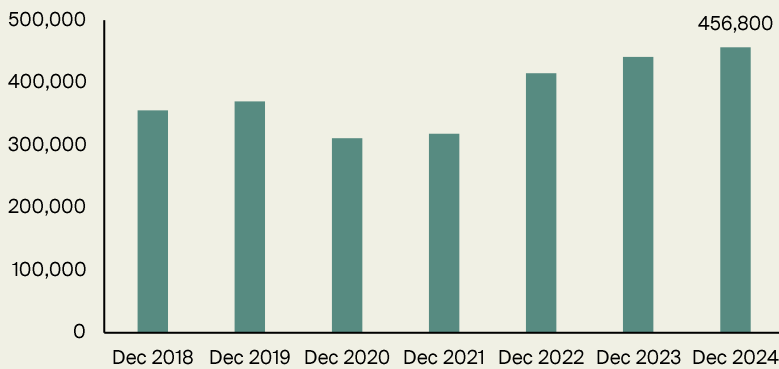
Introduction

This series of half-yearly reports is aimed at fostering greater awareness of the worker dormitory market in Singapore. Data from dormitory operators as represented by members from the Dormitory Association of Singapore Limited (DASL), as well as other publicly available sources will be used as content for demand, supply, and rental indicators.

Foreign Worker Population in Singapore

Based on the latest available data from the Ministry of Manpower (MOM) as at December 2024, there were 456,800 work permit holders in the Construction, Marine Shipyard and Process (CMP) industries, representing a 3.6% annual increase over the total recorded in December 2023 (Exhibit 1). CMP workers are typically housed in dormitory accommodation.

Exhibit 1: Work permit holders (Construction, Marine Shipyard and Process)



Source: Ministry of Manpower (MOM), Knight Frank Research

Stock of Worker Dormitories in Singapore

Worker dormitories in Singapore are classified into four classes: Class 1, Class 2, Class 3, and Class 4 (Refer to the previous H2 2024 report). For the purposes of this series of Singapore dormitory reports, only Class 4 worker dormitories will be reviewed, as these comprise the most representative class in what is broadly an opaque market. As at H1 2025, there were 60 Class 4 dormitories in Singapore with a corresponding total of about 274,000 beds, comprising 62.3% of the total islandwide bed load.

In April 2025, Phase One comprising 3,088 beds at the 10,500-bed Pioneer Lodge Dormitory started operations. In the same month, it was reported that Cochrane Lodge 1 and 2, both located in Admiralty Road West with a combined capacity of 9,000,

were shut down to make way for the development of a new housing estate.

Exhibit 2: Stock of worker dormitories by class

Class	Number of Dorms	Number of Beds
Class 1	1,016	38,912
Class 2	272	48,855
Class 3	168	77,756
Class 4	60	273,927
Total	1,516	439,450

Source: MOM, as of August 2025

Upcoming Supply

After the opening of Phase One, it was reported that Phase Two of Pioneer Lodge Dormitory with 7,412 beds will be opening in October 2025. Other upcoming dormitory completions include Westlite Toh Guan with 1,764 new beds and an expected completion in Q4 2025, while Westlite Mandai with 3,696 new beds was reported to have a completion date in Q1 2026.

Two dormitories developed by MOM located at Tukang with 2,400 beds in the West, and Sengkang with 7,200 beds in the North-East is expected to be ready in 2026 and 2028 respectively. It remains to be seen how this will impact the dormitory market in future, given the difference in the type of ownership structure between the MOM developed dormitories and the rest of the industry.

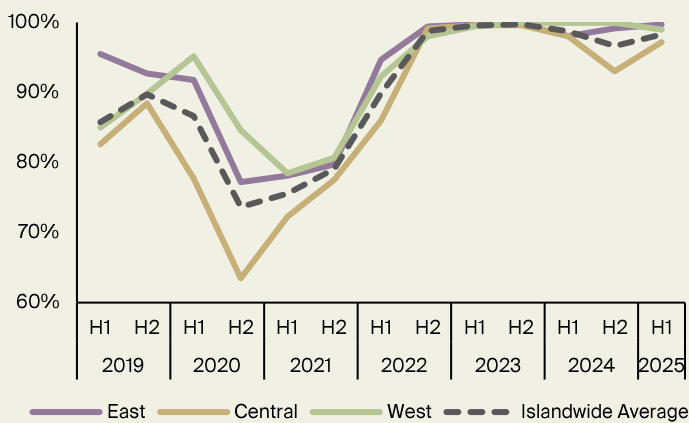
According to MOM, five new Purpose-Built Dormitories (PBDs) with an estimated total of around 35,000 beds is anticipated to be added to the market over the next few years.

Demand and Occupancy by Zones

Worker dormitories across Singapore were generally nearly fully occupied since the second half of 2022 and continued to remain so in H1 2025. In the first half of 2025, the islandwide average occupancy increased 1.6 percentage points (PP) from 96.7% in H2 2024 to 98.3% in H1 2025, based on a basket of Class 4 PBDs aggregated by DASL. More dormitories have also been included in DASL's basket of Class 4 PBDs in H1 2025 with more operators keen to participate in this series publication, increasing the data representation across Singapore's worker accommodation market.

All central, east and west zones were almost fully occupied in H1 2025, with respective occupancy levels of 97.2%, 99.7% and 99.0% (Exhibit 3 and Exhibit 4). Despite the near full occupancies, demand pressure was observed to have eased in the past six months in terms of the number of prospective workers on the wait list for the next available bed.

Exhibit 3: Average dormitory occupancy rates islandwide and by zones



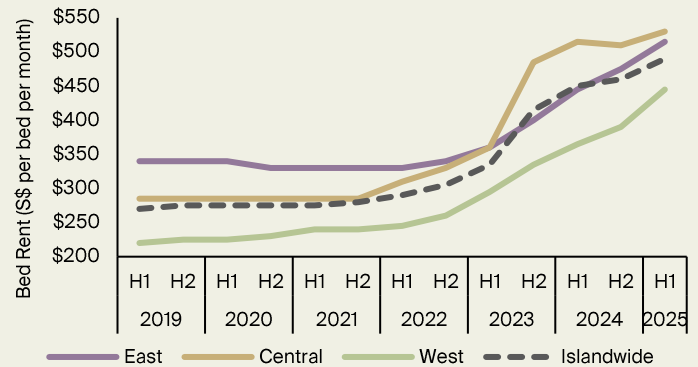
Source: DASL, Knight Frank Research
Based on a basket of Class 4 PBDs in Singapore aggregated by DASL

Rents

In H1 2025, average monthly rents for a bed in a commercial dormitory ranged between S\$445 per bed per month (pb pm) and S\$530 pb pm in the three zones with an islandwide average of S\$490 pb pm. An islandwide average of S\$490 pb pm represented a gain of 6.5% in the last six months and an increase of 8.9% over the same period last year (Exhibit 5). However, these gains in the past six months were not solely due to the prevailing firm demand, but was also contributed by the increase in the number of dormitories that has been included in DASL's basket of Class 4 PBDs. Since the trough of S\$270 pb pm in H1 2019, monthly dormitory bed rents have grown 81.5% from the pre-pandemic era.

The increasing bed rents islandwide were not only a result of strong and steady demand for beds. Other factors that contributed to the increase in bed rents included higher operating and maintenance costs due to widespread inflation over the past few years.

Exhibit 5: Average dormitory bed rents islandwide and by zones



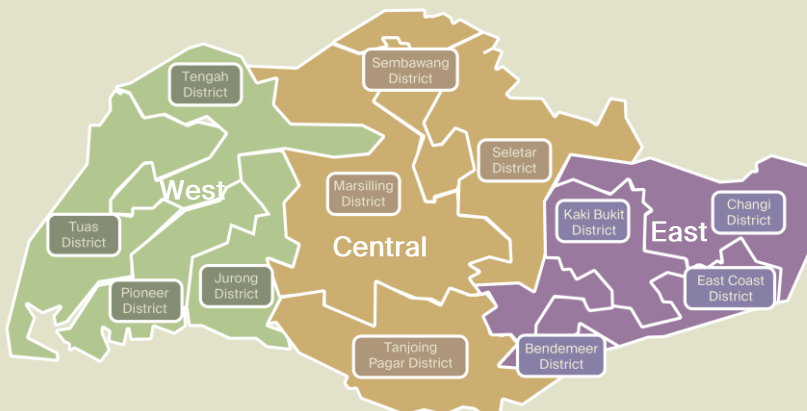
Source: DASL, Knight Frank Research

Note:

1) Based on a basket of Class 4 PBDs in Singapore aggregated by DASL

2) Additional PBDs were included in the basket in H1 2025 to increase sample representation

Exhibit 4: Dormitory zones in the east, central and west of Singapore



Zone	District	Postal Sectors
East	Bendemeer	3, 19, 20, 21, 32, 33, 34, 36, 37, 40, 43
	Changi	49, 50, 51, 52, 54, 81
	East Coast	38, 39, 42, 44, 46, 48
	Kaki Bukit	41, 45, 47, 53
Central	Marsiling	27, 28, 29, 57, 58, 59, 66, 67, 73, 77
	Seletar	31, 35, 55, 56, 76, 79, 80, 82, 83
	Sembawang	74, 75, 78
	Tanjong Pagar	1, 2, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 22, 23, 24, 25, 26, 30
West	Jurong	60, 61, 65, 68
	Pioneer	62, 64
	Tengah	69, 71, 72
	Tuas	63, 70

Source: MOM

In addition, with the introduction of the Dormitory Transition Scheme (DTS) and New Dormitory Standards (NDS) by MOM in October 2023, existing worker dormitories will need to be refurbished to meet the standards set in the DTS by 2030 and NDS by 2040. Each worker is expected to be allotted a larger living space, with a maximum of 12 to a room and en-suite toilets for every six workers. Dormitory operators that have started to improve their facilities will increasingly factor in the cost into bed rents to finance the mandatory upgrades, and those who have yet to initiate the upgrades are expected to also follow suit.

In H1 2025, centrally located dormitories typically had the highest bed rents with an average of S\$530 pb pm, followed by those in the east at an average of S\$515 pb pm (Exhibit 6). In the west, where the highest number of dormitories and beds are located, the bed rent average was S\$445 pb pm.

Exhibit 6: Spread of bed rents in dormitories by zones

Zones	H1 2025		
	Minimum	Average	Maximum
East	\$465	\$515	\$565
Central	\$425	\$530	\$635
West	\$380	\$445	\$580

Source: DASL, Knight Frank Research
Based on a basket of Class 4 PBDs in Singapore aggregated by DASL



Source: DASL

Investment Transactions

Centurion Corporation announced its intention to list a real estate investment trust (REIT) comprising income-generating assets in the purpose-built worker accommodation (PBWA), purpose-built student accommodation (PBSA), and other long-stay lodging segments globally, excluding Malaysia. The proposed initial public offering (IPO) will include an initial 14 assets, consisting of five PBWA properties in Singapore, eight PBSA properties in the UK and one PBSA property in Australia.

With the listing of this REIT, retail investors will have access to investing in PBWA properties in Singapore.



Source: DASL

Outlook

Despite the heightened global economic uncertainty caused by the widespread tariffs announced by the US Trump Administration, demand for worker accommodation in Singapore is likely to continue to be supported and even increase on the back of domestic construction volume. Mega infrastructural projects such as the continued development of Tuas Port, Changi Airport Terminal 5, the expansions of Marina Bay Sands and Resorts World Sentosa will drive demand for construction labour.

For the remainder of 2025, bed rent increases can be expected with an overall gain of around 10%, similar to the 10.8% increment in 2024. As dormitory operators adjust and modify facilities to the standards prescribed by DTS and NDS, rents of PBDs are expected to stay elevated with upward momentum over the medium- to long-term, driven by the capital expenditure (CAPEX) being committed and overall higher operating expenses.

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