

私人住宅

PRIVATE DOMESTIC



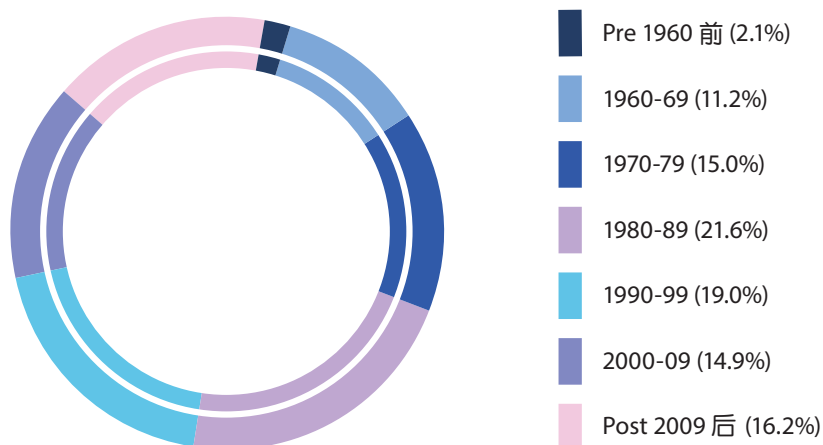


私人住宅 (整体) Private Domestic (Overall)

这类别包括设有专用煮食设施、浴室和厕所的独立居住单位，但不包括村屋、解放军辖下的宿舍、公用事业机构物业附设的宿舍、私营机构宿舍（包括教育院校的学生宿舍）、医院管理局辖下的宿舍，以及酒店和旅舍。2023年年底的整体总存量为1 269 831个单位。图表显示按楼龄划分的总存量。

This sector comprises independent domestic units with exclusive cooking facilities, bathroom and toilet, but does not include village houses, quarters held by the People's Liberation Army, quarters attached to premises of utility companies, dormitories (including student dormitories in educational institutes), quarters held by the Hospital Authority, hotels and hostels. At the end of 2023, the overall stock was 1 269 831 units. The chart shows stock distribution by age.

按楼龄分类的总存量 Stock Distribution by Age



2023年私人住宅落成量较前一年下跌35%至13 852个单位。九龙和新界分别占落成量的50%和44%，其余6%来自港岛。九龙城供应的落成单位最多，占25%，其次是屯门，占15%。

Completions in 2023 were down by 35% from the previous year to 13 852 units. Kowloon and the New Territories contributed 50% and 44% of the completions respectively, while the remainder 6% were from Hong Kong Island. The largest share of these completed units came from Kowloon City at 25%, followed by Tuen Mun at 15%.

2023 年的入住量为 15 670 个单位，较 2022 年增加 12%。年底空置量轻微下跌至 52 146 个单位，占总存量的 4.1%。空置单位中，有 5 042 个于占用许可证发出后仍未获发满意纸或转让同意书。

Take-up in 2023 at 15 670 units was 12% higher than that of 2022. Vacancy at the year-end slightly decreased to 52 146 units, or 4.1% of the total stock. Among these vacant units, 5 042 units were not yet issued with Certificate of Compliance or Consent to Assign after obtaining the Occupation Permit.



预计 2024 年落成量将升至 22 267 个单位，至 2025 年进一步升至 25 531 个单位。在 2024 年，九龙和新界将分别占新供应量的 47% 和 45%，其余 8% 来自港岛。按地区计，九龙城的供应量占新落成单位的 26%，其次是元朗，占 16%。在 2025 年，新界和九龙将分别占新供应量的 44% 和 41%。按地区计，九龙城将再度成为新单位供应量最多的地区，占落成量的 27%。

Completions are expected to increase to 22 267 units in 2024 and then rise further to 25 531 units in 2025. In 2024, Kowloon and the New Territories will contribute 47% and 45% of the new supply respectively whereas Hong Kong Island will provide the remaining 8%. On district basis, Kowloon City will account for 26% of the new units, followed by Yuen Long at 16%. In 2025, the New Territories and Kowloon will account for 44% and 41% of the new supply respectively. District-wise, Kowloon City will be the top supplier again, providing 27% of the completions.

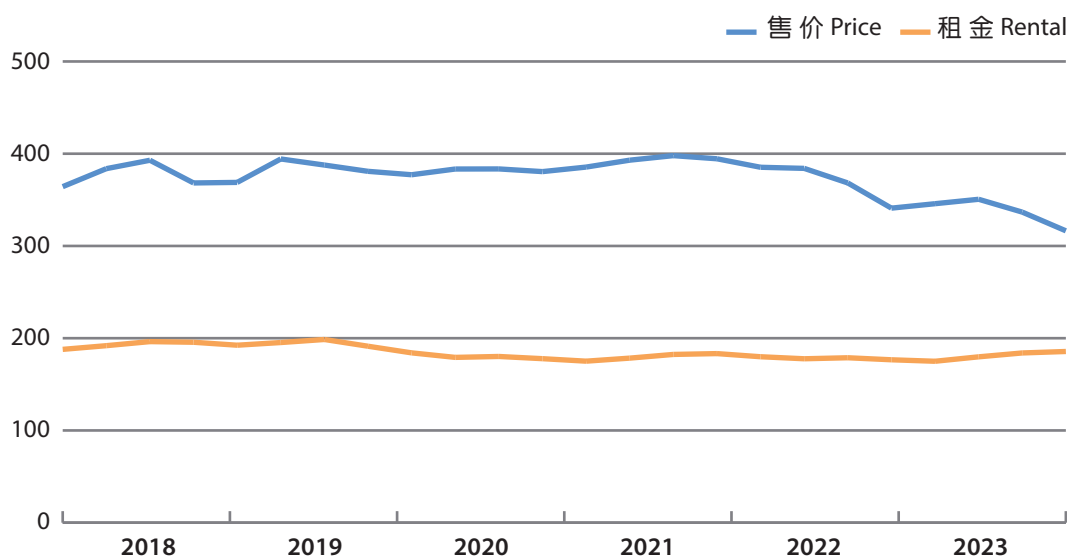
私人住宅 (整体) Private Domestic (Overall)

在金融状况收紧、外围经济前景不明朗、本地需求疲弱和市场气氛审慎的情况下，2023年二手住宅市场售价虽然在首四个月曾轻微回升，但年内仍录得跌幅。整体而言，2023年最后一季的住宅售价较2022年同期下跌7.2%。相反，租赁市场表现向好，最后一季的租金较前一年同季上升5.1%。

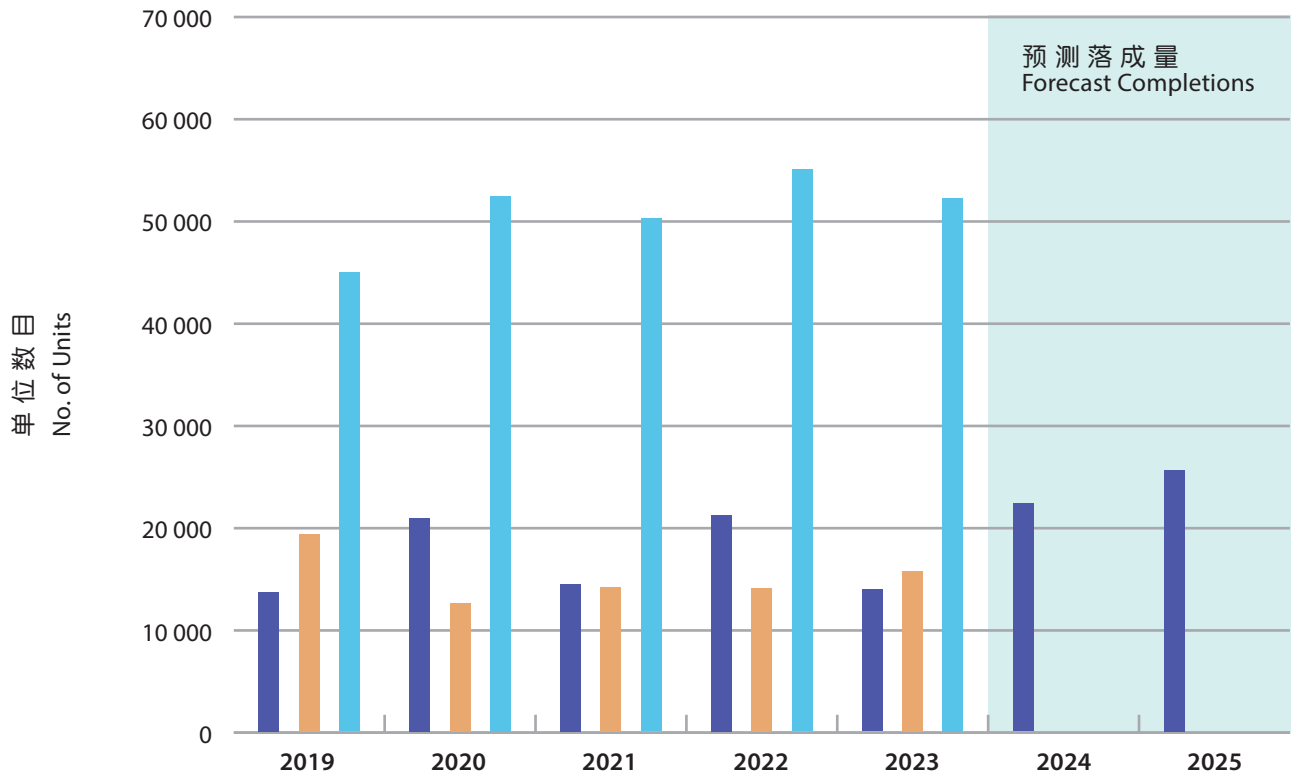
Despite a slight rebound in the first four months of 2023, domestic prices in the secondary market fell in the year amid tightened financial conditions, uncertain external economic outlook, weak local demand and cautious sentiments. Overall, prices in the last quarter of 2023 declined by 7.2% over the same period in 2022. In contrast, the rental market was upbeat, registering an increase of 5.1% in the last quarter over the corresponding quarter a year earlier.



售价及租金指数 Price and Rental Indices



落成量、入住量及空置量
Completions, Take-up and Vacancy



	2019	2020	2021	2022	2023	2024	2025
落成量* Completions	13 643	20 888	14 386	21 168	13 852	22 267 [#]	25 531 [#]
入住量 Take-up	19 278	12 545	14 111	14 012	15 670		
空置量 Vacancy	44 892	52 366	50 164	54 967	52 146		
% ⁺	3.7	4.3	4.1	4.4	4.1		

* 2019年落成量包括在年内落成并预计以市价在公开市场发售，但其后于2020年转为资助出售房屋的43个住宅单位。2025年起的预测落成量包括港人首次置业(首置)项目下预计落成的资助出售房屋。

Completions of 2019 include 43 units completed and designated to be sold to the public in the open market at prevailing market prices but converted to subsidised sale flats in 2020. Forecast completions from 2025 onwards include subsidised sale flats to be completed under the Starter Homes for Hong Kong Residents (SH) projects.

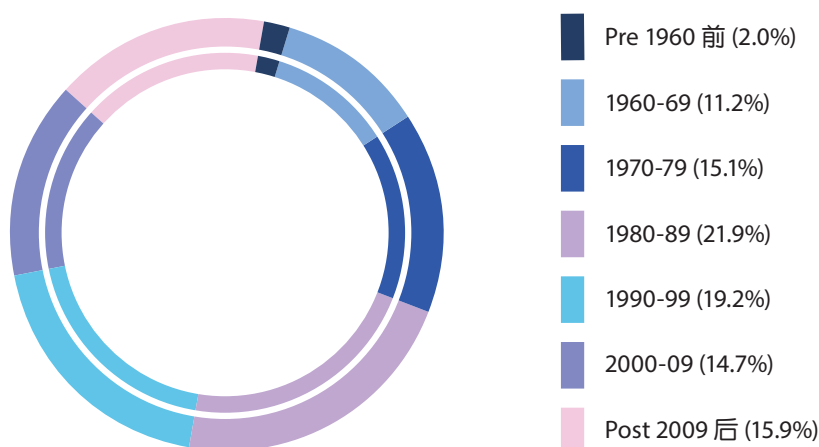
+ 年底空置量占总存量的百分率。
Vacancy at the end of the year as a percentage of stock.

预测数字
Forecast figures

此分类包括实用面积为 100 平方米以下的单位。2023 年年底的总存量为 1 171 348 个单位，占私人住宅总存量的 92%。图表显示这分类按楼龄划分的总存量。

This sub-sector comprises units with a saleable area of less than 100 m². Stock at the end of 2023 was 1 171 348 units which accounted for 92% of the total private domestic stock. The chart shows the stock distribution of this sub-sector by age.

按楼龄分类的总存量 Stock Distribution by Age



2023 年有 13 533 个单位落成，其中 51% 位于九龙，44% 位于新界，5% 位于港岛。供应集中在九龙城和屯门，合共占此分类总落成量的 41%。以单位面积计，A 类和 B 类单位分别占新供应的 58% 和 34%，而 C 类单位则占 8%。

There were 13 533 units completed in 2023, with 51% located in Kowloon, 44% in the New Territories and 5% on Hong Kong Island. Supply was concentrated in Kowloon City and Tuen Mun, together contributing 41% of the total completions in this sub-sector. In terms of flat size, Class A and Class B units accounted for 58% and 34% of the new supply respectively, while the share for Class C units was 8%.

2023 年的入住量飙升 34% 至 17 507 个单位。年底空置量下降至 42 279 个单位，相当于此分类总存量的 3.6%。

Take-up in 2023 soared by 34% to 17 507 units. Vacancy at the year-end dropped to 42 279 units, or 3.6% of the stock in this sub-sector.



预计 2024 和 2025 年将分别有 20 916 和 24 387 个单位落成。在 2024 年，新界及九龙将分别占 47% 和 45% 的供应量。按地区计，主要供应将位于九龙城，占 24%，其次是元朗，占 17%。在 2025 年，新界和九龙将分别占新供应的 46% 和 41%，其中九龙城占新落成单位的比例最高，为 26%。

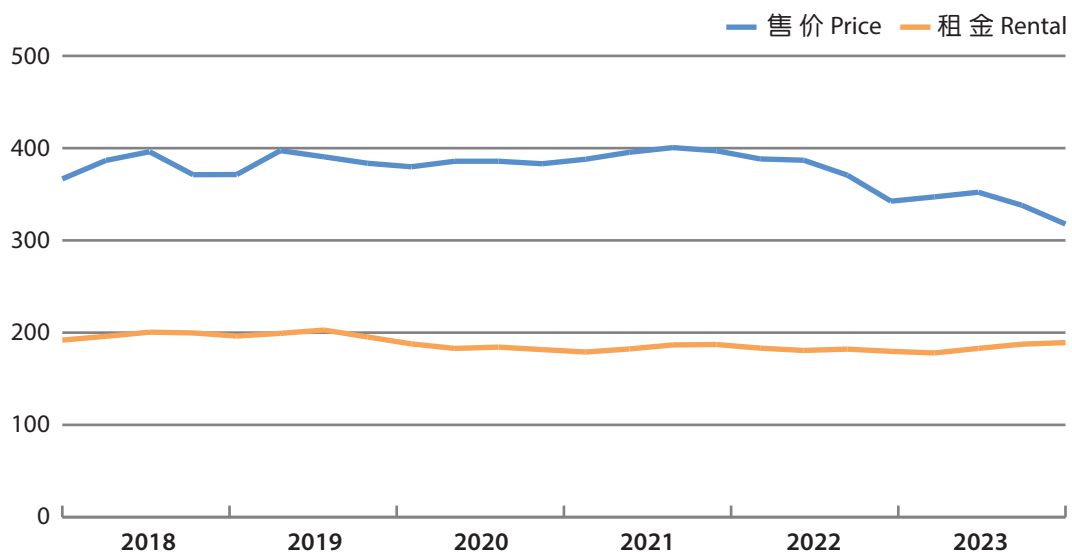
Completions in 2024 and 2025 are estimated to be 20 916 units and 24 387 units respectively. In 2024, the New Territories and Kowloon will contribute 47% and 45% of the supply respectively. On district basis, the major supply will be located in Kowloon City at 24%, followed by Yuen Long at 17%. In 2025, the New Territories and Kowloon will provide 46% and 41% of the new supply respectively, with Kowloon City contributing the largest share of 26% of the new units.

此分类的售价在 2023 年上半年轻微上升，但下半年显着下降。第四季售价较前一年同季下跌 7.2%。而第四季租金则较 2022 年同季上升 5.3%。

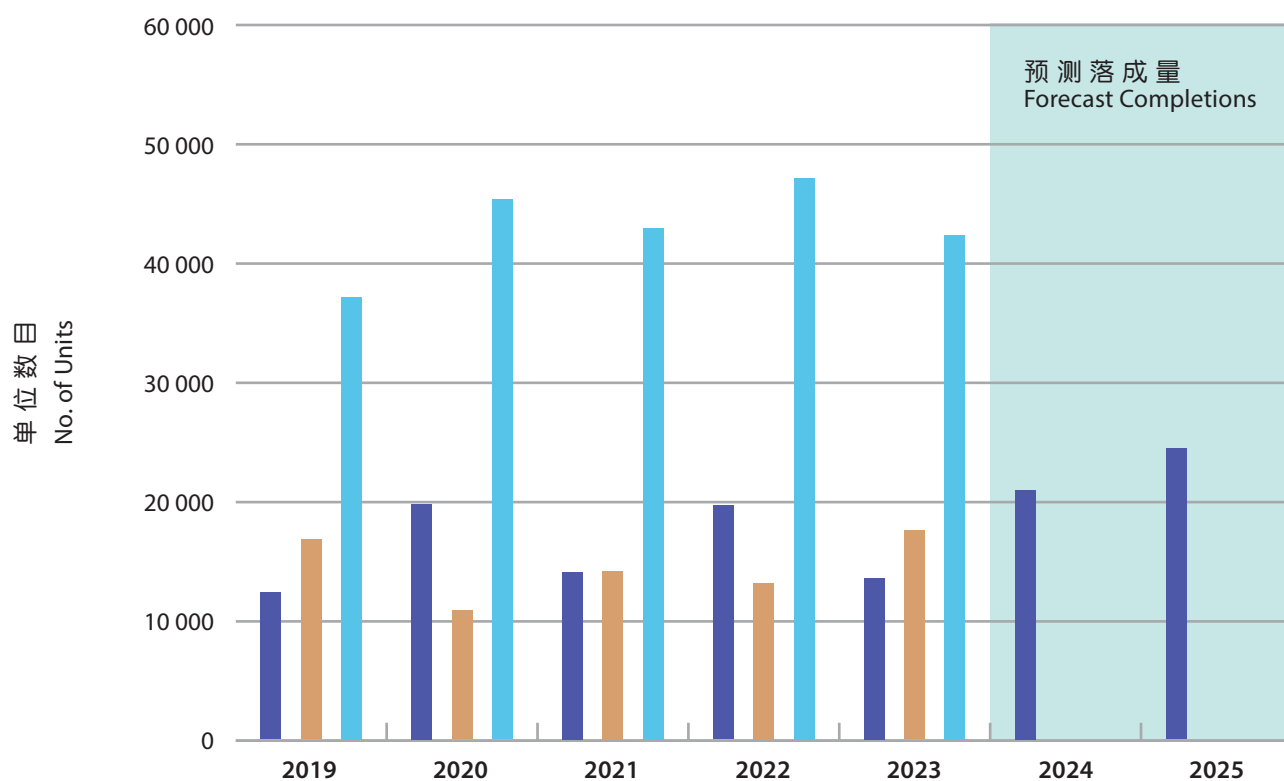
Prices in this sub-sector rose moderately in the first half of 2023, but fell noticeably in the second half of the year. Prices in the fourth quarter decreased by 7.2% from that of the preceding year. Meanwhile, rents grew by 5.3% in the fourth quarter over the corresponding quarter in 2022.



售价及租金指数 Price and Rental Indices



落成量、入住量及空置量
Completions, Take-up and Vacancy



单位数目
No. of Units

2019 2020 2021 2022 2023 2024 2025

落成量* Completions	12 302	19 751	14 016	19 595	13 533	20 916 [#]	24 387 [#]
入住量 Take-up	16 751	10 787	14 101	13 100	17 507		
空置量 Vacancy	37 091	45 260	42 860	47 081	42 279		
% ⁺	3.3	4.0	3.8	4.1	3.6		

* 2019年落成量包括在年内落成并预计以市价在公开市场发售，但其后于2020年转为资助出售房屋的43个住宅单位。2025年起的预测落成量包括港人首次置业(首置)项目下预计落成的资助出售房屋。

Completions of 2019 include 43 units completed and designated to be sold to the public in the open market at prevailing market prices but converted to subsidised sale flats in 2020. Forecast completions from 2025 onwards include subsidised sale flats to be completed under the Starter Homes for Hong Kong Residents (SH) projects.

+ 年底空置量占总存量的百分率。
Vacancy at the end of the year as a percentage of stock.

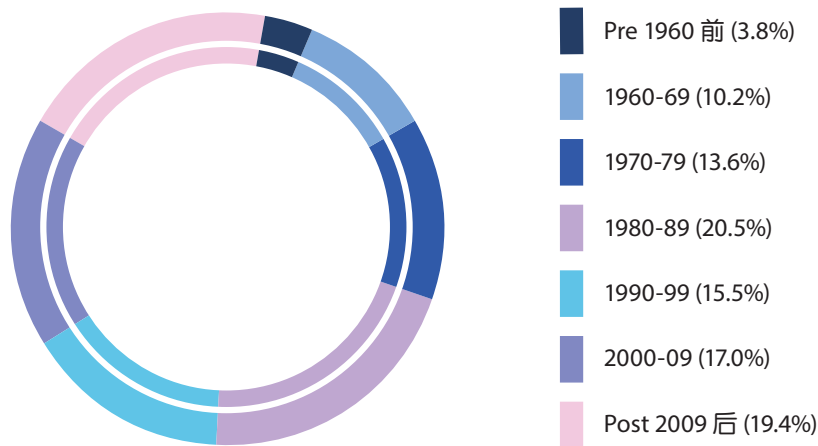
预测数字
Forecast figures

私人住宅(大型单位) Private Domestic (Large Units)

此分类包括实用面积为100平方米或以上的单位。2023年年底的总存量为98 483个单位，占私人住宅总存量的8%。图表显示这分类按楼龄划分的总存量。

This sub-sector comprises units with a saleable area of 100 m² or above. Stock at the end of 2023 was 98 483 units, representing 8% of the total private domestic stock. The stock distribution by age for this sub-sector is shown in the chart.

按楼龄分类的总存量 Stock Distribution by Age



2023年共有319个单位落成，其中49%位于港岛，35%位于九龙及16%位于新界。按地区计，中西区和南区合共占落成量的47%。

A total of 319 units were completed in 2023, of which 49% were on Hong Kong Island, 35% in Kowloon and 16% in the New Territories. On district level, the Central and Western district and the Southern district altogether accounted for 47% of the completions.

此分类的入住量在 2023 年录得负数 1 837 个单位。年底空置量上升至 9 867 个单位，相当于此分类单位总存量的 10.0%。

A negative take-up of 1 837 units was recorded for this sub-sector in 2023. Vacancy at the year-end increased to 9 867 units, representing 10.0% of the stock in this sub-sector.



预计此分类的落成量在 2024 和 2025 年将分别上升至 1 351 和 1 144 个单位。该两年的新供应将主要来自九龙，分别占 2024 和 2025 年预测落成量的 69% 和 53%。按地区计，九龙城的供应最多，在 2024 和 2025 年将分别占新落成量的 50% 和 53%。

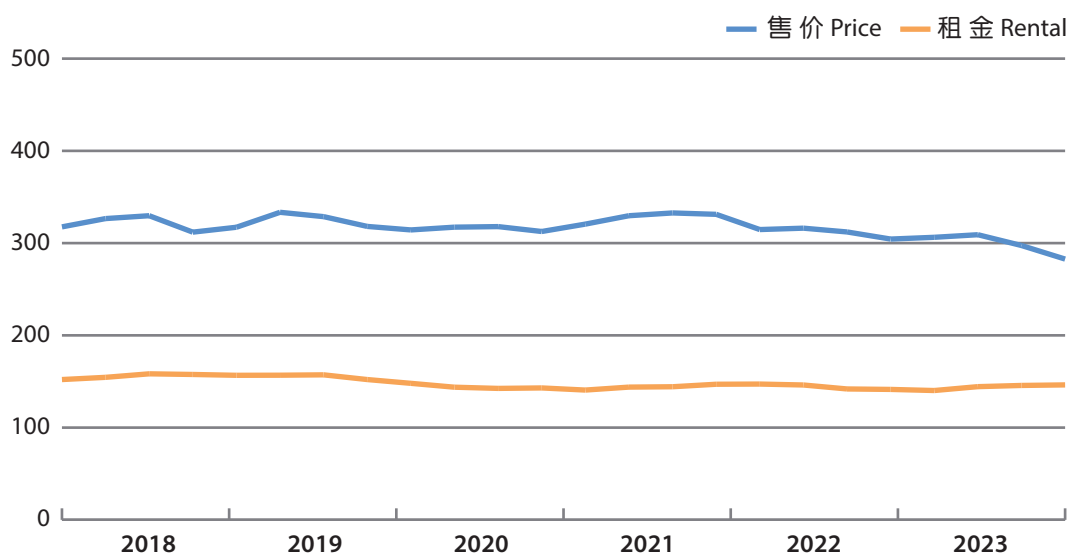
Completions in this sub-sector are expected to rise to 1 351 units in 2024 and 1 144 units in 2025. New supply will mainly come from Kowloon in both years, accounting for 69% and 53% of the forecast completions in 2024 and 2025 respectively. On district basis, Kowloon City will contribute the most supply, providing 50% and 53% of the new completions in 2024 and 2025 respectively.

与中/小型单位的分类相若，此分类物业的售价在2023年上半年轻微上升，但至下半年回落。第四季较前一年同季下跌7.1%。第四季的租金则较2022年同季录得3.5%的升幅。

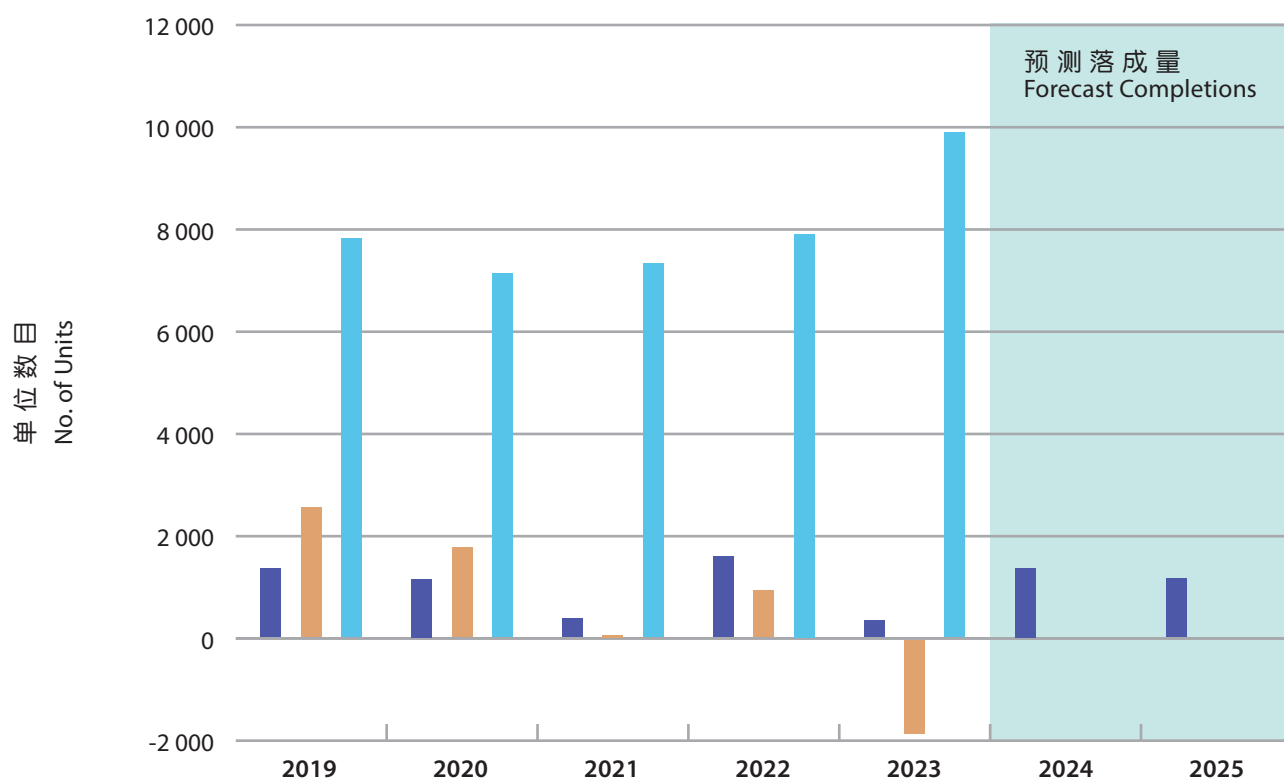
Similar to the sub-sector of the small/medium units, prices in this sub-sector grew mildly in the first half of 2023 but slid in the second half of the year. Prices in the fourth quarter fell by 7.1% from that of the preceding year. Rents recorded an increase of 3.5% in the fourth quarter compared with the corresponding quarter in 2022.



售价及租金指数 Price and Rental Indices



落成量、入住量及空置量
Completions, Take-up and Vacancy



单位数目
No. of Units

2019 2020 2021 2022 2023 2024 2025

落成量* Completions	1 341	1 137	370	1 573	319	1 351 [#]	1 144 [#]
入住量 Take-up	2 527	1 758	10	912	-1 837		
空置量 Vacancy	7 801	7 106	7 304	7 886	9 867		
% ⁺	8.1	7.3	7.5	8.0	10.0		

* 2025年起的预测落成量包括港人首次置业(首置)项目下预计落成的资助出售房屋。
Forecast completions from 2025 onwards include subsidised sale flats to be completed under the Starter Homes for Hong Kong Residents (SH) projects.

+ 年底空置量占总存量的百分率。
Vacancy at the end of the year as a percentage of stock.

预测数字
Forecast figures