

Singapore Office Market Review

Paya Lebar Square

DEMAND P9

Led by tech companies, asset management companies and displaced businesses that needed to relocate

SUPPLY P9

Vacancy rate on prime market drops to around 5.8% (approx. 8.6% overall)



Means click for more information



Office Rental Rates 2

BUSINESS DISTRICTS

Recommended Leasing Options

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Official Asking Rates

February 2022

S\$ psf per month – inclusive of service charge
These rates are negotiable

Raffles Place / New Downtown

6 Battery Road	\$11.50-\$13.00
6 Raffles Quay	\$7.20
18 Robinson	\$12.00-\$14.00
20 Collyer Quay	\$9.00-\$11.00
30 Raffles Place	\$10.50
55 Market Street	\$9.00-\$9.50
AIA Tower	Full
Asia Square Tower 1	\$14.00-\$15.00
Asia Square Tower 2	\$12.50-\$13.00
ASO Building	TBA
Bank of China Building	Full
Bank of Singapore Centre	\$9.50
Bharat Building	\$6.50
CapitaGreen	\$13.50
CapitaSpring	\$14.00-\$15.00
Capital Square	\$11.00
Clifford Centre	\$8.00-\$8.50
Far East Finance Building	\$4.80-\$7.00
Grace Global Raffles	\$8.50
Great Eastern Centre	Full
Hong Leong Building	\$9.00
Income@Raffles	\$9.80-\$10.50
Marina One	\$12.50
Maybank Tower	\$12.00
MBFC Tower 1, 2 & 3	\$11.00-\$13.00
MYP Centre	\$10.50
OCBC Centre	\$9.50
OCBC Centre East	\$9.00
OCBC Centre South	Full
Ocean Financial Centre	\$13.00
One Finlayson Green	\$7.90
One George Street	\$10.00-\$11.00
One Marina Boulevard	\$14.00
One Raffles Place Tower 1	\$10.00-\$11.50
One Raffles Place Tower 2	\$11.80
One Raffles Quay Towers	\$12.00
OUE Bayfront	\$13.00-\$14.00
PLUS	\$10.00
Prudential Tower	\$9.00
Republic Plaza 1	\$10.00-\$11.80
Republic Plaza 2	Full
Royal Group Building	\$9.00
Royal One Phillip	\$8.00
Samsung Hub	\$9.20-\$9.80
Singapore Land Tower	\$10.50
The Arcade	\$6.50-\$7.00
The House of Eden	\$8.60-\$8.80
UOB Plaza 1	\$11.00
UOB Plaza 2	\$10.00

Robinson Road / Shenton Way

61 Robinson Road	\$10.50
71 Robinson Road	\$10.00
79 Robinson Road	\$13.00
80 Robinson Road	\$8.50
108 Robinson Road	Full
110 Robinson Road	\$5.00
120 Robinson Road	\$6.00
137 Telok Ayer Street	\$7.50
135 Cecil Street	\$6.50
150 Cecil Street	\$6.00-\$6.50
158 Cecil Street	\$8.00
Afro Asia i-Mark	\$9.80-\$10.25
Bangkok Bank Building	\$5.50
BEA Building	\$7.50
Capital Tower	\$10.00-\$11.00
Cecil Building	\$6.50
Cecil Court	\$5.50
Cecil House	\$6.20
City House	\$8.20-\$9.00
Cross Street Exchange	\$8.00-\$8.50
Crown@Robinson	\$7.50-\$9.00

Fraser's Tower	\$12.00
GB Building	\$5.50-\$7.00
Keck Seng Tower	\$5.50-\$6.30
Manulife Tower	\$9.00-\$10.00
OUE Downtown 1 & 2	\$9.00
PIL Building	Full
Robinson 77	\$8.50-\$9.00
Robinson 112	\$6.50
Robinson Point	\$8.00-\$8.80
SBF Centre	\$7.60-\$8.50
SGX Centre 1 & 2	\$7.95-\$9.50
Shenton House	\$4.20-\$4.50
SIF Building	\$7.20
The Globe	\$6.30-\$6.50
The Octagon	\$5.50-\$6.50
Tokio Marine Centre	\$8.00
Tong Eng Building	\$5.30-\$5.60
UIC Building	Full
UOI Building	\$6.00

Tanjong Pagar

78 Shenton Way Tower 1	\$6.00-\$8.00
78 Shenton Way Tower 2	\$9.00
100AM	\$7.30-\$8.00
ABI Plaza	\$7.50
Anson Centre	\$4.50
Anson House	\$8.00-\$8.50
Guoco Tower	\$12.00-\$14.00
International Plaza	\$5.00-\$6.50
Jit Poh Building	\$5.50
Mapletree Anson	POA
MAS Building	Full
Southpoint	\$6.60-\$8.00
Springleaf Tower	\$8.00-\$8.20
St Andrew's Centre	\$5.30
Tanjong Pagar Complex	\$3.80
Twenty Anson	\$10.00
UE Anson	\$8.00-\$8.30

City Hall / Marina Centre / Beach Road

11 Beach Road	\$7.50
25 North Bridge Road	\$7.80
47 Hill Street	\$8.50
Beach Centre	\$7.80
Bugis Junction Towers	\$9.50
Centennial Tower	\$14.20
Duo Tower	\$11.00
Funan	Full
Lazada One	\$10.00-\$10.50
Millenia Tower	\$14.20
Odeon Towers	\$7.60-\$8.00
OG Albert Complex	\$4.80
Parkview Square	\$8.00-\$10.00
Peninsula Plaza	\$4.80-\$5.80
Raffles City Tower	\$10.00-\$10.50
South Beach Tower	\$11.00-\$12.00
Stamford Court	\$7.50
Suntec Towers 1-5	\$8.50-\$10.00
The Adelphi	\$5.60-\$5.90
The Concourse	\$8.00
The Gateway East & West	\$7.50

Orchard Road / Dhoby Ghaut

50 Scotts Road	\$8.00
51 Cuppage Road	\$8.00
Burlington Square	TBA
Fortune Centre	\$5.00-\$6.00
Forum	\$7.50
Goldbell Tower	\$8.00
Haw Par Centre	\$7.20
Haw Par Glass Tower	\$5.30
International Building	\$8.00
Liat Towers	Full
Ngee Ann City	\$10.00-\$11.00
Orchard Building	\$7.50-\$8.00
Orchard Gateway	\$9.50
Orchard Towers	\$3.80
Palais Renaissance	\$8.00
Regency House	Full
Shaw Centre	\$7.00-\$8.00
Shaw House	\$8.50

Singapore Pools Building	Full
Sunshine Plaza	\$6.00
Tanglin Shopping Centre	\$6.20
The Bencoolen	\$4.90
The Heeren	\$10.50
Thong Teck Building	\$7.11-\$7.50
Tong Building	Full
TripleOne Somerset	\$8.50-\$8.80
Visioncrest Commercial	\$8.00-\$9.00
Wheelock Place	\$11.50
Wilkie Edge	\$7.50
Winsland House I & II	\$9.50
Wisma Atria	\$9.80-\$10.00

Chinatown / River Valley Road

CES Centre	\$5.80
Chinatown Point	\$5.15-\$6.00
Great World City	\$7.50
Havelock II	\$7.00
King's Centre	\$6.50-\$8.20
The Central	\$6.69-\$9.80
UE Square	\$7.20
Valley Point	\$7.00

Edge of CBD

Alfa Centre	\$6.50
Aperia*	\$5.70-\$6.80
Boon Siew Building	\$5.25-\$5.50
Central Plaza	\$7.30-\$7.50
Goldhill Plaza	\$4.80
Newton 200	\$9.00
Novena Square	\$8.00-\$8.80
Rex House	\$4.80
SLF Building	\$4.00-\$4.30
United Square	\$7.50-\$7.80

East

AIA Tampines	Full
ARC 380	\$6.00
Asia Green	\$6.50
Changi Business Park	\$4.00+
CPF Tampines	\$4.90
ESR BizPark@Chai Chee	\$3.00+
Hiap Hoe Building	Full
Income@Tampines Junction	\$5.50
NTUC Income Tampines Point	\$5.50
Parkway Parade	\$5.00
Paya Lebar Quarter	\$9.00
Paya Lebar Square	\$5.40-\$6.60
Singapore Post Centre	\$6.50
Starhub Green*	\$5.20
Tampines Concourse	\$4.20
Tampines Plaza 1	Full
Tampines Plaza 2	\$6.00

West / Others

20 Harbour Drive (formerly PSA Vista)	\$4.50
Alexandra Point	\$7.00
Alexandra Techno Park*	\$5.00
ALICE@Mediapolis*	\$5.30-\$6.50
Fragrance Empire Building	\$5.80-\$6.50
Harbourfront Centre	\$6.30-\$6.90
Harbourfront Tower 1	\$7.30-\$7.80
Harbourfront Tower 2	\$7.00
International Business Park Jurong*	\$4.00+
JEM	Full
Keppel Bay Tower	\$8.20
Mapletree Business City*	POA
mTower (formerly PSA Building)	\$7.40
Pacific Tech Centre*	\$3.00+
Singapore Science Parks	\$4.50+
The JTC Summit	\$5.11
The Metropolis	\$8.50+
UE Biz Hub West	\$6.30
Vision Exchange	\$5.00-\$6.50
Westgate	\$6.70-\$7.30

*Business Park / B1 space

Express Office Search
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All rents quoted are asking rental rates and subject to change without prior notice

Raffles Place / New Downtown

\$9.00 – \$12.00 psf*

DEMAND

Brisk leasing activity in the heart of the financial district

The Prime Grade A office leasing market in Raffles Place was healthy in the second half of 2021. Most buildings have seen good leasing activity and many now have high occupancy. For instance, CapitaSpring is approx. 92% committed. One of the latest bits of news is that KPMG is planning to relocate from Hong Leong Building and are lined to take over around 100,000 sq ft of space in Asia Square Tower 2.

KPMG destined to lease 100,000 sq ft in Asia Square Tower 2

See outlined on the right some of the busiest buildings in this top prime commercial office location.

Summary of Movement

03

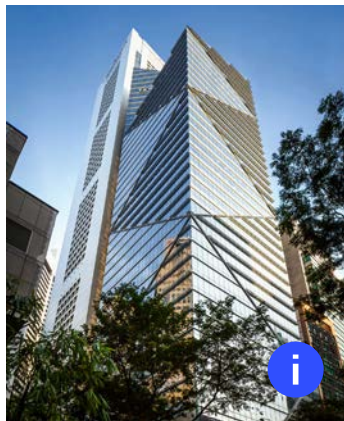
Company

Moved / Moving to

Butler Snow	6 Battery Road
CSC Global	30 Raffles Place
Preqin	30 Raffles Place
Kanto Kasei	Income@Raffles
Bridge Data Centers	Income@Raffles
Glencore	CapitaSpring
BG Shipping	MBFC Tower 2
Vanda Orchid	MBFC Tower 3
Donnelly Financial Solutions	Ocean Financial Centre
Permira Advisors	Ocean Financial Centre
Monk's Hill Ventures	One George Street
Mindful Wealth	One George Street
Franklin Medici Family Office	Republic Plaza
Pacmar Shipping	Republic Plaza
Swiss-Asia Financial Services	Republic Plaza
HarbourVest Partners	One Raffle Quay North
Cobo Singapore	One Raffles Place T1
AIMS Asia Pacific	One Raffles Place T1
DP World Ports	One Raffles Place T2
QCP Capital	Royal One Philip
Zeus Trading	Singapore Land Tower

Recommended Leasing Options

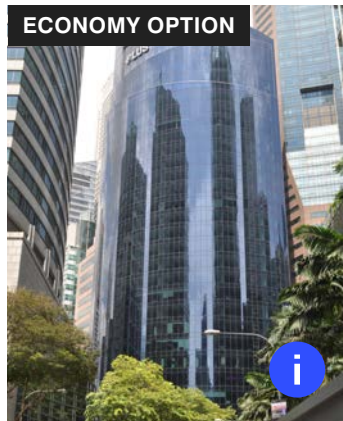
***Target average effective rate**



\$11.00 psf*

Units: 1,356 – 11,119 sq ft

One Raffles Place Tower 2
Raffles Place



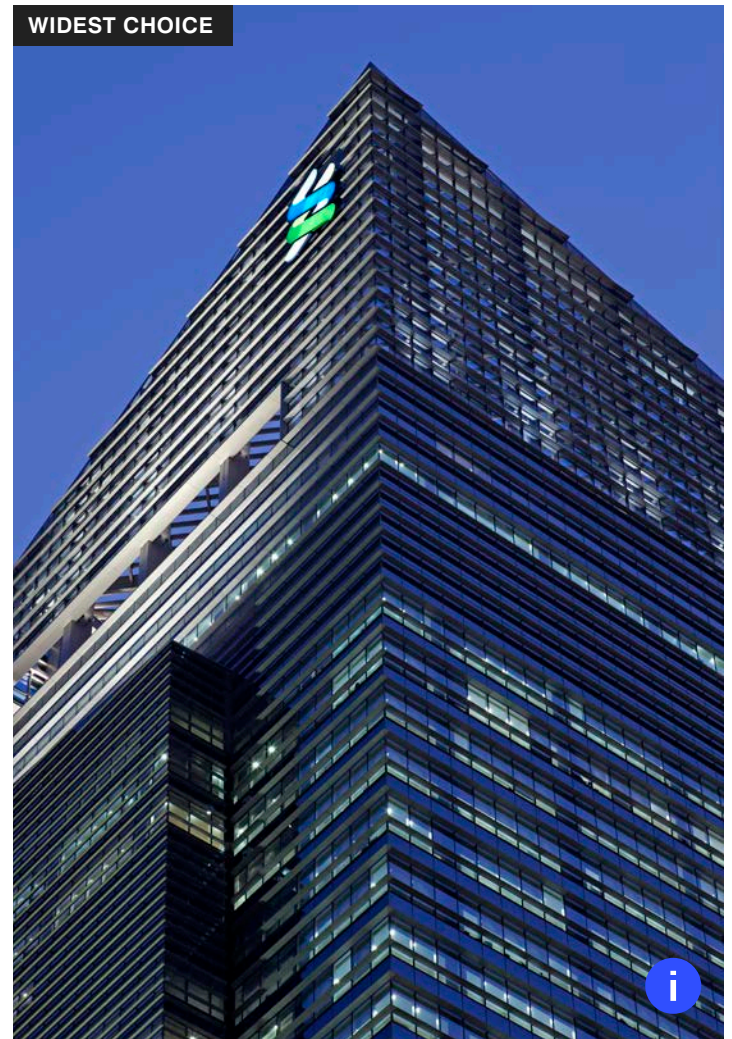
\$8.75 – \$9.00 psf*

Units: 1,098 – 21,200 sq ft

PLUS
20 Cecil Street



Most buildings in this location have seen good leasing activity and many now have high occupancy rates.



\$11.50 psf*

Units: 4,000 – 44,000 sq ft

Marina Bay Financial Centre Tower 1
8 Marina Boulevard

Edge of Raffles Place Robinson Road / Shenton Way


\$5.50 – \$9.75 psf*

This location offers the best value for money, whilst still being close to the top prime financial district. There is quite a wide variety of ages of buildings in this area, some of the newer ones still offering top quality specifications and the older ones offer more basic features at very affordable rates.



Recommended Leasing Options

PREMIUM CHOICE

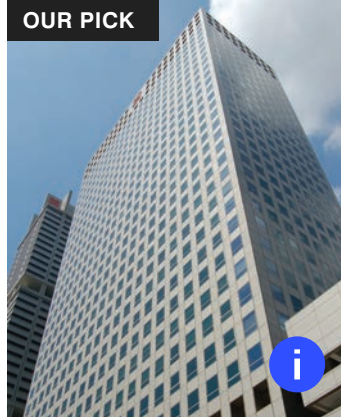


\$9.50+ psf*

Units: 3,000 – 22,500 sq ft

Afro Asia i-Mark
63 Robinson Road

OUR PICK

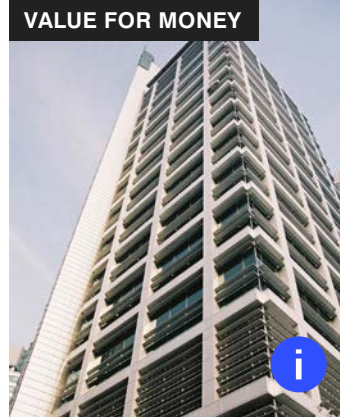


\$8.00+ psf*

Units: 1,000 – 16,263 sq ft

OUE Downtown 2
6 Shenton Way

VALUE FOR MONEY



\$8.80 psf*

Units: 1,259 – 13,110 sq ft

Samsung Hub
3 Church Street

RECENT UPGRADE




\$7.75 psf*

Units: 1,300 – 8,288 sq ft

Robinson Point
39 Robinson Road

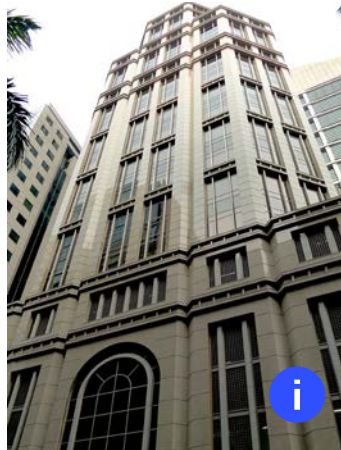
ULTRA PREMIUM CHOICE



\$11.50 psf*

Units: 3,294 – 7,487 sq ft

Guoco Tower
1 Wallich Street



\$8.75 – \$9.50 psf*

Units: 1,840 – 9,214 sq ft

61 Robinson Road
Robinson Road

Watch Video



Watch Video



This location offers the best value for money, whilst still being close to the top prime financial district.

*Target average effective rate



Robinson Point Foyer

Summary of Movement

Company

Moved / Moving to

Arthur J Gallagher	61 Robinson Road
Saab Motors	61 Robinson Road
Kanematsu	79 Robinson Road
The Embassy of Belgium	79 Robinson Road
Parcel Perform	Cecil Court
M.Moser Associates	City House
TZ Apac	City House
SDR Enterprise	City House
Driver Trett	Cross Street Exchange
Cooley LLP	Fraser's Tower
Faithful & Gould	Grace Global Raffles
Worldware	Grace Global Raffles
BBC Chartering	Guoco Tower
Evergreen Asset Management	Keck Seng Tower
Bunker Holdings	One Marina Boulevard
Crawford & Co	OUE Downtown 2
Finapac Capital	OUE Downtown 2
Barry Callebaut	OUE Downtown 2
Korea IT Corporation	One Finlayson Green
Crestron	Prudential Tower
Epic Land (21)	Prudential Tower
General Mills	Robinson 77
Alternative Asset Advisors	Samsung Hub
Quebec Government Office	SGX Centre 1
Citywire	SGX Centre 2
Showa Denko	SGX Centre 2
Goodwill Maritime	Springleaf Tower
Pacific Resource Trading	Springleaf Tower
Halo Technology	Tokio Marine Centre

Beach Road / City Hall / Suntec

\$7.50 – \$10.00 psf*

Suntec City has been one of the busiest districts for leasing activity because there had been a wide choice of units available, but not so much now, with vacancy rates dipping as a result. YWL Engineering has moved from Faber House on Orchard Road to **Suntec Tower 1**. GEO Resources have also moved into Tower 1 from MBFC Tower III.

Local international property company Singhaiyi Group has taken a whole floor in **Suntec Tower 2**, but it is **Tower 4** (wholly owned / managed by APM) that has seen the most activity. Samsonite has leased a whole floor here and other new tenants include investment company Revolytics Holdings, and Sun Wealth Group. Companies to expand within this tower include Leo Pharma, Santen Pharmaceutical, alternative investment management company, Brevan Howard and Norden Shipping. GoJek is relocating from AXA Tower to lease one whole floor (30,000 sq ft) in **Suntec Tower 5**.

On Beach Road, engineering consultant Aurecon Singapore has expanded to lease an extra floor at **The Gateway East**, and a new tenant here is CW Digital Technology. A recent new tenant to **The Gateway West** is global food supply company Cofco International. Elsewhere, creative marketeers, Maise has moved into **Bugis Junction Towers**, Palo IT leased a floor in **11 Beach Road** and Activeo has taken space in **The Adelphi**.

GoJek is relocating from AXA Tower to lease one whole floor (30,000 sq ft) in Suntec Tower 5.

Summary of Movement

05

Company	Moved / Moving to
Palo IT	11 Beach Road
Maise	Bugis Junction Towers
YWL Engineering	Suntec Tower 1
GEO Resources	Suntec Tower 1
Singhaiyi Group	Suntec Tower 2
Samsonite	Suntec Tower 4
Revolitics	Suntec Tower 4
Sun Wealth Group	Suntec Tower 4
Leo Pharma	Suntec Tower 4 (expected)
Norden Shipping	Suntec Tower 4 (expected)
Santen Pharmaceutical	Suntec Tower 4 (expected)
Brevan Howard	Suntec Tower 4 (expected)
GoJek	Suntec Tower 5
Aurecon	The Gateway East (expected)
CW Digital	The Gateway East
Activeo	The Adelphi

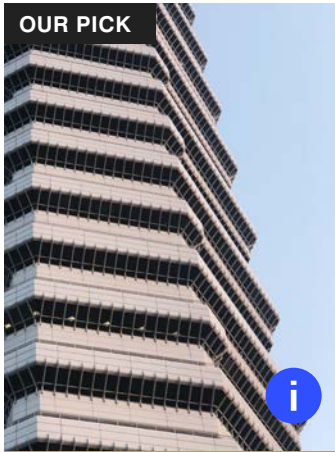


Suntec City

Recommended Leasing Options

*Target average effective rate

OUR PICK



\$7.25 psf*

Units: 1,055 – 6,610 sq ft

The Concourse
300 Beach Road

PREMIUM CHOICE



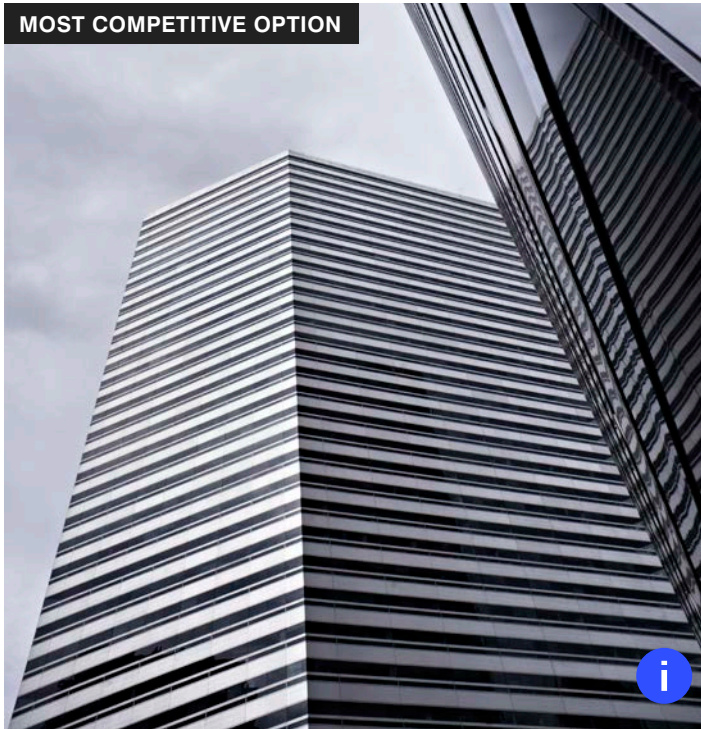
\$TBC psf*

Units: 6,400 – 30,000 sq ft

Guoco Midtown*
120 Beach Road

*See **Featured Building** on
page 8 for more details

MOST COMPETITIVE OPTION



\$7.00 psf*

Units: 1,278 – 5,814 sq ft

The Gateway East
152 Beach Road

Suntec City has been one of the busiest districts for leasing activity because there had been a wide choice of units available but not so much now, with vacancy rates dipping as a result.

Orchard Road / Edge of CBD

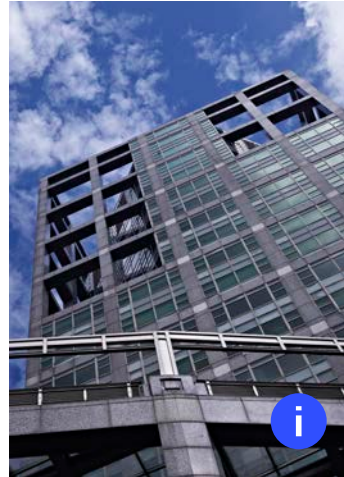
06

\$7.00 – \$10.00 psf*

On Orchard Road, Palais Renaissance has been one of the busier buildings in Q4 2021. Everise Holdings has leased a whole floor here and other new tenants include Mink Investments and Grace Products (from Republic Plaza). Shaw House also offers good value and both Trihill Capital Partners & Evia Real Estate are new occupiers here. Chanel has expanded further to lease another floor in Wheelock Place. Burda Singapore has taken up space in Thong Teck Building.

In Novena, Storck Asia Pacific has just relocated from Tong Building to Novena Square Tower A. New tenants to United Square include Anuvu. Symphony Asia Holdings has relocated from Raffles Place to lease a floor in Newton 200.

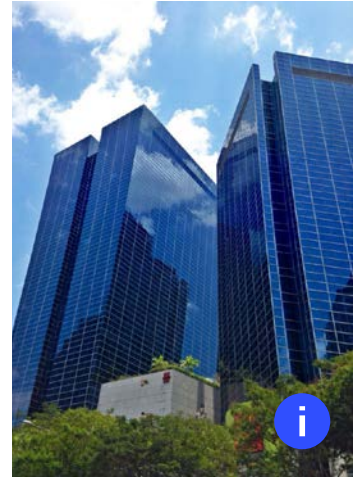
On Orchard Road, Palais Renaissance has been one of the busier buildings in Q4 2021.



\$8.75 – \$9.20 psf*

Units: 1,446 – 9,580 sq ft

The Heeren
260 Orchard Road



\$7.25+ psf*

Units: 2,329 – 11,582 sq ft

Novena Square Tower B
238B Thomson Road



Recommended Leasing Options

***Target average effective rate**



\$7.25 – \$8.00 psf*

Units: 1,000 – 18,000 sq ft

Triple One Somerset
111 Somerset Road



\$7.00 – \$8.00 psf*

Units: 2,500 – 29,450 sq ft

Visioncrest Commercial
103 Penang Road



Decentralized Locations

07

\$4.50 – \$8.00 psf*

Island East



Recommended Leasing Options

***Target average effective rate**



\$6.00+ psf*

Units: 1,598 – 7,632 sq ft

SingPost Centre

10 Eunos Road 8, Paya Lebar



\$4.50 psf*

Units: 1,167 – 9,914 sq ft

223 Mountbatten

Geylang / Paya Lebar



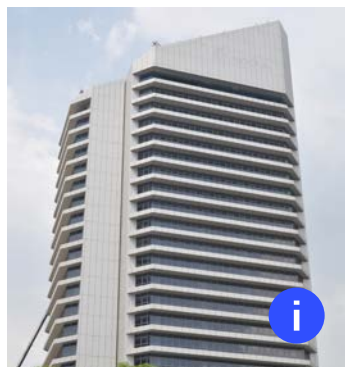
\$5.00 psf*

Units: 1,000 – 13,522 sq ft

Income@ Tampines Junction

300 Tampines Avenue 5

Island West



\$6.00 psf*

Units: 1,249 – 4,133 sq ft

Fragrance Empire Building

456 Alexandra Road

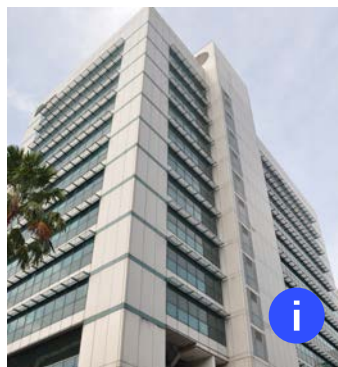


\$6.50 psf*

Units: 1,099 – 9,914 sq ft

Alexandra Point

438 Alexandra Road



\$5.50 psf*

Units: 2,002 – 9,509 sq ft

UE Bizhub West

450 Alexandra Road

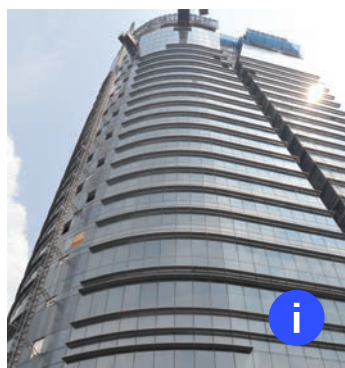


\$6.50+ psf*

Units: 2,148 – 17,247 sq ft

Harbourfront Tower 1

1 Harbourfront Place

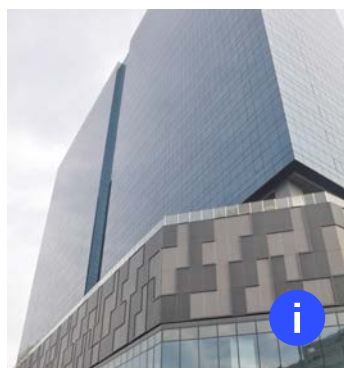


\$6.30 psf*

Units: 1,087 – 5,339 sq ft

Westgate Tower

1 Gateway Drive, Jurong East



\$5.50 psf*

Units: 1,098 – 24,789 sq ft

Vision Exchange

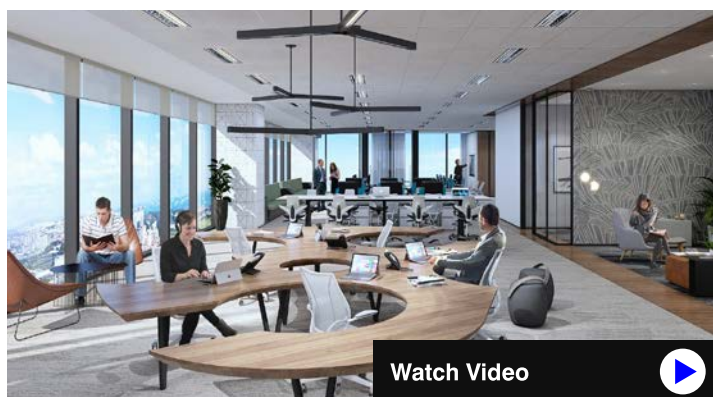
2 Venture Drive, Jurong East



Jurong

Featured Building

Guoco Midtown



Watch Video



Estimated Effective Rate

\$TBC

Units from 6,400 sq ft – 30,000 sq ft

TOP

Building Height
Average Floor Plate
Total Size
Nearest MRT

December 2022 Estimated

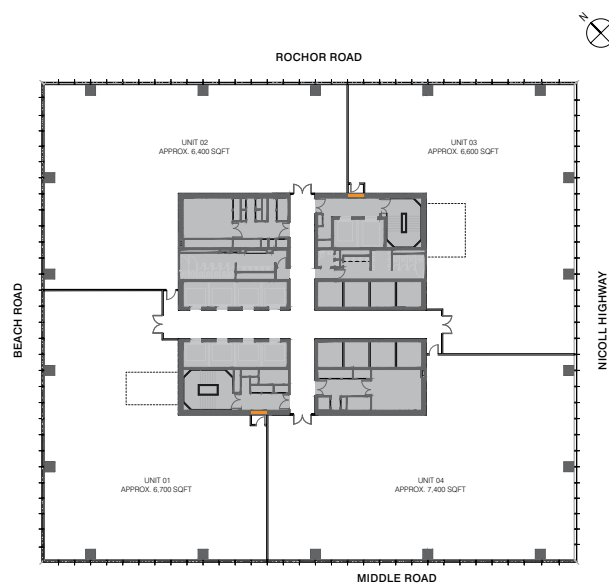
30-storeys
28,000 – 30,000 sq ft
770,000 sq ft
Bugis

Features

- Views of Marina Bay and Kallang Basin
- Roof garden on level 7 with 40m lap pool
- Social corner and 100m jogging track
- Shared facilities with event spaces, conference rooms, training spaces and hot desking areas
- Market Place – with rows of shops, cafes and restaurants and underground link to Bugis MRT
- Network Hub – 5-storey extension of the office facility with social business club, network lounges, meeting rooms, convention and exhibition (MICE) facilities
- Co-working spaces and rooms for private functions
- Midtown House – conversion of the old Beach Road police station into retail and high end dining options
- Midtown Bay – a 33-storey residential tower with 219 1-bedroom and 2-bedroom apartments

Specification

- 150mm raised floor and 3.3m ceiling height
- Efficient square column-free floor plate allowing for easy subdivision
- Occupancy loading 420 people per floor (70 sq ft per person)
- Full height floor to ceiling windows
- Emergency power 20W per sq m plus room for private gen set
- Telecommunications – Dual risers per floor
- Air-conditioning – both Central AHU and VAV Systems
- Good natural lighting: 500 lux / Floor loading 3.5KN/per sq m
- Security System: controlled access via turn-styles and 24 hour CCTV
- Car parking: 207 spaces / 150 bicycle spaces
- Lifts – 8 low-rise, 8 high-rise, 2 service and 2 car park lifts



Demand / Supply / Rents

Demand for Grade A office space in the CBD increased significantly in 2021 and was led by tech companies such as Tik Tok / Byte Dance, Amazon, LinkedIn and Fintech companies, as well as asset / wealth management companies. These sectors accounted for around 70% of new leases in 2021. Shipping was also a reasonably strong sector, as were the insurance and pharmaceutical sectors. Companies that were forced to relocate due to the redevelopment of their building also boosted demand.

Net positive take-up was around 800,000 sq ft last year, compared with just 200,000 sq ft in 2020 (which was predominantly just relocation activity to similar sized space, so no increase in net absorption).

The ultra-high-end properties are still commanding effective rates in excess of \$11.00 per sq ft per month.

Supply: This pick-up in leasing activity has caused vacancy rates to drop further and currently stands at around 8.6% in the market as a whole (5.8% for the prime market). For instance, Capitaland's **CapitaSpring** has been an outstanding success and now stands 92% committed with only pockets of space left for lease.

The buildings that currently have the widest choice of space available include **Marina Bay Financial Centre Tower 1** (six floors) as well as **Asia Square Tower 1**. Along Robinson Road **61 Robinson Road** and **Robinson Point** have ample options. Later in the year, **Capital Tower** will have substantial space available when JP Morgan relocate to CapitaSpring. **Hong Leong Building** will have significant space coming available after KPMG relocate.

Rental rates bottomed out in Q1 of 2021

Rents: During the course of 2021 rates bottomed out in Q1 last year, and then Grade A office rents grew by around 4.25%. Average gross effective rates for top Grade A buildings are around \$10.23 per sq ft compared with \$9.81 per sq ft the year before. The ultra-high-end properties are still commanding effective rates in excess of \$11.00 per sq ft per month.

Market Forecast



21 Collyer Quay



CapitaSpring

The amount of co-working space is expected to grow in 2022, with the opening of **21 Collyer Quay** (fka HSBC Building). This category of space has already reached the 1.7 Million sq ft mark, which is around 5.5% of total CBD stock. This sector is predicted to advance further with the popularity of hybrid office space solutions.

Fewer companies are downsizing or closing down and more companies are expected to set up shop here, with Singapore's attractiveness as a 'smart city' encouraging more companies in the high tech and finance sectors.

As a result of the continued expected increase in demand and further reduction in supply, we foresee that the vacancy rate in the prime Grade A sector could slip below 4.6% and the 'leasing power' is definitely shifting back towards the landlords. We expect that rental rates could rise by around 5.00%, in 2022 assuming there are no more Covid-19 setbacks or any other negative external factors.

The vacancy rate in the prime Grade A sector could slip below 4.6%.



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