



私人商业楼宇

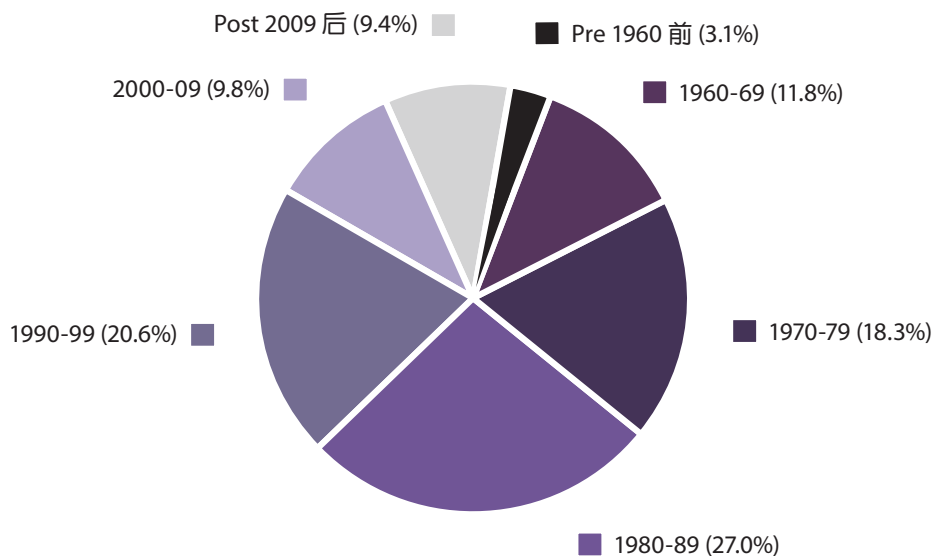
P R I V A T E
C O M M E R C I A L



这类别包括零售业楼宇，以及其他设计或改建作商业用途的楼宇，但不包括专作写字楼用途的楼宇。

这类物业在 2022 年年底的总存量为 11 692 400 平方米，其中港岛占 28%，九龙占 41%，新界占 31%。按楼龄划分的总存量详见图表。

按楼龄分类的总存量 Stock Distribution by Age



2022 年的落成量大幅上升至 117 700 平方米，按三大区域划分，九龙和新界分别占总落成量的 49% 和 39%，其余 12% 则坐落港岛。按地区计，九龙城的落成量最多，占 28%，其次为沙田，占 24%。

This sector comprises retail premises and other premises designed or adapted for commercial use, with the exception of purpose-built offices.

Stock in this sector at the end of 2022 was 11 692 400 m², with 28% of the total spaces on Hong Kong Island, 41% in Kowloon and 31% in the New Territories. Distribution of total stock by age is shown in the chart.

Completions in 2022 rose significantly to 117 700 m². Among the three geographical areas, Kowloon and the New Territories contributed 49% and 39% of the total completions respectively while the remaining 12% was attributable to Hong Kong Island. On district basis, Kowloon City provided the largest completions at 28%, followed by Sha Tin at 24%.

2022年，商业楼宇的使用量录得正数52 200平方米。年底空置量上升至1 223 700平方米，相当于总存量的10.5%。商场铺位和楼上商业单位占总空置量的63%。

The commercial sector recorded a positive take-up of 52 200 m² in 2022. The vacancy at the year-end increased to 1 223 700 m², representing 10.5% of the total stock. Vacant arcade shops and upper floor commercial space accounted for 63% of the total vacancy.



预计落成量将在2023年进一步上升至146 500平方米，然后在2024年回落至76 200平方米。2023年的供应将主要来自九龙城和南区，分别占总落成量的47%和21%。2024年的供应将主要位于湾仔和九龙城，分别提供总落成量的30%和27%。

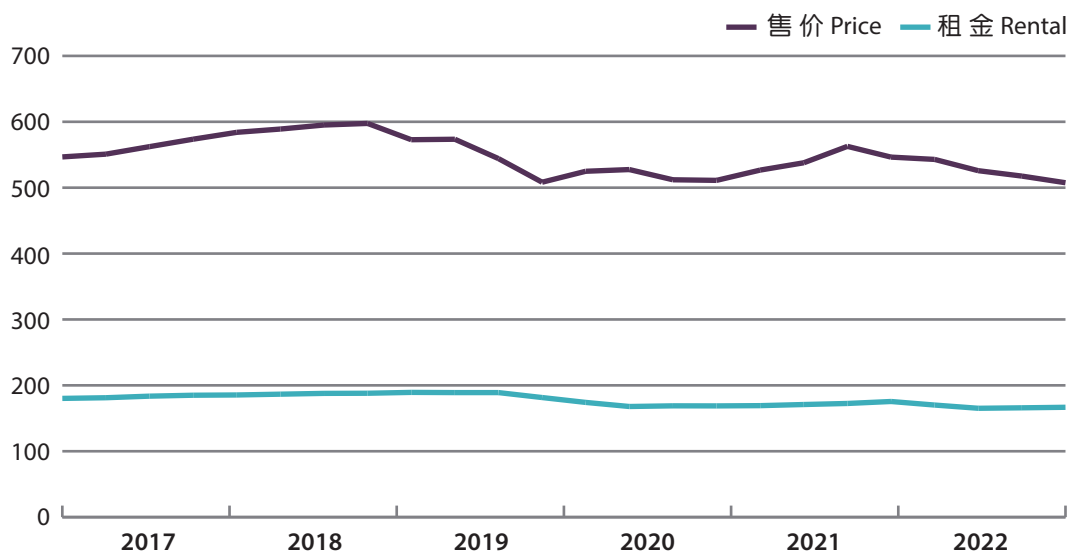
Completions are forecast to rise further to 146 500 m² in 2023 and then retreat to 76 200 m² in 2024. Supply in 2023 will mainly come from Kowloon City at 47% and the Southern district at 21% of the total completions. Supply in 2024 will be largely from Wan Chai and Kowloon City, providing 30% and 27% of the total completions respectively.

零售业楼宇售价在2022年全年均呈跌势，第四季较2021年同期显著下跌7.1%。租金在2022年上半年下跌，至下半年整固，第四季与前一年同期相比，以5.0%的跌幅作结。

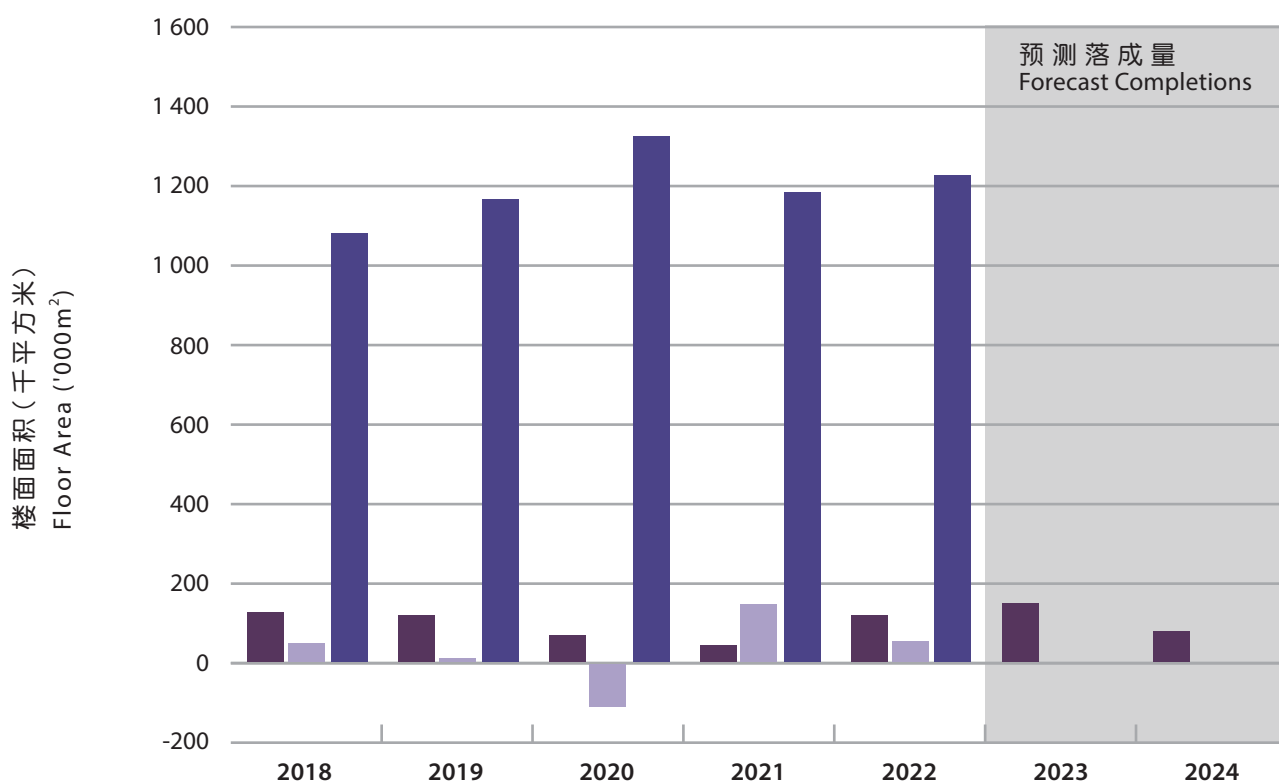
Prices of retail properties were on a downward trend throughout 2022, registering a marked decrease of 7.1% in the fourth quarter of 2022 over the same period of 2021. After declining in the first half of 2022, rents consolidated in the second half, ending the year with a fall of 5.0% in the fourth quarter as compared with the corresponding period of the preceding year.



私人零售业楼宇售价及租金指数 Private Retail Price and Rental Indices



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



	2018	2019	2020	2021	2022	2023	2024
落成量 Completions	125	118	67	42	118	147 [#]	76 [#]
使用量 Take-up	46	8	-108	145	52		
空置量 Vacancy	1 077	1 164	1 321	1 182	1 224		
% ⁺	9.4	10.1	11.4	10.2	10.5		

+ 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