

私人住宅

PRIVATE
DOMESTIC

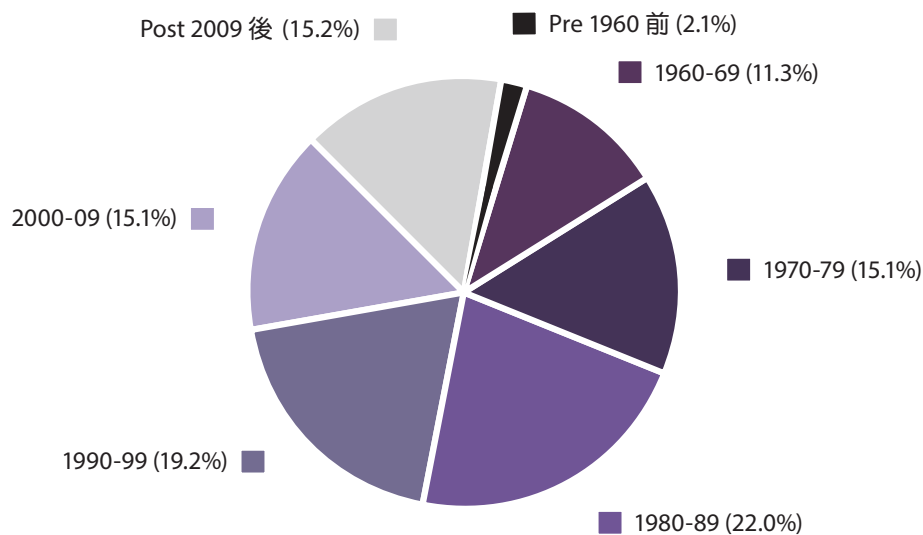




這類別包括設有專用煮食設施、浴室和廁所的獨立居住單位，但不包括村屋、解放軍轄下的宿舍、公用事業機構物業附設的宿舍、私營機構宿舍（包括教育院校的學生宿舍）、醫院管理局轄下的宿舍，以及酒店和旅舍。2022年年底的整體總存量為1 256 722個單位。圖表顯示按樓齡劃分的總存量。

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 2022, the overall stock was 1 256 722 units. The chart shows stock distribution by age.

按樓齡分類的總存量 Stock Distribution by Age



2022年私人住宅落成量為21 168個單位，較前一年上升47%。新界和九龍分別佔落成量的61%和27%，而港島佔總數的12%。在年內落成單位中，九龍城供應最多新單位，佔整體落成量的20%，其次是元朗和沙田，各佔14%。

Completions in 2022 were 21 168 units, up by 47% from the previous year. The New Territories and Kowloon contributed 61% and 27% of the completions respectively, while Hong Kong Island accounted for 12% of the total. Of these completed units, Kowloon City contributed the largest share of the new units, at 20% of the overall completions, followed by Yuen Long and Sha Tin at 14% each.

2022 年的入住量為 14 012 個單位，與 2021 年的水平相若。年底空置量上升至 54 967 個單位，佔總存量的 4.4%。空置單位中，有 7 875 個於佔用許可證發出後仍未獲發滿意紙或轉讓同意書。

Take-up in 2022 at 14 012 units remained at a similar level as that of 2021. Vacancy at the year-end increased to 54 967 units, or 4.4% of the total stock. Among these vacant units, 7 875 units were not yet issued with Certificate of Compliance or Consent to Assign after obtaining the Occupation Permit.



預計 2023 年落成量將放緩至 19 953 個單位，至 2024 年升至 26 970 個單位。在 2023 年，52% 的新供應將來自九龍，其餘有 42% 來自新界和 6% 來自港島。按地區計，九龍城的供應量佔新落成單位的 24%，其次是屯門和觀塘，各佔 14%。在 2024 年，九龍和新界將分別佔新供應量的 47% 和 46%。按地區計，九龍城將提供落成量的 33%。

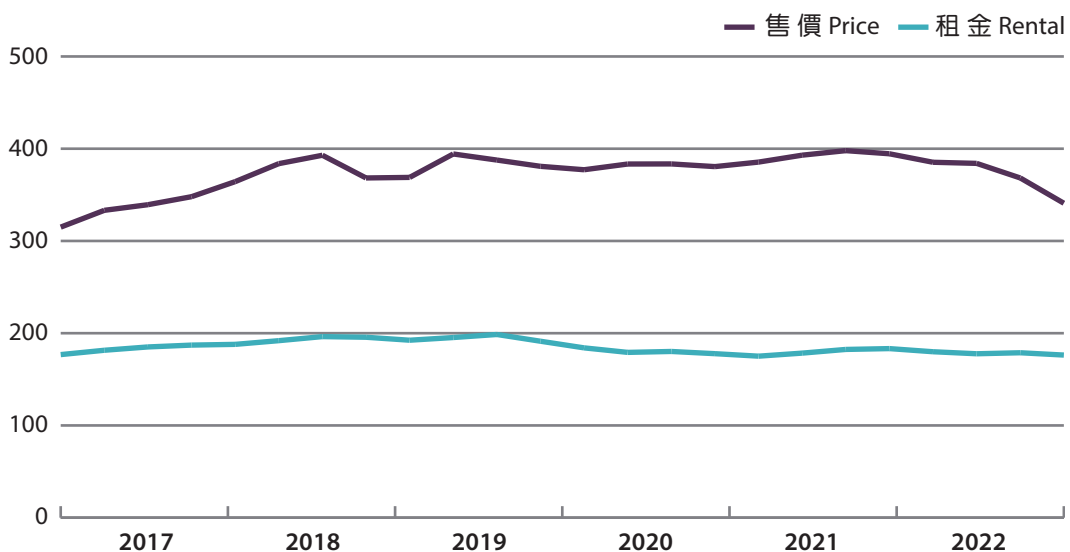
Completions are expected to ease to 19 953 units in 2023 and then surge to 26 970 units in 2024. In 2023, 52% of the new supply will come from Kowloon whereas the remainder will be from the New Territories at 42% and Hong Kong Island at 6%. On district basis, Kowloon City will account for 24% of the new units, followed by Tuen Mun and Kwun Tong at 14% each. In 2024, Kowloon and the New Territories will account for 47% and 46% of the new supply respectively. District-wise, Kowloon City will provide 33% of the completions.

在年內持續加息、本地需求疲軟及市場信心減弱的情況下，2022年二手住宅市場售價呈急劇跌勢。年初售價輕微下滑，但接近下半年時跌幅加劇。整體而言，2022年最後一季的住宅售價較2021年同期顯著下跌13.6%。租金在2022年上半年下跌，至第三季回穩，但在第四季再現跌勢，第四季的整體租金按年下跌3.8%。

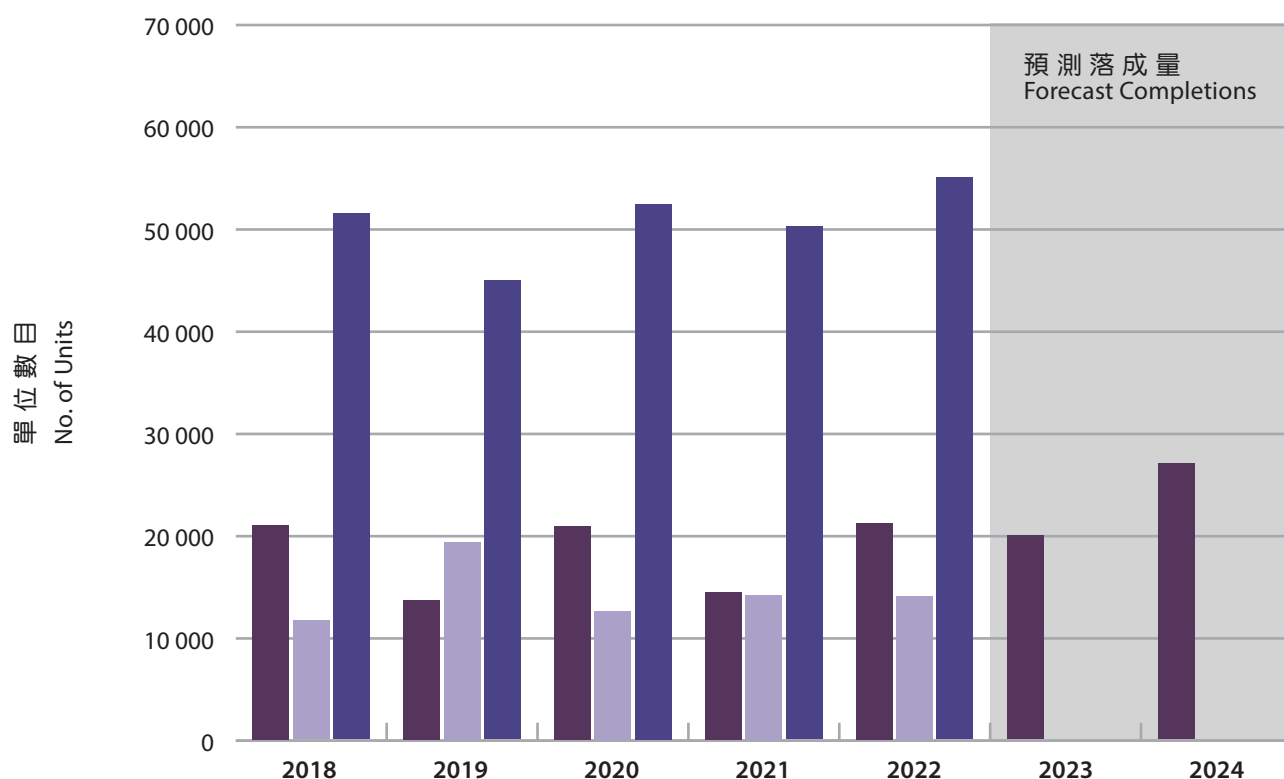
Amid a continuous rise in interest rates, sluggish local demand and weakened market confidence during the year, domestic prices in the secondary market exhibited a sharp downward trend in 2022. Prices slid moderately in the beginning of the year, but the fall accelerated towards the second half of the year. Overall, prices in the last quarter of 2022 declined significantly by 13.6% over the same period in 2021. Rents fell in the first half in 2022 and stabilised in the third quarter, but declined again in the fourth quarter. Overall rents in the fourth quarter registered a fall of 3.8% compared to a year earlier.



售價及租金指數 Price and Rental Indices



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



	2018	2019	2020	2021	2022	2023	2024
落成量 Completions	20 968	13 643*	20 888	14 386	21 168	19 953#	26 970#
入住量 Take-up	11 623	19 278	12 545	14 111	14 012		
空置量 Vacancy	51 426	44 892	52 366	50 164	54 967		
% ⁺	4.3	3.7	4.3	4.1	4.4		

* 2019年落成量包括在年內落成並預計以市價在公開市場發售，但其後於2020年轉為資助出售房屋的43個住宅單位。

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.

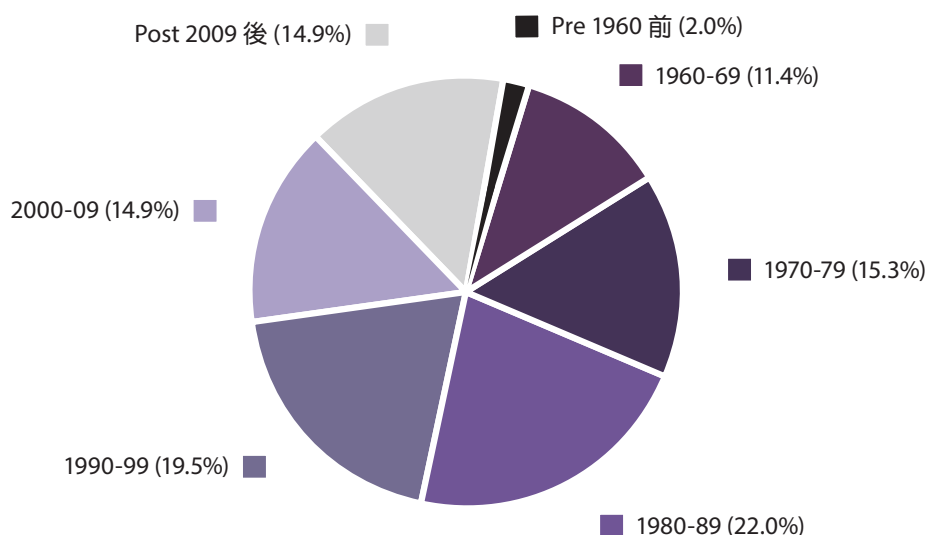
+ 年底空置量佔總存量的百分率。
Vacancy at the end of the year as a percentage of stock.

預測數字
Forecast figures

此分類包括實用面積為 100 平方米以下的單位。2022 年年底的總存量為 1 158 273 個單位，佔私人住宅總存量的 92%。圖表顯示這分類按樓齡劃分的總存量。

This sub-sector comprises units with a saleable area of less than 100 m². Stock at the end of 2022 was 1 158 273 units which accounted for 92% of the total private domestic stock. The chart shows the stock distribution of this sub-sector by age.

按樓齡分類的總存量 Stock Distribution by Age



2022 年有 19 595 個單位落成，其中 62% 位於新界，28% 位於九龍，10% 位於港島。供應主要來自九龍城、元朗和沙田，合共佔此分類總落成量的 49%。以單位面積計，A 類和 B 類單位分別佔新供應的 51% 和 39%，而 C 類單位則佔 10%。

There were 19 595 units completed in 2022, of which 62% were located in the New Territories, 28% in Kowloon and 10% on Hong Kong Island. Supply mainly came from Kowloon City, Yuen Long and Sha Tin, together contributing 49% of the total completions in this sub-sector. In terms of flat size, Class A and Class B units accounted for 51% and 39% of the new supply respectively, while the share for Class C units was 10%.

2022年的入住量下跌7%至13 100個單位。年底空置量上升至47 081個單位，相當於此分類總存量的4.1%。

Take-up in 2022 dropped by 7% to 13 100 units. Vacancy at the year-end rose to 47 081 units, or 4.1% of the stock in this sub-sector.



預計2023和2024年將分別有18 522個和25 967個單位落成。在2023年，九龍將為主要供應區域，佔51%的供應量。按地區計，新供應將主要位於九龍城，佔22%，其次是屯門和觀塘，各佔15%。在2024年，九龍和新界將分別佔新供應的47%和46%，其中九龍城佔新落成單位的比例最高，為33%。

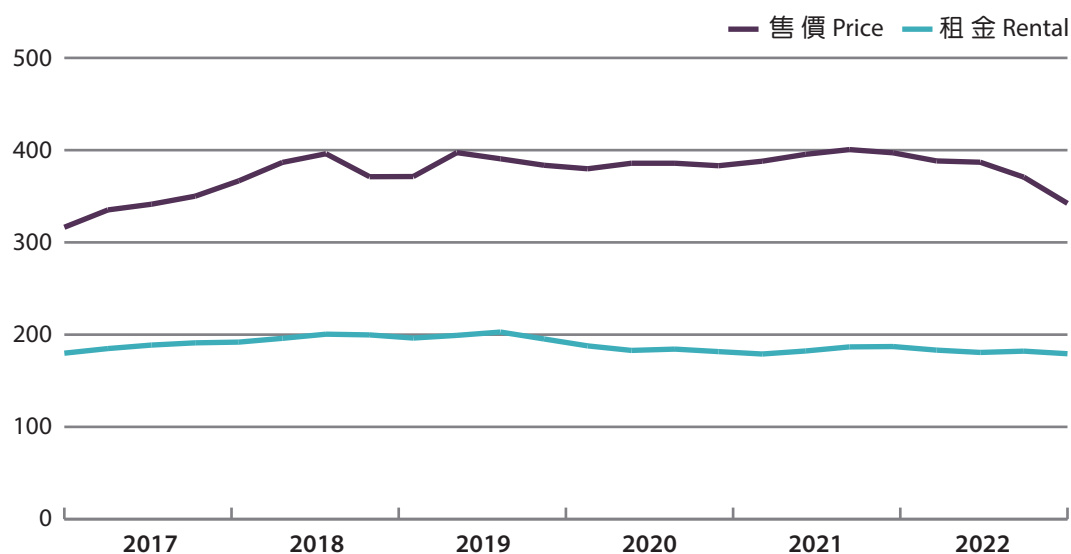
Completions in 2023 and 2024 are estimated to be 18 522 units and 25 967 units respectively. In 2023, Kowloon will be the major supplier, contributing 51% of the supply. On district basis, the new supply will mainly be located in Kowloon City at 22%, followed by Tuen Mun and Kwun Tong at 15% each. In 2024, Kowloon and the New Territories will provide 47% and 46% of the new supply respectively, with Kowloon City contributing the largest share of 33% of the new units.

此分類的售價在 2022 年全年均下跌。最後一季的售價較前一年大跌 13.8%。而第四季租金較 2021 年同期下跌 4.2%。

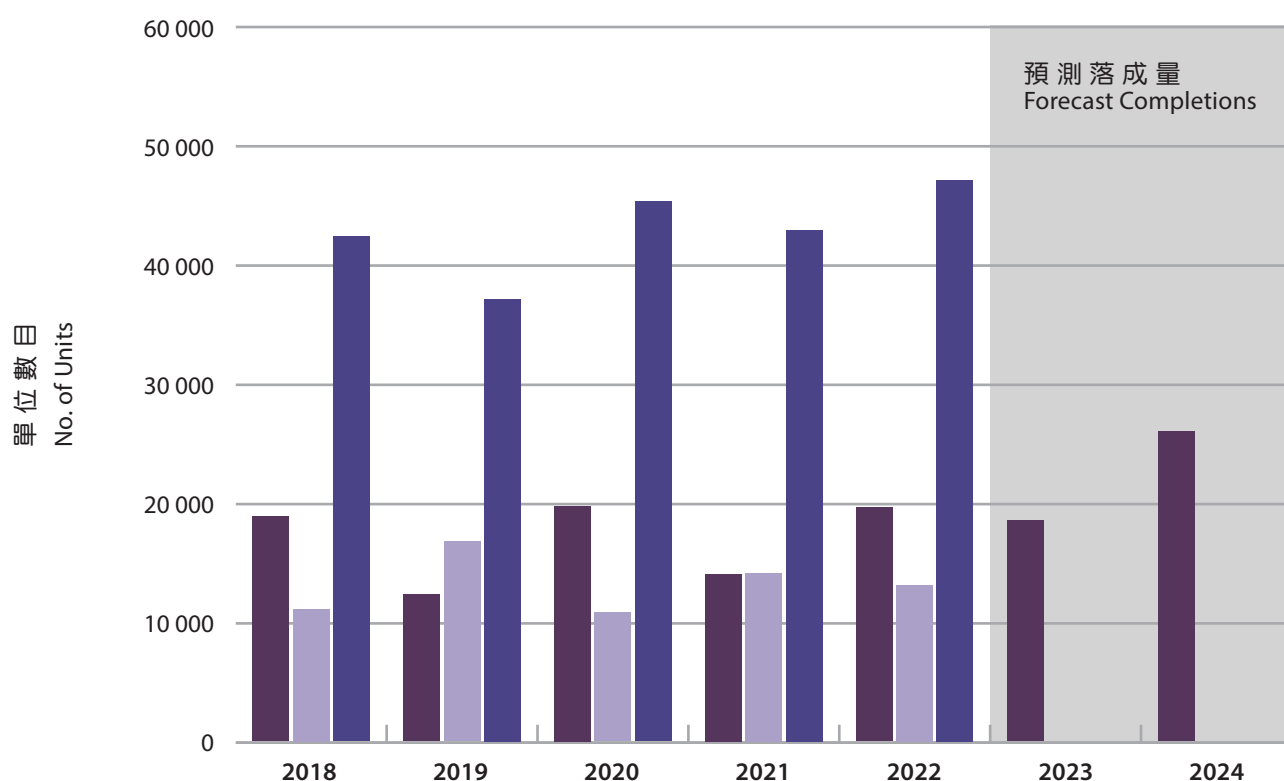
Prices in this sub-sector declined throughout 2022. Prices in the last quarter plunged by 13.8% from that of the preceding year. Meanwhile, rents slid by 4.2% in the fourth quarter over the corresponding quarter in 2021.



售價及租金指數 Price and Rental Indices



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



	2018	2019	2020	2021	2022	2023	2024
落成量 Completions	18 863	12 302*	19 751	14 016	19 595	18 522#	25 967#
入住量 Take-up	11 083	16 751	10 787	14 101	13 100		
空置量 Vacancy	42 336	37 091	45 260	42 860	47 081		
% ⁺	3.9	3.3	4.0	3.8	4.1		

* 2019年落成量包括在年內落成並預計以市價在公開市場發售，但其後於2020年轉為資助出售房屋的43個住宅單位。

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.

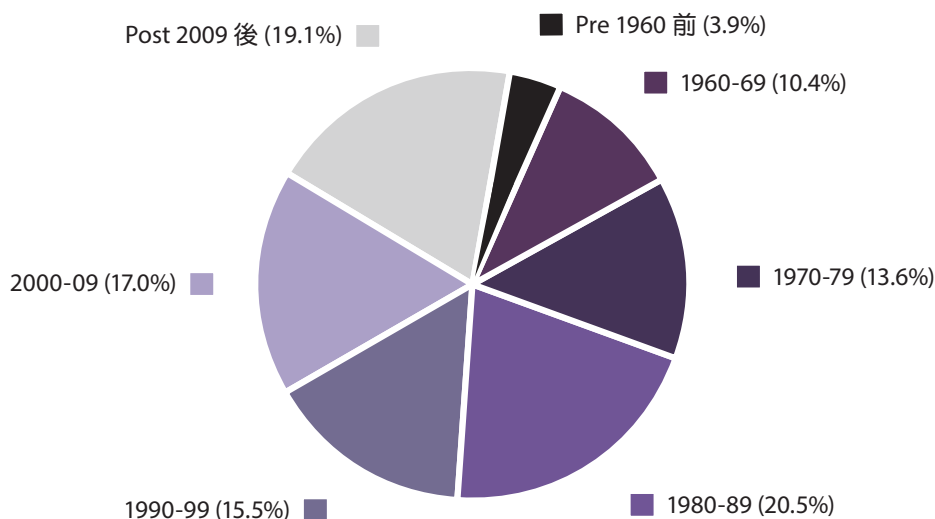
+ 年底空置量佔總存量的百分率。
Vacancy at the end of the year as a percentage of stock.

預測數字
Forecast figures

此分類包括實用面積為100平方米或以上的單位。2022年年底的總存量為98 449個單位，佔私人住宅總存量的8%。圖表顯示這分類按樓齡劃分的總存量。

This sub-sector comprises units with a saleable area of 100 m² or above. Stock at the end of 2022 was 98 449 units, representing 8% of the total private domestic stock. The stock distribution by age for this sub-sector is shown in the chart.

按樓齡分類的總存量 Stock Distribution by Age



2022年落成的1 573個單位中，56%位於新界，30%位於港島及14%位於九龍。按地區計，南區佔落成量的28%，其次是沙田和大埔，各佔17%。

There were 1 573 units completed in 2022, of which 56% were located in the New Territories, 30% on Hong Kong Island and 14% in Kowloon. On district level, the Southern district accounted for 28% of the completions, followed by Sha Tin and Tai Po at 17% each.

此分類的入住量在 2022 年急升至 912 個單位。年底空置量上升至 7 886 個單位，相當於此分類單位總存量的 8.0%。

Take-up in this sub-sector soared to 912 units in 2022. Vacancy at the year-end increased to 7 886 units, representing 8.0% of the stock in this sub-sector.



預計此分類的落成量在 2023 年將回落至 1 431 個單位，並在 2024 年進一步下降至 1 003 個單位。該兩年的新供應將主要來自九龍，分別佔 2023 和 2024 年預測落成量的 69% 和 55%。按地區計，九龍城的供應最多，在 2023 和 2024 年將分別佔新落成量的 46% 和 52%。

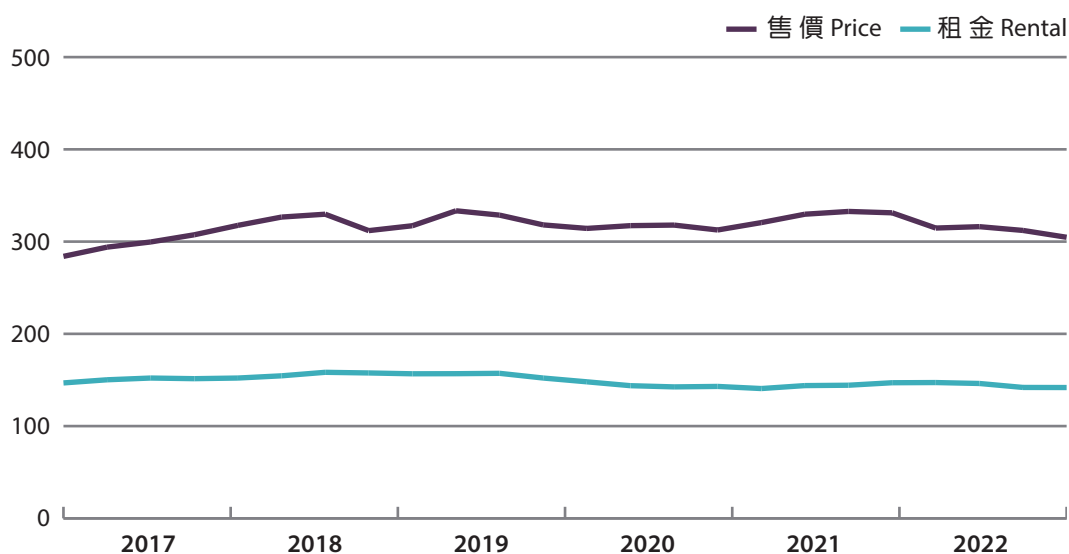
Completions in this sub-sector are expected to retreat to 1 431 units in 2023 and drop further to 1 003 units in 2024. New supply will mainly come from Kowloon in both years, accounting for 69% and 55% of the forecast completions in 2023 and 2024 respectively. On district basis, Kowloon City will contribute the most supply, providing 46% and 52% of the new completions in 2023 and 2024 respectively.

此分類物業在銷售和租賃市場均表現遜色，但較中 / 小型單位為佳。售價在 2022 年第一季輕微下滑，至第二季回升，但在下半年再度下跌，最後一季的售價較 2021 年同期下跌 8.0%。第四季租金較 2021 年同季錄得 3.5% 的跌幅。

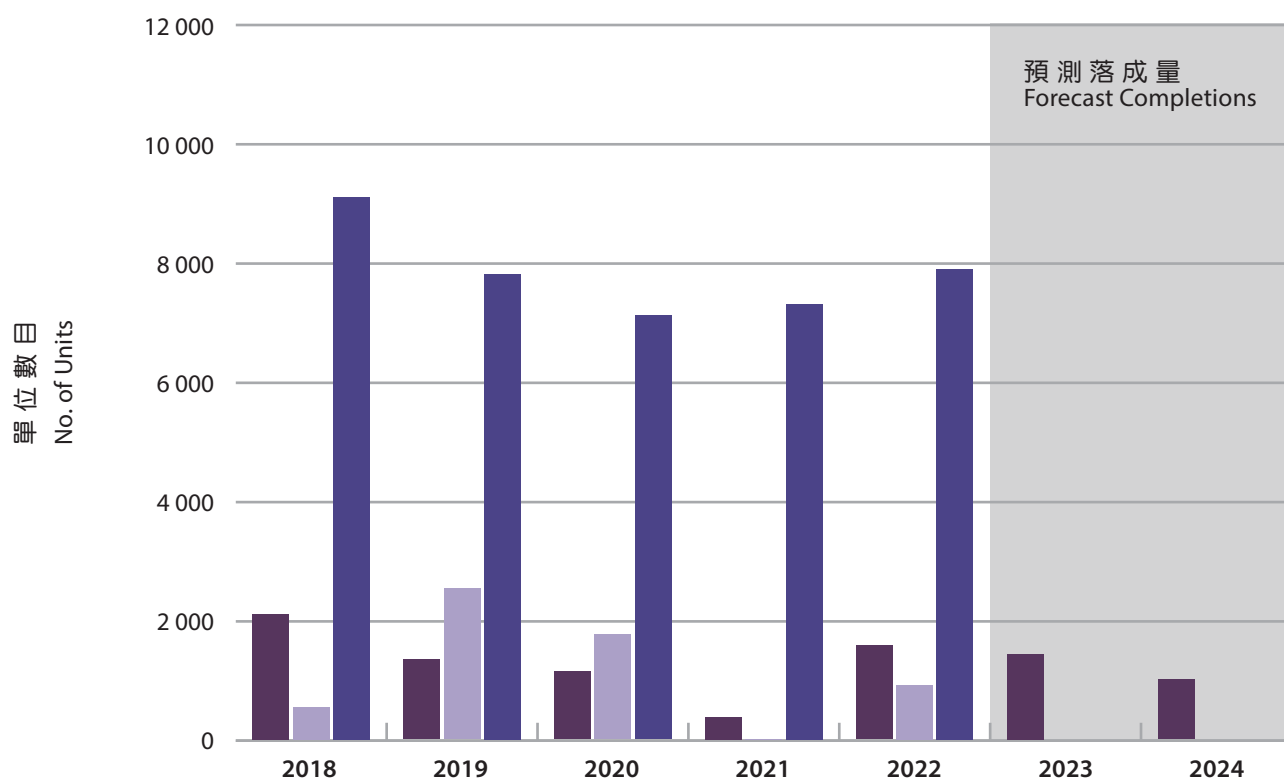
Both the sales and leasing markets in this sub-sector performed poorly, yet comparatively better than those of the small/medium units. After a slight decline in the first quarter of 2022, prices rebounded in the second quarter but fell again in the second half of the year, registering a decrease of 8.0% in the final quarter over the same period in 2021. Rents recorded a decrease of 3.5% in the fourth quarter compared with the corresponding quarter in 2021.



售價及租金指數 Price and Rental Indices



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



單位數目
No. of Units

2018 2019 2020 2021 2022 2023 2024

落成量 Completions	2 105	1 341	1 137	370	1 573	1 431 [#]	1 003 [#]
入住量 Take-up	540	2 527	1 758	10	912		
空置量 Vacancy	9 090	7 801	7 106	7 304	7 886		
% ⁺	9.6	8.1	7.3	7.5	8.0		

+ 年底空置量佔總存量的百分率。
Vacancy at the end of the year as a percentage of stock.

預測數字
Forecast figures