

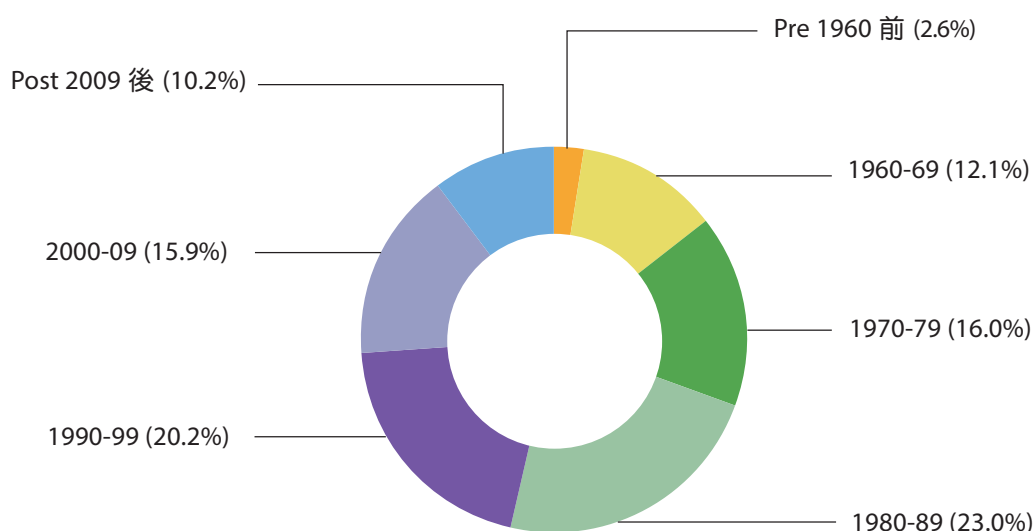
私人住宅 (整體)

Private Domestic (Overall)

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。2018年年底的整體總存量為1 193 971個單位。圖表顯示按樓齡分類的總存量。

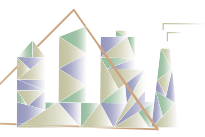
This sector comprises independent domestic units with an exclusive cooking area, bathroom and toilet, but does not include village houses, quarters held by the People's Liberation Army, quarters attached to premises of utility companies, dormitories (including student dormitories in educational institutes), quarters held by the Hospital Authority, hotels and hostels. At the end of 2018, the overall stock was 1 193 971 units. The chart shows stock distribution by age.

按樓齡分類的總存量 Stock Distribution by Age



2018年私人住宅落成量為20 968個單位，較前一年增加18%。當中新界佔大約56%，九龍佔28%，港島佔16%。按地區計，九龍城、西貢和荃灣為供應量較多的主要地區，分別佔整體落成量的24%、22%和21%。

Completions in 2018 amounted to 20 968 units, up by 18% from the previous year. About 56% of the completions was in the New Territories, 28% in Kowloon and 16% on Hong Kong Island. District-wise, Kowloon City, Sai Kung and Tsuen Wan were the major contributors providing 24%, 22% and 21% of the overall completions respectively.



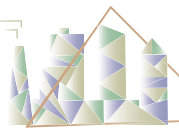
2018年的入住量減少至11 623個單位，相當於年內落成量的55%。年底空置量隨入住量減少而增加至51 426個單位，相當於總存量的4.3%。空置單位中，有11 242個於佔用許可證發出後仍未獲發滿意紙或轉讓同意書。

Take-up in 2018 reduced to 11 623 units, equivalent to 55% of the completions in the year. As a result, vacancy at the year-end was driven up to 51 426 units, or 4.3% of the total stock. Amongst these vacant units, 11 242 units were not yet issued with Certificate of Compliance or Consent to Assign after obtaining the Occupation Permit.



預計2019和2020年的落成量將維持相近水平，新落成單位分別為20 415個和20 181個。在2019年，約66%的新供應將來自新界，其中以西貢的比例最高，佔新落成單位的20%，其次為大埔，佔16%。2020年的新供應仍將會集中於新界，佔62%，當中以大埔的比例最高，佔整體落成量的21%，其次為屯門，佔15%。

Completions in 2019 and 2020 are expected to stay at similar level of 20 415 units and 20 181 units respectively. In 2019, about 66% of the new supply will come from the New Territories. Sai Kung will contribute the largest share at 20% of the new units, followed by Tai Po at 16%. New supply in 2020 will still be concentrated in the New Territories with a share of 62%. Tai Po will account for the largest share, at 21% of the overall completions, followed by Tuen Mun at 15%.



私人住宅 (整體)

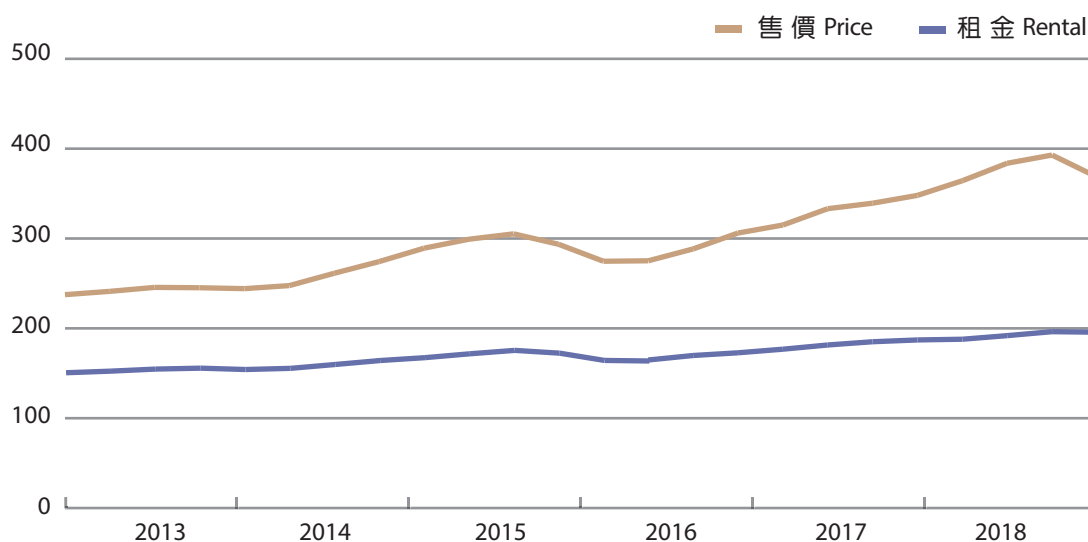
Private Domestic (Overall)

受美國與內地的貿易摩擦升溫、美國持續加息，以及本地最優惠貸款利率在9月隨之上調等多項因素影響，市場氣氛在2018年下半年逐漸減弱，令市場人士感到憂慮。這情況導致二手市場物業售價在首三季持續上升後，於第四季回落。第四季的整體售價較前一年同期高5.9%。租金同樣連升三個季度後，於第四季調整，較前一年同期增長4.6%。

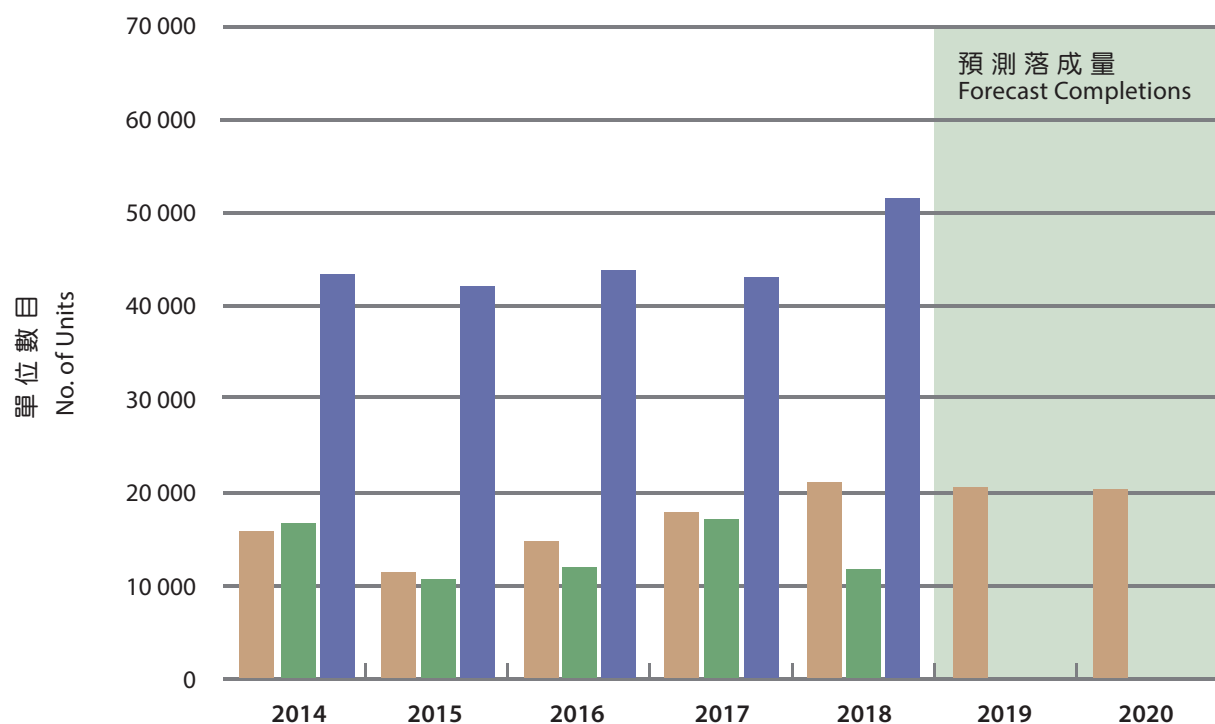
Amid the weakening sentiment in the second half of 2018, including the elevated US-Mainland trade conflicts, the continued US interest rate hikes and the subsequent increase in local Best Lending Rates in September, prices in the secondary market rose continually in the first three quarters and declined in the fourth quarter. Overall prices in the fourth quarter were 5.9% higher than the level in the same quarter of the previous year. Similarly, rents consolidated in the last quarter after rising consecutively for three quarters, increasing 4.6% over the corresponding period.



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



| | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|--------------------|--------|----------|--------|--------|--------|---------------------|---------------------|
| 落成量 Completions | 15 719 | 11 296 * | 14 595 | 17 791 | 20 968 | 20 415 [#] | 20 181 [#] |
| 入住量 Take-up | 16 523 | 10 533 | 11 881 | 16 954 | 11 623 | | |
| 空置量 Vacancy | 43 263 | 42 035 | 43 657 | 42 942 | 51 426 | | |
| % ⁺ | 3.8 | 3.7 | 3.8 | 3.7 | 4.3 | | |

* 2015年落成量包括在年內落成並預留為資助出售房屋，但其後於2017年以市價在公開市場發售的16個住宅單位。相關入住量和空置量的數字並沒有修正。
Completions of 2015 include 16 flats completed and designated as subsidised sale flats in the year but sold to the public in the open market at prevailing market prices in 2017. There is no amendment to other related take-up and vacancy figures.

+ 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