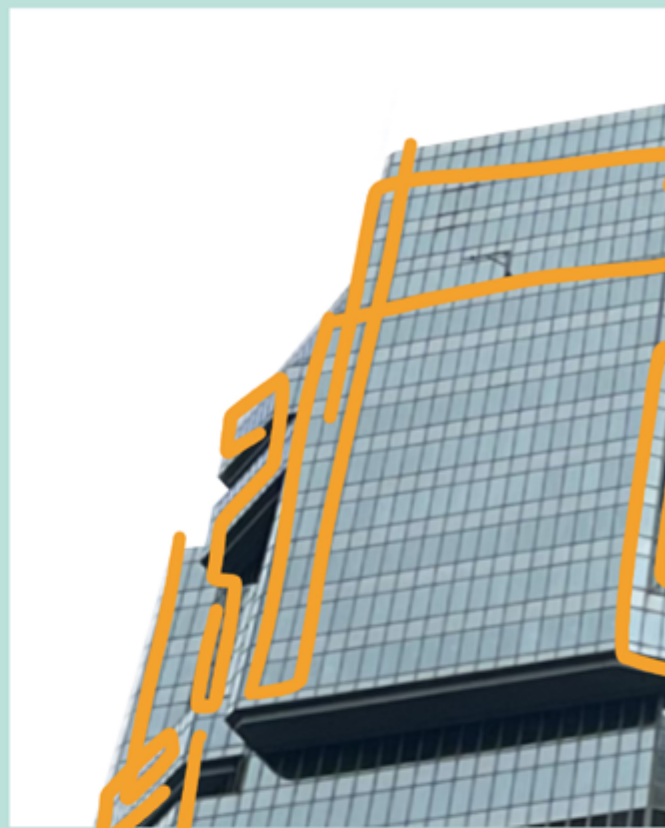
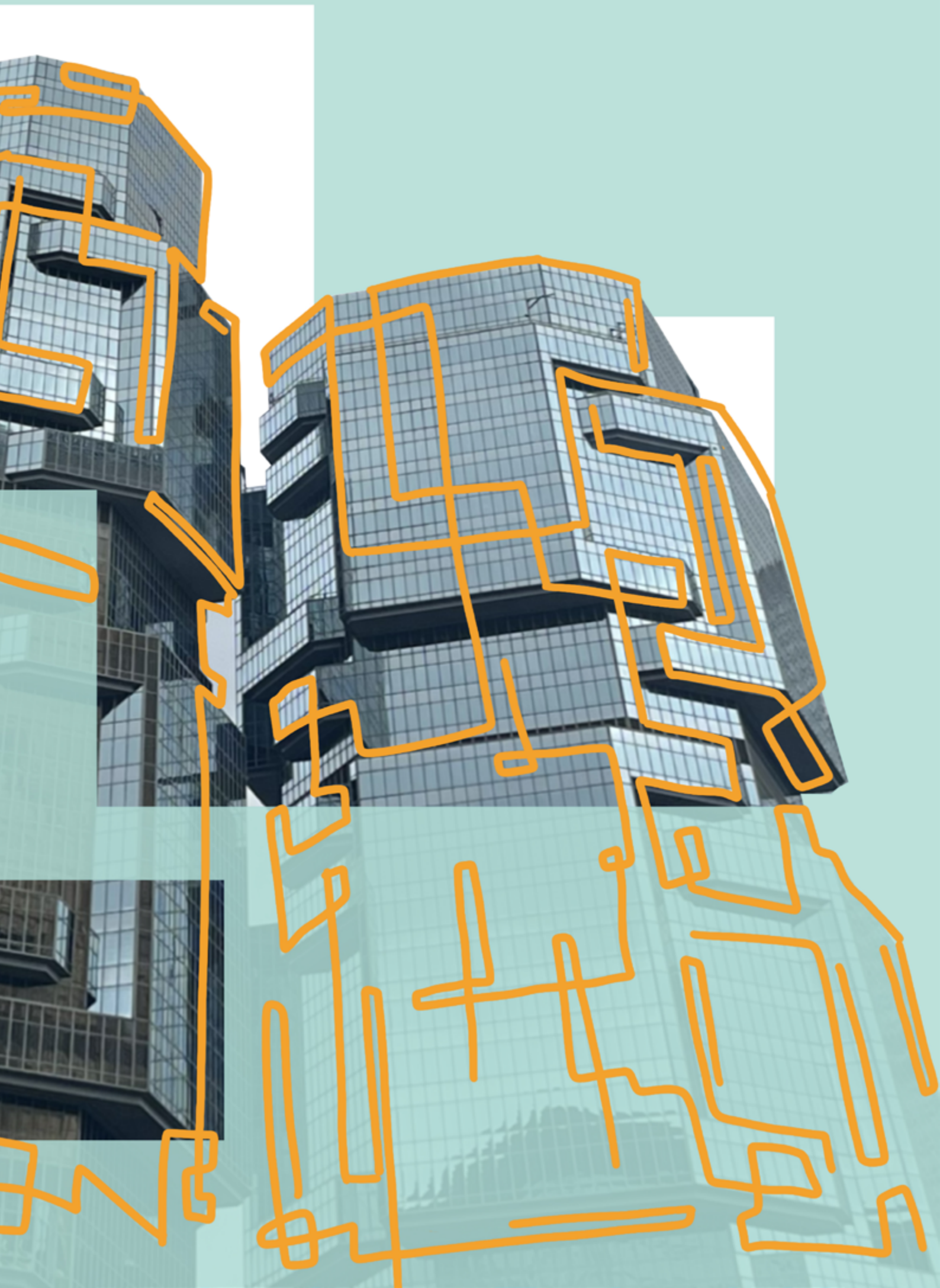


# 私人写字楼

PRIVATE OFFICE



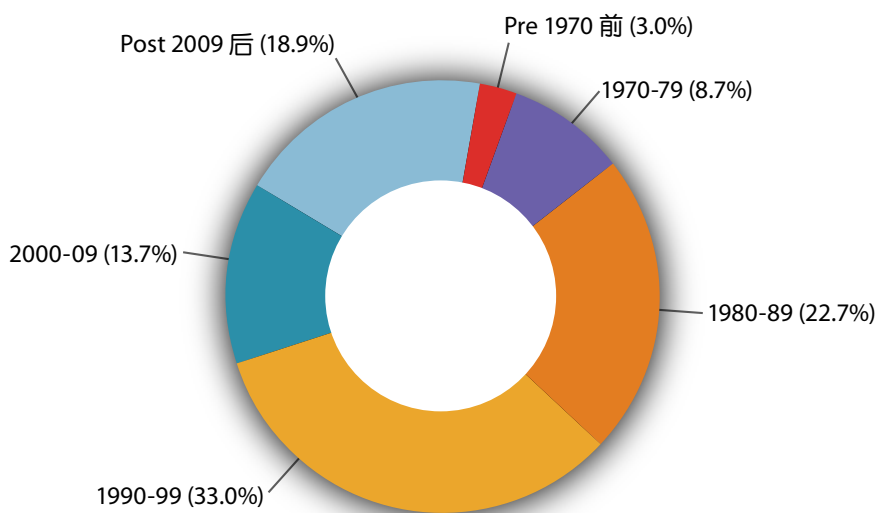




2024年年底，私人写字楼的总存量为13 305 400平方米，当中甲级写字楼占66%，乙级写字楼占23%，丙级写字楼占11%。位于上环、中区、湾仔、铜锣湾和尖沙咀核心地区的写字楼面积在2024年年底共占总存量的49%。图表显示按楼龄划分的整体写字楼总存量。

The total stock of private offices at the end of 2024 amounted to 13 305 400 m<sup>2</sup>, 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.

### 按楼龄分类的总存量 Stock Distribution by Age



2024年私人写字楼的落成量轻微下跌至147 300平方米，其中61%位于核心地区。在这些落成量中，甲级写字楼的落成量为146 300平方米，占了近乎全部的总落成量。

Office completions in 2024 decreased slightly to 147 300 m<sup>2</sup>, with 61% situated in the core districts. Among these completions, Grade A office space, amounting to 146 300 m<sup>2</sup>, contributed almost the entire total completions.





年内整体使用量录得负数 58 600 平方米。年底空置量上升至 2 165 700 平方米，相当于总存量的 16.3%。

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



预计落成量在 2025 年将大幅增加至 308 500 平方米，但到 2026 年将下跌至 116 200 平方米。在 2025 年，72% 的新落成量将主要来自九龙，其中油尖旺占总落成量的 60%。在 2026 年，大部分新落成量将集中在湾仔及中西区，分别占总落成量的 54% 及 35%。

Completions are expected to surge to 308 500 m<sup>2</sup> in 2025 but plummet to 116 200 m<sup>2</sup> 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.

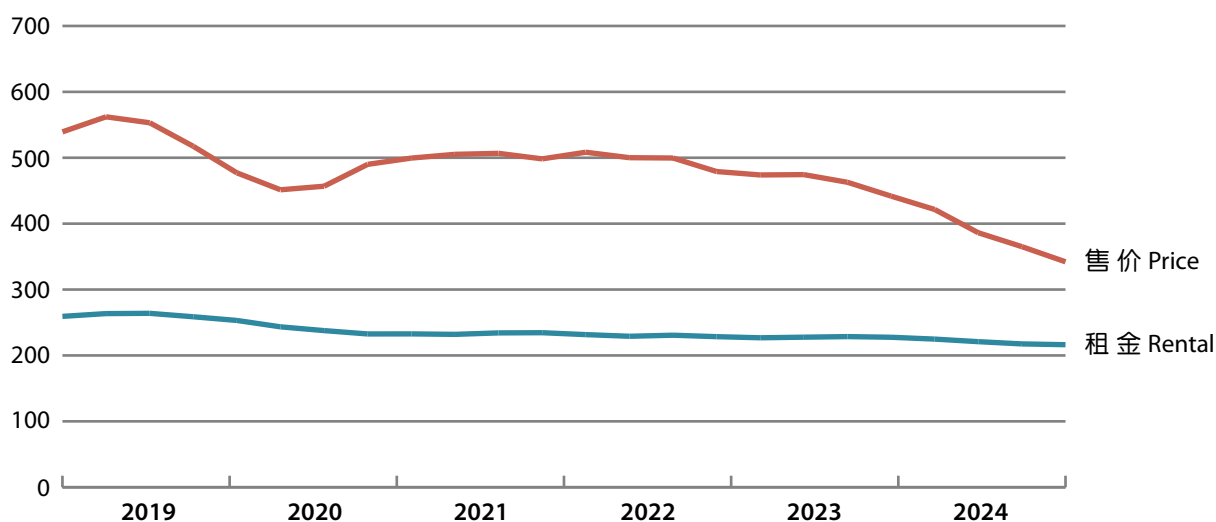


写字楼售价在 2024 年最后一季与 2023 年同期相比下跌 22.6%，而租金于 2024 年最后一季亦较 2023 年同期录得 5.0% 的跌幅。

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.

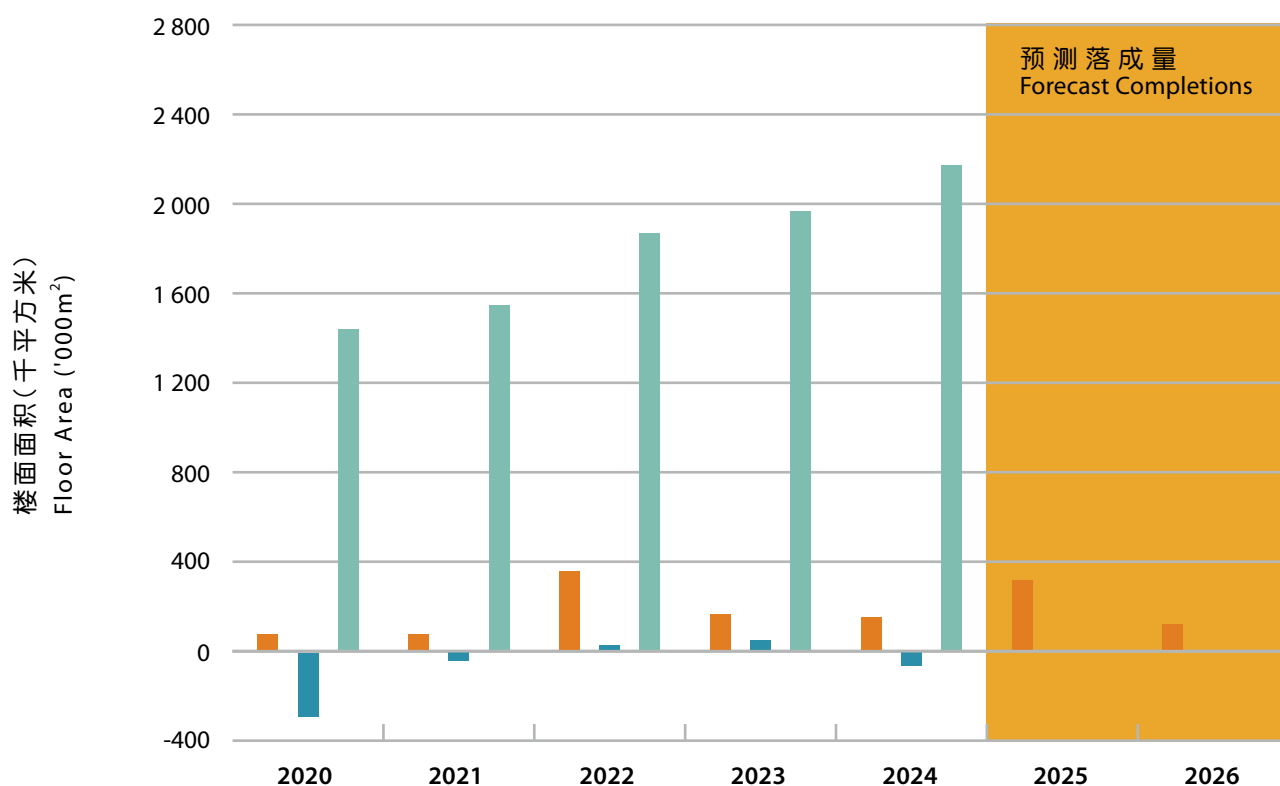


### 售价及租金指数 Price and Rental Indices





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



楼面面积 (千平方米)  
Floor Area ('000m<sup>2</sup>)

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

+ 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.

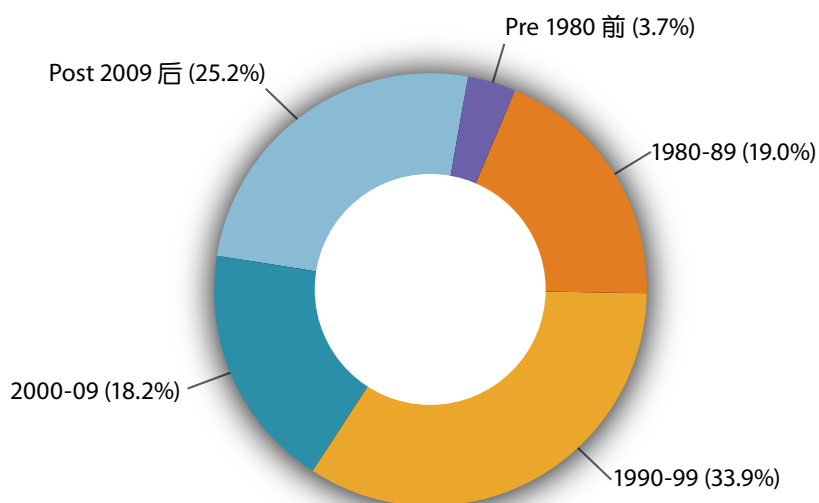
# 预测数字  
Forecast figures



2024 年年底，甲级写字楼的总存量为 8 779 600 平方米，占写字楼总存量的 66%。图表显示按楼龄划分的甲级写字楼总存量。

Stock of Grade A office space at the end of 2024 was 8 779 600 m<sup>2</sup>, representing 66% of the total office stock. The chart shows the distribution of stock in this grade by age.

### 按楼龄分类的总存量 Stock Distribution by Age



港岛占总存量的 47%，而九龙与新界则分别占 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 年甲级写字楼的落成量维持平稳，为 146 300 平方米，主要来自中西区和湾仔。

Completions of Grade A offices in 2024 remained steady at 146 300 m<sup>2</sup>, mainly coming from the Central and Western district and Wan Chai.



2024 年录得负数 3 700 平方米的使用量。年底空置量上升至 1 527 700 平方米，相当于甲级写字楼总存量的 17.4%，其中 34% 的空置面积位于核心地区。

A negative take-up of 3 700 m<sup>2</sup> was recorded in 2024. The year-end vacancy rose to 1 527 700 m<sup>2</sup>, representing 17.4% of Grade A stock. 34% of the vacant spaces was found in the core districts.



预测落成量在 2025 年将大幅增加至 288 600 平方米，但其后在 2026 年将回落至 102 600 平方米。2025 年的新落成量将集中在油尖旺，占预计总落成量的 62%。在 2026 年，湾仔和中西区将合共提供全部落成量，分别占总落成量的 61% 和 39%。

Forecast completions will surge to 288 600 m<sup>2</sup> in 2025 but then retreat to 102 600 m<sup>2</sup> 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.



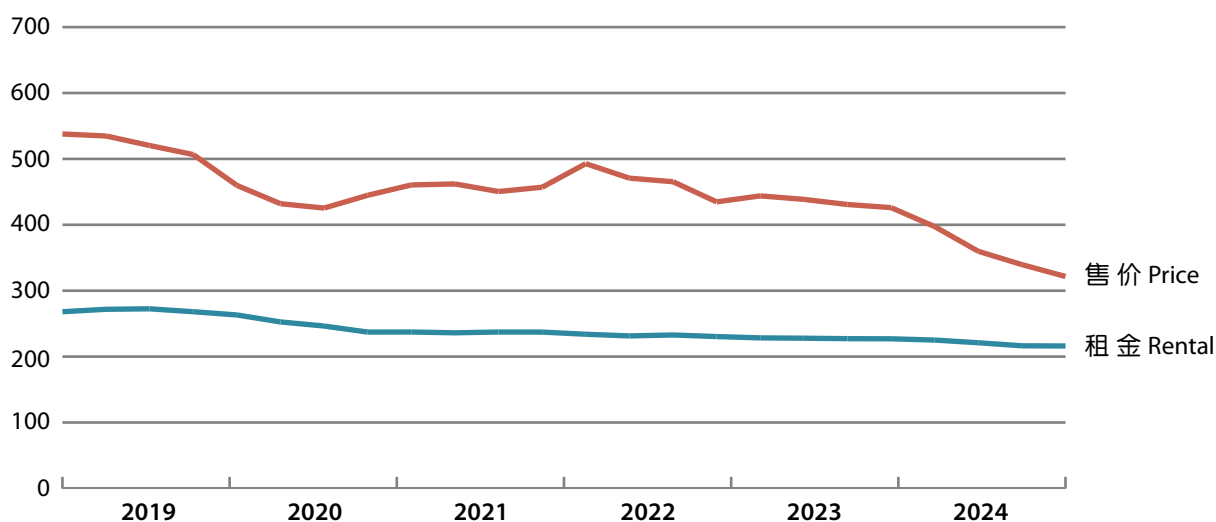


甲级写字楼销售市场全年表现黯淡，以第四季与2023年同期相比，售价录得24.5%的跌幅。全年租金亦下跌，与2023年第四季相比，2024年第四季录得4.8%的跌幅。

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.

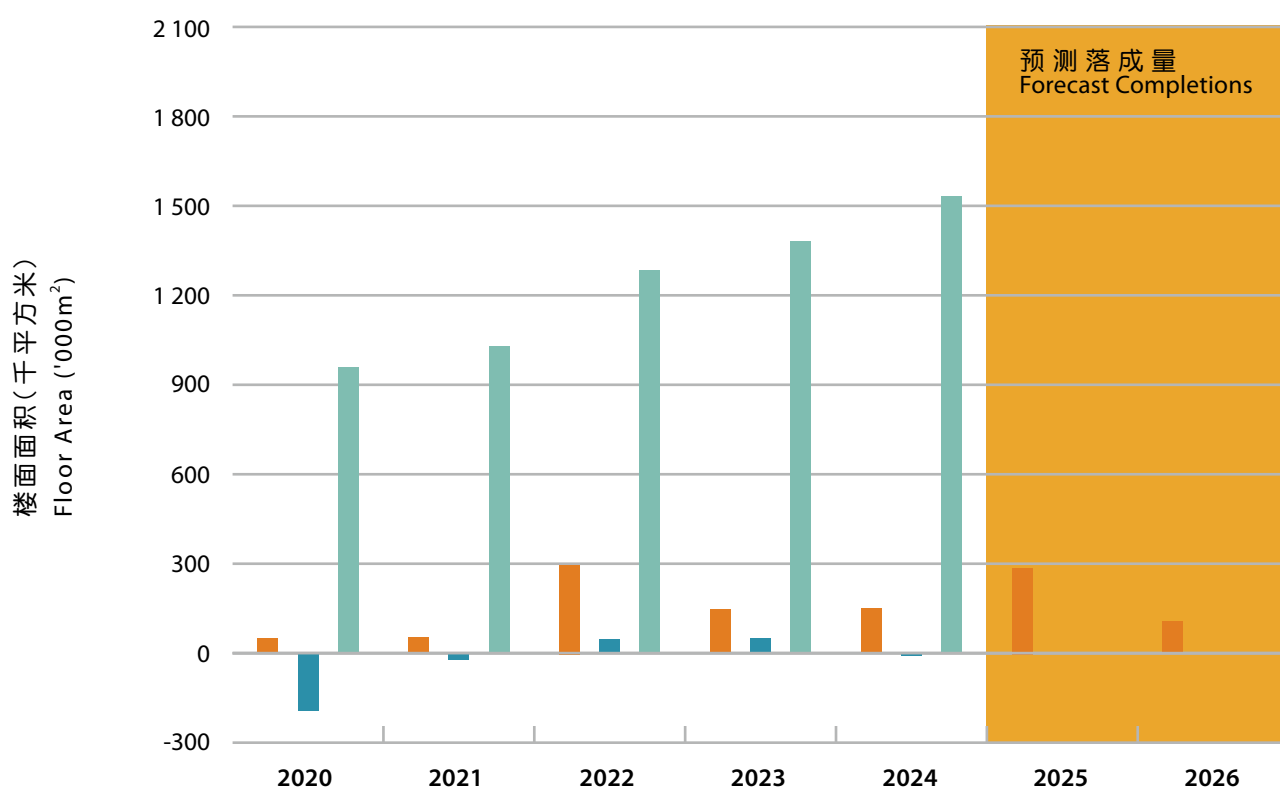


### 售价及租金指数 Price and Rental Indices





## 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 <sup>#</sup>	102 <sup>#</sup>
使用量 Take-up	-189	-18	42	45	-4		
空置量 Vacancy	955	1 023	1 280	1 377	1 528		
% <sup>+</sup>	11.8	12.5	15.1	16.0	17.4		

+ 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.

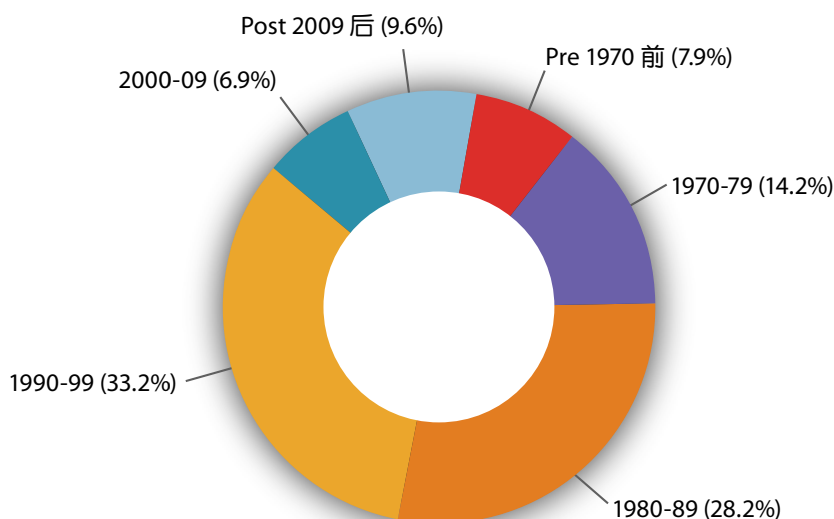
# 预测数字  
Forecast figures



2024 年年底，乙级写字楼的总存量为 3 046 300 平方米，占写字楼总存量的 23%。图表显示按楼龄划分的乙级写字楼总存量。

Stock of Grade B offices was 3 046 300 m<sup>2</sup> at the end of 2024, representing 23% of the total office stock. The chart shows the distribution of stock in this grade by age.

### 按楼龄分类的总存量 Stock Distribution by Age



港岛占总存量的 55%，而九龙与新界则分别占 36% 和 9%。

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

2024 年并无录得乙级写字楼落成量。

No Grade B office completions were recorded in 2024.



乙级写字楼在 2024 年的使用量为负数 25 800 平方米。年底空置量为 475 300 平方米，相当于乙级写字楼总存量的 15.6%，其中 53% 的空置面积位于核心地区。

Take-up of Grade B offices in 2024 was negative at 25 800 m<sup>2</sup>. The year-end vacancy, amounting to 475 300 m<sup>2</sup>, was equivalent to 15.6% of the Grade B stock. 53% of the vacant spaces was found in the core districts.



预计落成量在 2025 和 2026 年将分别为 19 600 平方米和 13 600 平方米。2025 年的所有落成量将来自观塘、中西区和油尖旺，2026 年的新落成量则主要来自东区 and 油尖旺。

It is estimated that completions will be 19 600 m<sup>2</sup> and 13 600 m<sup>2</sup> 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.

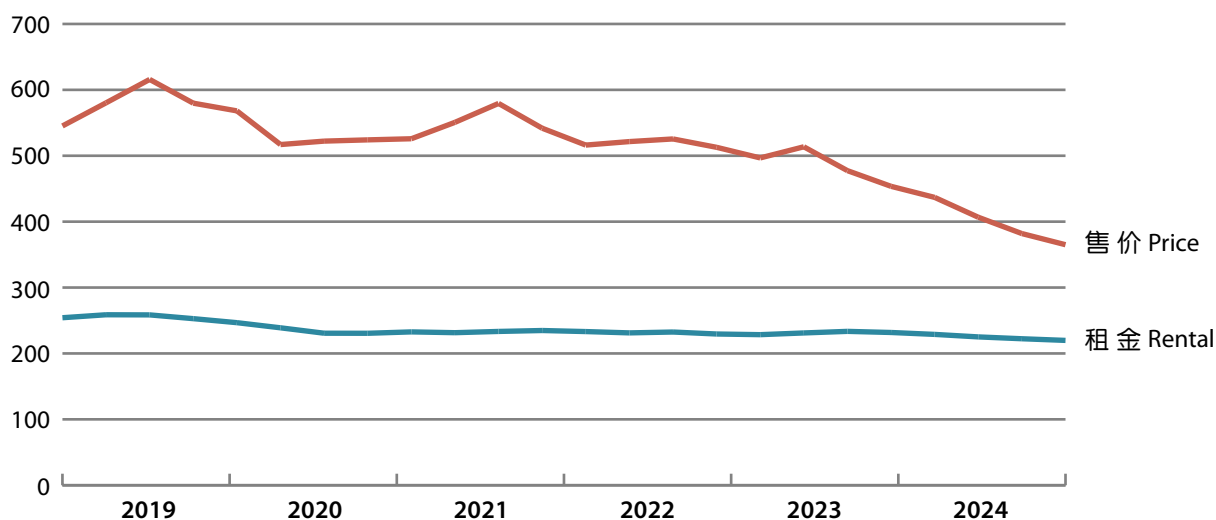


以 2024 年最后一季与 2023 年同期相比，乙级写字楼售价下跌 19.5%。租金亦见下跌，但幅度温和，以 2023 和 2024 年最后一季作比较，录得 5.2% 的跌幅。

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.



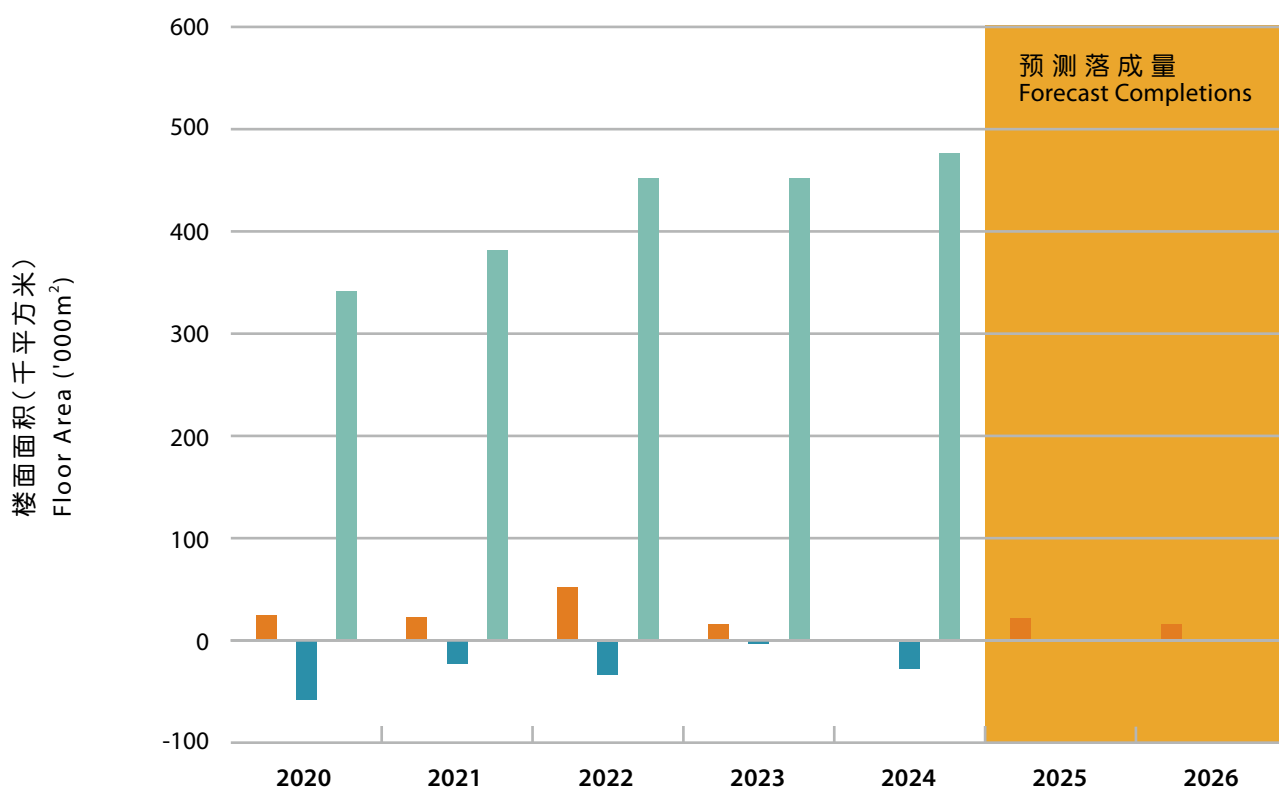
### 售价及租金指数 Price and Rental Indices







## 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	23	21	50	14	0	20 <sup>#</sup>	14 <sup>#</sup>
使用量 Take-up	-57	-22	-32	-2	-26		
空置量 Vacancy	340	380	450	450	475		
% <sup>+</sup>	11.9	13.1	15.1	14.9	15.6		

+ 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.

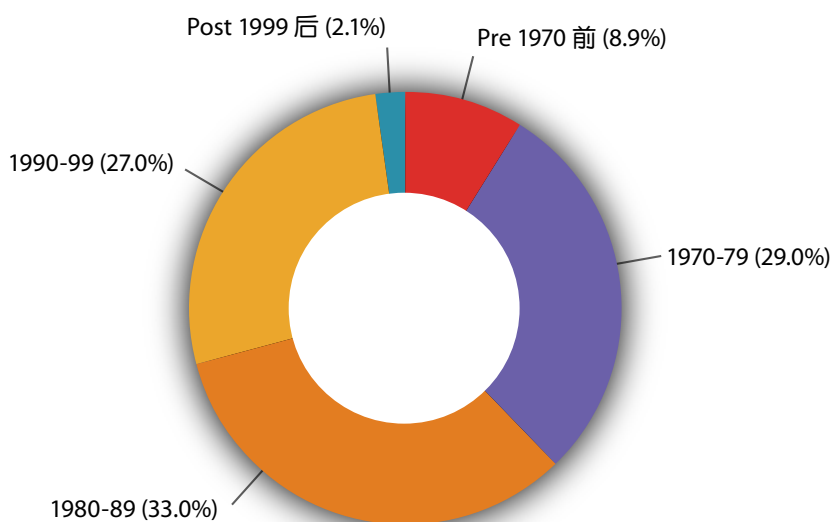
# 预测数字  
Forecast figures



2024 年年底，丙级写字楼的总存量为 1 479 500 平方米，占写字楼总存量的 11%。图表显示按楼龄划分的丙级写字楼总存量。

Stock of Grade C offices was 1 479 500 m<sup>2</sup> at the end of 2024, representing 11% of the total office stock. The chart shows the distribution of stock in this grade by age.

### 按楼龄分类的总存量 Stock Distribution by Age



港岛占总存量的 65%，而九龙与新界则分别占 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 年丙级写字楼的落成量为 1 000 平方米，全部来自湾仔。

Completions for Grade C offices in 2024 were 1 000 m<sup>2</sup>. All came from Wan Chai.



丙级写字楼的使用量录得负数 29 100 平方米。年底空置量为 162 700 平方米，占丙级写字楼总存量的 11.0%，当中 73% 的空置面积位于核心地区。

Grade C offices registered a negative take-up of 29 100 m<sup>2</sup>. The year-end vacancy amounted to 162 700 m<sup>2</sup>, representing 11.0% of its stock. 73% of the vacant spaces was found in the core districts.



预计 2025 年将有 300 平方米的丙级写字楼在东区落成，2026 年则不会有新落成量。

Grade C office space of 300 m<sup>2</sup> from the Eastern district will be expected in 2025. In 2026, there will be no new completions.

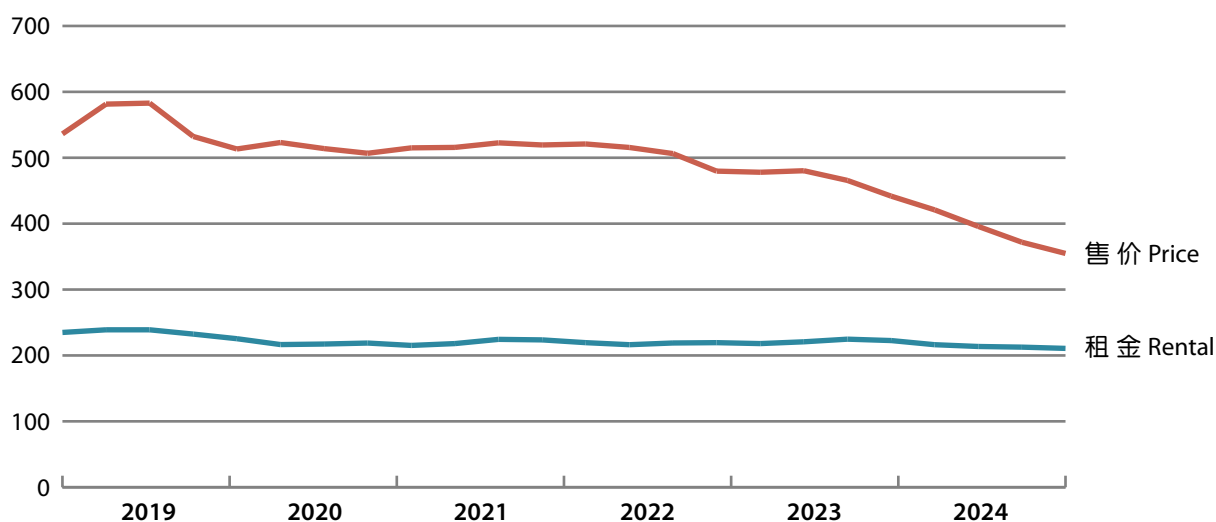


丙级写字楼售价全年下滑。以 2023 和 2024 年第四季相比，售价录得 19.7% 的跌幅，而同期租金亦温和下跌 5.3%。

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.

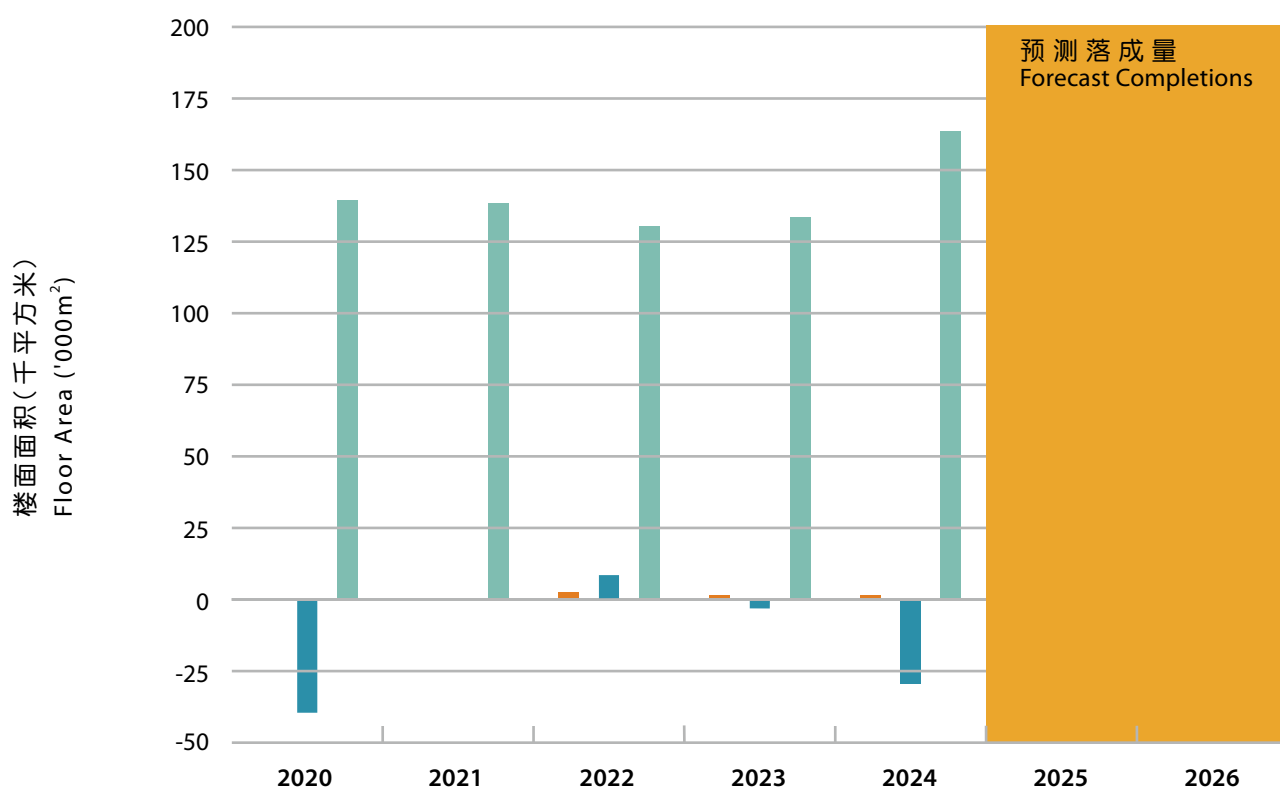


### 售价及租金指数 Price and Rental Indices





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



楼面面积(千平方米)  
Floor Area ('000m<sup>2</sup>)

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

+ 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