

# Worker Dormitories in Singapore

H2 2025

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

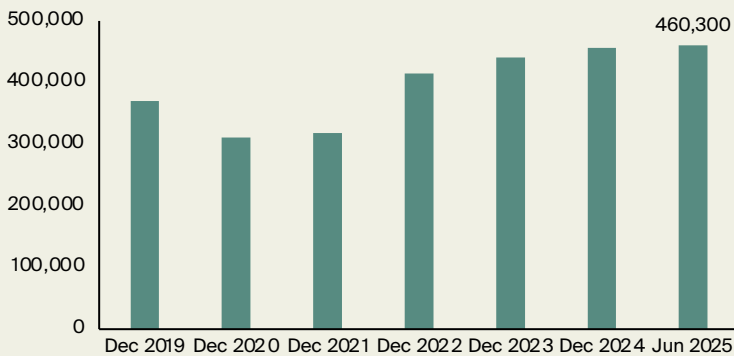
### Introduction

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 June 2025, there were 460,300 work permit holders in the Construction, Marine Shipyard and Process (CMP) industries, representing a 0.8% increase in six months from the total recorded in December 2024 (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 generally an opaque market. As at H2 2025, there were 64 Class 4 dormitories in Singapore with a corresponding total of 285,633 beds, comprising 62.6% of the total islandwide bed load.

Phase One of Pioneer Lodge at Soon Lee Road with 3,088 beds, commenced operations in April 2025, and was reported to be fully leased. Phase Two was completed towards the end of 2025 with a complement of 7,412 beds. Other dormitories that recently received Temporary Occupancy Permit (TOP) included Westlite

Toh Guan with 1,764 new beds in October 2025 and Westlite Mandai with 3,696 new beds in January 2026.

Also opening in January 2026 was NESST Tukang Dormitory. Located at Tukang Innovation Lane, this first dormitory developed by MOM meets the full New Dormitory Standards (NDS) and is operated by NESST Singapore. Housing up to 2,400 residents across 210 rooms, the dormitory is expected to be fully occupied by May 2026, with occupants settling in, in phases.

#### Exhibit 2: Stock of worker dormitories by class

Class	Number of Dorms	Number of Beds
Class 1	1,041	38,910
Class 2	284	48,819
Class 3	175	82,926
Class 4	64	285,633
<b>Total</b>	<b>1,564</b>	<b>456,288</b>

Source: MOM, as of February 2026

### Upcoming supply

A second dormitory developed by MOM at Sengkang West with 7,200 beds is expected to begin operations by end-2028. In December 2025, the Building and Construction Authority (BCA) called a tender to develop a dormitory that can house up to 3,200 workers at Terusan Edge in the Jurong East Planning Area. Envisaged to be completed in 2028, the tender for the parcel closes in February 2026. It was also reported that Centurion Accommodation Real Estate Investment Trust (REIT) received provisional permission to develop an additional

six-storey block and to alter the existing eight-storey dormitory building at Westlite Ubi. Upon completion around end-2028, the number of beds at Westlite Ubi will increase by 540 beds to 2,190 beds.

According to MOM, at least six more Purpose-Built Dormitories (PBDs) with a total of around 47,000 beds (inclusive of the Sengkang West PBD) are expected to be completed over the next few years.

The announcement of the Dormitory Transition Scheme (DTS) and NDS by MOM in October 2023, will require that existing worker dormitories need to be refurbished to meet the standards set in the DTS by 2030 and the more stringent NDS standards by 2040. In January 2026, MOM also announced a grant to partially defray the costs of retrofitting existing dormitories to meet the interim standards under DTS. The grant is structured in two periods where operators who transition earlier and complete their works by the end of 2028 will be eligible for a higher grant, while those who complete the retrofit in 2029 or 2030 will qualify for less.<sup>1</sup>

As dormitory operators across Singapore transit towards the DTS by 2030, it is anticipated that bed supply would tighten in the next five years as a result of disruptions caused by the improvement works.

### Demand and occupancy by zones

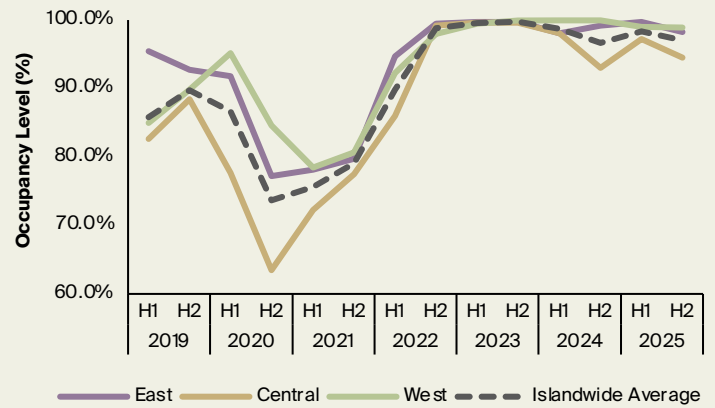
Since the second half of 2022, the occupancy levels at worker dormitories in Singapore have been healthy, continuing into H2 2025. Nevertheless, the pressure on beds generally eased throughout 2025, with the intensity of demand moderating as the marine shipyard and process industries weighed the increasingly level of caution in the global economic climate as a result of geo-political disruption and tensions. From July to December 2025, the

average islandwide occupancy declined 1.2 percentage points (PP) from 98.3% in H1 2025 to 97.1% in H2 2025, based on a basket of Class 4 PBDs aggregated by DASL.

The east and west zones remained almost full in the latter half of 2025, with respective occupancy levels of 98.3% and 99.0% (Exhibit 3 and Exhibit 4).

There was more availability in the central zone as the 97.2% occupancy recorded in H1 2025 decreased to 94.5% in H2 2025. This contributed to the easing of demand pressure in the past six months in terms of the number of wait-listed workers in the queue for the next available bed.

**Exhibit 3: Average dormitory occupancy rates islandwide and by zones**



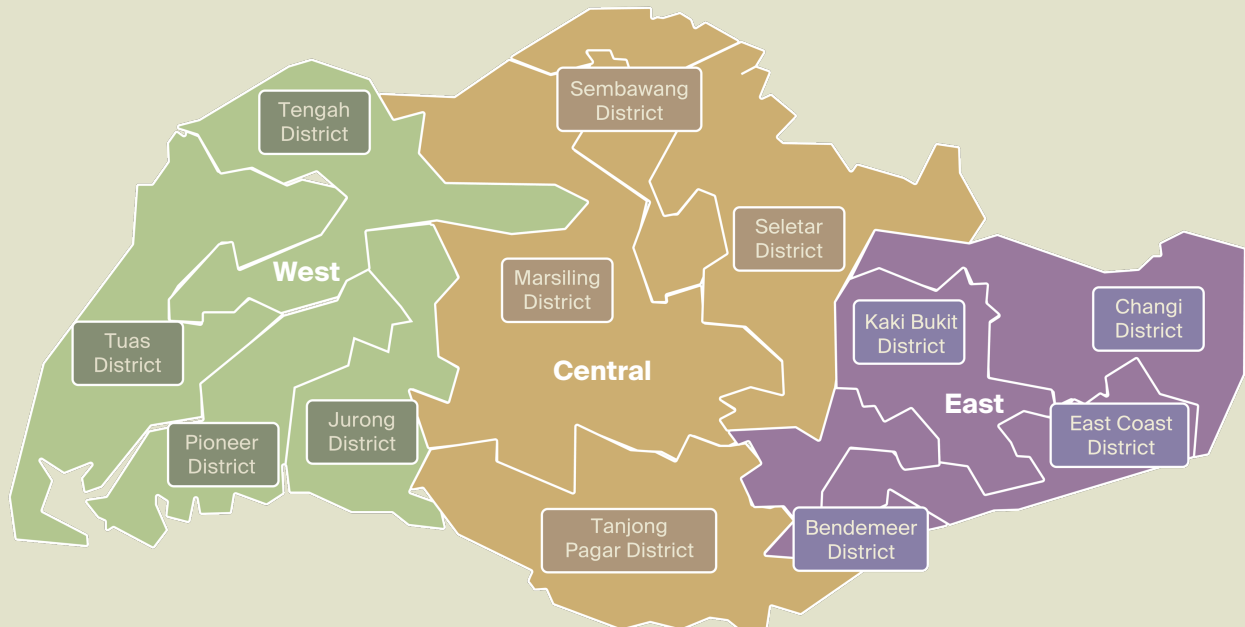
Source: DASL, Knight Frank Research  
Based on a basket of Class 4 PBDs in Singapore aggregated by DASL

### Rents

With the pressure for available beds easing and occupancy levels allowing for more breathing space, the intensive growth of bed rents also moderated. In a reversal from the previous six-monthly periods since this data series started in 2019, the average monthly rents for a bed in a

<sup>1</sup> <https://www.mom.gov.sg/passes-and-permits/work-permit-for-foreign-worker/housing/requirements-for-dormitory-operators/dormitory-transition-scheme>

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



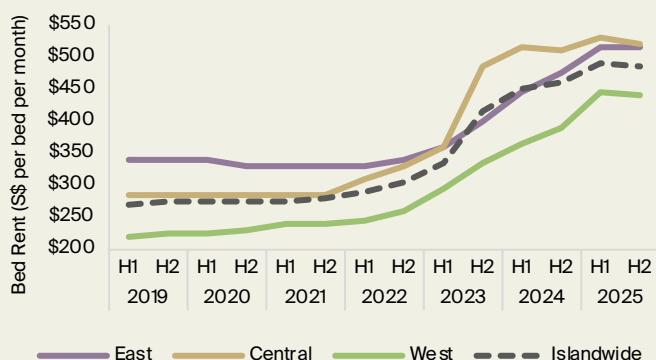
Source: MOM

commercial dormitory stopped rising. The islandwide average eased by 1.0% in H2 2025 to S\$485 per bed per month (pb pm) from H1 2025, as the gap between demand and supply showed signs of narrowing (Exhibit 5).

In the east, the average bed rent was unchanged from H1 2025, recording S\$515 pb pm in H2, while in the central zone, this average fell by 1.9% to S\$520 pb pm in the same period. Notwithstanding the tight occupancy level in the west, the average bed rent declined 1.1% half-yearly to S\$440 pb pm in the second half of 2025.

From the S\$270 pb pm recorded in H1 2019, monthly dormitory bed rents have since grown 79.6% from the pre-pandemic era.

### 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 6: Spread of bed rents in dormitories by zones

Zones	H2 2025		
	Minimum	Average	Maximum
East	\$465	\$515	\$565
Central	\$415	\$520	\$625
West	\$375	\$440	\$570

Source: DASL, Knight Frank Research

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

### Investment transactions

Centurion Accommodation Real Estate Investment Trust (REIT) debuted on the Singapore Exchange (SGX) in

September 2025, comprising worker and student housing in Singapore, the United Kingdom (UK), and Australia. The five purpose-built-worker accommodations in its portfolio total more than 24,000 beds and allowed retail investors access to investment opportunities of such properties in Singapore.

### Outlook

The reprieve from the intense pressure for beds at a time when dormitory operators will have to ramp up the pace of upgrades to meet the DTS, currently makes for a balance in demand and supply for bed space. The worker dormitory market in 2026 is positioned for continued resilience supported by the robust and sustained S\$39 billion to S\$46 billion annual construction demand, sustained maritime activity, and ongoing mega-infrastructure projects.

Nevertheless, as more dormitories embark on improvement works to meet the DTS standards, available bed inventory will inevitably be impacted given the 5-year window to comply. Based on the incoming applications for DTS grants, MOM will likely mitigate the timing of upgrading works among the various dormitories, staging this in a balanced manner that minimises disruption when managing the temporal bed loss. As most dormitories will be refurbishing in the next five years, there is a possibility that construction resources could be stretched, leading to cost increases. As such, DASL will work with MOM to provide industry oversight so as to maintain a sustainable dormitory ecosystem during this period of transition.

Although demand and supply factors are currently in a state of balance, bed rents can be expected to increase, albeit at a more moderate pace of around 5% for the whole of 2026, as more dormitories commence the transformational upgrading works. Transient supply constraints should prop up occupancies and support rental growth. However, as more dormitories complete their upgrades, rents could possibly be adjusted to reflect the upgraded quality as a result of the capital expenditure (CAPEX) committed, and the overall higher expenses that correspond with the upkeep of maintaining and running better facilities.

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