私人住宅

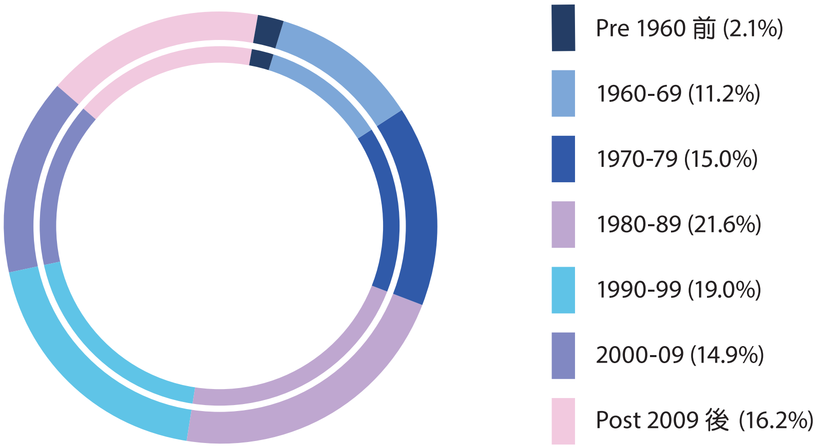
PRIVATE DOMESTIC

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。2023 年年底的整體總存量為 1 269 831 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 2023, the overall stock was 1 269 831 units. The chart shows stock distribution by age.

按樓齡分類的總存量
Stock Distribution by Age



2023 年私人住宅落成量較前一年下跌 35% 至 13 852 個單位。九龍和新界分別佔落成量的 50% 和 44%，其餘 6% 來自港島。九龍城供應的落成單位最多，佔 25%，其次是屯門，佔 15%。

Completions in 2023 were down by 35% from the previous year to 13 852 units. Kowloon and the New Territories contributed 50% and 44% of the completions respectively, while the remainder 6% were from Hong Kong Island. The largest share of these completed units came from Kowloon City at 25%, followed by Tuen Mun at 15%.

2023 年的入住量為 15 670 個單位，較 2022 年增加 12%。年底空置量輕微下跌至 52 146 個單位，佔總存量的 4.1%。空置單位中，有 5 042 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 2023 at 15 670 units was 12% higher than that of 2022. Vacancy at the year-end slightly decreased to 52 146 units, or 4.1% of the total stock. Among these vacant units, 5 042 units were not yet issued with Certificate of Compliance or Consent to Assign after obtaining the Occupation Permit.

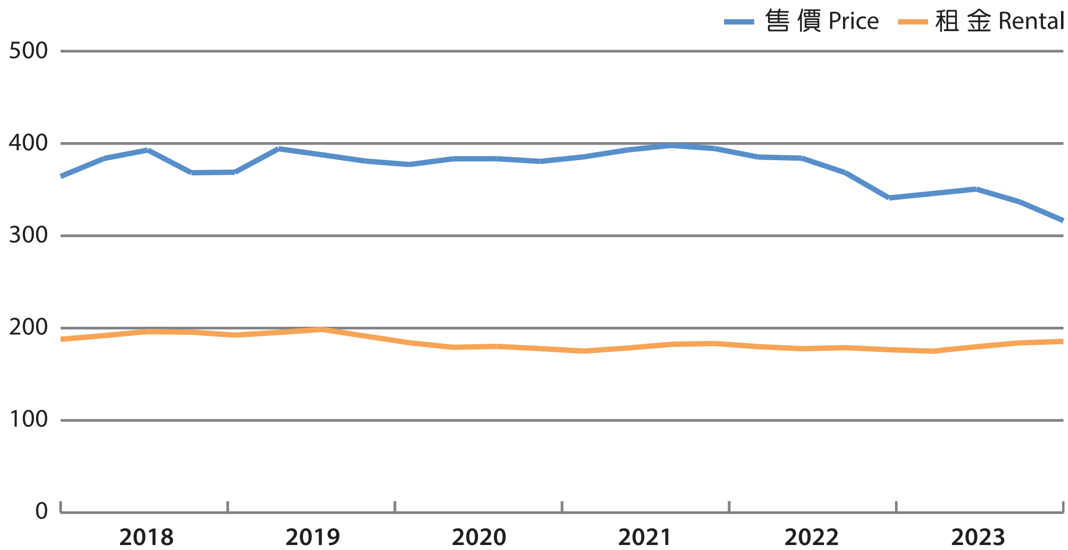
預計 2024 年落成量將升至 22 267 個單位，至 2025 年進一步升至 25 531 個單位。在 2024 年，九龍和新界將分別佔新供應量的 47% 和 45%，其餘 8% 來自港島。按地區計，九龍城的供應量佔新落成單位的 26%，其次是元朗，佔 16%。在 2025 年，新界和九龍將分別佔新供應量的 44% 和 41%。按地區計，九龍城將再度成為新單位供應量最多的地區，佔落成量的 27%。

Completions are expected to increase to 22 267 units in 2024 and then rise further to 25 531 units in 2025. In 2024, Kowloon and the New Territories will contribute 47% and 45% of the new supply respectively whereas Hong Kong Island will provide the remaining 8%. On district basis, Kowloon City will account for 26% of the new units, followed by Yuen Long at 16%. In 2025, the New Territories and Kowloon will account for 44% and 41% of the new supply respectively. District-wise, Kowloon City will be the top supplier again, providing 27% of the completions.

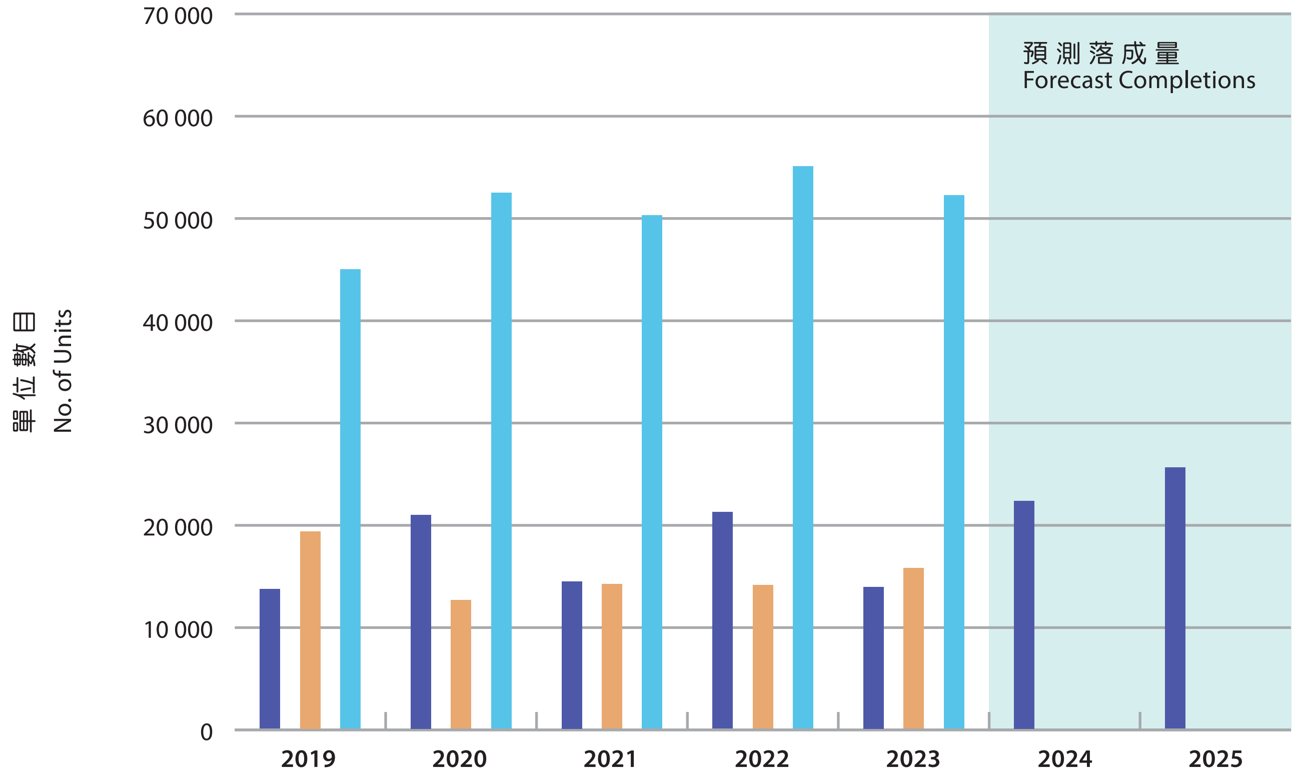
在金融狀況收緊、外圍經濟前景不明朗、本地需求疲弱和市場氣氛審慎的情況下，2023 年二手住宅市場售價雖然在首四個月曾輕微回升，但年內仍錄得跌幅。整體而言，2023 年最後一季的住宅售價較 2022 年同期下跌 7.2%。相反，租賃市場表現向好，最後一季的租金較前一年同季上升 5.1%。

Despite a slight rebound in the first four months of 2023, domestic prices in the secondary market fell in the year amid tightened financial conditions, uncertain external economic outlook, weak local demand and cautious sentiments. Overall, prices in the last quarter of 2023 declined by 7.2% over the same period in 2022. In contrast, the rental market was upbeat, registering an increase of 5.1% in the last quarter over the corresponding quarter 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



單位數目
No. of Units

	2019	2020	2021	2022	2023	2024	2025
落成量* Completions	13 643	20 888	14 386	21 168	13 852	22 267#	25 531#
入住量 Take-up	19 278	12 545	14 111	14 012	15 670		
空置量 Vacancy	44 892	52 366	50 164	54 967	52 146		
%+	3.7	4.3	4.1	4.4	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。2025年起的預測落成量包括港人首次置業（首置）項目下預計落成的資助出售房屋。

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. Forecast completions from 2025 onwards include subsidised sale flats to be completed under the Starter Homes for Hong Kong Residents (SH) projects.

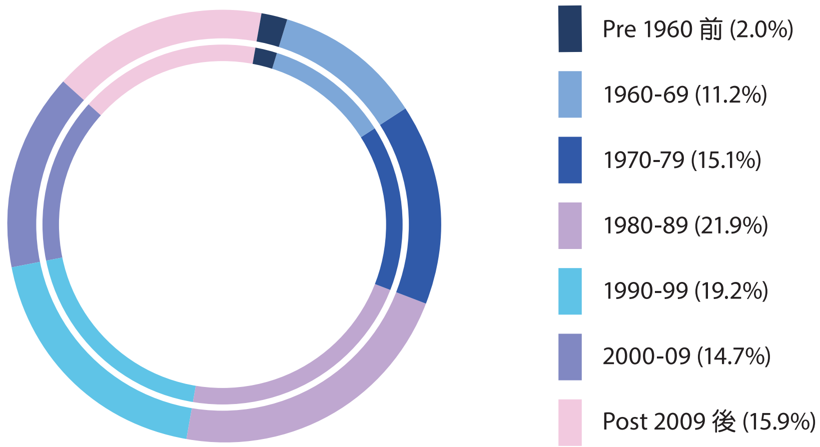
\+ 年底空置量佔總存量的百分率。
Vacancy at the end of the year as a percentage of stock.

\# 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。2023 年年底的總存量為 1 171 348 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 2023 was 1 171 348 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



2023 年有 13 533 個單位落成，其中 51% 位於九龍，44% 位於新界，5% 位於港島。供應集中在九龍城和屯門，合共佔此分類總落成量的 41%。以單位面積計，A 類和 B 類單位分別佔新供應的 58% 和 34%，而 C 類單位則佔 8%。

There were 13 533 units completed in 2023, with 51% located in Kowloon, 44% in the New Territories and 5% on Hong Kong Island. Supply was concentrated in Kowloon City and Tuen Mun, together contributing 41% of the total completions in this sub-sector. In terms of flat size, Class A and Class B units accounted for 58% and 34% of the new supply respectively, while the share for Class C units was 8%.

2023 年的入住量飆升 34% 至 17 507 個單位。年底空置量下降至 42 279 個單位，相當於此分類總存量的 3.6%。

Take-up in 2023 soared by 34% to 17 507 units. Vacancy at the year-end dropped to 42 279 units, or 3.6% of the stock in this sub-sector.

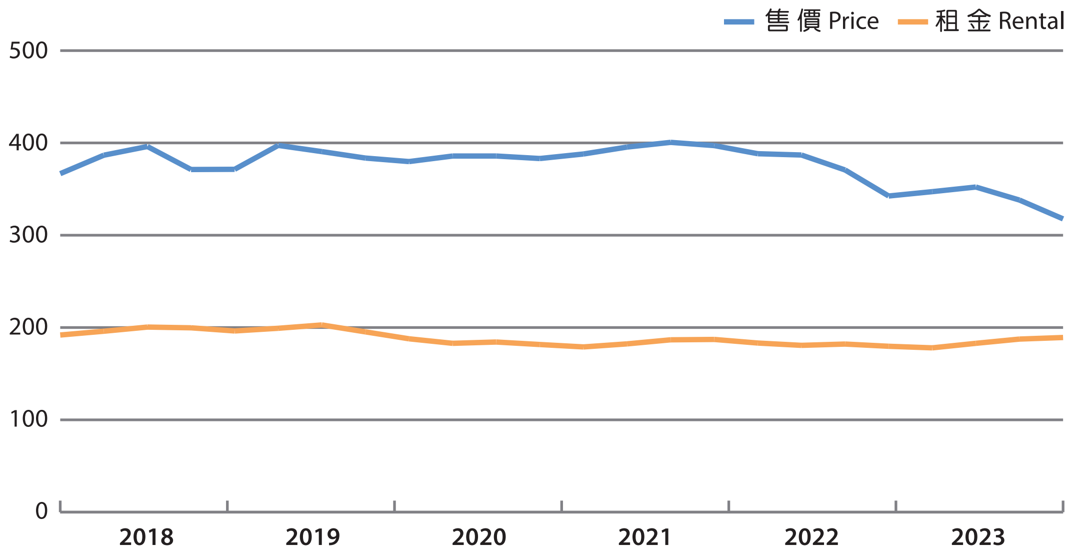
預計 2024 和 2025 年將分別有 20 916 和 24 387 個單位落成。在 2024 年，新界及九龍將分別佔 47% 和 45% 的供應量。按地區計，主要供應將位於九龍城，佔 24%，其次是元朗，佔 17%。在 2025 年，新界和九龍將分別佔新供應的 46% 和 41%，其中九龍城佔新落成單位的比例最高，為 26%。

Completions in 2024 and 2025 are estimated to be 20 916 units and 24 387 units respectively. In 2024, the New Territories and Kowloon will contribute 47% and 45% of the supply respectively. On district basis, the major supply will be located in Kowloon City at 24%, followed by Yuen Long at 17%. In 2025, the New Territories and Kowloon will provide 46% and 41% of the new supply respectively, with Kowloon City contributing the largest share of 26% of the new units.

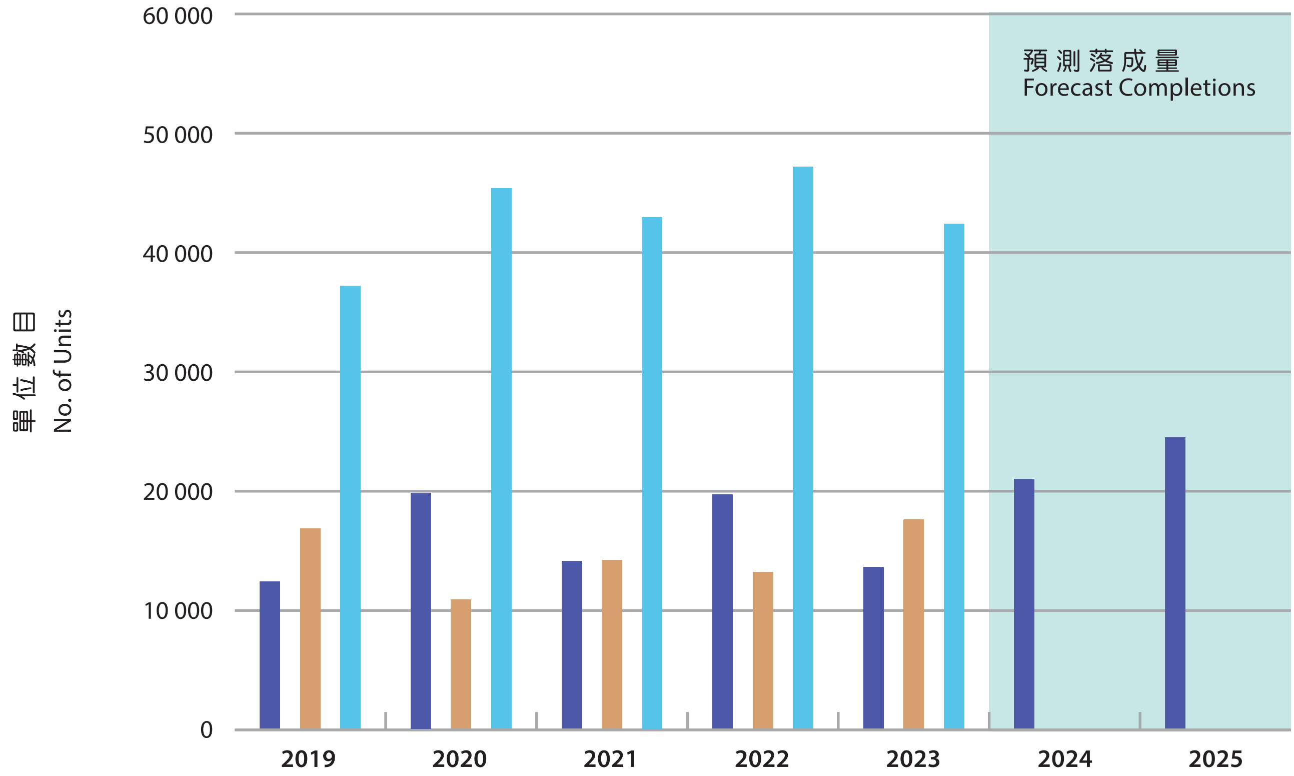
此分類的售價在2023年上半年輕微上升，但下半年顯著下降。第四季的售價較前一年同季下跌7.2%。而第四季租金則較2022年同季上升5.3%。

Prices in this sub-sector rose moderately in the first half of 2023, but fell noticeably in the second half of the year. Prices in the fourth quarter decreased by 7.2% from that of the preceding year. Meanwhile, rents grew by 5.3% in the fourth quarter over the corresponding quarter in 2022.

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

	2019	2020	2021	2022	2023	2024	2025
落成量* Completions	12 302	19 751	14 016	19 595	13 533	20 916#	24 387#
入住量 Take-up	16 751	10 787	14 101	13 100	17 507		
空置量 Vacancy	37 091	45 260	42 860	47 081	42 279		
%+	3.3	4.0	3.8	4.1	3.6		

* 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。2025年起的預測落成量包括港人首次置業（首置）項目下預計落成的資助出售房屋。

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. Forecast completions from 2025 onwards include subsidised sale flats to be completed under the Starter Homes for Hong Kong Residents (SH) projects.

\+ 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.

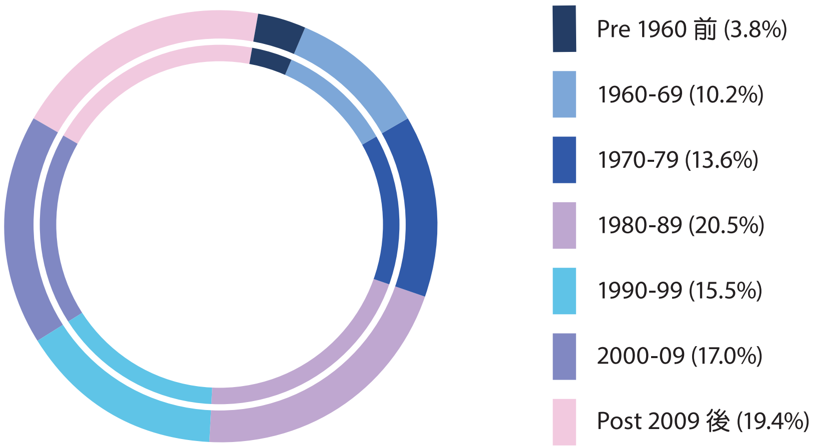
\# 預測數字
Forecast figures

私人住宅（大型單位）Private Domestic (Large Units)

此分類包括實用面積為100平方米或以上的單位。2023年年底的總存量為98 483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 m^2 or above. Stock at the end of 2023 was 98 483 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



2023年共有319個單位落成，其中49%位於港島，35%位於九龍及16%位於新界。按地區計，中西區和南區合共佔落成量的47%。

A total of 319 units were completed in 2023, of which 49% were on Hong Kong Island, 35% in Kowloon and 16% in the New Territories. On district level, the Central and Western district and the Southern district altogether accounted for 47% of the completions.

此分類的入住量在 2023 年錄得負數 1 837 個單位。年底空置量上升至 9 867 個單位，相當於此分類單位總存量的 10.0%。

A negative take-up of 1 837 units was recorded for this sub-sector in 2023. Vacancy at the year-end increased to 9 867 units, representing 10.0% of the stock in this sub-sector.

預計此分類的落成量在 2024 和 2025 年將分別上升至 1 351 和 1 144 個單位。該兩年的新供應將主要來自九龍，分別佔 2024 和 2025 年預測落成量的 69% 和 53%。按地區計，九龍城的供應最多，在 2024 和 2025 年將分別佔新落成量的 50% 和 53%。

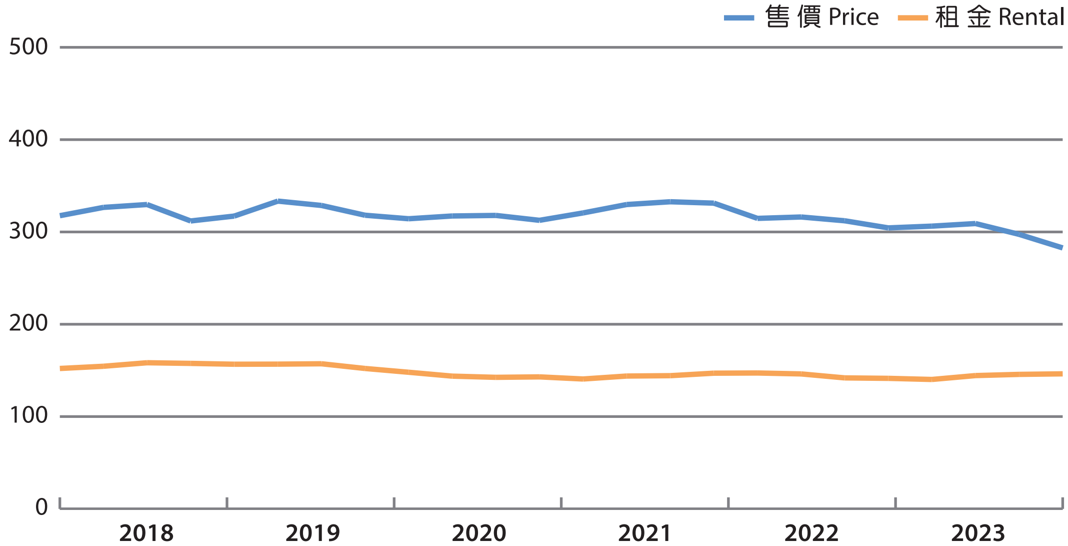
Completions in this sub-sector are expected to rise to 1 351 units in 2024 and 1 144 units in 2025. New supply will mainly come from Kowloon in both years, accounting for 69% and 53% of the forecast completions in 2024 and 2025 respectively. On district basis, Kowloon City will contribute the most supply, providing 50% and 53% of the new completions in 2024 and 2025 respectively.

私人住宅（大型單位）Private Domestic (Large Units)

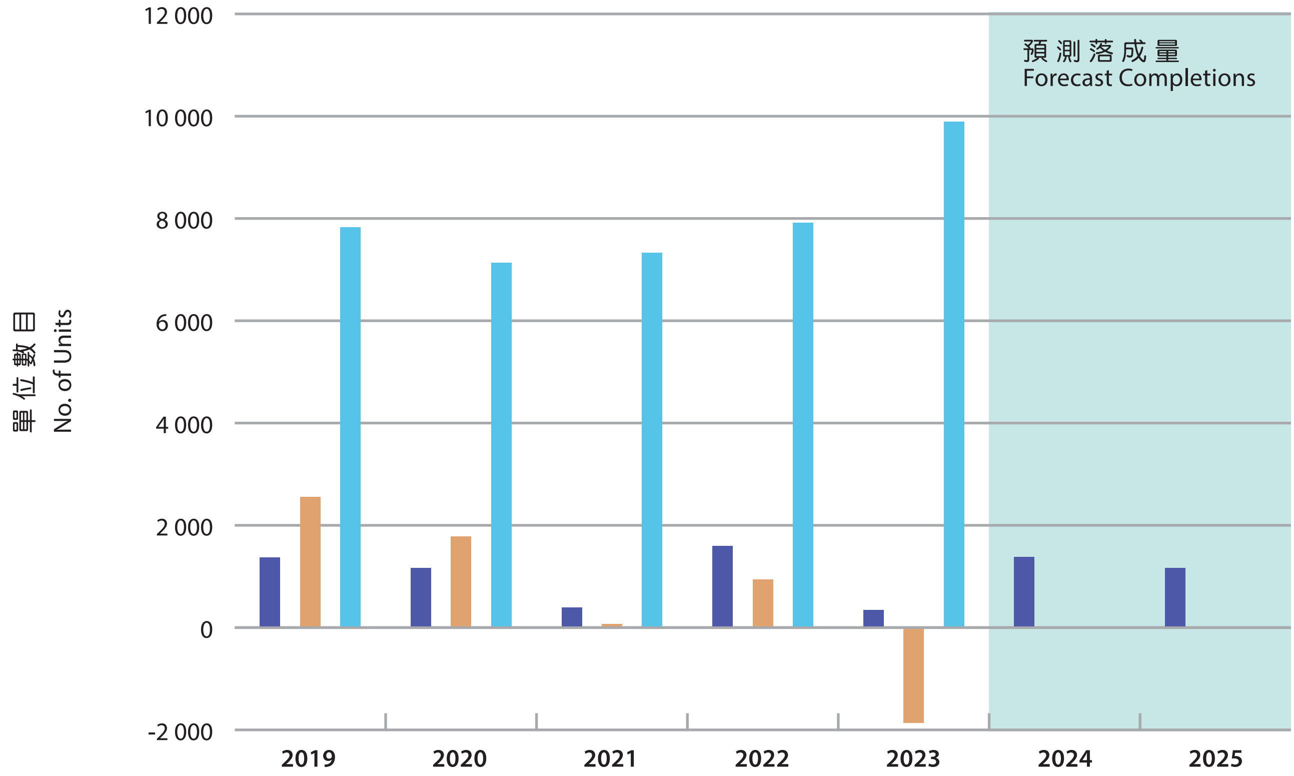
與中 / 小型單位的分類相若，此分類物業的售價在 2023 年上半年輕微上升，但至下半年回落。第四季的售價較前一年同季下跌 7.1%。第四季的租金則較 2022 年同季錄得 3.5% 的升幅。

Similar to the sub-sector of the small/medium units, prices in this sub-sector grew mildly in the first half of 2023 but slid in the second half of the year. Prices in the fourth quarter fell by 7.1% from that of the preceding year. Rents recorded an increase of 3.5% in the fourth quarter compared with the corresponding quarter in 2022.

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

	2019	2020	2021	2022	2023	2024	2025
落成量 * Completions	1 341	1 137	370	1 573	319	1 351#	1 144#
入住量 Take-up	2 527	1 758	10	912	-1 837		
空置量 Vacancy	7 801	7 106	7 304	7 886	9 867		
%+	8.1	7.3	7.5	8.0	10.0		

* 2025年起的預測落成量包括港人首次置業(首置)項目下預計落成的資助出售房屋。
Forecast completions from 2025 onwards include subsidised sale flats to be completed under the Starter Homes for Hong Kong Residents (SH) projects.

\+ 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.

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