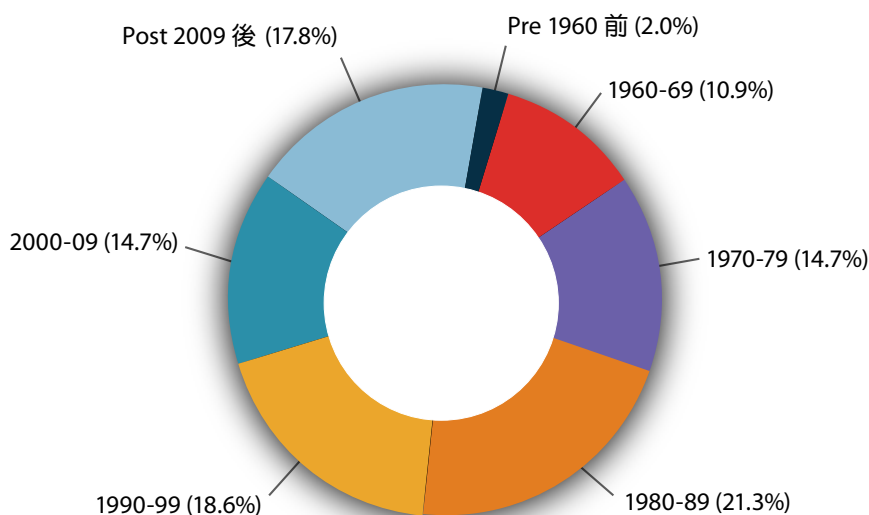




這類別包括設有專用煮食設施、浴室和廁所的獨立居住單位，但不包括村屋、解放軍轄下的宿舍、公用事業機構物業附設的宿舍、私營機構宿舍（包括教育院校的學生宿舍）、醫院管理局轄下的宿舍，以及酒店和旅舍。2024 年年底的整體總存量為 1 291 956 個單位。圖表顯示按樓齡劃分的總存量。

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 2024, the overall stock was 1 291 956 units. The chart shows the stock distribution by age.

按樓齡分類的總存量 Stock Distribution by Age



2024 年私人住宅落成量較前一年急增 75% 至 24 261 個單位。新界和九龍分別佔落成量的 48% 和 45%，其餘 7% 來自港島。九龍城供應的落成單位最多，佔 33%，其次是元朗和屯門，各佔 17%。

Completions in 2024 soared by 75% over the previous year to 24 261 units. The New Territories and Kowloon contributed 48% and 45% of the completions respectively, while the remainder 7% were from Hong Kong Island. The largest share of these completed units came from Kowloon City at 33%, followed by Yuen Long and Tuen Mun at 17% each.



2024 年的入住量增至 17 305 個單位。年底空置量為 57 900 個單位，相當於總存量的 4.5%。空置單位中，有 14 256 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 2024 increased to 17 305 units. Vacancy at the year-end was 57 900 units, equivalent to 4.5% of the total stock. Among these vacant units, 14 256 units were not yet issued with Certificate of Compliance or Consent to Assign after obtaining the Occupation Permit.



2025 和 2026 年的預測落成量分別為 20 862 個和 20 098 個單位。在 2025 年，新落成量將主要集中在九龍和新界，合共佔總落成量的 85%。按地區計，九龍城佔新落成單位的 26%，其次是屯門和西貢，各佔 10%。在 2026 年，單是新界便提供預測落成量的 69%。按地區計，西貢將提供 27% 的落成量，另有 16% 將來自大埔。

Forecast completions in 2025 and 2026 are 20 862 units and 20 098 units respectively. In 2025, new completions will mainly be concentrated in Kowloon and the New Territories, altogether accounting for 85% of the total completions. On district basis, Kowloon City will account for 26% of the new units, followed by Tuen Mun and Sai Kung at 10% each. In 2026, the New Territories alone will contribute 69% of the anticipated completions. District-wise, Sai Kung will provide 27% of the completions while Tai Po will provide another 16%.

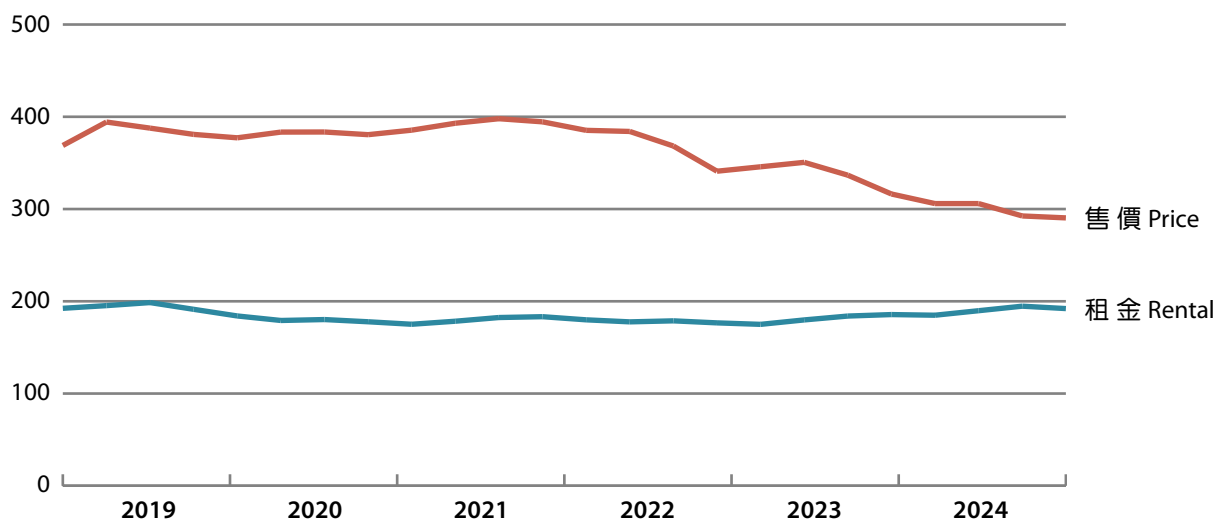


所有需求管理措施在 2024 年第一季撤銷，使住宅銷售市場在第二季得到短暫的喘息。然而，在外圍經濟前景不明朗和資金流動性收緊的情況下，市場氣氛審慎，住宅售價及後重拾跌勢。由於連續多次減息，加上按揭成數上限和供款與入息比率上限有所調整，銷售市場在 2024 年最後一季回穩。最終，住宅售價以 2023 和 2024 年最後一季相比，下跌 8.2%。相反，受惠於不少人才流入，加上學生住屋需求和「轉買為租」的趨勢，租賃市場的表現勝過銷售市場，最後一季的租金較前一年同季錄得 3.5% 的升幅。



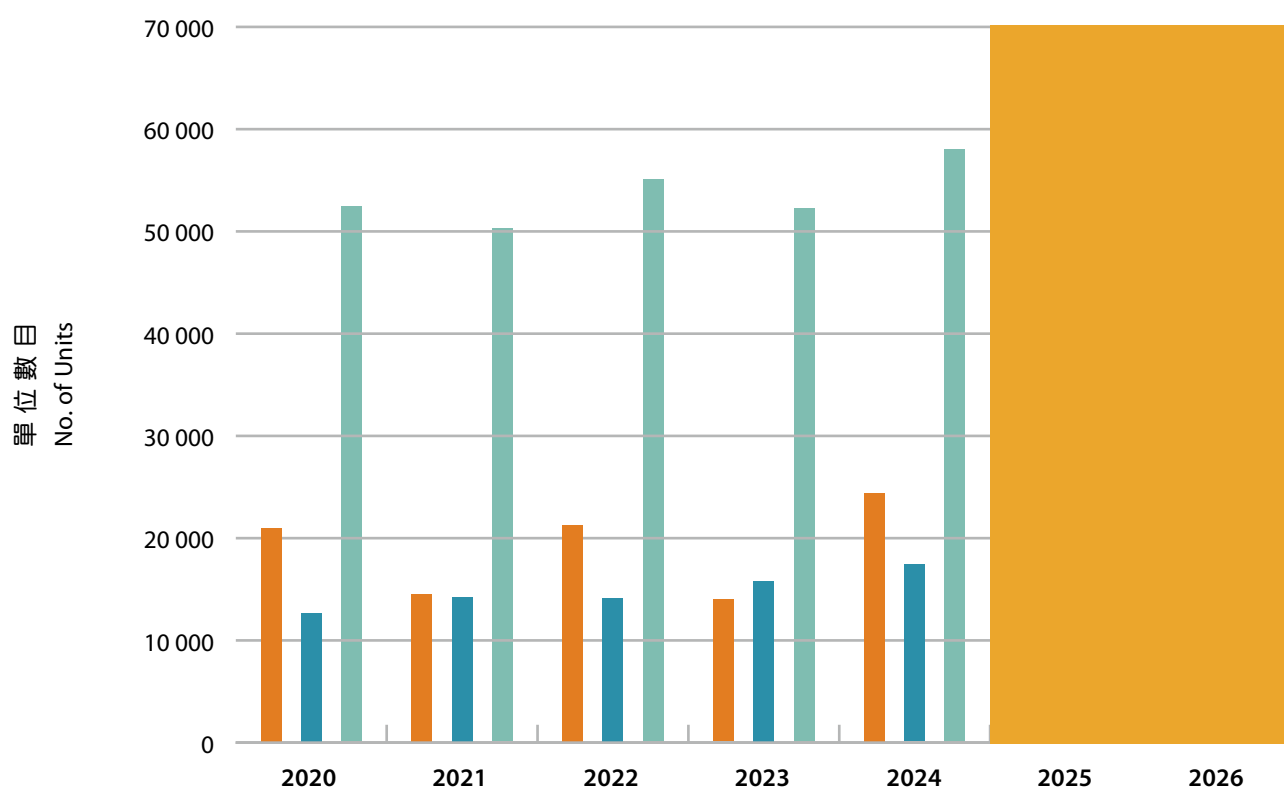
The cancellation of all demand-side management measures in the first quarter of 2024 provided the domestic sales market a brief respite in the second quarter. Prices thereafter resumed their downward trend amid cautious sentiments due to uncertain external economic outlook and tight financial liquidity. The sales market was stabilised in the last quarter of 2024 following a number of successive interest rate cuts together with the adjustments to the maximum loan-to-value ratio and the debt servicing ratio limit. In the end, domestic prices declined by 8.2% between the last quarters of 2023 and 2024. In contrast, buoyed by the influx of talents, demand for housing for students and a shifting trend from home purchase to leasing, the rental market outperformed the sales market, with rents registering an increase of 3.5% 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

	2020	2021	2022	2023	2024	2025	2026
落成量* Completions	20 888	14 386	21 168	13 852	24 261	20 862 [#]	20 098 [#]
入住量 Take-up	12 545	14 111	14 012	15 670	17 305		
空置量 Vacancy	52 366	50 164	54 967	52 146	57 900		
% ⁺	4.3	4.1	4.4	4.1	4.5		

* 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.

預測數字
Forecast figures