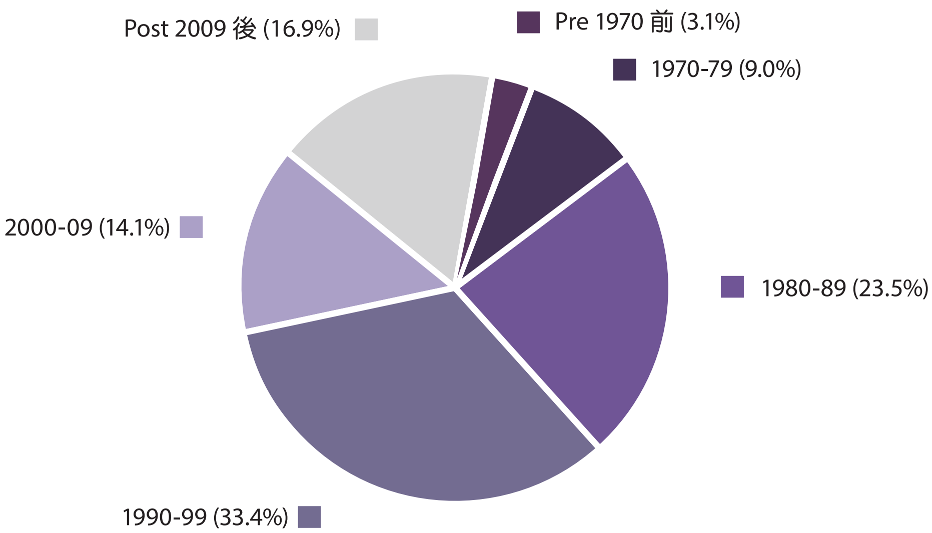
私人寫字樓
PRIVATE OFFICE

私人寫字樓 (整體) Private Office (Overall)

2022年年底，私人寫字樓的總存量為12 912 400平方米，當中甲級寫字樓佔66%，乙級寫字樓佔23%，丙級寫字樓佔11%。位於上環、中區、灣仔、銅鑼灣和尖沙咀核心地區的寫字樓面積在2022年年底共佔總存量的49%。圖表顯示按樓齡劃分的整體寫字樓總存量。

The total stock of private offices at the end of 2022 amounted to 12 912 400 m^2, 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 2022. The chart shows the total stock of all offices by age.

按樓齡分類的總存量
Stock Distribution by Age



2022年私人寫字樓的落成量大幅上升至351 300平方米，有97%的落成量位於非核心地區。甲級寫字樓的落成量為299 300平方米，相當於總供應量的85%。

Office completions in 2022 rose significantly to 351 300 m^2. 97% of the completions were in the non-core districts. Completions of Grade A space amounted to 299 300 m^2, equivalent to 85% of the total supply.

年內整體使用量錄得正數 19 300 平方米。年底空置量上升至 1 859 600 平方米，相當於總存量的 14.4%。

A positive overall take-up of 19 300 m^2 was recorded for the year. Vacancy at the year-end increased to 1 859 600 m^2, which was equivalent to 14.4% of the total stock.

預計 2023 和 2024 年的落成量將分別下降至 267 200 平方米和 105 700 平方米。2023 年的新供應將全部來自九龍和港島，分別佔總落成量的 58% 和 42%，當中深水埗和中西區合共佔總落成量的 60%。在 2024 年，新供應將集中在觀塘、中西區和灣仔，分別佔預計落成量的 45%、18% 和 14%。

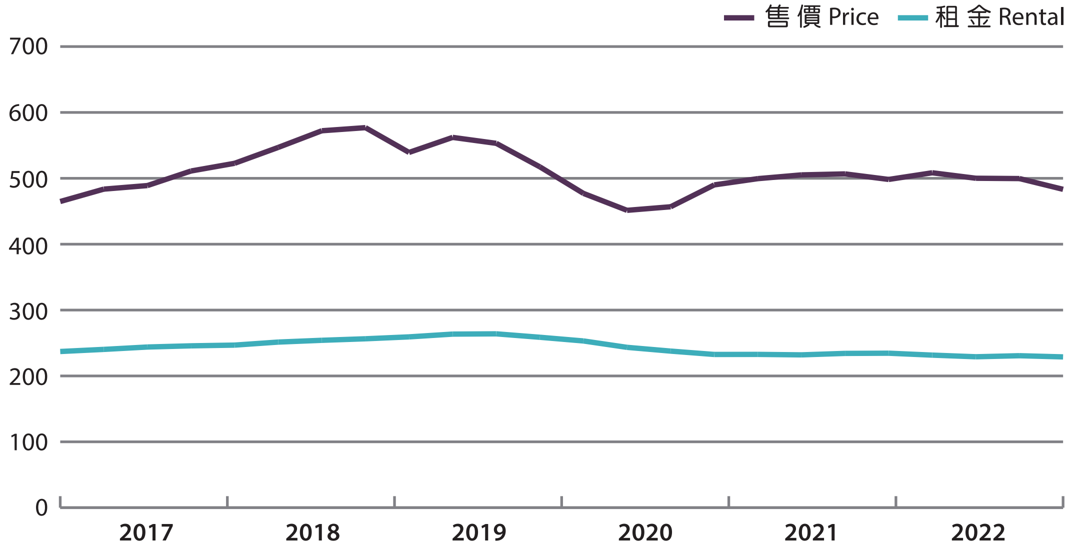
Completions are expected to drop to 267 200 m^2 and 105 700 m^2 in 2023 and 2024 respectively. New supply in 2023 will all come from Kowloon and Hong Kong Island at 58% and 42% of total completions respectively, with Sham Shui Po and the Central and Western district together providing 60% of the total completions. In 2024, new supply will be concentrated in Kwun Tong, the Central and Western district and Wan Chai, accounting for 45%, 18% and 14% of the estimated completions respectively.

私人寫字樓 (整體) Private Office (Overall)

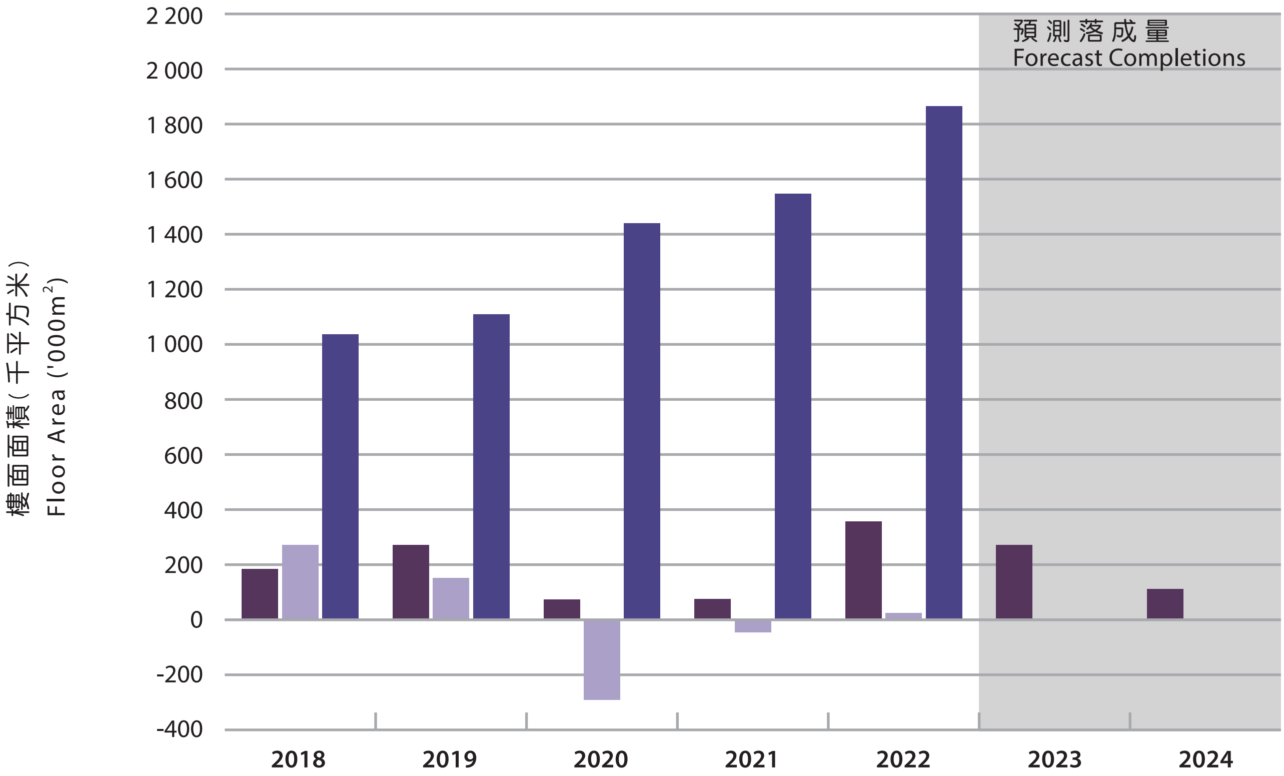
隨著 2022 年第一季的溫和升幅，寫字樓售價在餘下季度回軟，2022 年最後一季較 2021 年同期下跌 3.0%。雖然寫字樓租金在第三季略為回升，但全年持續微跌，2022 年最後一季與前一年相比，錄得 2.4% 的跌幅。

Following a mild increase in the first quarter of 2022, office prices softened for the remaining quarters, registering a decrease of 3.0% in the last quarter of 2022 over the same period in 2021. Office rents edged down throughout the year, despite a slight rebound in the third quarter, with a decrease of 2.4% in the last quarter of 2022 over a year ago.

售價及租金指數
Price and Rental Indices



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



樓面面積（千平方米）
Floor Area ('000m²)

	2018	2019	2020	2021	2022	2023	2024
落成量 Completions	179	267	69	70	351	267#	106#
使用量 Take-up	266	147	-286	-40	19		
空置量 Vacancy	1 032	1 104	1 434	1 541	1 860		
%+	8.6	9.0	11.5	12.3	14.4		

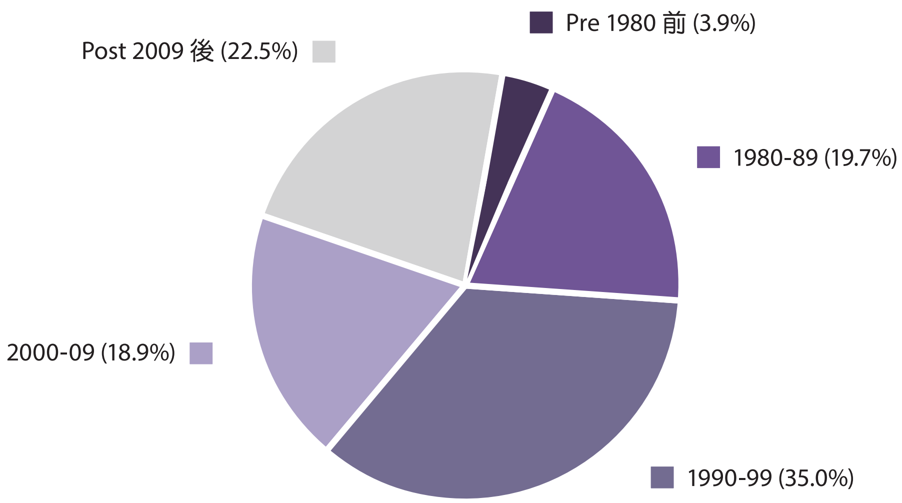
\+ 年底空置量佔總存量的百分率。
Vacancy at the end of the year as a percentage of stock.

\# 預測數字
Forecast figures

2022 年年底，甲級寫字樓的總存量達 8 455 500 平方米，佔寫字樓總存量的 66%。圖表顯示按樓齡劃分的甲級寫字樓總存量。

Stock of Grade A office space at the end of 2022 stood at 8 455 500 m^2, representing 66% of the total office stock. The chart shows the distribution of stock in this grade by age.

按樓齡分類的總存量
Stock Distribution by Age



港島佔總存量的 48%，而九龍與新界則分別佔 39% 和 13%。

Hong Kong Island accounted for 48% of the stock, while the shares for Kowloon and the New Territories were 39% and 13% respectively.

甲級寫字樓的落成量飆升至 299 300 平方米。新發展項目主要位於非核心地區，如九龍城、觀塘和東區。

Completions of Grade A offices soared to 299 300 m^2. New developments were mainly located in the non-core districts such as Kowloon City, Kwun Tong and the Eastern district.

2022 年錄得正數 42 000 平方米的使用量。年底空置量上升至 1 279 600 平方米，相當於甲級寫字樓總存量的 15.1%，其中 33% 的空置面積位於核心地區。

A positive take-up of 42 000 m² was recorded in 2022. The year-end vacancy rose to 1 279 600 m², representing 15.1% of Grade A stock. 33% of the vacant spaces was found in the core districts.

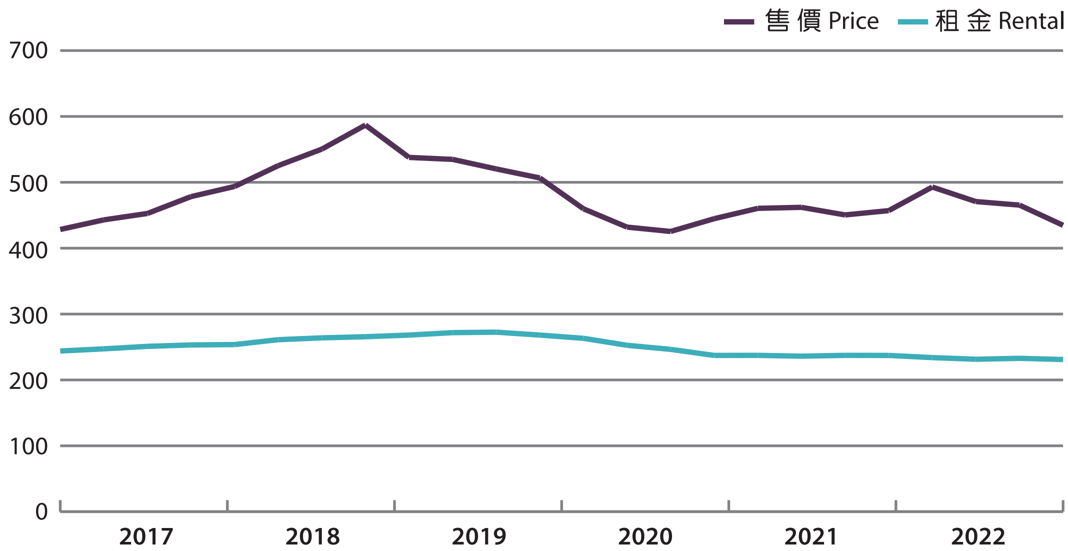
預計甲級寫字樓的落成量在 2023 及 2024 年將分別下跌至 250 700 平方米和 86 600 平方米。2023 年的新供應將集中在深水埗和中西區，分別佔新落成量的 38% 和 25%。在 2024 年，預計觀塘將成為主要供應區，佔新落成量的 49%。

It is anticipated that completions will fall to 250 700 m² in 2023 and 86 600 m² in 2024. New supply in 2023 will be concentrated in Sham Shui Po and the Central and Western district, providing 38% and 25% of the new completions respectively. In 2024, it is expected that Kwun Tong will be the major supplier, accounting for 49% of the new completions.

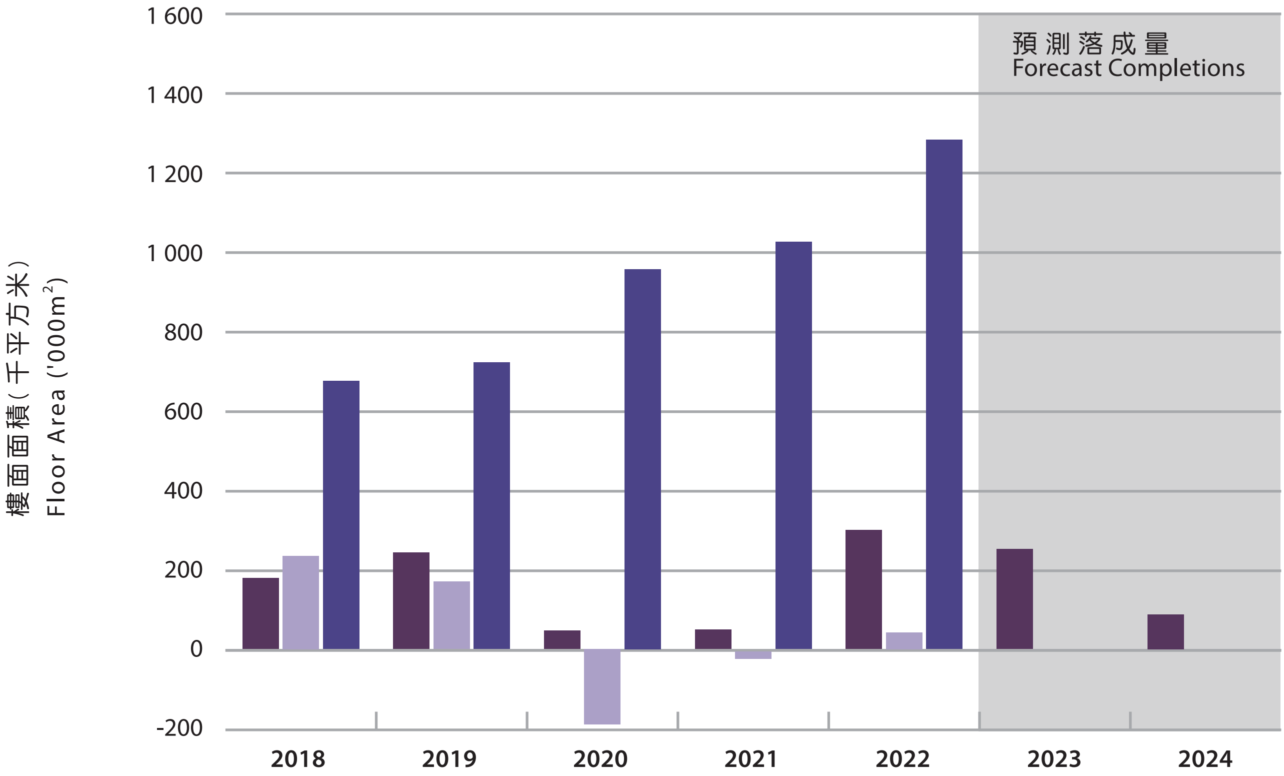
甲級寫字樓售價在 2022 年第一季錄得顯著升幅，但接近年底時回落，以第四季與 2021 年同期相比，售價下跌 4.9% 作結。租金在首兩季連續下跌，至第三季回穩，但接近年底時重拾跌勢，與 2021 年第四季相比，2022 年第四季錄得 2.6% 的跌幅。

Prices of Grade A offices registered a significant growth in the first quarter but retreated towards the end of 2022, ending with a fall of 4.9% in the fourth quarter over the same period in 2021. Rents dropped consecutively in the first two quarters, then stabilised in the third quarter, but resumed the downward trend towards the year-end, posting a decrease of 2.6% between the fourth quarters of 2021 and 2022.

售價及租金指數
Price and Rental Indices



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



樓面面積(千平方米)
Floor Area ('000m²)

	2018	2019	2020	2021	2022	2023	2024
落成量 Completions	178	242	46	49	299	251#	87#
使用量 Take-up	234	169	-189	-18	42		
空置量 Vacancy	674	720	955	1 023	1 280		
%+	8.7	9.0	11.8	12.5	15.1		

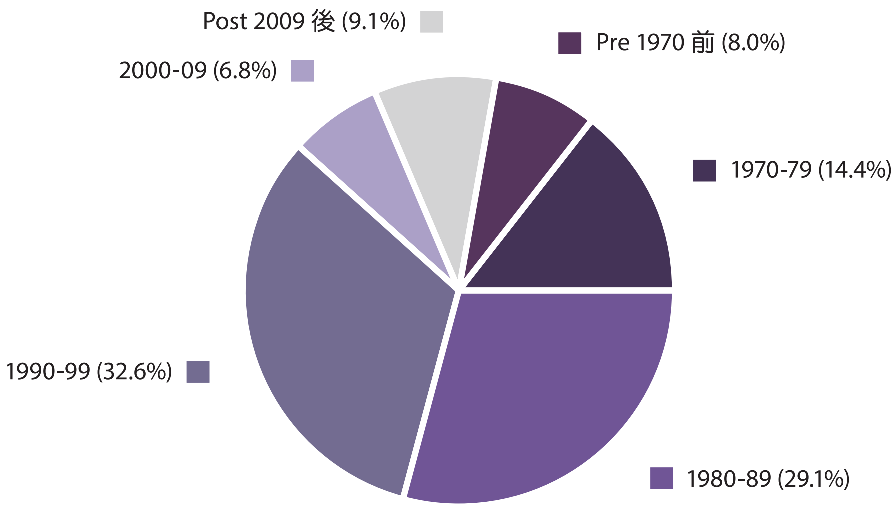
\+ 年底空置量佔總存量的百分率。
Vacancy at the end of the year as a percentage of stock.

\# 預測數字
Forecast figures

2022 年年底，乙級寫字樓的總存量為 2 986 400 平方米，佔寫字樓總存量的 23%。圖表顯示按樓齡劃分的乙級寫字樓總存量。

Stock of Grade B offices was 2 986 400 m^2 at the end of 2022, representing 23% of the total office stock. The chart shows the distribution of stock in this grade by age.

按樓齡分類的總存量
Stock Distribution by Age



港島佔總存量的 56%，而九龍與新界則分別佔 36% 和 8%。

Hong Kong Island accounted for 56%, while Kowloon and the New Territories contributed 36% and 8% respectively.

2022 年乙級寫字樓落成量急升至 50 300 平方米，主要來自觀塘和荃灣。

Grade B office completions in 2022 surged to 50 300 m^2. Completions mainly came from Kwun Tong and Tsuen Wan.

乙級寫字樓在 2022 年的使用量維持負數，為 31 700 平方米。年底空置量為 450 400 平方米，增至乙級寫字樓總存量的 15.1%，其中 46% 的空置面積位於核心地區。

Take-up of Grade B offices in 2022 remained negative at 31 700 m^2. The year-end vacancy, amounting to 450 400 m^2, recorded a rise to 15.1% of the Grade B stock. 46% of the vacant spaces was found in the core districts.

預計落成量在 2023 和 2024 年將分別下跌至 15 100 平方米和 17 800 平方米。2023 年的主要供應將來自觀塘和灣仔，分別佔預計落成量的 48% 和 29%。2024 年的新供應大部分會來自中西區和觀塘。

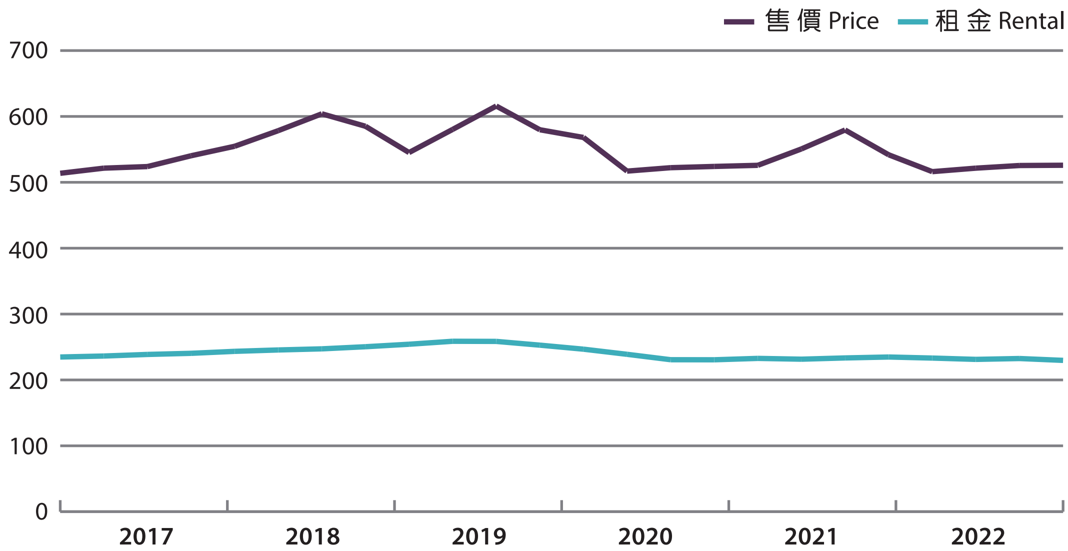
It is estimated that completions will drop to 15 100 m^2 and 17 800 m^2 in 2023 and 2024 respectively. In 2023, major supply will be contributed from Kwun Tong and Wan Chai providing 48% and 29% of the estimated completions respectively. Most of the new supply in 2024 will come from the Central and Western district and Kwun Tong.

私人寫字樓（乙級）Private Office (Grade B)

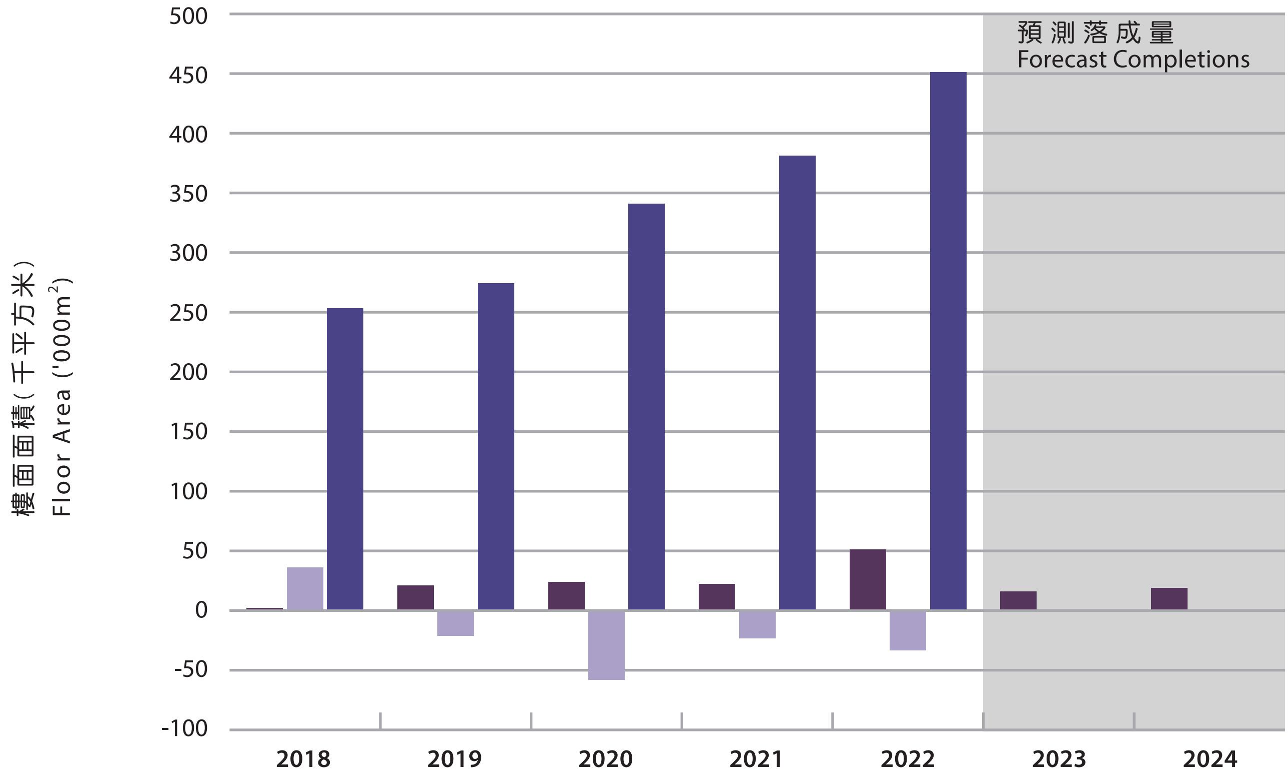
乙級寫字樓售價於第一季下跌，但在餘下季度整固，以 2022 年最後一季與 2021 年同期相比，下跌 2.9%。租金雖然在 2022 年第三季出現短暫反彈，但年內仍稍微下跌，以 2021 和 2022 年最後一季比較，錄得 2.2% 的跌幅。

Prices of Grade B offices subsided in the first quarter but consolidated for the remaining quarters, posting a decrease of 2.9% in the last quarter of 2022 over the same period in 2021. Despite a short-lived rebound in the third quarter, rents fell slightly in 2022, registering a decline of 2.2% between the last quarters of 2021 and 2022.

售價及租金指數
Price and Rental Indices



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



樓面面積（千平方米）
Floor Area ('000m^2)

	2018	2019	2020	2021	2022	2023	2024
落成量 Completions	1	20	23	21	50	15#	18#
使用量 Take-up	35	-20	-57	-22	-32		
空置量 Vacancy	252	273	340	380	450		
%+	9.0	9.7	11.9	13.1	15.1		

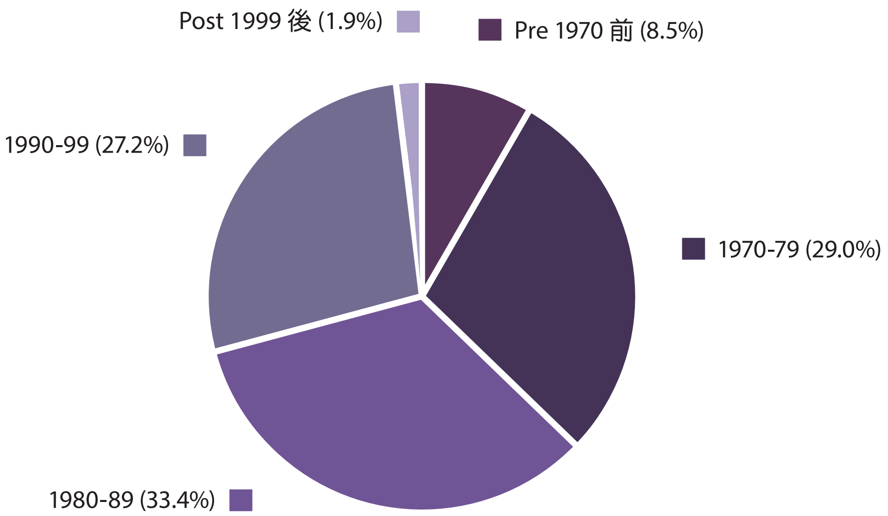
\+ 年底空置量佔總存量的百分率。
Vacancy at the end of the year as a percentage of stock.

\# 預測數字
Forecast figures

2022年年底，丙級寫字樓的總存量為 1 470 500 平方米，佔寫字樓總存量的 11%。圖表顯示按樓齡劃分的丙級寫字樓總存量。

Stock of Grade C offices was 1 470 500 m² at the end of 2022, representing 11% of the total office stock. The chart shows the distribution of stock in this grade by age.

按樓齡分類的總存量
Stock Distribution by Age



港島佔總存量的 65%，而九龍與新界則分別佔 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.

2022年丙級寫字樓的落成量為 1 700 平方米，主要來自灣仔。

Completions for Grade C offices in 2022 were 1 700 m². They mainly came from Wan Chai.

丙級寫字樓的使用量錄得正數 9 000 平方米。年底空置量為 129 600 平方米，相等於丙級寫字樓總存量的 8.8%，當中 66% 的空置面積位於核心地區。

Grade C offices registered a positive take-up of 9 000 m^2. The year-end vacancy, amounting to 129 600 m^2, was equivalent to 8.8% of its stock. 66% of the vacant spaces was found in the core districts.

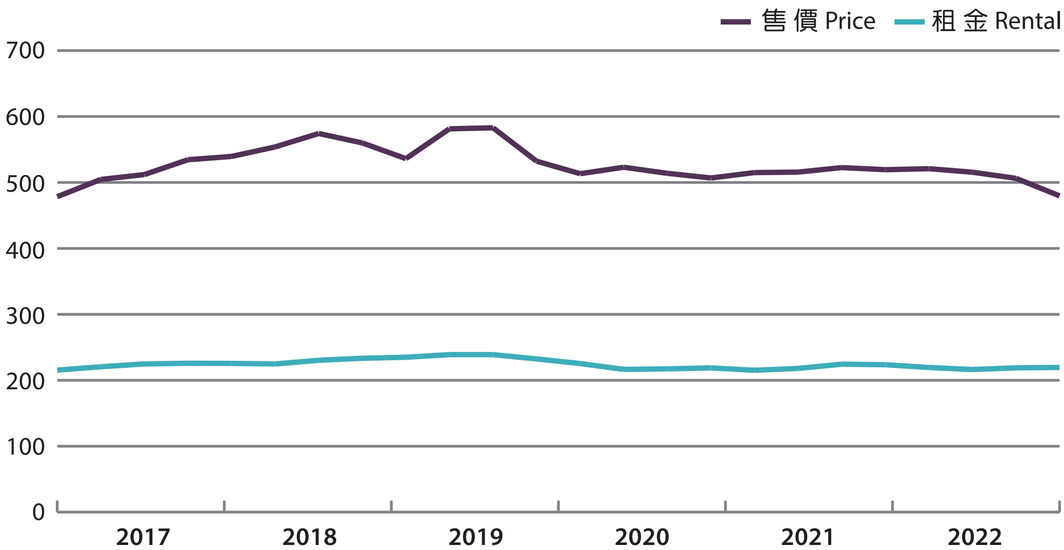
預計 2023 和 2024 年將分別有 1 400 平方米和 1 300 平方米的丙級寫字樓落成，2023 年的供應將全部來自東區，而 2024 年則主要來自灣仔。

Grade C office space of 1 400 m^2 and 1 300 m^2 will be expected in 2023 and 2024 respectively. The Eastern district will contribute the entire supply in 2023. In 2024, the major supply will be located in Wan Chai.

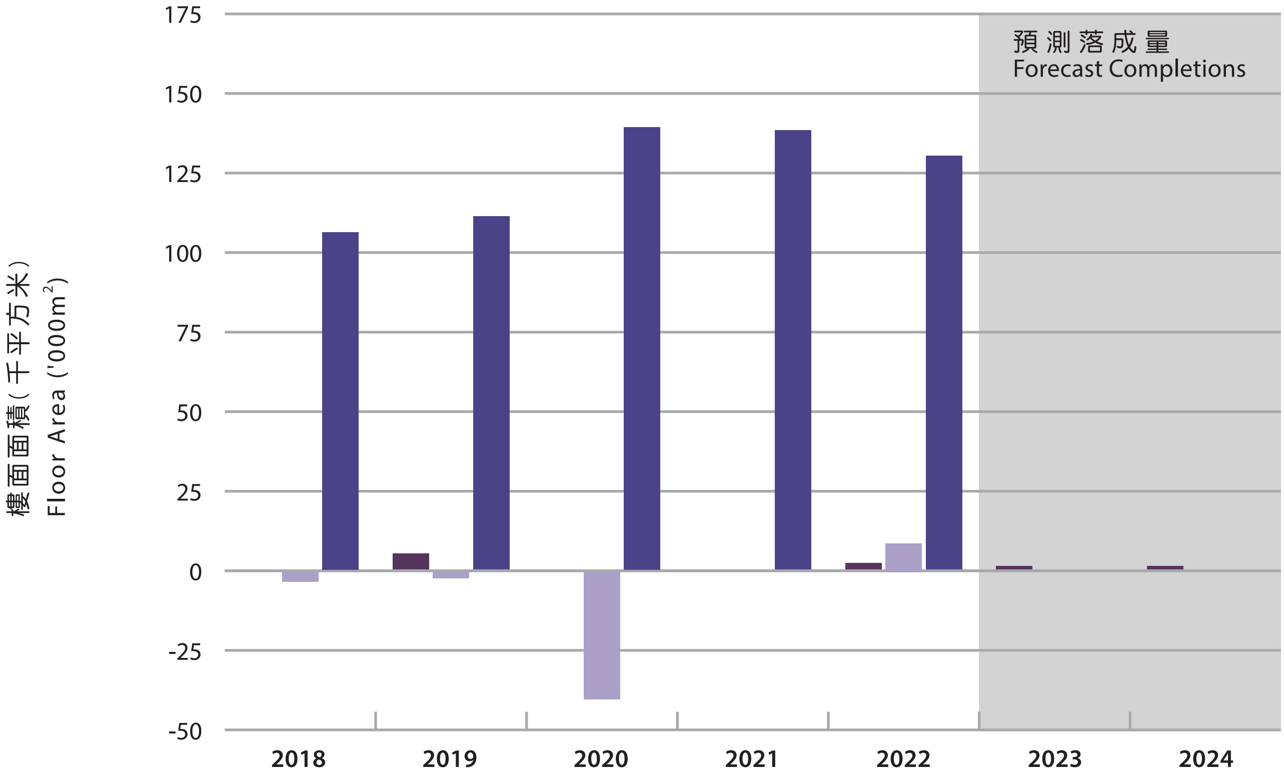
丙級寫字樓售價在第一季保持平穩，但其後持續下跌。以 2021 和 2022 年第四季作比較，售價大幅下跌 7.6%。租金在 2022 年上半年下跌，但在下半年稍微上升，2022 年第四季與 2021 年同期相比，以 1.8% 的輕微跌幅作結。

Prices of Grade C offices stabilised in the first quarter but declined continuously thereafter, registering a considerable decrease of 7.6% between the fourth quarters of 2021 and 2022. Rents fell in the first half of 2022 but rose slightly in the second half of the year, ending with a moderate decrease of 1.8% in the fourth quarter of 2022 over the same period in 2021.

售價及租金指數
Price and Rental Indices



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



樓面面積（千平方米）
Floor Area ('000m²)

	2018	2019	2020	2021	2022	2023	2024
落成量 Completions	0	5	0	0	2	1#	1#
使用量 Take-up	-3	-2	-40	0	9		
空置量 Vacancy	106	111	139	138	130		
%+	7.2	7.5	9.4	9.3	8.8		

\+ 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