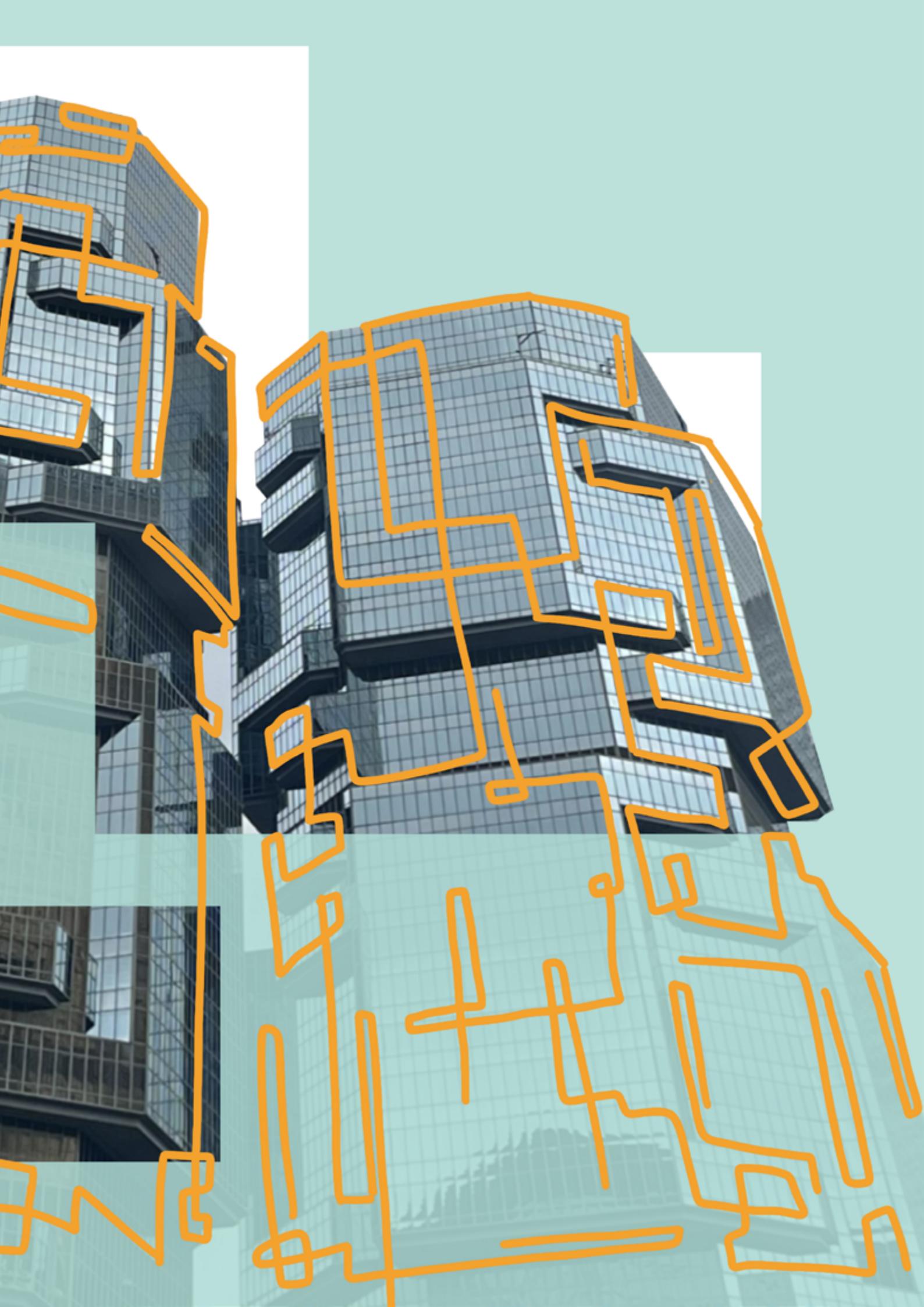


私人寫字樓

PRIVATE OFFICE

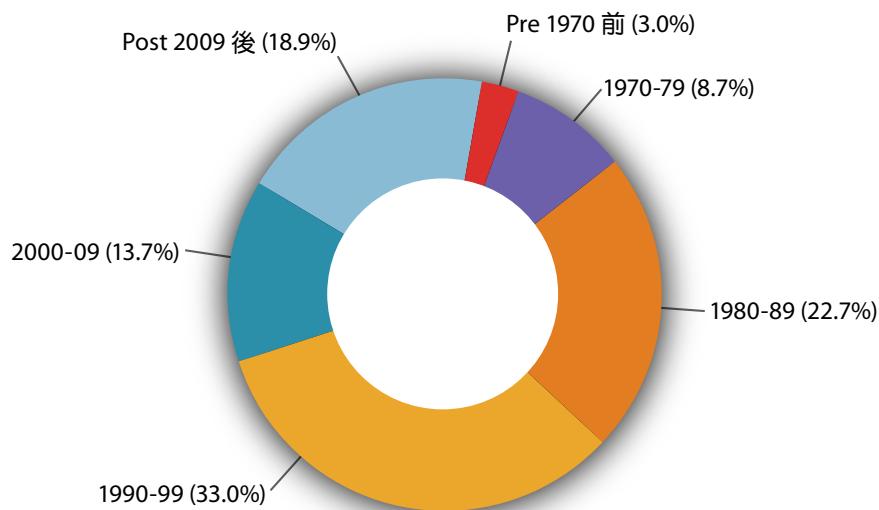




2024年年底，私人寫字樓的總存量為13 305 400平方米，當中甲級寫字樓佔66%，乙級寫字樓佔23%，丙級寫字樓佔11%。位於上環、中區、灣仔、銅鑼灣和尖沙咀核心地區的寫字樓面積在2024年年底共佔總存量的49%。圖表顯示按樓齡劃分的整體寫字樓總存量。

The total stock of private offices at the end of 2024 amounted to 13 305 400 m², 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 2024. The chart shows the total stock of all offices by age.

按樓齡分類的總存量 Stock Distribution by Age



2024年私人寫字樓的落成量輕微下跌至147 300平方米，其中61%位於核心地區。在這些落成量中，甲級寫字樓的落成量為146 300平方米，佔了近乎全部的總落成量。

Office completions in 2024 decreased slightly to 147 300 m², with 61% situated in the core districts. Among these completions, Grade A office space, amounting to 146 300 m², contributed almost the entire total completions.



年內整體使用量錄得負數 58 600 平方米。年底空置量上升至 2 165 700 平方米，相當於總存量的 16.3%。

A negative overall take-up of 58 600 m² was recorded for the year. Vacancy at the year-end rose to 2 165 700 m², equivalent to 16.3% of the total stock.



預計落成量在 2025 年將大幅增加至 308 500 平方米，但到 2026 年將下跌至 116 200 平方米。在 2025 年，72% 的新落成量將主要來自九龍，其中油尖旺佔總落成量的 60%。在 2026 年，大部分新落成量將集中在灣仔及中西區，分別佔總落成量的 54% 及 35%。

Completions are expected to surge to 308 500 m² in 2025 but plummet to 116 200 m² in 2026. In 2025, 72% of the new completions will mainly come from Kowloon, with Yau Tsim Mong providing 60% of the total completions. In 2026, the major new completions will be concentrated in Wan Chai and the Central and Western district, accounting for 54% and 35% of the total completions respectively.

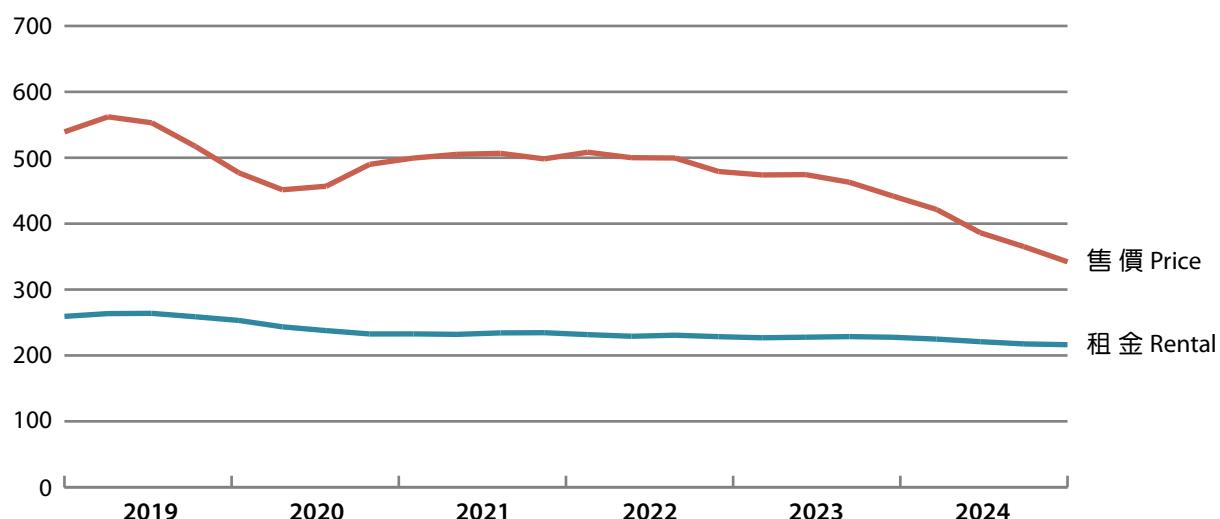


寫字樓售價在 2024 年最後一季與 2023 年同期相比下跌 22.6%，而租金於 2024 年最後一季亦較 2023 年同期錄得 5.0% 的跌幅。

Office prices dropped by 22.6% in the last quarter of 2024 over the same period in 2023. Rents recorded a decrease of 5.0% in the last quarter of 2024 over the corresponding period in 2023.

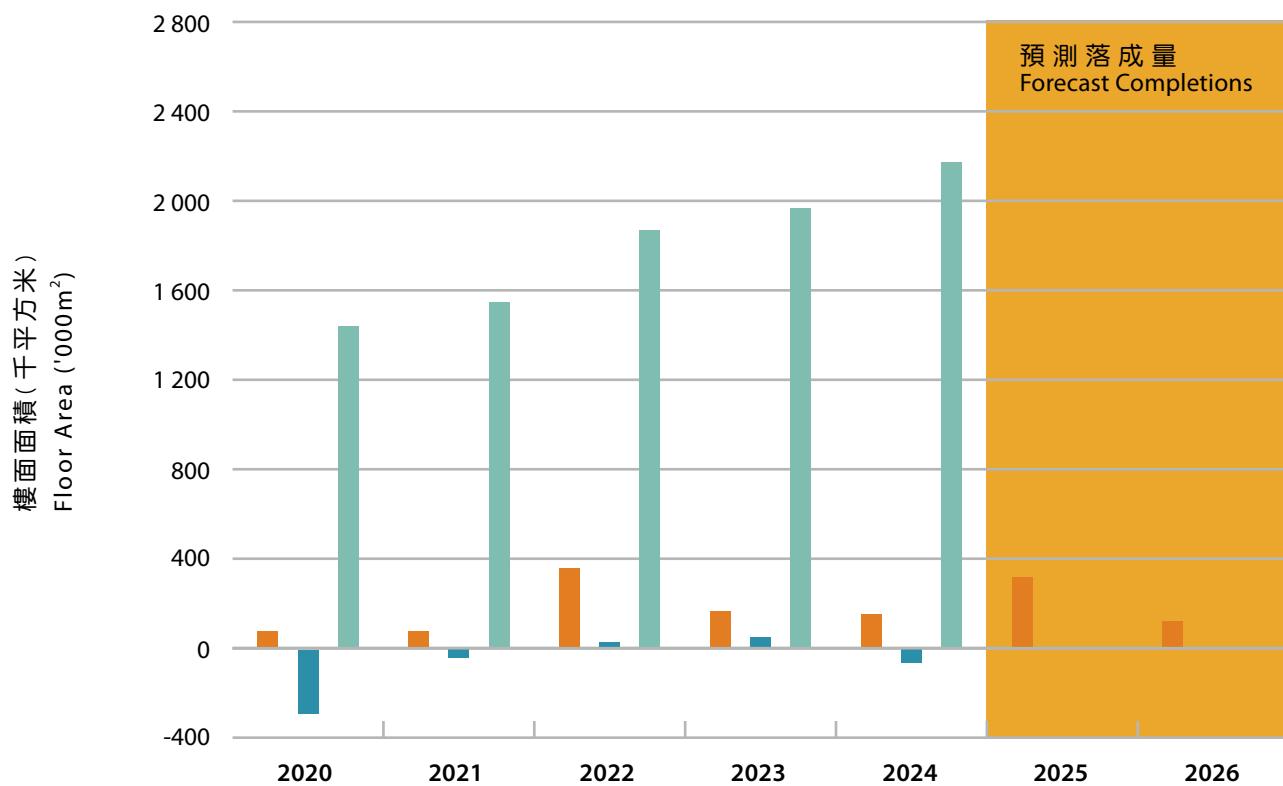


售價及租金指數 Price and Rental Indices





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



	2020	2021	2022	2023	2024	2025	2026
落成量 Completions	69	70	351	159	147	309 [#]	116 [#]
使用量 Take-up	-286	-40	19	41	-59		
空置量 Vacancy	1 434	1 541	1 860	1 960	2 166		
% ⁺	11.5	12.3	14.4	14.9	16.3		

+ 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.

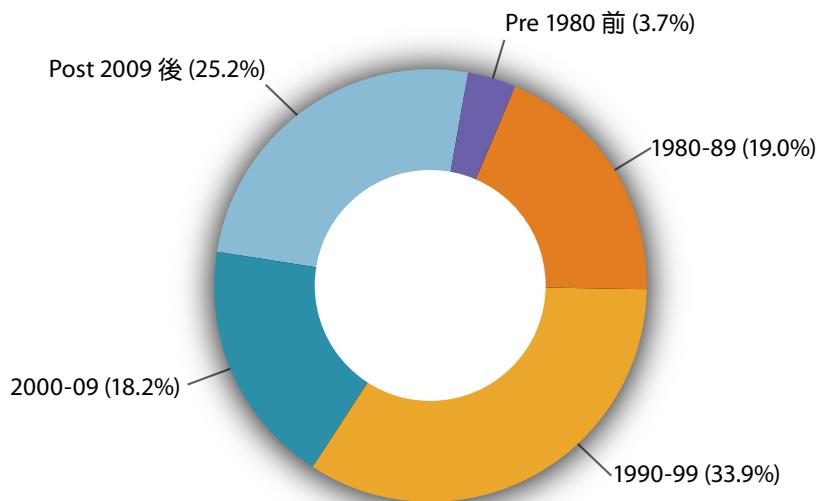
預測數字
Forecast figures



2024年年底，甲級寫字樓的總存量為8 779 600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 2024 was 8 779 600 m², 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47%，而九龍與新界則分別佔40%和13%。

Hong Kong Island accounted for 47% of the stock, while the shares for Kowloon and the New Territories were 40% and 13% respectively.

2024年甲級寫字樓的落成量維持平穩，為146 300平方米，主要來自中西區和灣仔。

Completions of Grade A offices in 2024 remained steady at 146 300 m², mainly coming from the Central and Western district and Wan Chai.



2024 年錄得負數 3 700 平方米的使用量。年底空置量上升至 1 527 700 平方米，相當於甲級寫字樓總存量的 17.4%，其中 34% 的空置面積位於核心地區。

A negative take-up of 3 700 m² was recorded in 2024. The year-end vacancy rose to 1 527 700 m², representing 17.4% of Grade A stock. 34% of the vacant spaces was found in the core districts.



預測落成量在 2025 年將大幅增加至 288 600 平方米，但其後在 2026 年將回落至 102 600 平方米。2025 年的新落成量將集中在油尖旺，佔預計總落成量的 62%。在 2026 年，灣仔和中西區將合共提供全部落成量，分別佔總落成量的 61% 和 39%。

Forecast completions will surge to 288 600 m² in 2025 but then retreat to 102 600 m² in 2026. New completions in 2025 will be concentrated in Yau Tsim Mong, providing 62% of the total. In 2026, completions will all be coming on stream from Wan Chai and the Central and Western district, accounting for 61% and 39% of the total completions respectively.

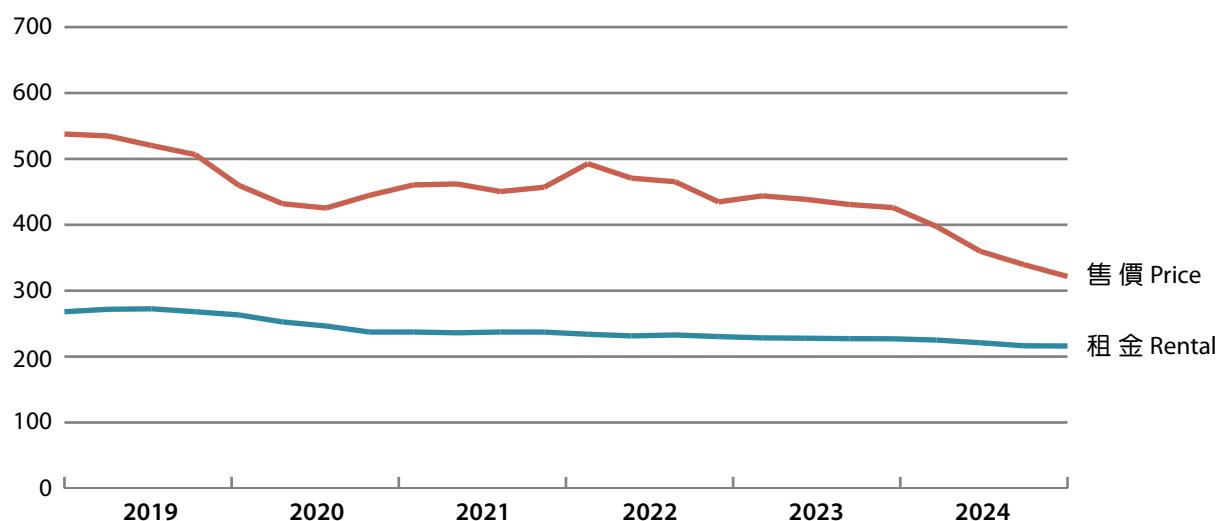


甲級寫字樓銷售市場全年表現黯淡，以第四季與2023年同期相比，售價錄得24.5%的跌幅。全年租金亦下跌，與2023年第四季相比，2024年第四季錄得4.8%的跌幅。

Sales market of Grade A offices was lacklustre over the year, with prices registering a decrease of 24.5% in the fourth quarter over the same period in 2023. Rents also fell throughout the year, recording a decrease of 4.8% between the fourth quarters of 2023 and 2024.

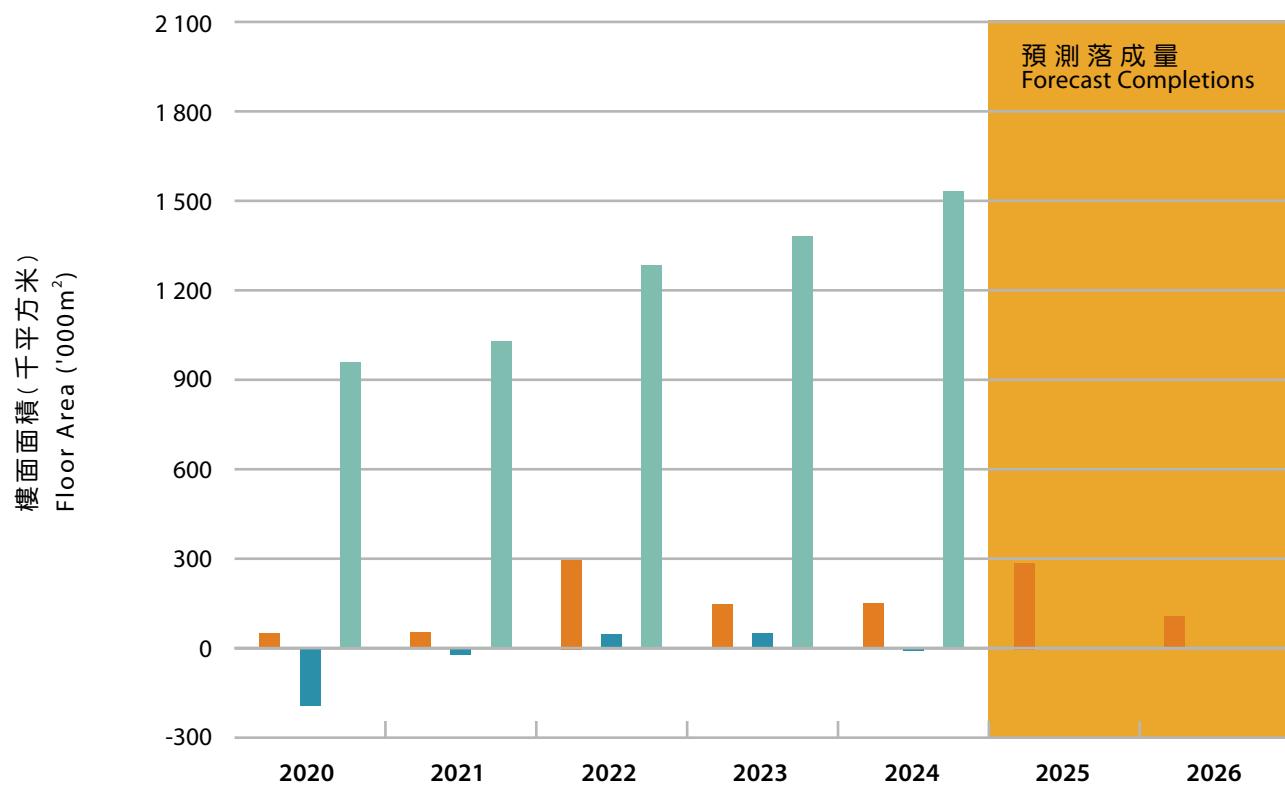


售價及租金指數 Price and Rental Indices





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



	2020	2021	2022	2023	2024	2025	2026
落成量 Completions	46	49	299	144	146	289 [#]	102 [#]
使用量 Take-up	-189	-18	42	45	-4		
空置量 Vacancy	955	1 023	1 280	1 377	1 528		
% ⁺	11.8	12.5	15.1	16.0	17.4		

+ 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.

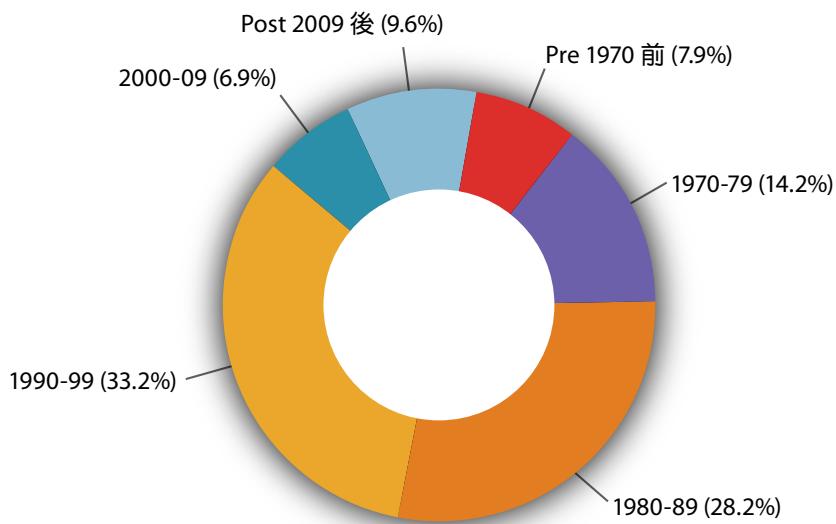
預測數字
Forecast figures



2024年年底，乙級寫字樓的總存量為3 046 300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 3 046 300 m² at the end of 2024, 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55%，而九龍與新界則分別佔36%和9%。

Hong Kong Island accounted for 55%, while Kowloon and the New Territories contributed 36% and 9% respectively.

2024年並無錄得乙級寫字樓落成量。

No Grade B office completions were recorded in 2024.



乙級寫字樓在 2024 年的使用量為負數 25 800 平方米。年底空置量為 475 300 平方米，相當於乙級寫字樓總存量的 15.6%，其中 53% 的空置面積位於核心地區。

Take-up of Grade B offices in 2024 was negative at 25 800 m². The year-end vacancy, amounting to 475 300 m², was equivalent to 15.6% of the Grade B stock. 53% of the vacant spaces was found in the core districts.



預計落成量在 2025 和 2026 年將分別為 19 600 平方米和 13 600 平方米。2025 年的所有落成量將來自觀塘、中西區和油尖旺，2026 年的新落成量則主要來自東區和油尖旺。

It is estimated that completions will be 19 600 m² and 13 600 m² in 2025 and 2026 respectively. In 2025, the whole completions will be contributed from Kwun Tong, the Central and Western district and Yau Tsim Mong. The new completions in 2026 will mainly come from the Eastern district and Yau Tsim Mong.

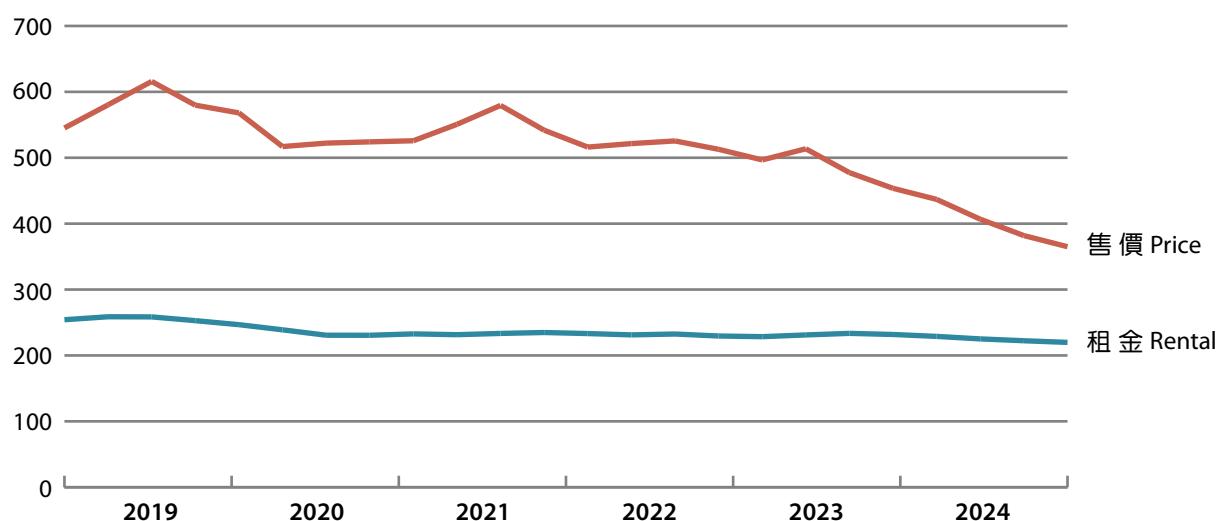


以 2024 年最後一季與 2023 年同期相比，乙級寫字樓售價下跌 19.5%。租金亦見下跌，但幅度溫和，以 2023 和 2024 年最後一季作比較，錄得 5.2% 的跌幅。

Prices of Grade B offices declined by 19.5% in the last quarter of 2024 over the same period in 2023. Rents also registered a fall but at a moderate rate of 5.2% between the last quarters of 2023 and 2024.

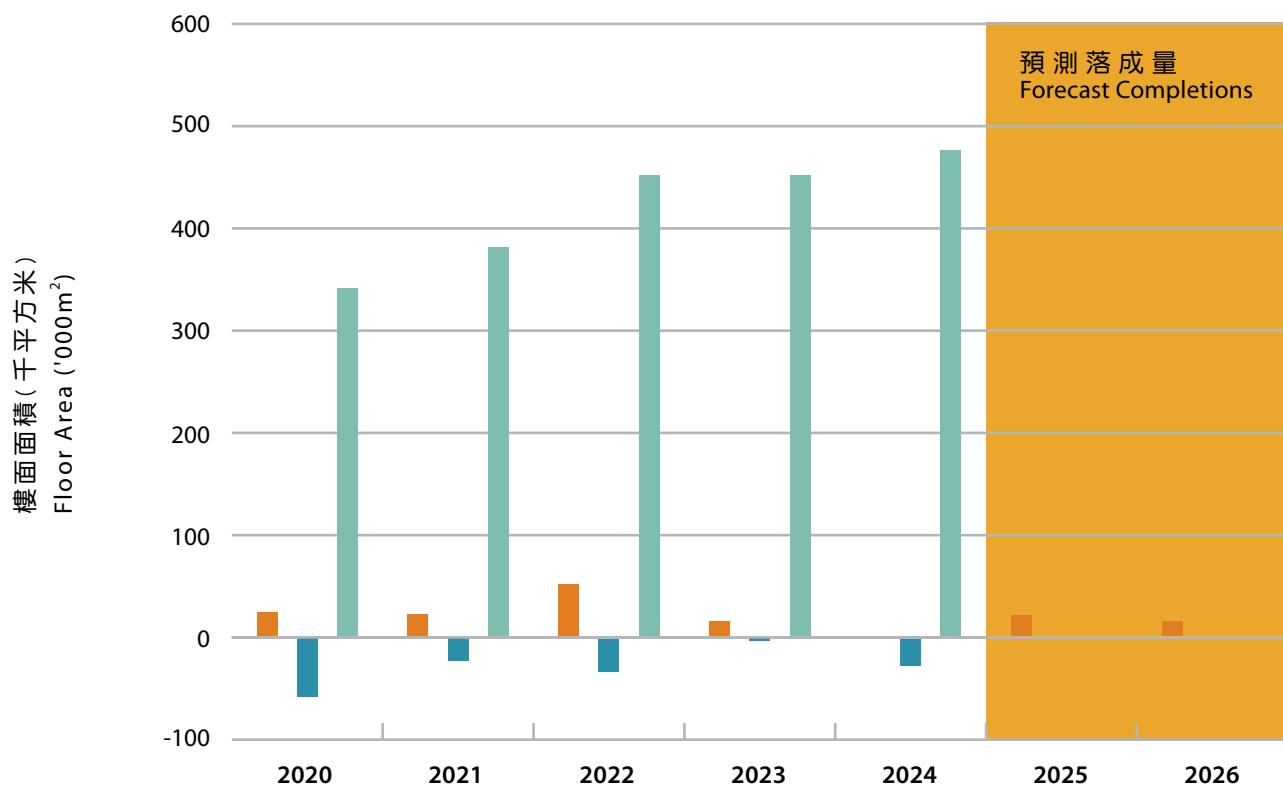


售價及租金指數 Price and Rental Indices





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)						
	2020	2021	2022	2023	2024	2025	2026
落成量 Completions	23	21	50	14	0	20 [#]	14 [#]
使用量 Take-up	-57	-22	-32	-2	-26		
空置量 Vacancy	340	380	450	450	475		
% ⁺	11.9	13.1	15.1	14.9	15.6		

+ 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.

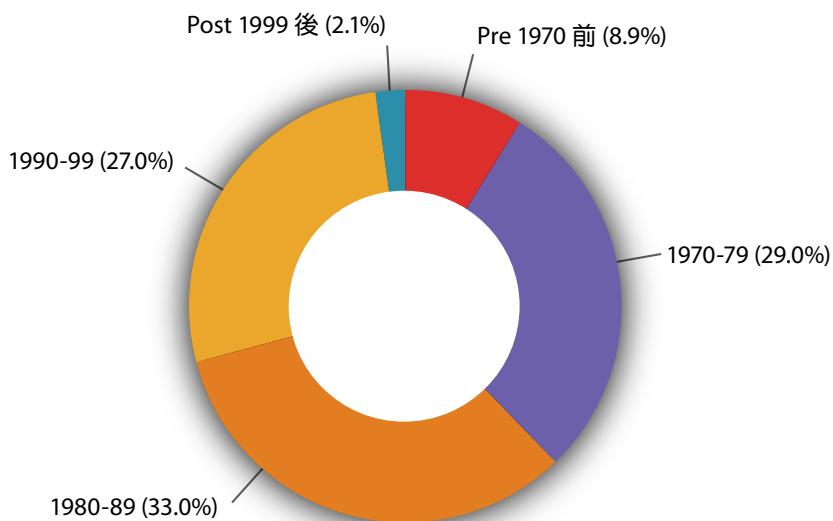
預測數字
Forecast figures



2024年年底，丙級寫字樓的總存量為1 479 500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 1 479 500 m² at the end of 2024, 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 the stock, while the shares for Kowloon and the New Territories were 33% and 2% respectively.

2024年丙級寫字樓的落成量為1 000平方米，全部來自灣仔。

Completions for Grade C offices in 2024 were 1 000 m². All came from Wan Chai.



丙級寫字樓的使用量錄得負數 29 100 平方米。年底空置量為 162 700 平方米，佔丙級寫字樓總存量的 11.0%，當中 73% 的空置面積位於核心地區。

Grade C offices registered a negative take-up of 29 100 m². The year-end vacancy amounted to 162 700 m², representing 11.0% of its stock. 73% of the vacant spaces was found in the core districts.



預計 2025 年將有 300 平方米的丙級寫字樓在東區落成，2026 年則不會有新落成量。

Grade C office space of 300 m² from the Eastern district will be expected in 2025. In 2026, there will be no new completions.

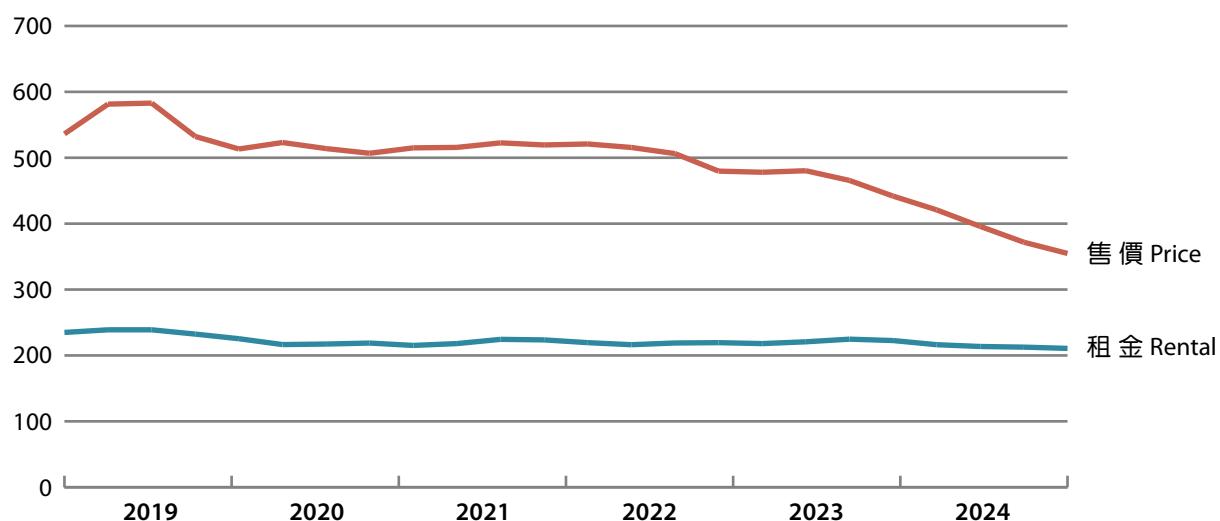


丙級寫字樓售價全年下滑。以 2023 和 2024 年第四季相比，售價錄得 19.7% 的跌幅，而同期租金亦溫和下跌 5.3%。

Prices of Grade C offices dipped throughout the year, registering a drop of 19.7% between the fourth quarters of 2023 and 2024, whereas rents fell mildly by 5.3% during the same period.

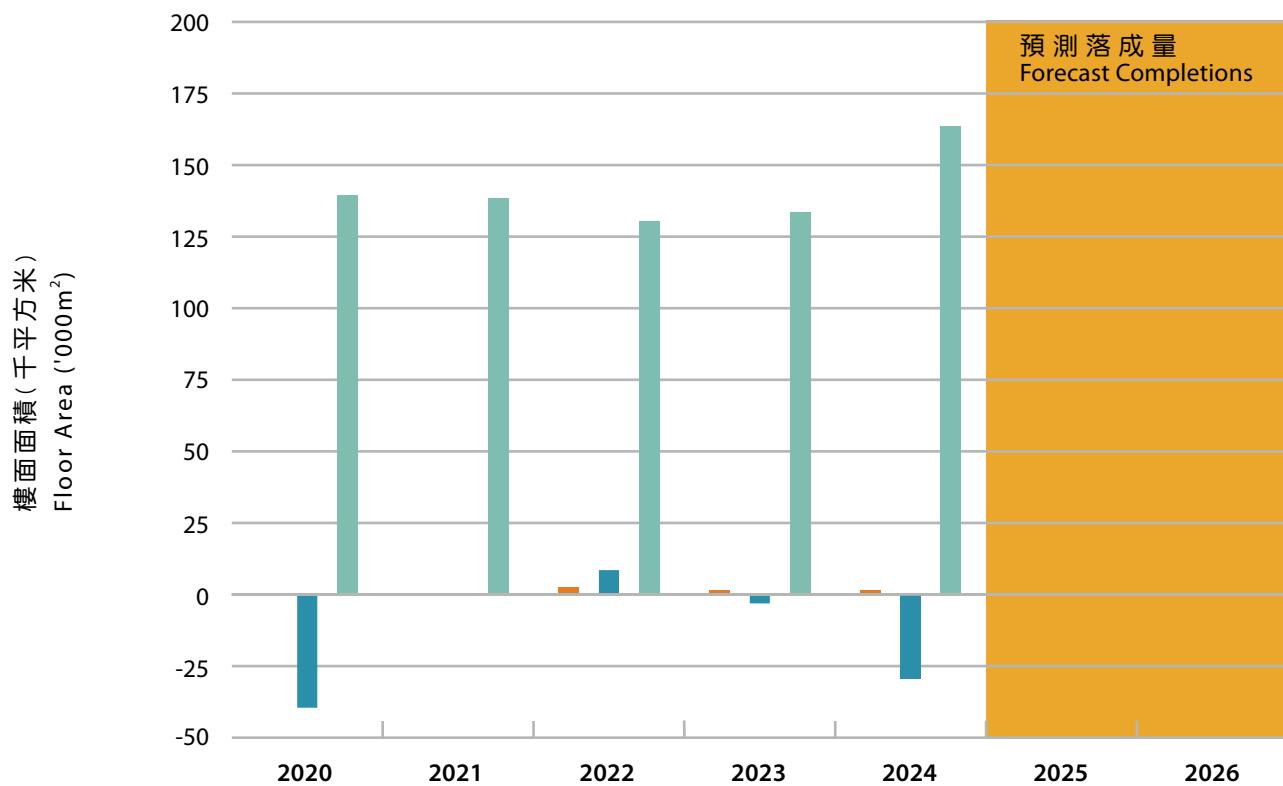


售價及租金指數 Price and Rental Indices





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)						
	2020	2021	2022	2023	2024	2025	2026
落成量 Completions	0	0	2	1	1	0 [#]	0 [#]
使用量 Take-up	-40	0	9	-2	-29		
空置量 Vacancy	139	138	130	133	163		
% ⁺	9.4	9.3	8.8	9.0	11.0		

+ 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