

私人住宅

**PRIVATE DOMESTIC**





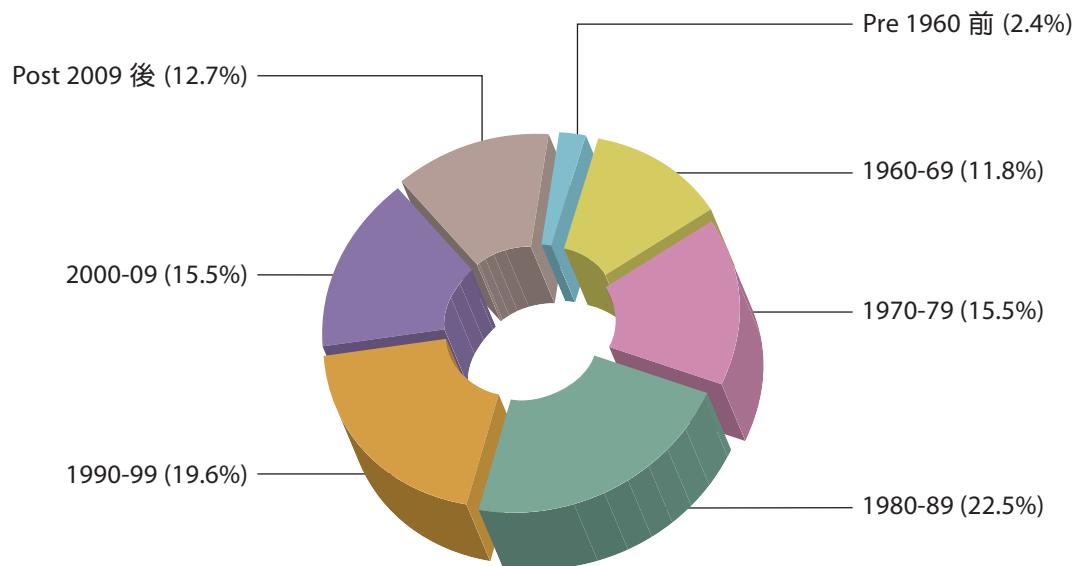
## 私人住宅（整體）

### PRIVATE DOMESTIC (OVERALL)

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。2020年年底的整體總存量為 1 225 848 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 2020, the overall stock was 1 225 848 units. The chart shows stock distribution by age.

#### 按樓齡分類的總存量 Stock Distribution by Age



2020 年私人住宅落成量飆升至 20 888 個單位，較前一年增加 53%。按地域計，新界佔落成量的 74%，九龍佔 19%，港島佔 7%。按地區計，屯門供應最多新單位，佔整體落成量的 23%，其次為大埔和元朗，分別佔 18% 和 14%。

Completions in 2020 surged to 20 888 units, up by 53% from the previous year. By region, 74% of the completions were in the New Territories, 19% in Kowloon and 7% on Hong Kong Island. District-wise, Tuen Mun contributed the largest share of new units, at 23% of the overall completions, followed by Tai Po at 18% and Yuen Long at 14%.

2020 年的入住量減少 35% 至 12 545 個單位。年底空置量上升至 52 366 個單位，相當於總存量的 4.3%。空置單位中，有 10 352 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 2020 reduced by 35% to 12 545 units. Vacancy at the year-end rose to 52 366 units, equivalent to 4.3% of the total stock. 10 352 of these vacant units were not yet issued with Certificate of Compliance or Consent to Assign after obtaining the Occupation Permit.



預計 2021 年落成量將放緩至 18 228 個單位，至 2022 年回升至 19 984 個。在 2021 年，約 56% 的新供應將來自新界，33% 來自九龍及 11% 來自港島。按地區計，西貢的供應量佔新落成單位的 25%，其次為屯門和九龍城，分別佔 15% 和 14%。在 2022 年，新界將佔新供應的 60%。按地區計，沙田、九龍城和元朗將合共提供 55% 的落成量。

Completions are expected to ease to 18 228 units in 2021 and then rise to 19 984 units in 2022. In 2021, about 56% of the new supply will come from the New Territories while 33% and 11% will be from Kowloon and Hong Kong Island respectively. On district basis, Sai Kung will account for 25% of the new units, followed by Tuen Mun and Kowloon City at 15% and 14% respectively. In 2022, the New Territories will contribute 60% of the new supply. District-wise, Sha Tin, Kowloon City and Yuen Long together will provide 55% of the completions.



## 私人住宅 (整體)

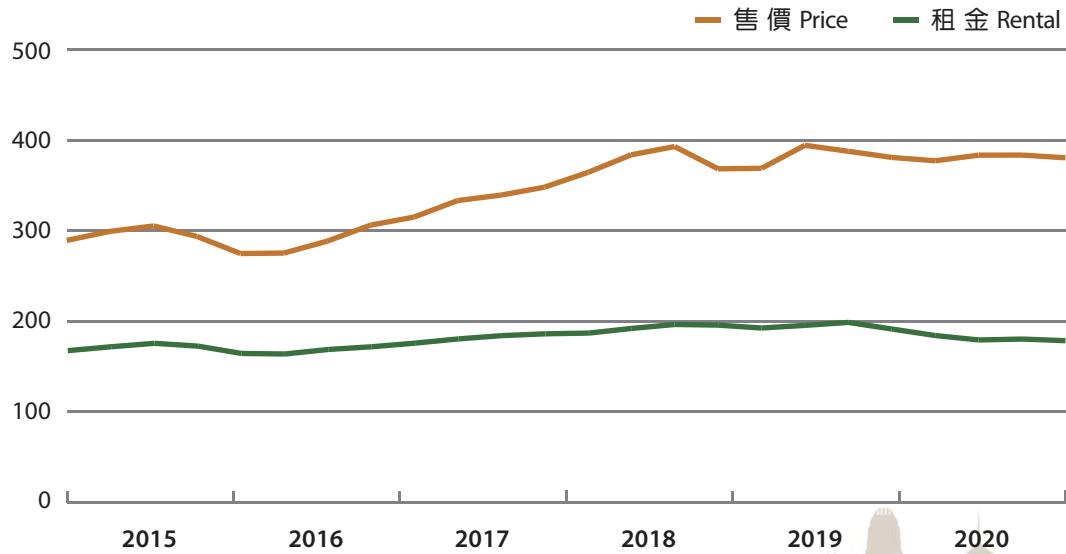
## PRIVATE DOMESTIC (OVERALL)

雖然新冠病毒疫情對整體經濟造成沉重打擊，但整體住宅售價全年變化甚微。二手市場的售價於2020年第一季下跌，至第二季開始上升，但在第四季再度回落。住宅售價在年內無甚變動。租金在上半年大幅下跌，至第三季回穩，但接近年底時重拾跌勢。第四季的整體租金較前一年低6.7%。與市場的頂峯相比，售價較2019年第二季下跌3.5%，租金則較2019年第三季下跌10.2%。

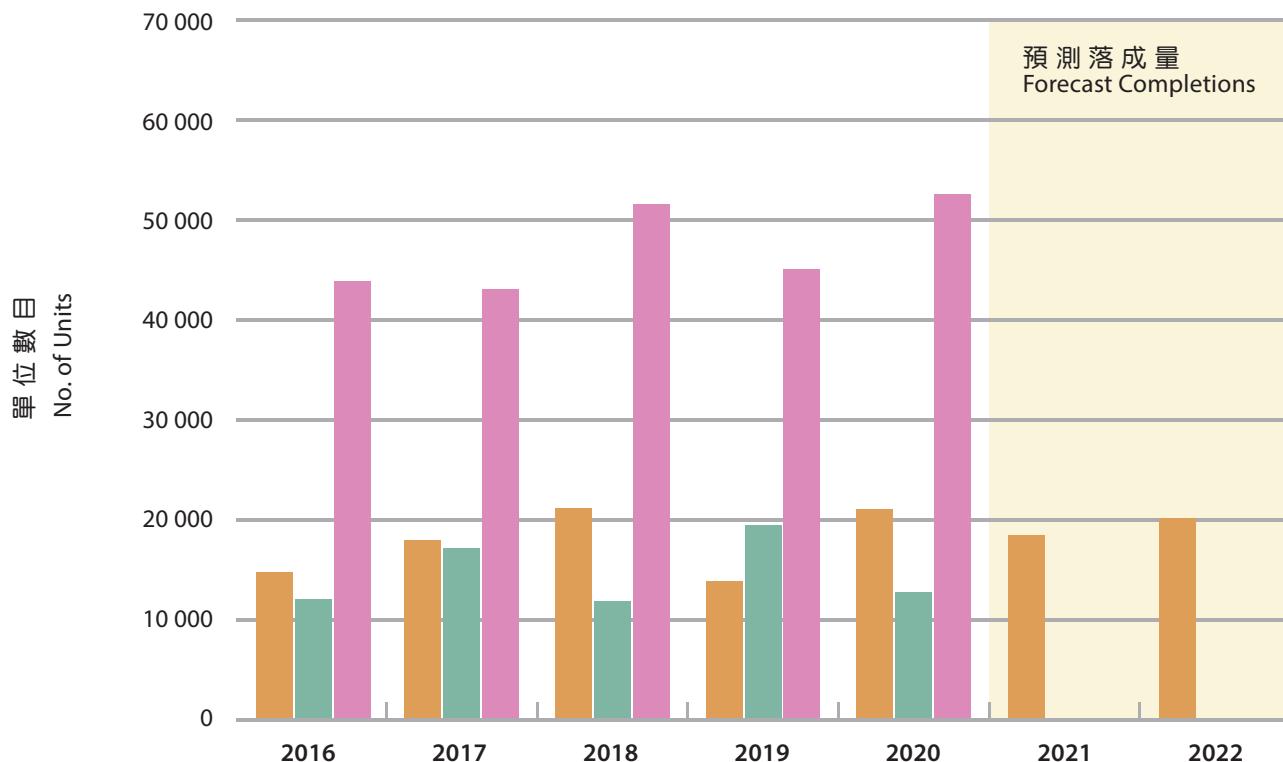
While the COVID-19 outbreak took a heavy toll on the overall economy, overall domestic prices showed an insignificant change for the year as a whole. Prices in the secondary market fell in the first quarter of the year, and started to pick up in the second quarter but retreated again in the fourth quarter. Domestic prices at the year-end were virtually unchanged over the year. Rents fell considerably during the first half of the year and stabilised in the third quarter but resumed the declining trend towards the year-end. Overall rents in the fourth quarter were 6.7% lower than a year earlier. Comparing with the market peak, prices declined by 3.5% from the second quarter of 2019 and rents plunged by 10.2% from the third quarter of 2019.



### 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						
	2016	2017	2018	2019	2020	2021	2022
落成量 Completions	14 595	17 791	20 968	13 643*	20 888	18 228#	19 984#
入住量 Take-up	11 881	16 954	11 623	19 278	12 545		
空置量 Vacancy	43 657	42 942	51 426	44 892	52 366		
% <sup>+</sup>	3.8	3.7	4.3	3.7	4.3		

\* 2019年落成量包括在年內落成並預計以市價在公開市場發售，但其後於2020年轉為資助出售房屋的43個住宅單位。

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

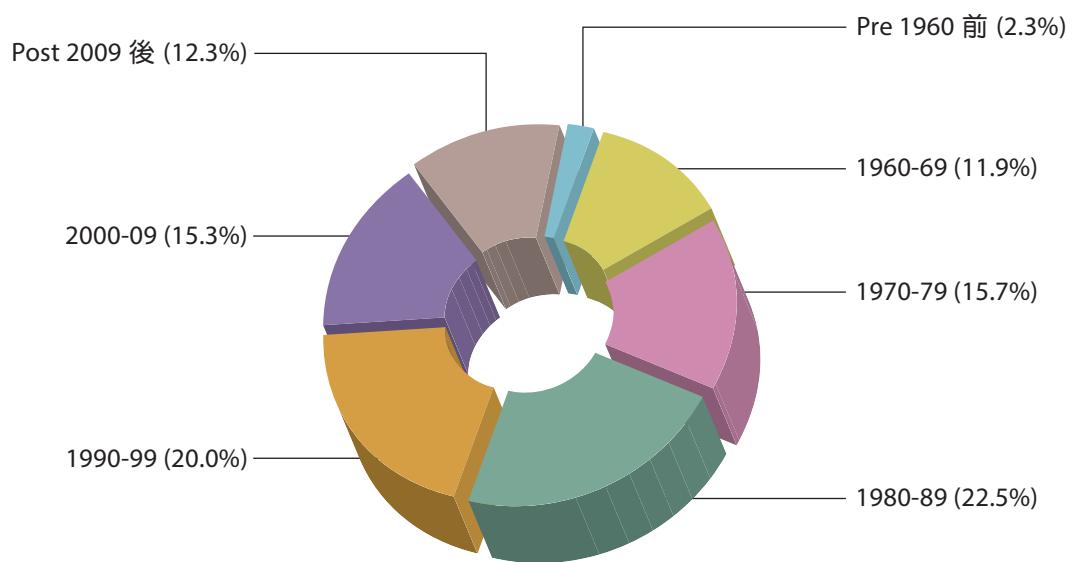
## 私人住宅 (中 / 小型單位)

### PRIVATE DOMESTIC (SMALL/MEDIUM UNITS)

此分類包括實用面積為 100 平方米以下的單位。2020 年年底的總存量為 1 129 118 個單位，佔私人住宅總存量的 92%。圖表顯示這分類按樓齡劃分的總存量。

This sub-sector comprises units with a saleable area of less than 100 m<sup>2</sup>. Stock at the end of 2020 was 1 129 118 units which accounted for 92% of the total private domestic stock. The chart shows the stock distribution of this sub-sector by age.

#### 按樓齡分類的總存量 Stock Distribution by Age



2020 年共有 19 751 個單位落成，其中 75% 位於新界，18% 位於九龍，7% 位於港島。供應主要來自屯門和大埔，合共佔此分類總落成量的 41%。以單位面積計，A 類和 B 類單位分別佔新供應的 47% 和 39%，而 C 類單位則佔 14%。

There were 19 751 units completed in 2020, of which 75% were located in the New Territories, 18% in Kowloon and 7% on Hong Kong Island. Supply mainly came from Tuen Mun and Tai Po, together contributing 41% of the total completions in this sub-sector. In terms of flat size, Class A and Class B units accounted for 47% and 39% of the new supply respectively, while the share for Class C units was 14%.

## 私人住宅 (中 / 小型單位) PRIVATE DOMESTIC (SMALL/MEDIUM UNITS)

2020 年的入住量下跌 36% 至 10 787 個單位。年底空置量上升至 45 260 個單位，相當於此分類總存量的 4.0%。

Take-up in 2020 dropped by 36% to 10 787 units. Vacancy at the year-end rose to 45 260 units, or 4.0% of the stock in this sub-sector.



預計 2021 和 2022 年 將 分 別 有 17 252 個 和 19 017 個單位落成。該兩年的新供應將主要來自新界，分別佔預測落成量的 57% 和 60%。按地區計，在 2021 年，西貢的落成量最多，達 26%，其次為屯門和九龍城，分別佔 15% 和 14%。在 2022 年的落成量中，九龍城所佔的比例最高，佔新落成單位的 21%，其次是沙田，佔 20%，以及元朗，佔 14%。

Completions in 2021 and 2022 are estimated to be 17 252 units and 19 017 units respectively. New supply will mainly come from the New Territories in both years, accounting for 57% and 60% of the forecast completions in 2021 and 2022 respectively. On district basis, Sai Kung will contribute the most completions in 2021 at 26%, followed by Tuen Mun and Kowloon City at 15% and 14% respectively. In 2022, Kowloon City will contribute the largest share of 21% of the new units, followed by Sha Tin at 20% and Yuen Long at 14%.



## 私人住宅 (中/小型單位)

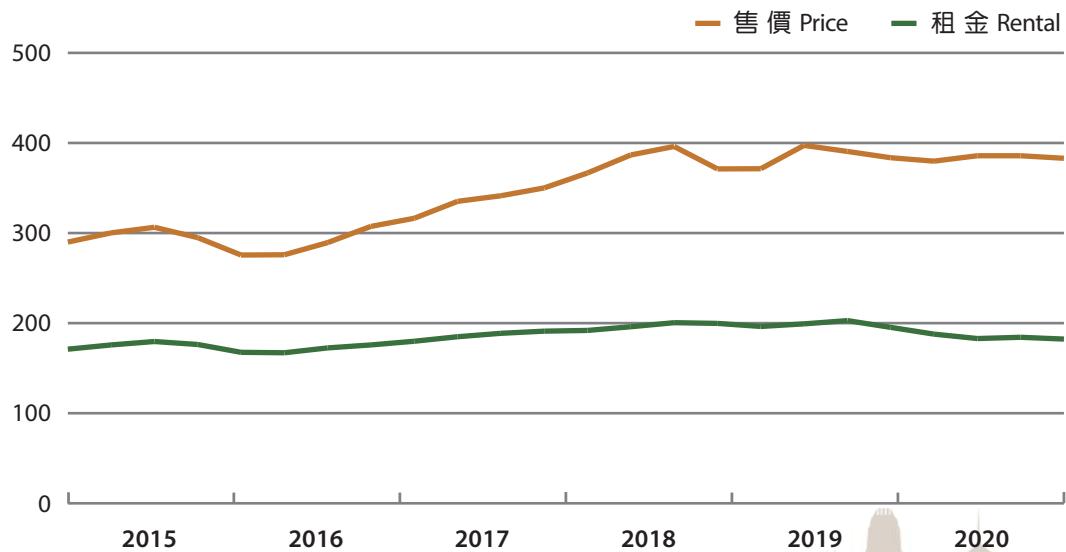
## PRIVATE DOMESTIC (SMALL/MEDIUM UNITS)

此分類的售價在最後一季按年微跌 0.2%，而租金則錄得 6.7% 的跌幅。售價繼 2020 年第一季下行後，在第二季回升，到第四季再次回落，年底售價比 2019 年第二季的頂峯低 3.6%。租金在上半年顯著下跌，至第三季回穩，但第四季再度下跌。與 2019 年第三季的頂峯相比，整體跌幅達 10.1%。

Prices in this sub-sector in the last quarter were 0.2% marginally lower than a year earlier, while rents registered a reduction of 6.7%. After a downward movement in the first quarter, prices rebounded in the second quarter and resumed the falling trend in the fourth quarter of the year. Prices at the year-end were 3.6% below the peak in the second quarter of 2019. Rents fell distinctly in the first half of the year and stabilised in the third quarter but declined in the fourth quarter again. An overall reduction of 10.1% was noted as compared with the peak in the third quarter of 2019.

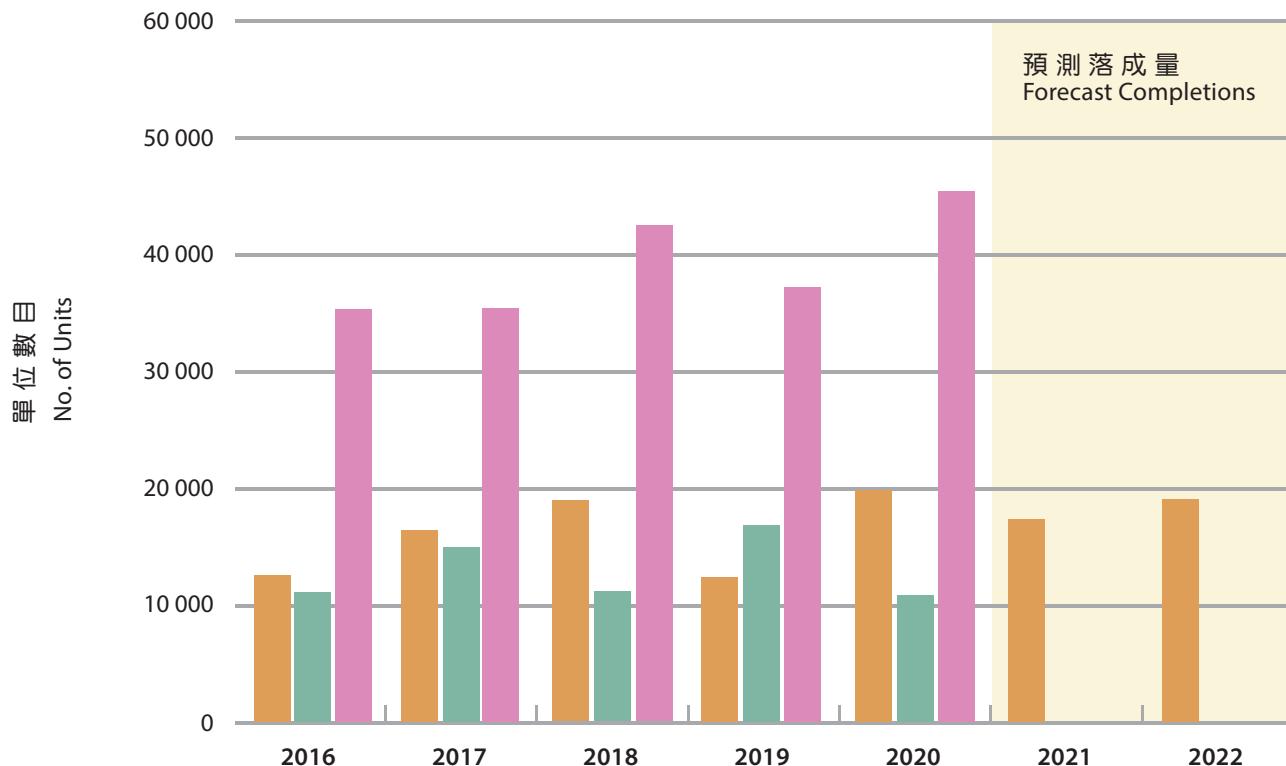


### 售價及租金指數 Price and Rental Indices



# 私人住宅 (中 / 小型單位) PRIVATE DOMESTIC (SMALL/MEDIUM UNITS)

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



	單位 數 目 No. of Units						
	2016	2017	2018	2019	2020	2021	2022
落成量 Completions	12 512	16 350	18 863	12 302*	19 751	17 252#	19 017#
入住量 Take-up	11 040	14 867	11 083	16 751	10 787		
空置量 Vacancy	35 234	35 314	42 336	37 091	45 260		
% <sup>+</sup>	3.3	3.3	3.9	3.3	4.0		

\* 2019年落成量包括在年內落成並預計以市價在公開市場發售，但其後於2020年轉為資助出售房屋的43個住宅單位。

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.

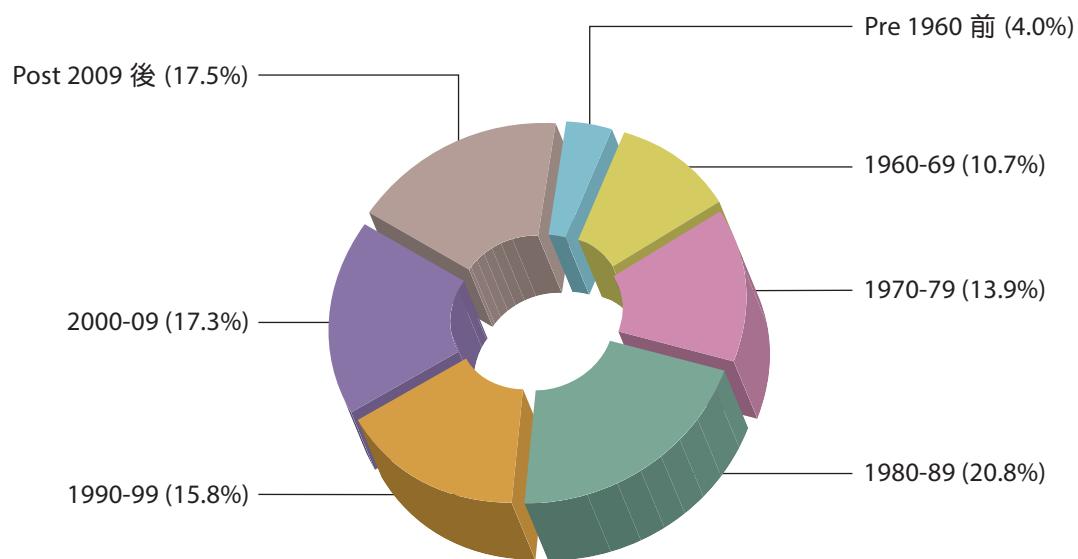
# 預測數字  
Forecast figures

## 私人住宅（大型單位） PRIVATE DOMESTIC (LARGE UNITS)

此分類包括實用面積為 100 平方米或以上的單位。2020 年年底的總存量為 96 730 個單位，佔私人住宅總存量的 8%。圖表顯示這分類按樓齡劃分的總存量。

This sub-sector comprises units with a saleable area of 100 m<sup>2</sup> or above. Stock at the end of 2020 was 96 730 units, representing 8% of the total private domestic stock. The stock distribution by age for this sub-sector is shown in the chart.

### 按樓齡分類的總存量 Stock Distribution by Age



2020 年落成的 1 137 個單位中，有 64% 位於新界。按地區計，大埔和九龍城合共佔落成量的 56%。

Of the 1 137 units completed in 2020, 64% were located in the New Territories. On district basis, Tai Po and Kowloon City together accounted for 56% of the completions.

私人住宅（大型單位）  
**PRIVATE DOMESTIC (LARGE UNITS)**

2020 年的入住量減少 30% 至 1 758 個單位。年底空置量下跌至 7 106 個單位，相當於此分類單位總存量的 7.3%。

Take-up in 2020 decreased by 30% to 1 758 units. Vacancy at the year-end fell to 7 106 units, representing 7.3% of the stock in this sub-sector.



預計此分類的落成量在 2021 年將下跌至 976 個單位，並在 2022 年進一步下跌至 967 個。在 2021 年，此分類的新供應將集中在港島，當中南區將提供落成量的 39%。在 2022 年，新供應將集中在新界。大埔和沙田將合共提供新落成單位的 51%。

Completions in this sub-sector are expected to drop to 976 units in 2021 and further to 967 units in 2022. In 2021, new supply in this sub-sector will be concentrated in Hong Kong Island, with the Southern district providing 39% of the completions. In 2022, new supply will be concentrated in the New Territories, with Tai Po and Sha Tin together providing 51% of the new completions.



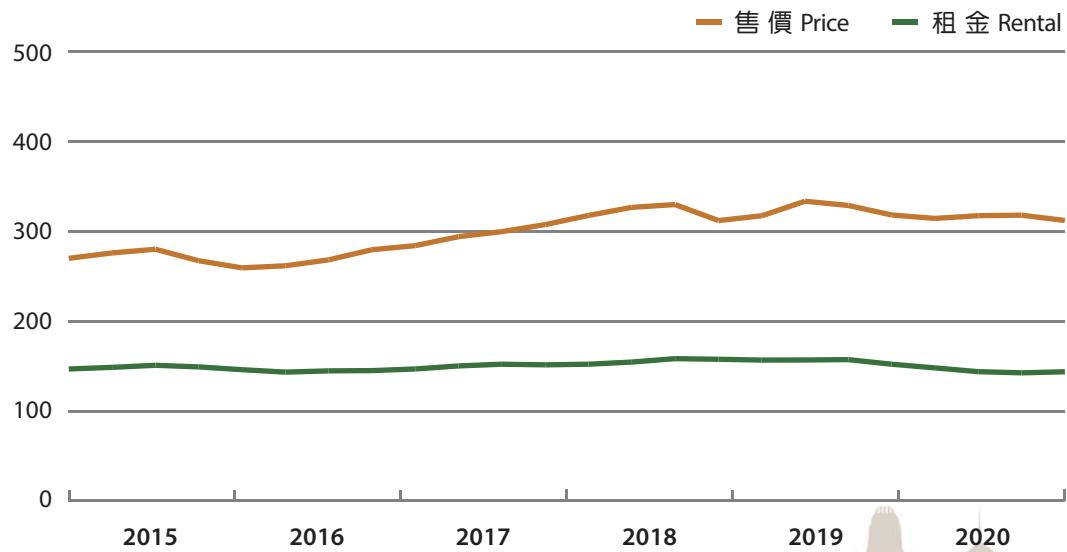
## 私人住宅（大型單位） PRIVATE DOMESTIC (LARGE UNITS)

此分類物業的售價在年內有升有跌。2020 年第四季的售價較前一年同期下跌 1.9%。租金則於首三季下跌，但在第四季回升。然而，第四季的租金仍較 2019 年同期下跌 5.5%。與近期的市場頂峯相比，售價較 2019 年第二季下跌 6.4%，租金則較 2018 年第三季下跌 9.2%。

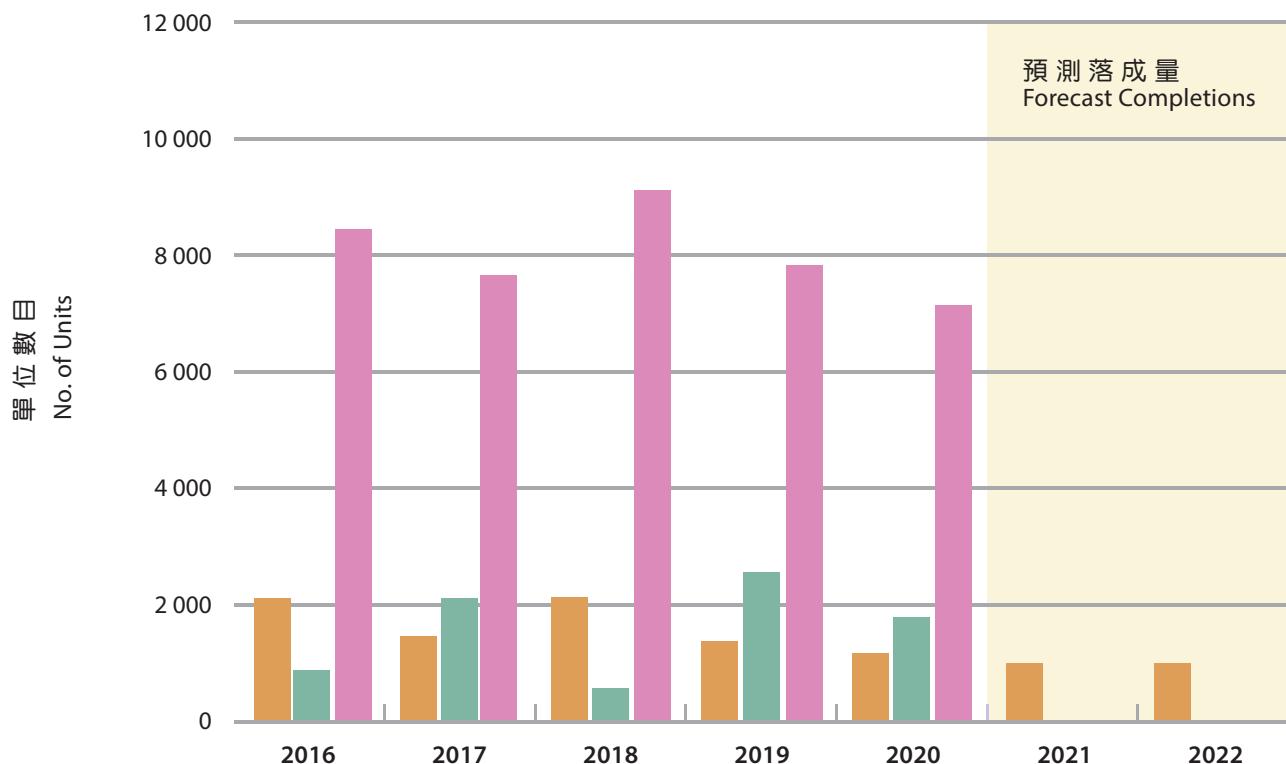
Prices in this sub-sector experienced ups and downs throughout the year. In the fourth quarter of 2020, prices registered a decrease of 1.9% from a year earlier. Rents dropped in the first three quarters but rebounded in the fourth quarter. Nevertheless, rentals still recorded a fall of 5.5% in the fourth quarter over the same period in 2019. Comparing with the recent market peak, prices fell by 6.4% from the second quarter of 2019 while rents dropped by 9.2% from the third quarter of 2018.



### 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						
	2016	2017	2018	2019	2020	2021	2022
落成量 Completions	2 083	1 441	2 105	1 341	1 137	976 <sup>#</sup>	967 <sup>#</sup>
入住量 Take-up	841	2 087	540	2 527	1 758		
空置量 Vacancy	8 423	7 628	9 090	7 801	7 106		
% <sup>+</sup>	9.2	8.2	9.6	8.1	7.3		

- + 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