

私人住宅

PRIVATE
DOMESTIC

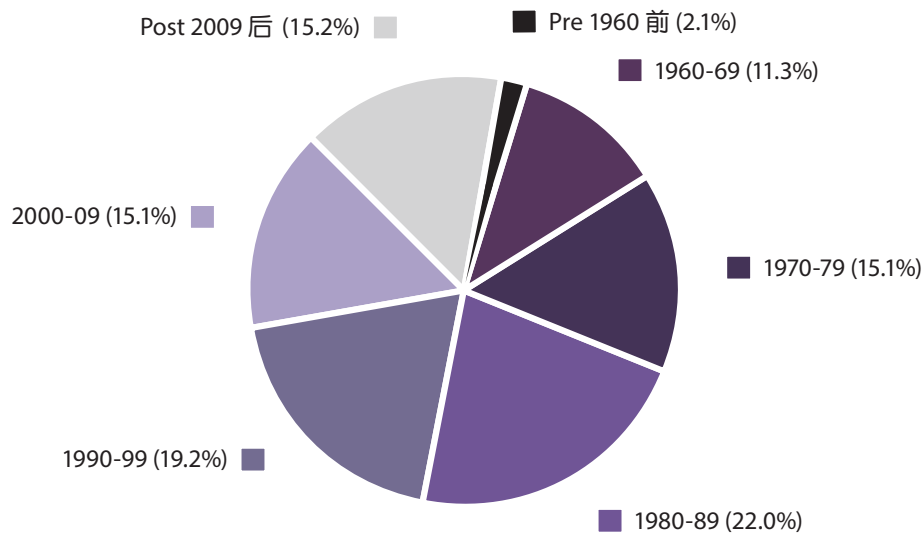




这类别包括设有专用煮食设施、浴室和厕所的独立居住单位，但不包括村屋、解放军辖下的宿舍、公用事业机构物业附设的宿舍、私营机构宿舍（包括教育院校的学生宿舍）、医院管理局辖下的宿舍，以及酒店和旅舍。2022年年底的整体总存量为1 256 722个单位。图表显示按楼龄划分的总存量。

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 2022, the overall stock was 1 256 722 units. The chart shows stock distribution by age.

按楼龄分类的总存量 Stock Distribution by Age



2022年私人住宅落成量为21 168个单位，较前一年上升47%。新界和九龙分别占落成量的61%和27%，而港岛占总数的12%。在年内落成单位中，九龙城供应最多新单位，占整体落成量的20%，其次是元朗和沙田，各占14%。

Completions in 2022 were 21 168 units, up by 47% from the previous year. The New Territories and Kowloon contributed 61% and 27% of the completions respectively, while Hong Kong Island accounted for 12% of the total. Of these completed units, Kowloon City contributed the largest share of the new units, at 20% of the overall completions, followed by Yuen Long and Sha Tin at 14% each.

2022 年的入住量为 14 012 个单位，与 2021 年的水平相若。年底空置量上升至 54 967 个单位，占总存量的 4.4%。空置单位中，有 7 875 个于占用许可证发出后仍未获发满意纸或转让同意书。

Take-up in 2022 at 14 012 units remained at a similar level as that of 2021. Vacancy at the year-end increased to 54 967 units, or 4.4% of the total stock. Among these vacant units, 7 875 units were not yet issued with Certificate of Compliance or Consent to Assign after obtaining the Occupation Permit.



预计 2023 年落成量将放缓至 19 953 个单位，至 2024 年升至 26 970 个单位。在 2023 年，52% 的新供应将来自九龙，其余有 42% 来自新界和 6% 来自港岛。按地区计，九龙城的供应量占新落成单位的 24%，其次是屯门和观塘，各占 14%。在 2024 年，九龙和新界将分别占新供应量的 47% 和 46%。按地区计，九龙城将提供落成量的 33%。

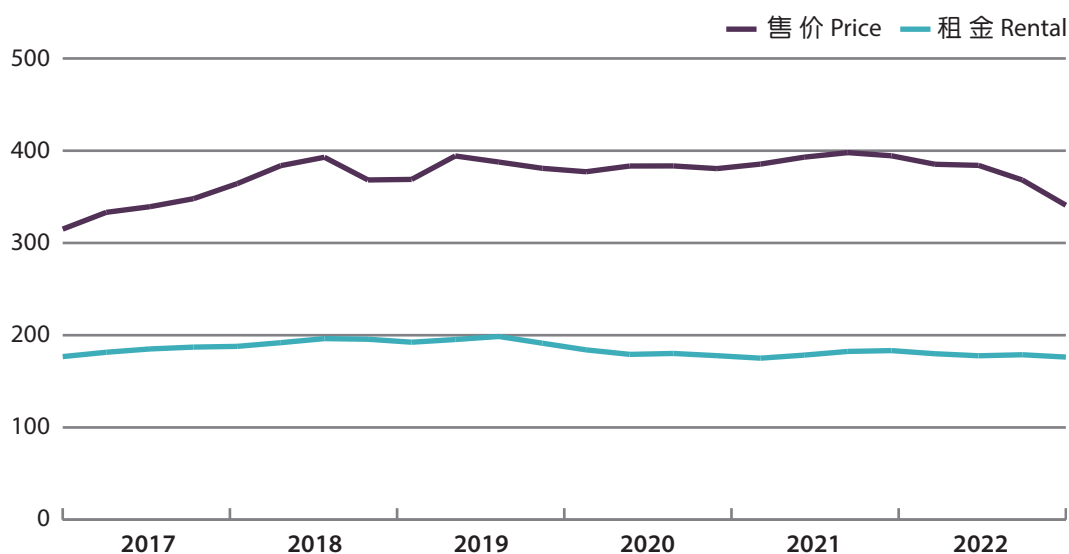
Completions are expected to ease to 19 953 units in 2023 and then surge to 26 970 units in 2024. In 2023, 52% of the new supply will come from Kowloon whereas the remainder will be from the New Territories at 42% and Hong Kong Island at 6%. On district basis, Kowloon City will account for 24% of the new units, followed by Tuen Mun and Kwun Tong at 14% each. In 2024, Kowloon and the New Territories will account for 47% and 46% of the new supply respectively. District-wise, Kowloon City will provide 33% of the completions.

在年内持续加息、本地需求疲软及市场信心减弱的情况下，2022年二手住宅市场售价呈急剧跌势。年初售价轻微下滑，但接近下半年时跌幅加剧。整体而言，2022年最后一季的住宅售价较2021年同期显著下跌13.6%。租金在2022年上半年下跌，至第三季回稳，但在第四季再现跌势，第四季的整体租金按年下跌3.8%。

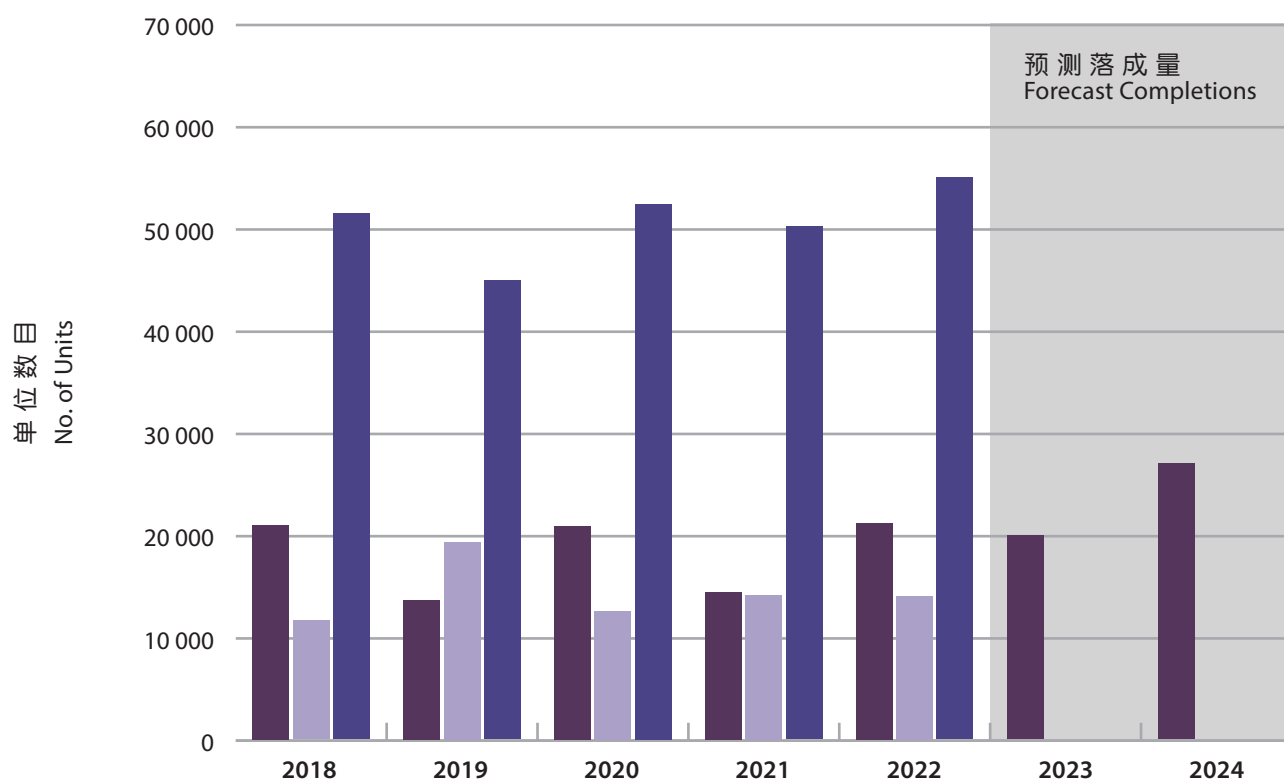
Amid a continuous rise in interest rates, sluggish local demand and weakened market confidence during the year, domestic prices in the secondary market exhibited a sharp downward trend in 2022. Prices slid moderately in the beginning of the year, but the fall accelerated towards the second half of the year. Overall, prices in the last quarter of 2022 declined significantly by 13.6% over the same period in 2021. Rents fell in the first half in 2022 and stabilised in the third quarter, but declined again in the fourth quarter. Overall rents in the fourth quarter registered a fall of 3.8% compared to a year earlier.



售价及租金指数 Price and Rental Indices



落成量、入住量及空置量 Completions, Take-up and Vacancy



	2018	2019	2020	2021	2022	2023	2024
落成量 Completions	20 968	13 643*	20 888	14 386	21 168	19 953#	26 970#
入住量 Take-up	11 623	19 278	12 545	14 111	14 012		
空置量 Vacancy	51 426	44 892	52 366	50 164	54 967		
% ⁺	4.3	3.7	4.3	4.1	4.4		

* 2019年落成量包括在年内落成并预计以市价在公开市场发售，但其后于2020年转为资助出售房屋的43个住宅单位。

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.

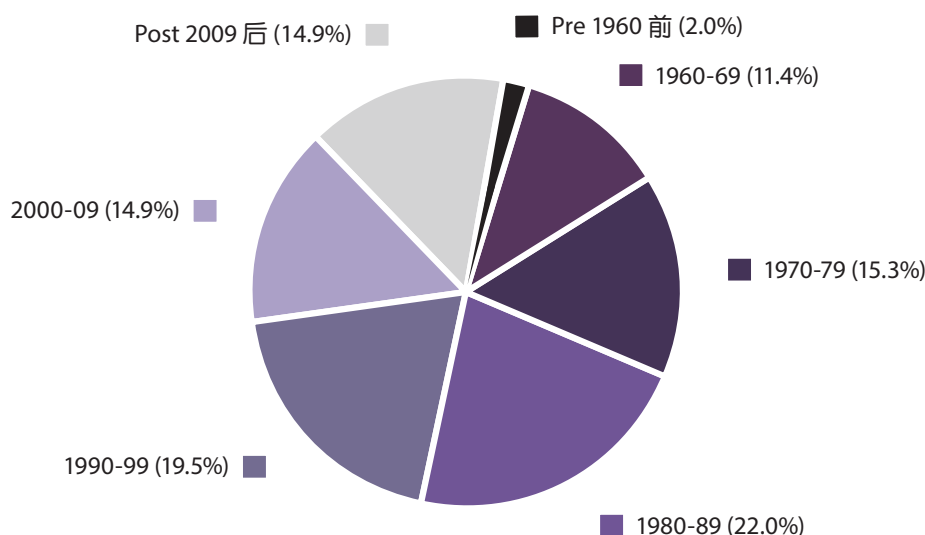
+ 年底空置量占总存量的百分率。
Vacancy at the end of the year as a percentage of stock.

预测数字
Forecast figures

此分类包括实用面积为 100 平方米以下的单位。2022 年年底的总存量为 1 158 273 个单位，占私人住宅总存量的 92%。图表显示这分类按楼龄划分的总存量。

This sub-sector comprises units with a saleable area of less than 100 m². Stock at the end of 2022 was 1 158 273 units which accounted for 92% of the total private domestic stock. The chart shows the stock distribution of this sub-sector by age.

按楼龄分类的总存量 Stock Distribution by Age



2022 年有 19 595 个单位落成，其中 62% 位于新界，28% 位于九龙，10% 位于港岛。供应主要来自九龙城、元朗和沙田，合共占此分类总落成量的 49%。以单位面积计，A 类和 B 类单位分别占新供应的 51% 和 39%，而 C 类单位则占 10%。

There were 19 595 units completed in 2022, of which 62% were located in the New Territories, 28% in Kowloon and 10% on Hong Kong Island. Supply mainly came from Kowloon City, Yuen Long and Sha Tin, together contributing 49% of the total completions in this sub-sector. In terms of flat size, Class A and Class B units accounted for 51% and 39% of the new supply respectively, while the share for Class C units was 10%.

2022年的入住量下跌7%至13 100个单位。年底空置量上升至47 081个单位，相当于此分类总存量的4.1%。

Take-up in 2022 dropped by 7% to 13 100 units. Vacancy at the year-end rose to 47 081 units, or 4.1% of the stock in this sub-sector.



预计2023和2024年将分别有18 522个和25 967个单位落成。在2023年，九龙将为主要供应区域，占51%的供应量。按地区计，新供应将主要位于九龙城，占22%，其次是屯门和观塘，各占15%。在2024年，九龙和新界将分别占新供应的47%和46%，其中九龙城占新落成单位的比例最高，为33%。

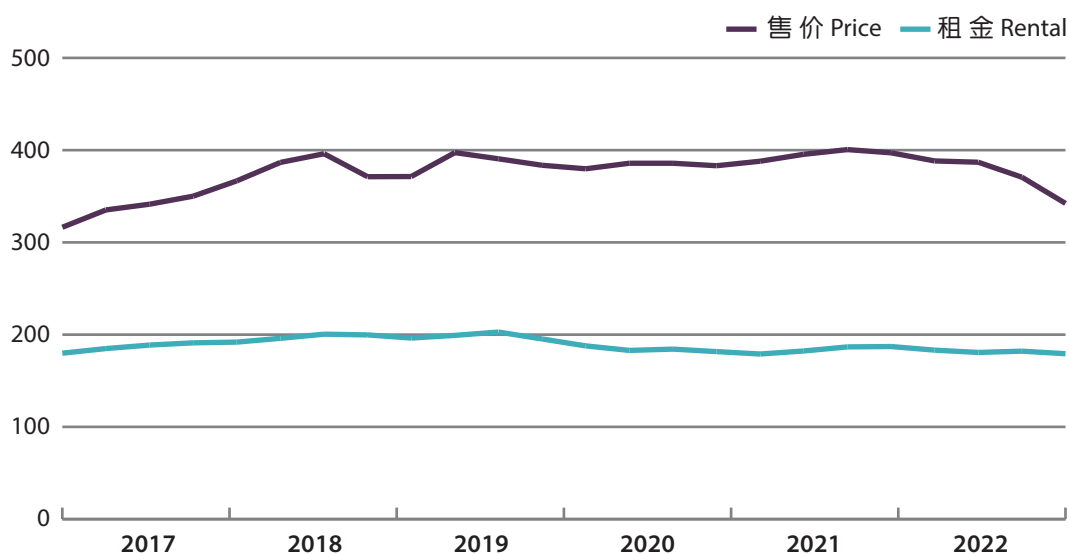
Completions in 2023 and 2024 are estimated to be 18 522 units and 25 967 units respectively. In 2023, Kowloon will be the major supplier, contributing 51% of the supply. On district basis, the new supply will mainly be located in Kowloon City at 22%, followed by Tuen Mun and Kwun Tong at 15% each. In 2024, Kowloon and the New Territories will provide 47% and 46% of the new supply respectively, with Kowloon City contributing the largest share of 33% of the new units.

此分类的售价在 2022 年全年均下跌。最后一季的售价较前一年大跌 13.8%。而第四季租金较 2021 年同期下跌 4.2%。

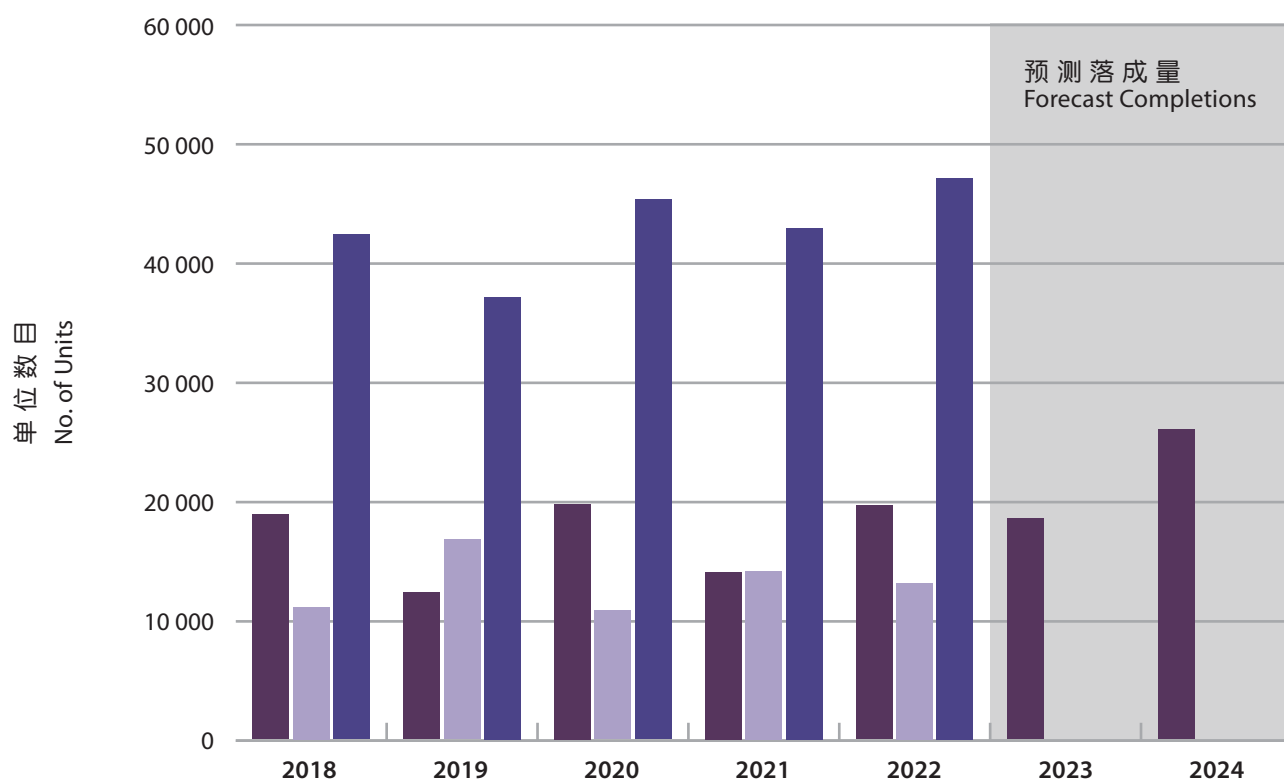
Prices in this sub-sector declined throughout 2022. Prices in the last quarter plunged by 13.8% from that of the preceding year. Meanwhile, rents slid by 4.2% in the fourth quarter over the corresponding quarter in 2021.



售价及租金指数 Price and Rental Indices



落成量、入住量及空置量 Completions, Take-up and Vacancy



	2018	2019	2020	2021	2022	2023	2024
落成量 Completions	18 863	12 302*	19 751	14 016	19 595	18 522#	25 967#
入住量 Take-up	11 083	16 751	10 787	14 101	13 100		
空置量 Vacancy	42 336	37 091	45 260	42 860	47 081		
% ⁺	3.9	3.3	4.0	3.8	4.1		

* 2019年落成量包括在年内落成并预计以市价在公开市场发售，但其后于2020年转为资助出售房屋的43个住宅单位。

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.

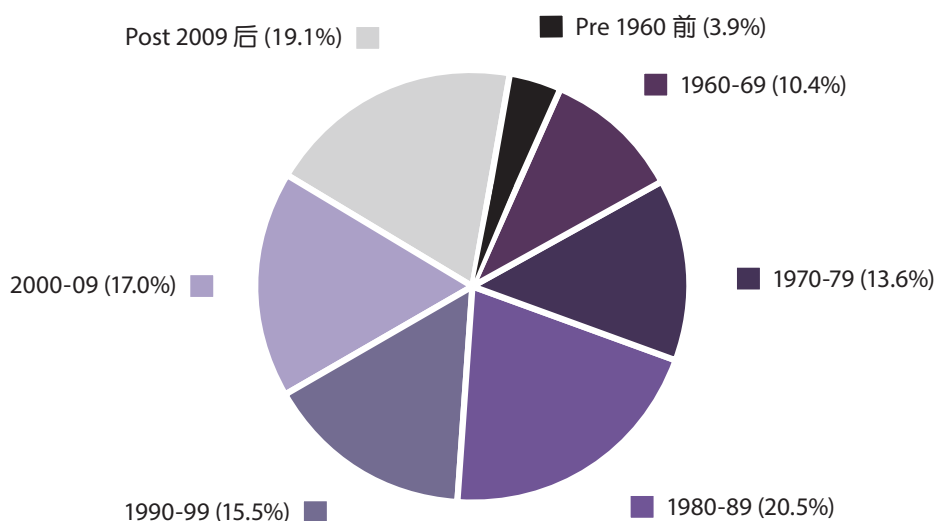
+ 年底空置量占总存量的百分率。
Vacancy at the end of the year as a percentage of stock.

预测数字
Forecast figures

此分类包括实用面积为100平方米或以上的单位。2022年年底的总存量为98 449个单位，占私人住宅总存量的8%。图表显示这分类按楼龄划分的总存量。

This sub-sector comprises units with a saleable area of 100 m² or above. Stock at the end of 2022 was 98 449 units, representing 8% of the total private domestic stock. The stock distribution by age for this sub-sector is shown in the chart.

按楼龄分类的总存量 Stock Distribution by Age



2022年落成的1 573个单位中，56%位于新界，30%位于港岛及14%位于九龙。按地区计，南区占落成量的28%，其次是沙田和大埔，各占17%。

There were 1 573 units completed in 2022, of which 56% were located in the New Territories, 30% on Hong Kong Island and 14% in Kowloon. On district level, the Southern district accounted for 28% of the completions, followed by Sha Tin and Tai Po at 17% each.

此分类的入住量在 2022 年急升至 912 个单位。年底空置量上升至 7 886 个单位，相当于此分类单位总存量的 8.0%。

Take-up in this sub-sector soared to 912 units in 2022. Vacancy at the year-end increased to 7 886 units, representing 8.0% of the stock in this sub-sector.



预计此分类的落成量在 2023 年将回落至 1 431 个单位，并在 2024 年进一步下降至 1 003 个单位。该两年的新供应将主要来自九龙，分别占 2023 和 2024 年预测落成量的 69% 和 55%。按地区计，九龙城的供应最多，在 2023 和 2024 年将分别占新落成量的 46% 和 52%。

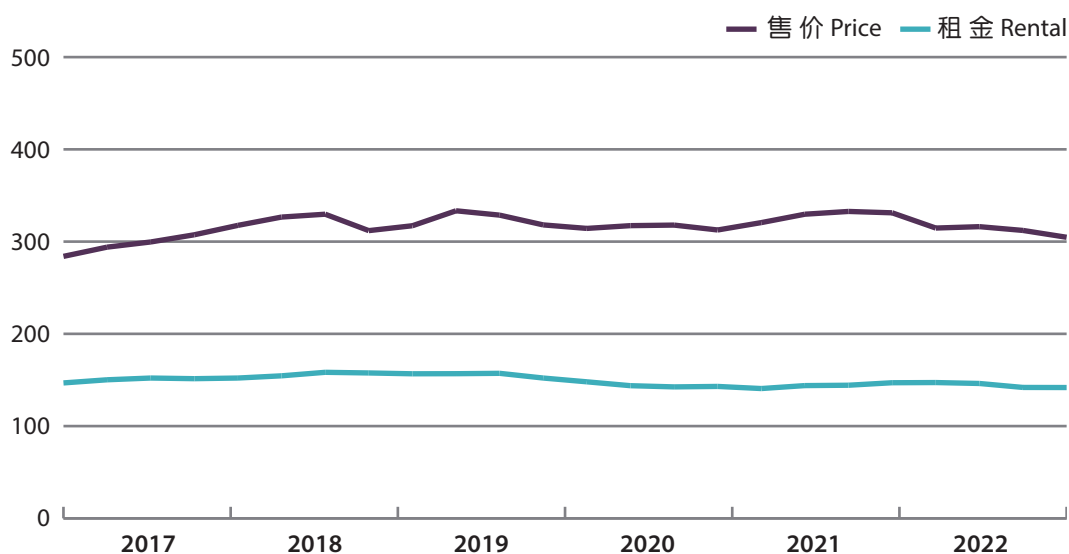
Completions in this sub-sector are expected to retreat to 1 431 units in 2023 and drop further to 1 003 units in 2024. New supply will mainly come from Kowloon in both years, accounting for 69% and 55% of the forecast completions in 2023 and 2024 respectively. On district basis, Kowloon City will contribute the most supply, providing 46% and 52% of the new completions in 2023 and 2024 respectively.

此分类物业在销售和租赁市场均表现逊色，但较中 / 小型单位为佳。售价在 2022 年第一季轻微下滑，至第二季回升，但在下半年再度下跌，最后一季的售价较 2021 年同期下跌 8.0%。第四季的租金较 2021 年同季录得 3.5% 的跌幅。

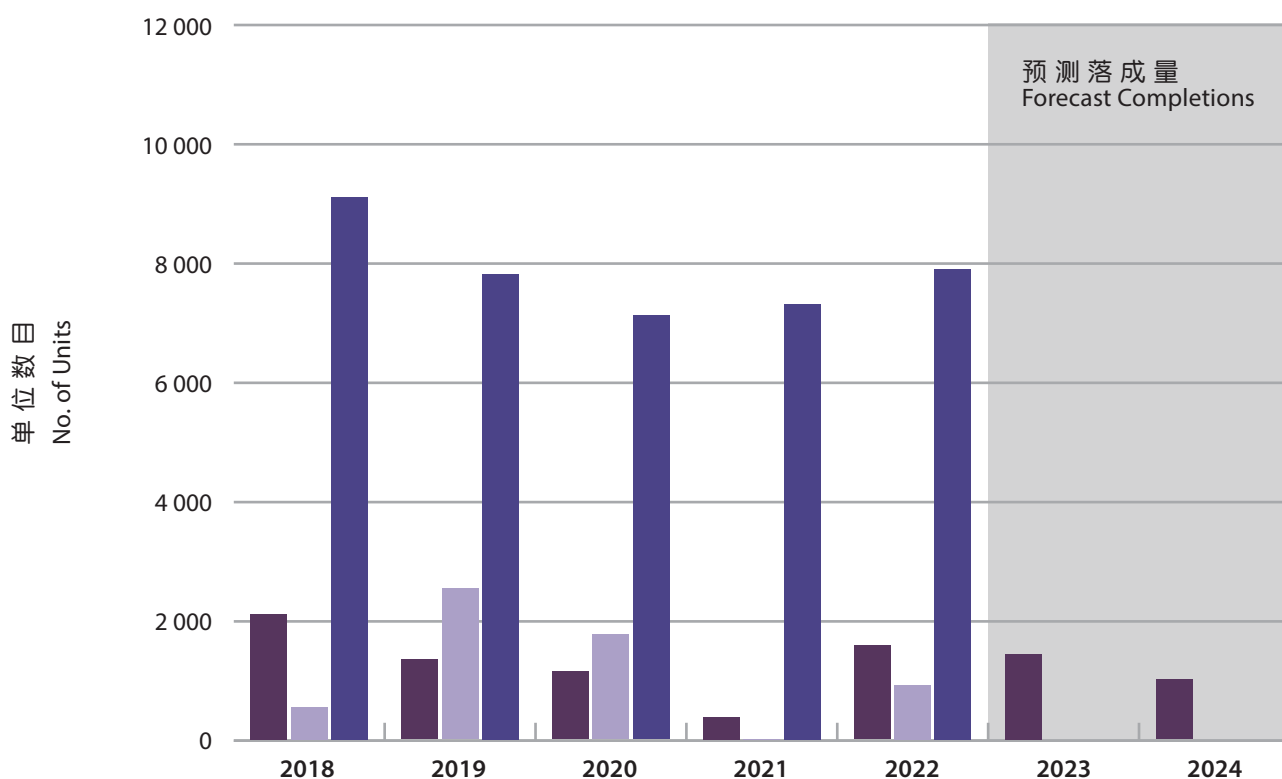
Both the sales and leasing markets in this sub-sector performed poorly, yet comparatively better than those of the small/medium units. After a slight decline in the first quarter of 2022, prices rebounded in the second quarter but fell again in the second half of the year, registering a decrease of 8.0% in the final quarter over the same period in 2021. Rents recorded a decrease of 3.5% in the fourth quarter compared with the corresponding quarter in 2021.



售价及租金指数 Price and Rental Indices



落成量、入住量及空置量 Completions, Take-up and Vacancy



	2018	2019	2020	2021	2022	2023	2024
落成量 Completions	2 105	1 341	1 137	370	1 573	1 431 [#]	1 003 [#]
入住量 Take-up	540	2 527	1 758	10	912		
空置量 Vacancy	9 090	7 801	7 106	7 304	7 886		
% ⁺	9.6	8.1	7.3	7.5	8.0		

+ 年底空置量占总存量的百分率。
Vacancy at the end of the year as a percentage of stock.

预测数字
Forecast figures