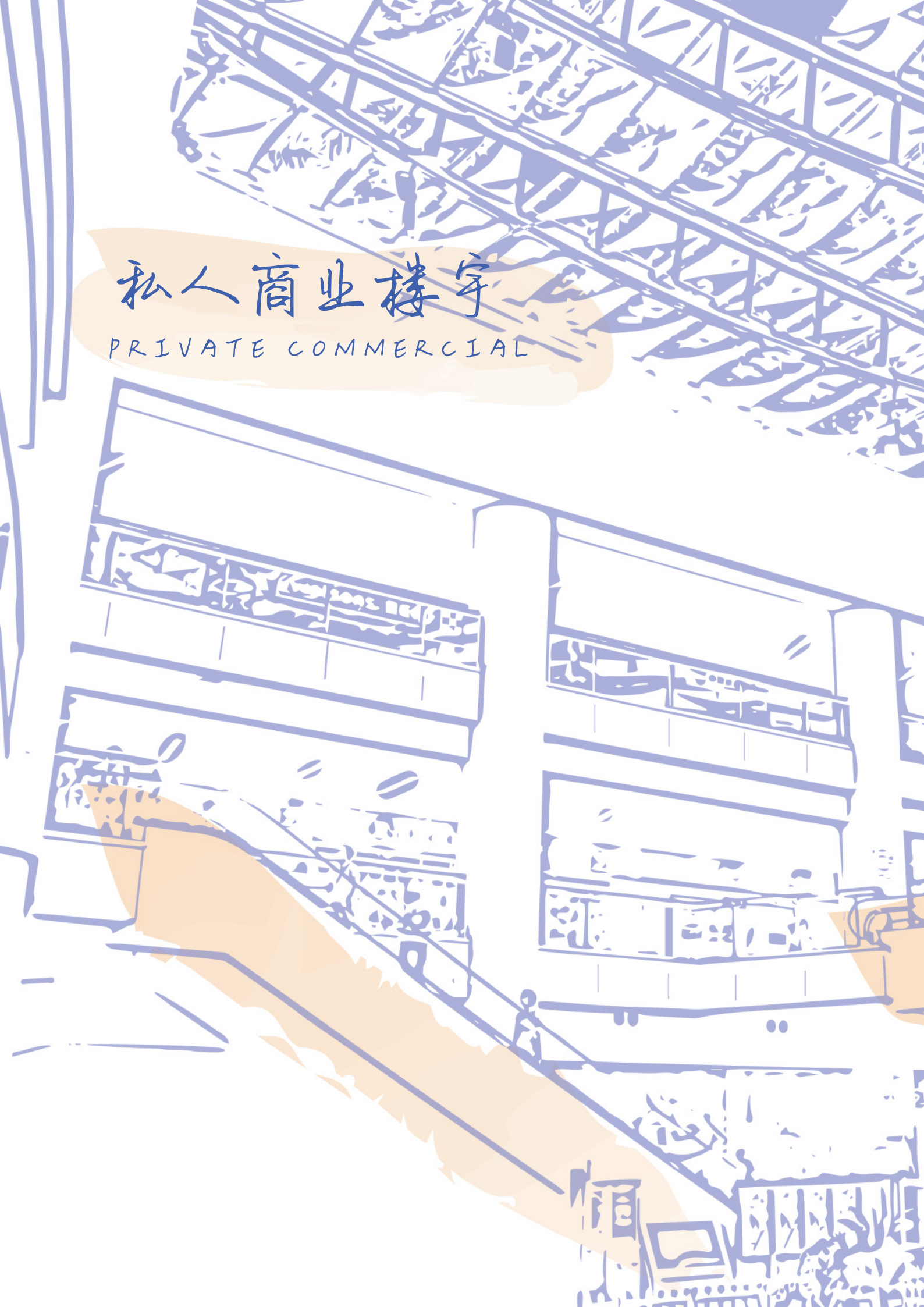
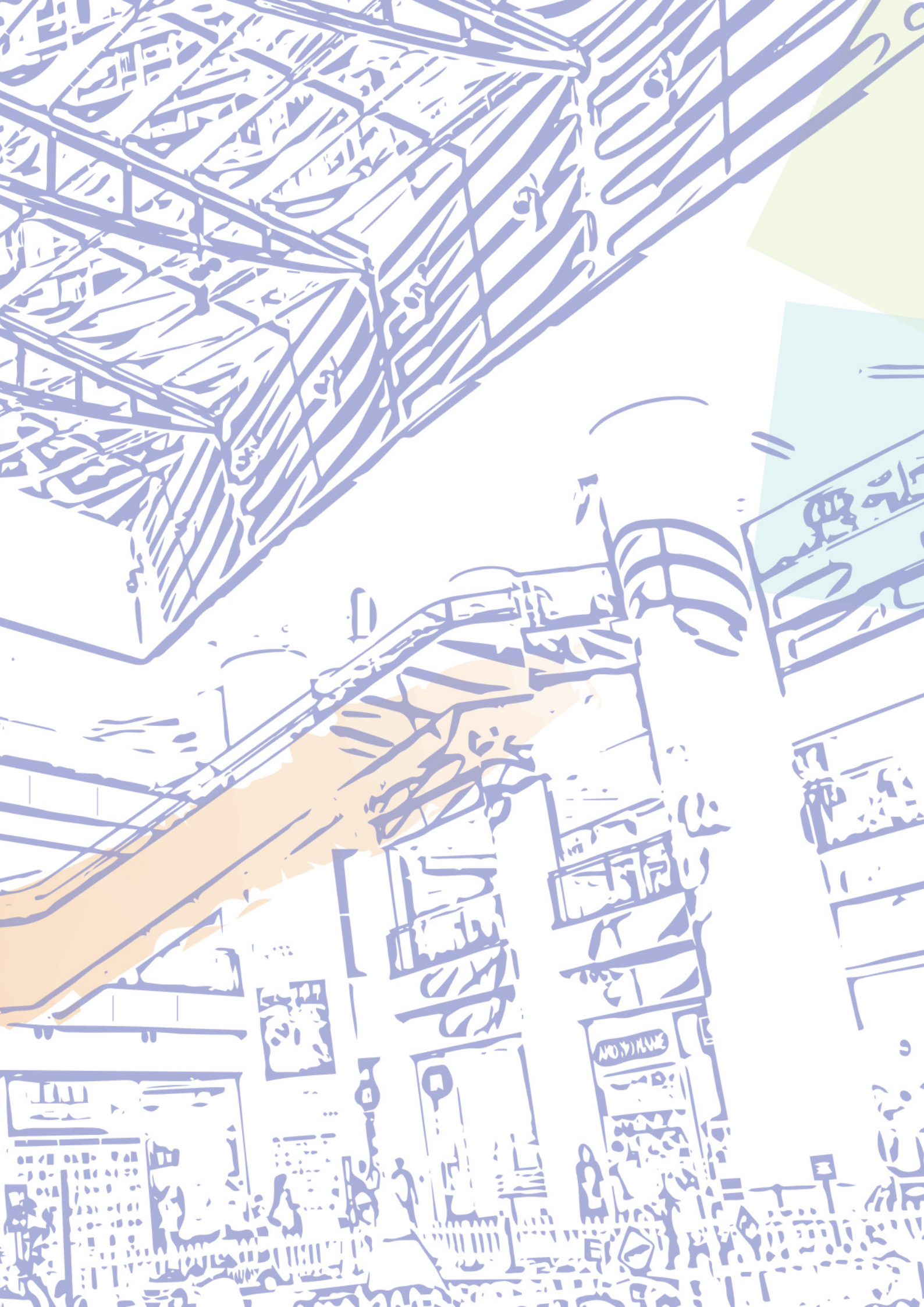


私人商业楼宇

PRIVATE COMMERCIAL

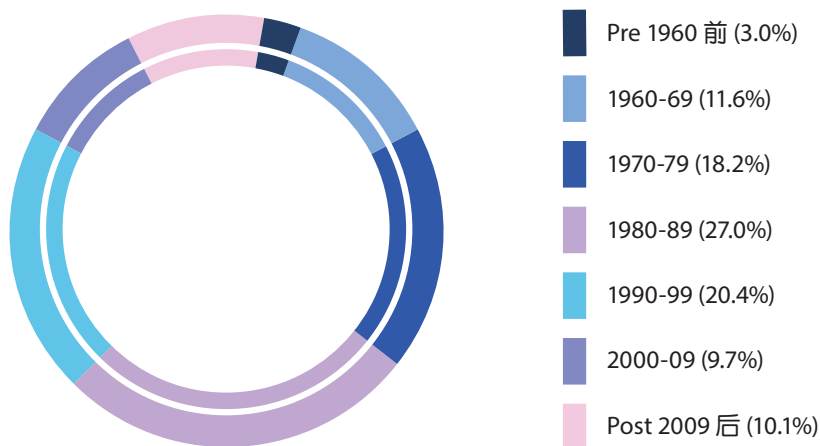




这类别包括零售业楼宇，以及其他设计或改建作商业用途的楼宇，但不包括专作写字楼用途的楼宇。

这类物业在 2023 年年底的总存量为 11 778 300 平方米，其中港岛占 28%，九龙占 41%，新界占 31%。按楼龄划分的总存量详见图表。

按楼龄分类的总存量 Stock Distribution by Age



2023 年的落成量下跌至 90 700 平方米，九龙和港岛分别占总落成量的 62% 和 29%，其余 9% 则坐落新界。按地区计，落成量主要来自九龙城，占 47%，其次为南区，占 23%。

This sector comprises retail premises and other premises designed or adapted for commercial use, with the exception of purpose-built offices.

Stock in this sector at the end of 2023 was 11 778 300 m², with 28% of the total spaces on Hong Kong Island, 41% in Kowloon and 31% in the New Territories. Distribution of total stock by age is shown in the chart.

Completions in 2023 fell to 90 700 m². Kowloon and Hong Kong Island contributed 62% and 29% of the total completions respectively while the remaining 9% was attributable to the New Territories. On district basis, completions mainly came from Kowloon City at 47%, followed by the Southern district at 23%.

2023年，商业楼宇的使用量录得正数87 300平方米。年底空置量微跌至1 217 400平方米，相当于总存量的10.3%。商场铺位和楼上商业单位占总空置量的64%。

The commercial sector recorded a positive take-up of 87 300 m² in 2023. The vacancy at the year-end slid gently to 1 217 400 m², representing 10.3% of the total stock. Vacant arcade shops and upper floor commercial space accounted for 64% of the total vacancy.



预计落成量将在2024年进一步下跌至78 400平方米，然后在2025年回升至88 500平方米。2024年的供应将主要来自湾仔和油尖旺，分别占总落成量的36%和20%。2025年的供应将主要位于九龙城，占总落成量的33%，其次为湾仔和油尖旺，分别占17%和13%。

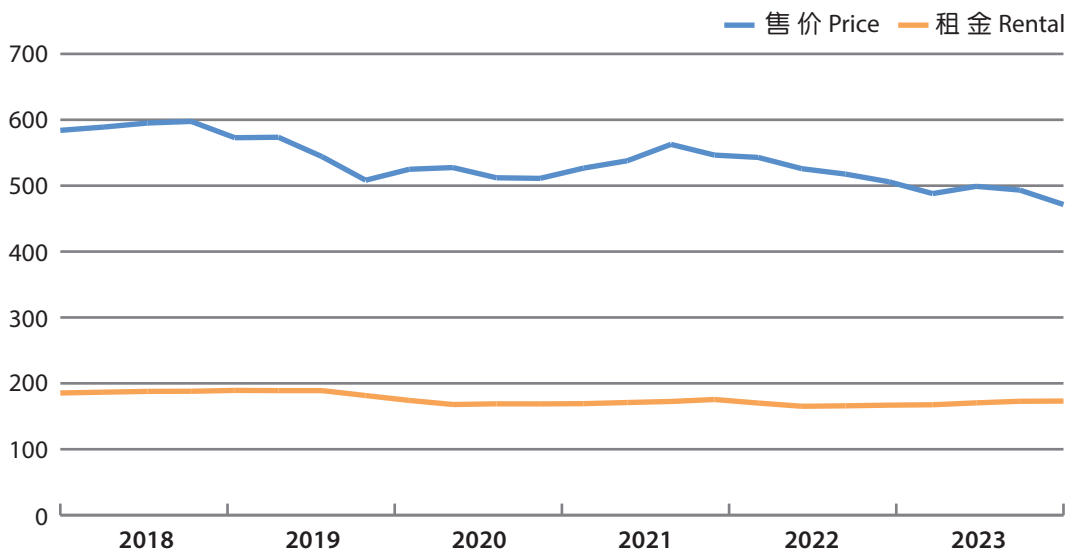
Completions are forecast to decrease further to 78 400 m² in 2024 and then rebound to 88 500 m² in 2025. Supply in 2024 will mainly come from Wan Chai at 36% and Yau Tsim Mong at 20% of the total completions. Supply in 2025 will be largely from Kowloon City providing 33% of the total completions, followed by Wan Chai and Yau Tsim Mong at 17% and 13% respectively.

零售业楼宇售价虽然在第二季曾轻微回升，但在2023年仍录得跌幅，以2022年第四季与2023年第四季相比，售价下跌6.8%。相反，租金在2023年全年均呈升势，2023年第四季与2022年同期相比，租金录得3.7%的升幅。

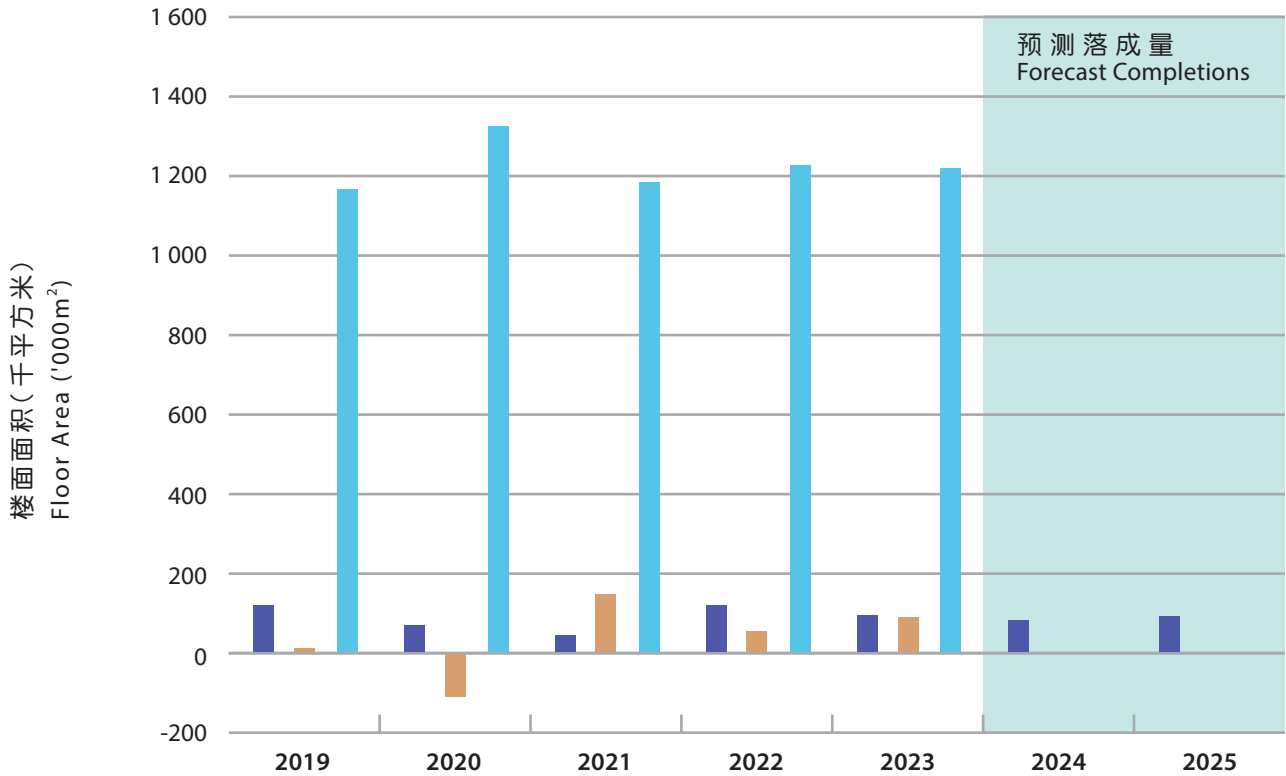
Despite a slight rebound in the second quarter, prices of retail properties declined in 2023, registering a fall of 6.8% between the fourth quarters of 2022 and 2023. In contrast, rents were on an upward trend throughout 2023, registering a growth of 3.7% in the fourth quarter of 2023 over the same period of 2022.



私人零售业楼宇售价及租金指数
Private Retail 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	118	67	42	118	91	78 [#]	89 [#]
使用量 Take-up	8	-108	145	52	87		
空置量 Vacancy	1 164	1 321	1 182	1 224	1 217		
% ⁺	10.1	11.4	10.2	10.5	10.3		

+ 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