

# 私人写字楼

PRIVATE OFFICE





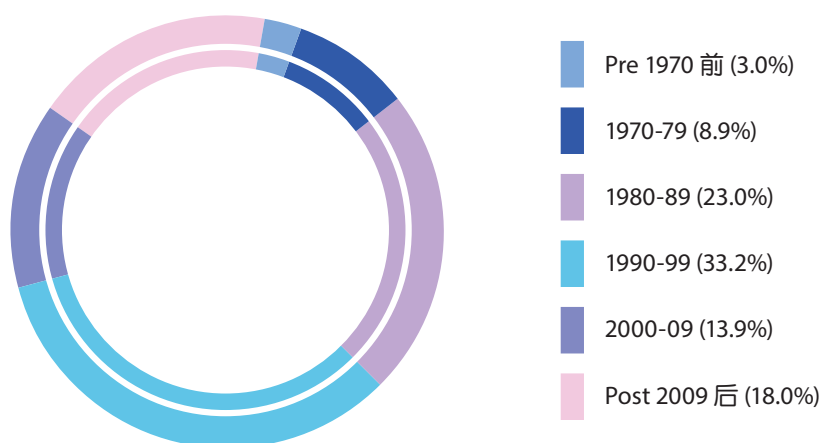


## 私人写字楼(整体) Private Office (Overall)

2023年年底，私人写字楼的总存量为13 110 500平方米，当中甲级写字楼占66%，乙级写字楼占23%，丙级写字楼占11%。位于上环、中区、湾仔、铜锣湾和尖沙咀核心地区的写字楼面积在2023年年底共占总存量的49%。图表显示按楼龄划分的整体写字楼总存量。

The total stock of private offices at the end of 2023 amounted to 13 110 500 m<sup>2</sup>, comprising 66% Grade A, 23% Grade B and 11% Grade C offices. Office space in the core districts of Sheung Wan, Central, Wan Chai, Causeway Bay and Tsim Sha Tsui accounted for 49% of the total stock at the end of 2023. The chart shows the total stock of all offices by age.

### 按楼龄分类的总存量 Stock Distribution by Age



2023年私人写字楼的落成量显著下降至158 700平方米。在这些落成量中，有91%位于非核心地区。甲级写字楼的落成量为143 400平方米，相当于总供应量的90%。

Office completions in 2023 decreased considerably to 158 700 m<sup>2</sup>. Among the completions, 91% were situated in the non-core districts. Completions of Grade A space amounted to 143 400 m<sup>2</sup>, equivalent to 90% of the total supply.

年内整体使用量录得正数 41 400 平方米。年底空置量上升至 1 959 800 平方米，相当于总存量的 14.9%。

A positive overall take-up of 41 400 m<sup>2</sup> was recorded for the year. Vacancy at the year-end increased to 1 959 800 m<sup>2</sup>, which was equivalent to 14.9% of the total stock.



预计落成量在 2024 年维持平稳，为 156 300 平方米，并将在 2025 年轻微下降至 136 100 平方米。2024 和 2025 年大部分新供应将来自港岛，分别占总落成量的 72% 和 94%。这两年的新供应将集中在中西区，分别占预计落成量的 40% 和 42%。

Completions are expected to remain steady in 2024 at 156 300 m<sup>2</sup> and slightly fall to 136 100 m<sup>2</sup> in 2025. The majority of the new supply in 2024 and 2025 will both come from Hong Kong Island at 72% and 94% of total completions respectively. In these two years, new supply will be concentrated in the Central and Western district, accounting for 40% and 42% of the estimated completions respectively.



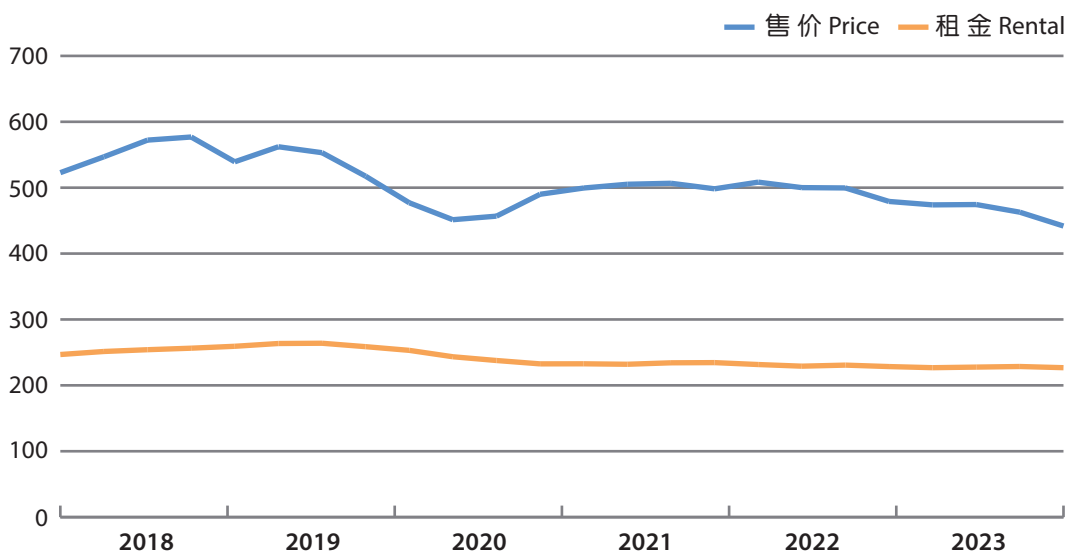
## 私人写字楼(整体) Private Office (Overall)

写字楼售价在 2023 年全年均下跌，在第二季有所整固，以 2023 年最后一季与 2022 年同期相比，售价下跌 7.8%。2023 年写字楼租金保持平稳，2023 年最后一季与 2022 年同期相比，租金以 0.7% 的轻微跌幅作结。

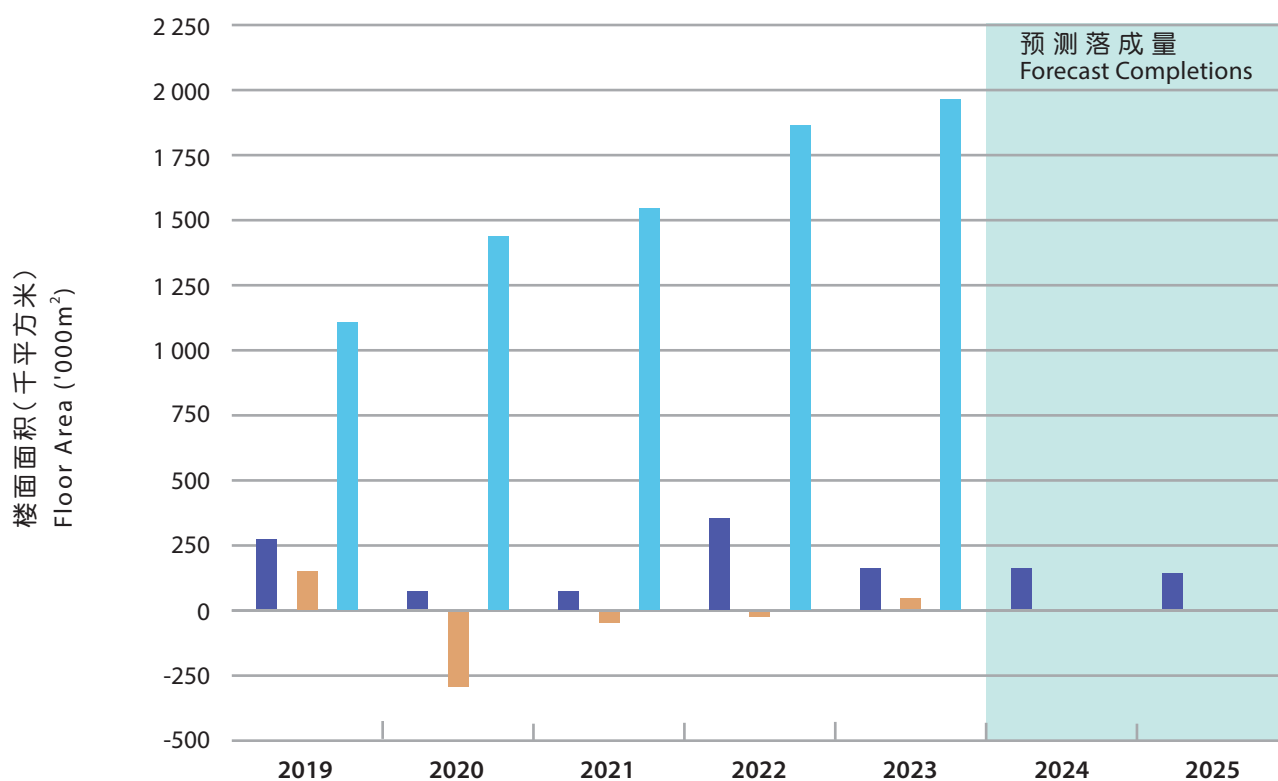
Office prices dropped throughout 2023 with some consolidation in the second quarter, declining by 7.8% in the last quarter of 2023 over the same period in 2022. Office rents were steady in 2023, ending with an insignificant drop of 0.7% in the last quarter of 2023 over the corresponding period in 2022.



### 售价及租金指数 Price and Rental Indices



落成量、使用量及空置量  
Completions, Take-up and Vacancy



	楼面面积 (千平方米) Floor Area ('000m <sup>2</sup> )						
	2019	2020	2021	2022	2023	2024	2025
落成量 Completions	267	69	70	351	159	156 <sup>#</sup>	136 <sup>#</sup>
使用量 Take-up	147	-286	-40	19	41		
空置量 Vacancy	1 104	1 434	1 541	1 860	1 960		
% <sup>+</sup>	9.0	11.5	12.3	14.4	14.9		

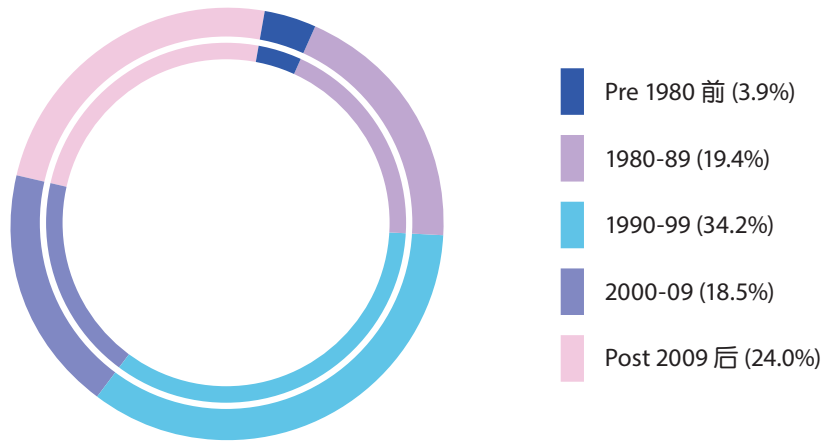
+ 年底空置量占总存量的百分率。  
Vacancy at the end of the year as a percentage of stock.

# 预测数字  
Forecast figures

2023年年底，甲级写字楼的总存量达8 617 500平方米，占写字楼总存量的66%。图表显示按楼龄划分的甲级写字楼总存量。

Stock of Grade A office space at the end of 2023 stood at 8 617 500 m<sup>2</sup>, representing 66% of the total office stock. The chart shows the distribution of stock in this grade by age.

### 按楼龄分类的总存量 Stock Distribution by Age



港岛占总存量的47%，而九龙与新界则分别占40%和13%。

Hong Kong Island accounted for 47% of the stock, while the shares for Kowloon and the New Territories were 40% and 13% respectively.

2023年甲级写字楼的落成量下降至143 400平方米。新供应主要来自于非核心地区，如深水埗、九龙城和观塘。

Completions of Grade A offices in 2023 fell to 143 400 m<sup>2</sup>. New supply mainly came from the non-core districts such as Sham Shui Po, Kowloon City and Kwun Tong.

2023年录得正数45 300平方米的使用量。年底空置量上升至1 377 700平方米，相当于甲级写字楼总存量的16.0%，其中30%的空置面积位于核心地区。

A positive take-up of 45 300 m<sup>2</sup> was recorded in 2023. The year-end vacancy rose to 1 377 700 m<sup>2</sup>, representing 16.0% of Grade A stock. 30% of the vacant spaces was found in the core districts.



预计甲级写字楼的落成量在2024年维持平稳，为146 000平方米，但其后在2025年将回落至126 400平方米。2024和2025年的新供应将集中在中西区，分别占新落成量的43%和40%。

It is anticipated that completions will remain steady at 146 000 m<sup>2</sup> in 2024 but then retreat to 126 400 m<sup>2</sup> in 2025. New supply in 2024 and 2025 will both be concentrated in the Central and Western district, providing 43% and 40% of the new completions respectively.

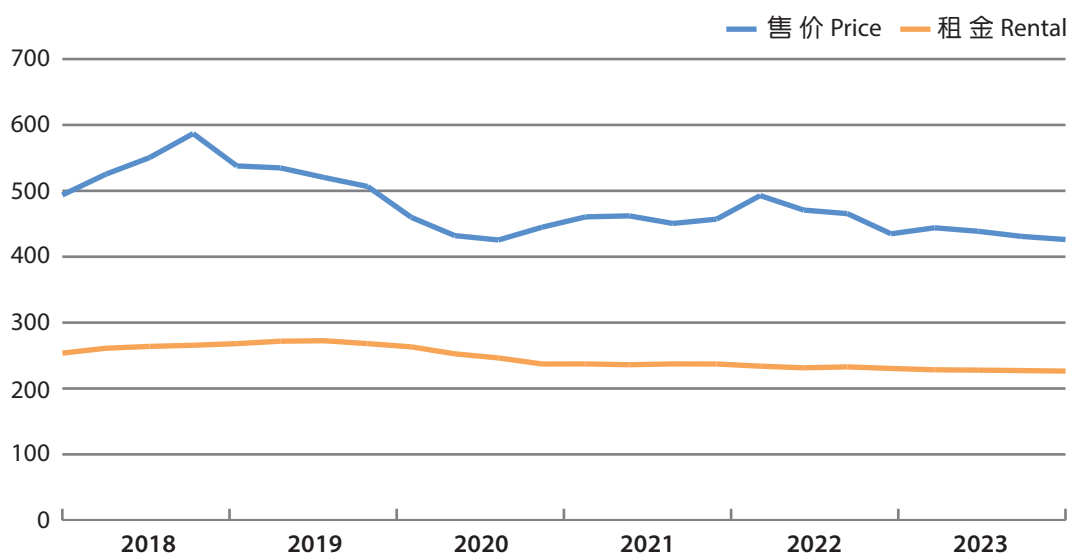


甲级写字楼售价虽然在 2023 年第一季呈轻微升幅，但接近年底时下降，以第四季与 2022 年同期相比，售价下跌 2.0% 作结。全年租金偏软，与 2022 年第四季相比，2023 年第四季录得 1.7% 的温和跌幅。

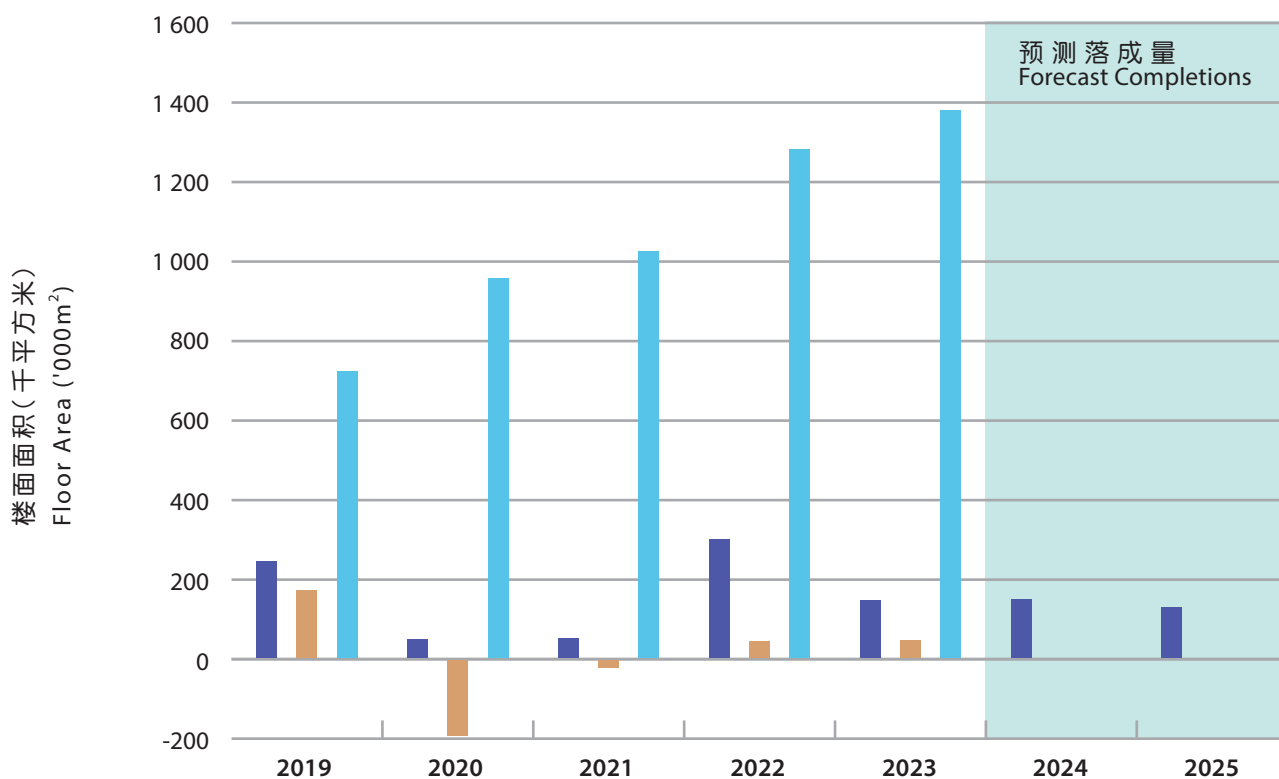
Although prices of Grade A offices displayed a modest growth in the first quarter, they subsided towards the end of 2023, ending with a decrease of 2.0% in the fourth quarter over the same period in 2022. Rents softened throughout the year, registering a mild decrease of 1.7% between the fourth quarters of 2022 and 2023.



### 售价及租金指数 Price and Rental Indices



落成量、使用量及空置量  
Completions, Take-up and Vacancy



	2019	2020	2021	2022	2023	2024	2025
落成量 Completions	242	46	49	299	144	146 <sup>#</sup>	127 <sup>#</sup>
使用量 Take-up	169	-189	-18	42	45		
空置量 Vacancy	720	955	1 023	1 280	1 377		
% <sup>+</sup>	9.0	11.8	12.5	15.1	16.0		

+ 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.

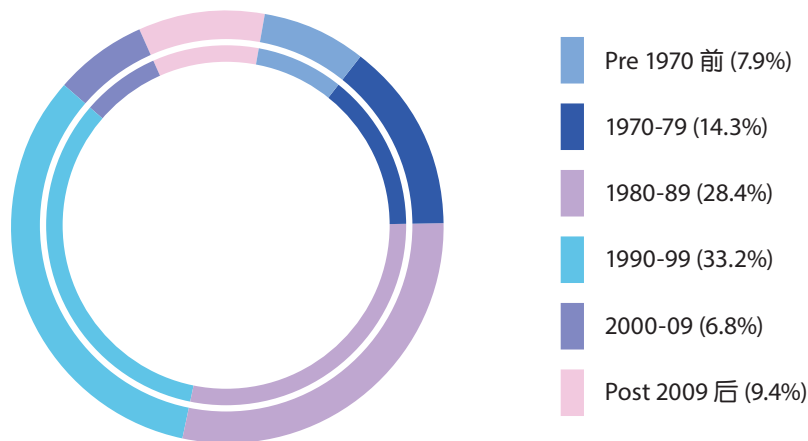
# 预测数字  
Forecast figures

## 私人写字楼(乙级) Private Office (Grade B)

2023年年底，乙级写字楼的总存量为3 017 700平方米，占写字楼总存量的23%。图表显示按楼龄划分的乙级写字楼总存量。

Stock of Grade B offices was 3 017 700 m<sup>2</sup> at the end of 2023, representing 23% of the total office stock. The chart shows the distribution of stock in this grade by age.

### 按楼龄分类的总存量 Stock Distribution by Age



港岛占总存量的55%，而九龙与新界则分别占36%和9%。

Hong Kong Island accounted for 55%, while Kowloon and the New Territories contributed 36% and 9% respectively.

2023年乙级写字楼落成量急跌至13 900平方米，落成量主要位于观塘和湾仔。

Grade B office completions in 2023 fell sharply to 13 900 m<sup>2</sup>. Completions were mainly located in Kwun Tong and Wan Chai.



乙级写字楼在 2023 年的使用量维持负数，为 2 300 平方米。年底空置量为 449 500 平方米，相当于乙级写字楼总存量的 14.9%，其中 49% 的空置面积位于核心地区。

Take-up of Grade B offices in 2023 remained negative at 2 300 m<sup>2</sup>. The year-end vacancy, amounting to 449 500 m<sup>2</sup>, was equivalent to 14.9% of the Grade B stock. 49% of the vacant spaces was found in the core districts.



预计落成量在 2024 和 2025 年将分别下跌至 9 300 平方米和 9 400 平方米。2024 年的所有供应将来自观塘和油尖旺。2025 年的新供应将全部来自中西区和油尖旺。

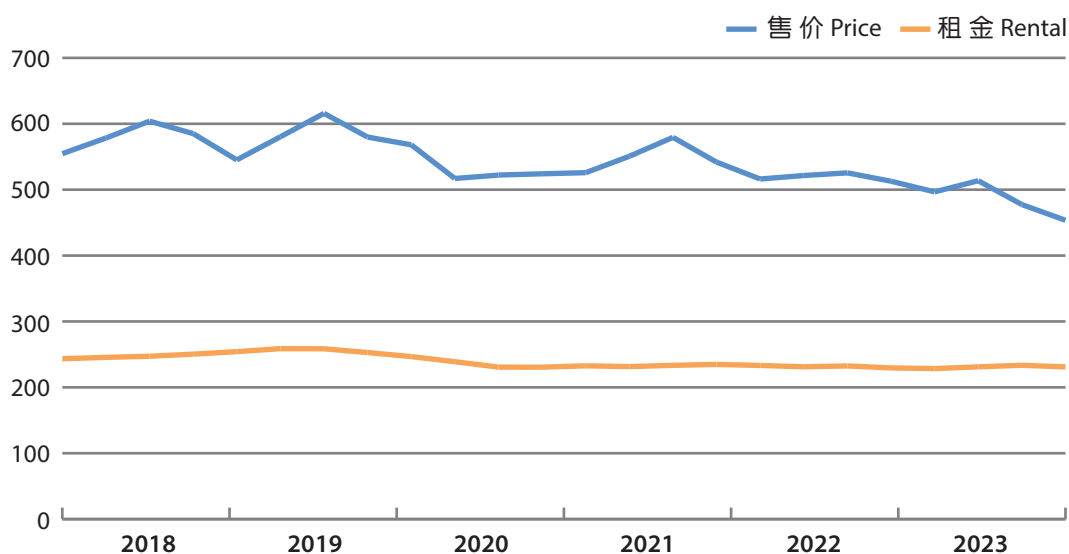
It is estimated that completions will decrease to 9 300 m<sup>2</sup> and 9 400 m<sup>2</sup> in 2024 and 2025 respectively. In 2024, the whole supply will be contributed from Kwun Tong and Yau Tsim Mong. All the new supply in 2025 will come from the Central and Western district and Yau Tsim Mong.

乙级写字楼售价于年初下跌，至第二季回升，其后大幅回落，以2023年最后一季与2022年同期相比，售价大跌11.5%。租金在2023年窄幅波动，以2022和2023年最后一季作比较，录得0.7%的温和升幅。

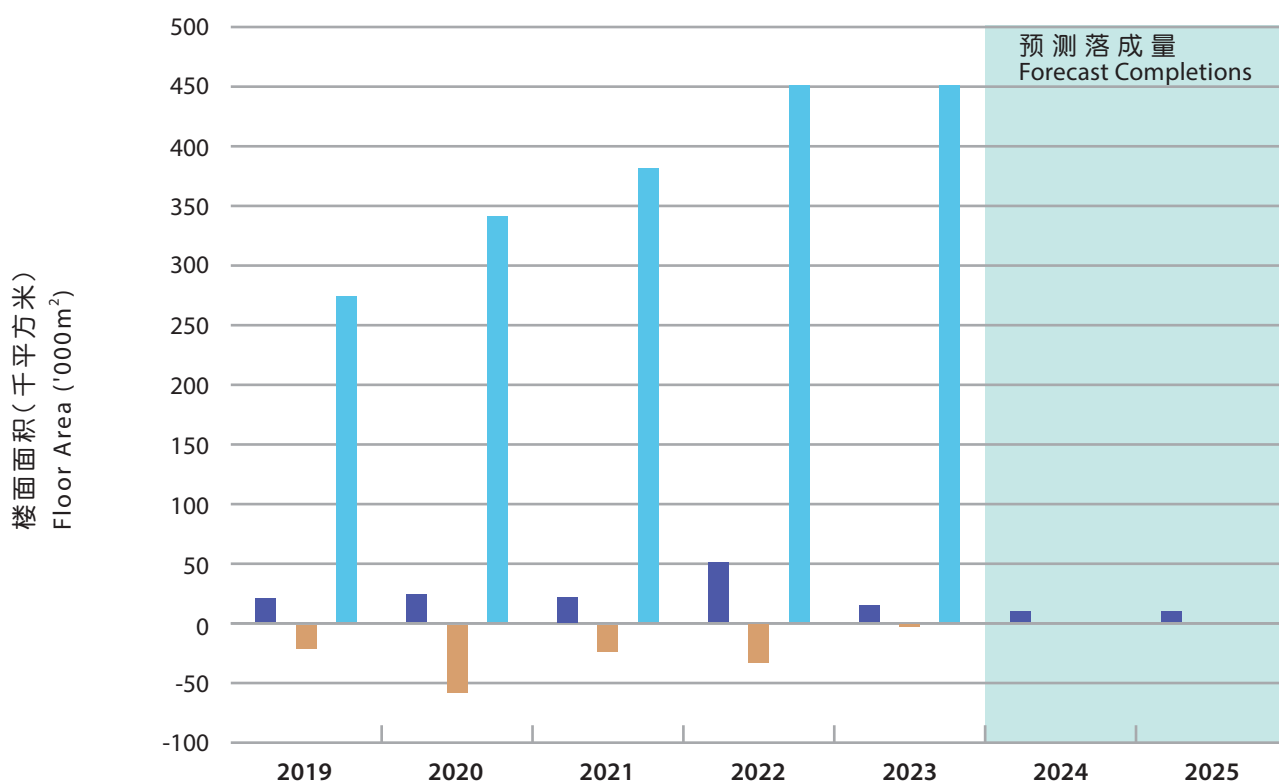
Prices of Grade B offices dropped at the beginning of the year but rebounded in the second quarter, before retreating substantially thereafter, posting a considerable decrease of 11.5% in the last quarter of 2023 over the same period in 2022. Rents fluctuated within a small magnitude in 2023, registering a mild increase of 0.7% between the last quarters of 2022 and 2023.



### 售价及租金指数 Price and Rental Indices



落成量、使用量及空置量  
Completions, Take-up and Vacancy



	楼面面积(千平方米) Floor Area ('000m <sup>2</sup> )						
	2019	2020	2021	2022	2023	2024	2025
落成量 Completions	20	23	21	50	14	9 <sup>#</sup>	9 <sup>#</sup>
使用量 Take-up	-20	-57	-22	-32	-2		
空置量 Vacancy	273	340	380	450	450		
% <sup>+</sup>	9.7	11.9	13.1	15.1	14.9		

+ 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

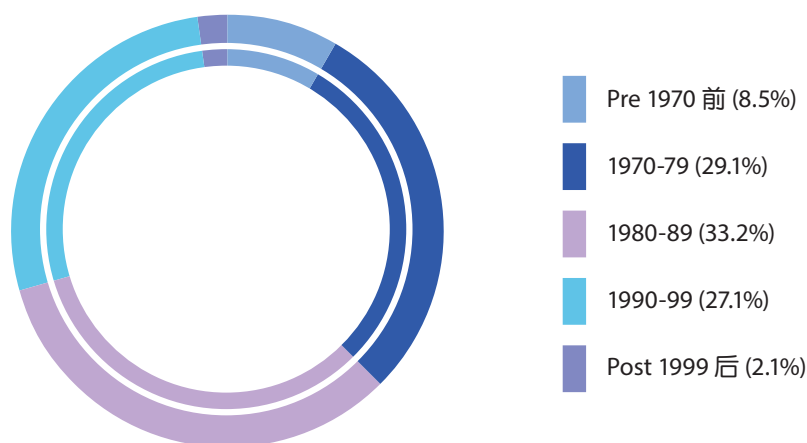


## 私人写字楼 (丙级) Private Office (Grade C)

2023 年年底，丙级写字楼的总存量为 1 475 300 平方米，占写字楼总存量的 11%。图表显示按楼龄划分的丙级写字楼总存量。

Stock of Grade C offices was 1 475 300 m<sup>2</sup> at the end of 2023, representing 11% of the total office stock. The chart shows the distribution of stock in this grade by age.

### 按楼龄分类的总存量 Stock Distribution by Age



港岛占总存量的 65%，而九龙与新界则分别占 33% 和 2%。

Hong Kong Island accounted for 65% of stock, while the shares for Kowloon and the New Territories were 33% and 2% respectively.

2023 年丙级写字楼的落成量为 1 400 平方米，全部来自东区。

Completions for Grade C offices in 2023 were 1 400 m<sup>2</sup>. All came from the Eastern district.

丙级写字楼的使用量录得负数 1 600 平方米。年底空置量为 132 600 平方米，占丙级写字楼总存量的 9.0%，当中 68% 的空置面积位于核心地区。

Grade C offices registered a negative take-up of 1 600 m<sup>2</sup>. The year-end vacancy amounted to 132 600 m<sup>2</sup>, representing 9.0% of its stock. 68% of the vacant spaces was found in the core districts.



预计 2024 年将有 1 000 平方米的丙级写字楼在湾仔落成。2025 年的供应量将为 300 平方米，全部来自东区。

Grade C office space of 1 000 m<sup>2</sup> from Wan Chai will be expected in 2024. In 2025, the Eastern district will contribute the entire supply of 300 m<sup>2</sup>.

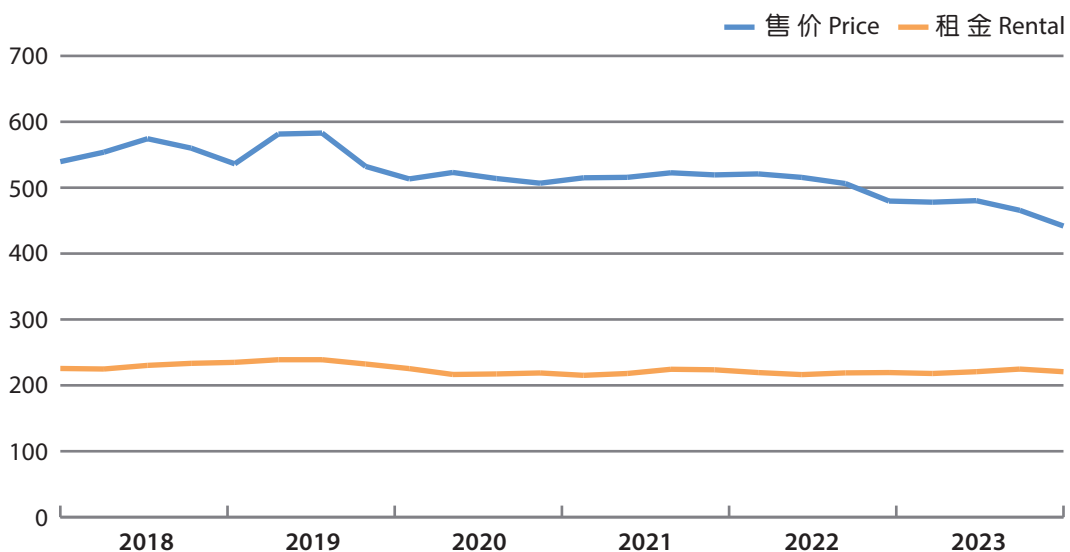
## 私人写字楼 (丙级) Private Office (Grade C)

丙级写字楼售价在第一季下滑，至第二季有所整固，而在余下季度则进一步下跌。以 2022 和 2023 年第四季相比，售价下降 7.9%。租金在 2023 年第一季轻微下跌，随后逐渐上升，在最后一季再次下降，以 2023 年第四季与 2022 年同期相比，录得 0.6% 的温和升幅。

Prices of Grade C offices dipped in the first quarter, then consolidated in the second quarter before slipping further in the remaining quarters, registering a drop of 7.9% between the fourth quarters of 2022 and 2023. Following a moderate drop in the first quarter of 2023, rents rose gradually before dropping again in the last quarter, posting a mild increase of 0.6% in the fourth quarter of 2023 over the same period in 2022.

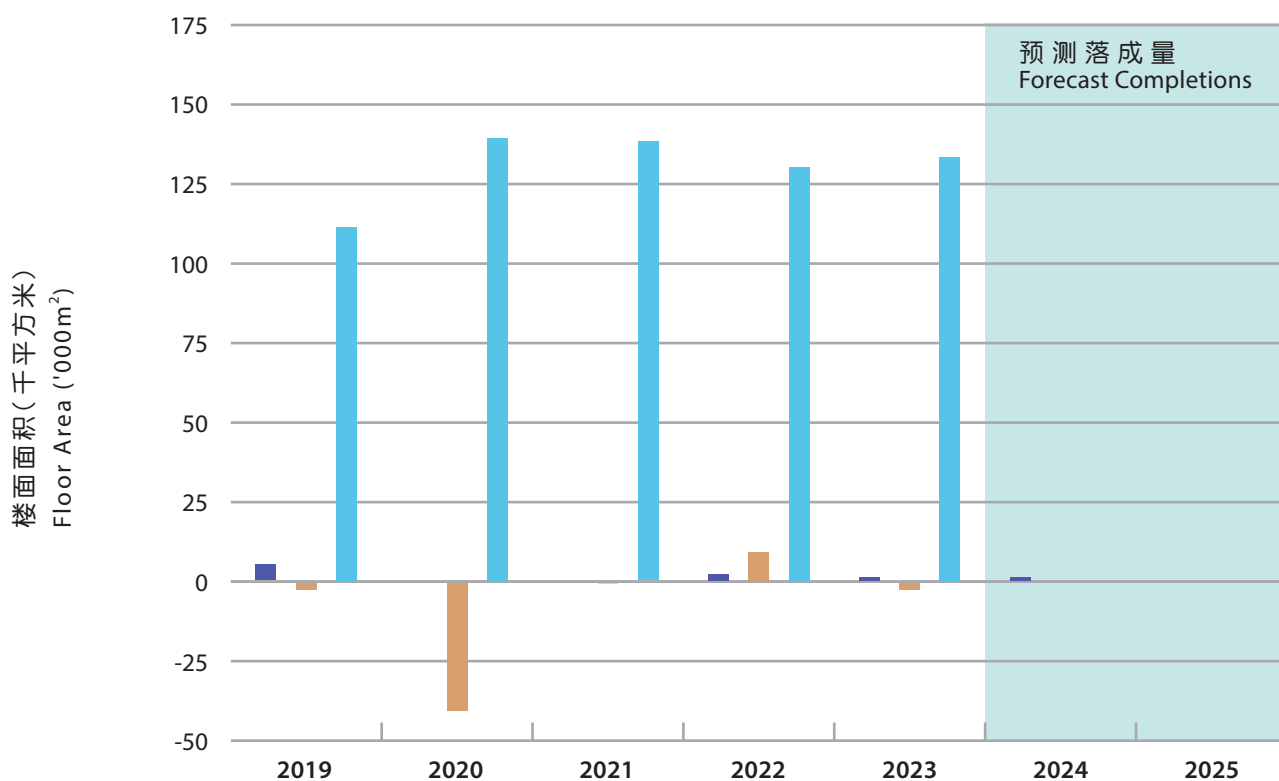


### 售价及租金指数 Price and Rental Indices





落成量、使用量及空置量  
Completions, Take-up and Vacancy



	2019	2020	2021	2022	2023	2024	2025
落成量 Completions	5	0	0	2	1	1 <sup>#</sup>	0 <sup>#</sup>
使用量 Take-up	-2	-40	0	9	-2		
空置量 Vacancy	111	139	138	130	133		
% <sup>+</sup>	7.5	9.4	9.3	8.8	9.0		

+ 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