

SEOUL OFFICE LEASING

March 2022 Monthly Market Review

조사개요

지역	서울 전 지역 및 판교, 분당 지역
대상	연면적 1,000㎡(330py) 이상, 지상 4층 이상의 업무시설 및 업무 복합시설
조사 방법	전화조사 및 자산관리업체의 발표자료, 공시자료 등 참고
조사 내용	오피스 임대 및 공실 변화, 임차인 이동현황, 거래 사례 등
조사 기간	2022년 2월 1개월 간 조사
DB 관리	OKEY 리서치센터는 업무용 빌딩의 공실정보 및 임대료를 조사하고 있으며, 사무실 임대플랫폼 OKEY Office Key를 통하여 관리 활용되고 있습니다.

권역별 분류

CBD
Central Business District

GBD
Gangnam Business District

YBD
Yeouido Business District

ETC
Non Major Business District

PBBD
PTV-Bundang Business District

도심권
종로구, 중구 일대

강남권
강남구, 서초구 일대

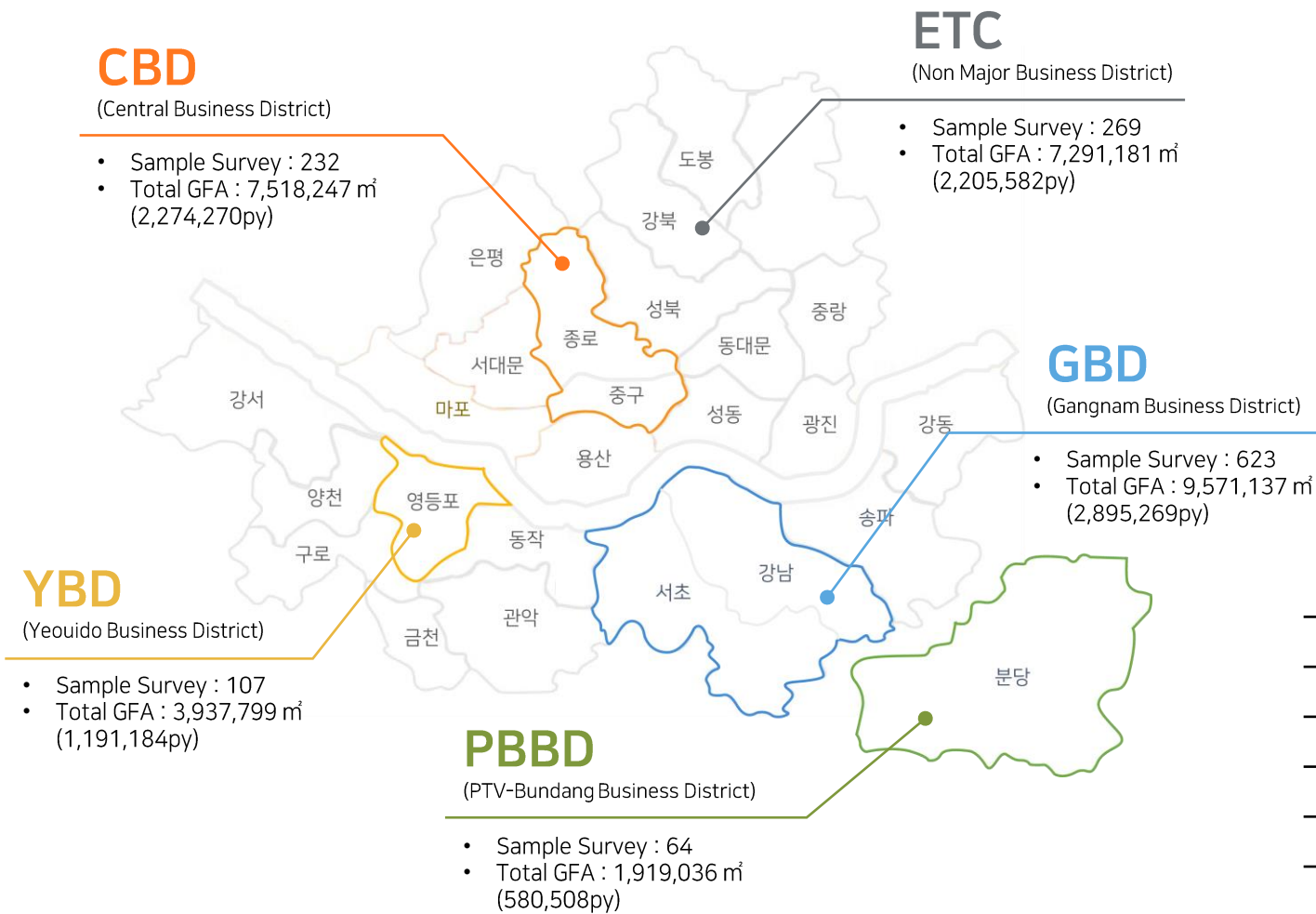
여의도권
여의도, 영등포구 일대

서울기타권
상암, 마포, 용산 등 주요권역에 속하지 않은 서울권역

판교, 분당권
판교테크노밸리, 성남시 분당구 일대

오피스 규모별 분류기준

OKEY	P Grade Prime 빌딩	S Grade 대형 빌딩	A Grade 중대형 빌딩	B Grade 중소형 빌딩	C Grade 소형 빌딩
연면적	15,000py 이상	7,000py 이상	4,000py 이상	1,000py 이상	1,000py 미만
기준층 임대면적	500py 이상	300py 이상	200py 이상	150py 이상	150py 미만



Building Survey : Total 1,295

	P	S	A	B
CBD	44	70	34	84
GBD	27	82	91	423
YBD	19	23	31	34
ETC	41	59	54	115
PBBD	10	16	11	27

• NOC (Net Occupancy Cost)

오피스시장의 특성상 임대형태(전세, 월세) 및 빌딩특성이 각각 다른 오피스 빌딩의 비교를 위하여 전용면적 1평당 임대 할 때 필요한 비용을 월 단위로 환산한 수치

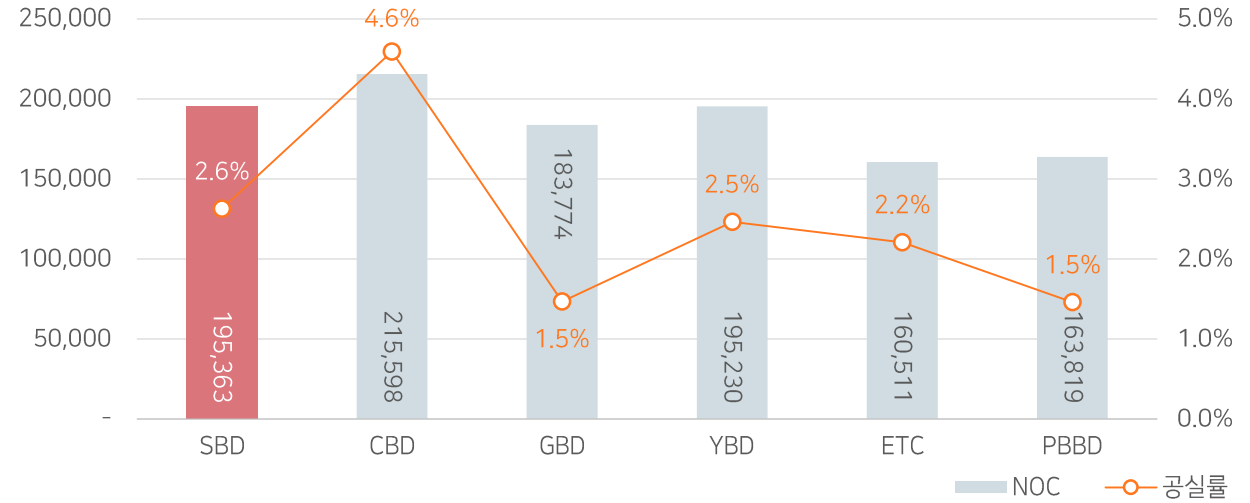
01 SBD 서울 전체

공실률
2.63% ↓

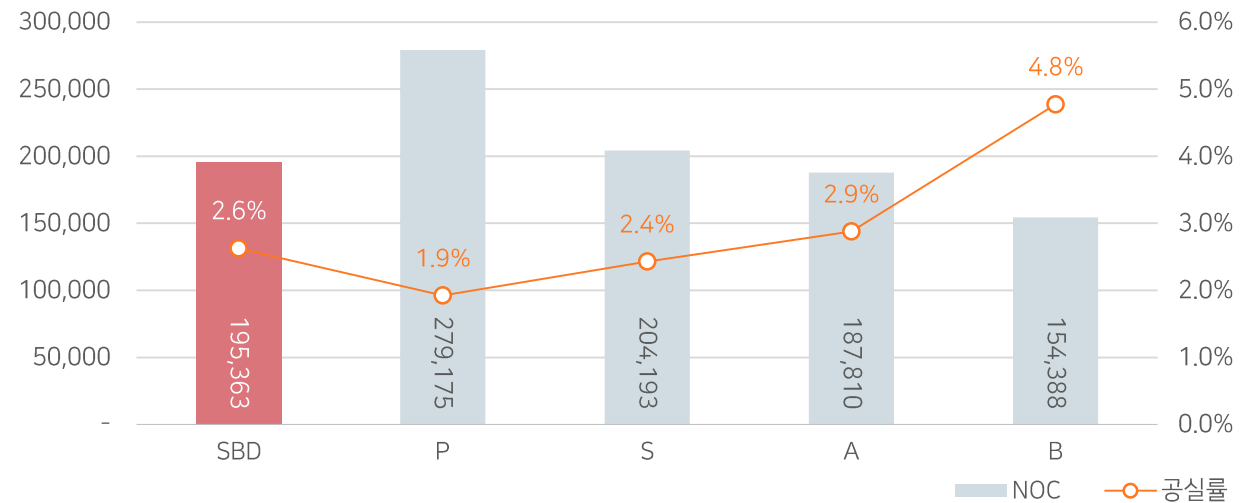
평균 NOC
₩ 195,363 ↑

평균 임대료	평균 보증금	평균 관리비
79,335	861,119	30,246

2022년도 2월 조사한 서울지역 오피스의
평균 공실률은 2.63%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 195,363원으로 조사되었다.



■ 서울 전체 권역 별 공실률 / NOC



■ 서울 전체 규모 별 공실률 / NOC

01 SBD 서울 전체

2022년 2월 서울권역의 공실률 흐름은 다음과 같이 조사되었다.

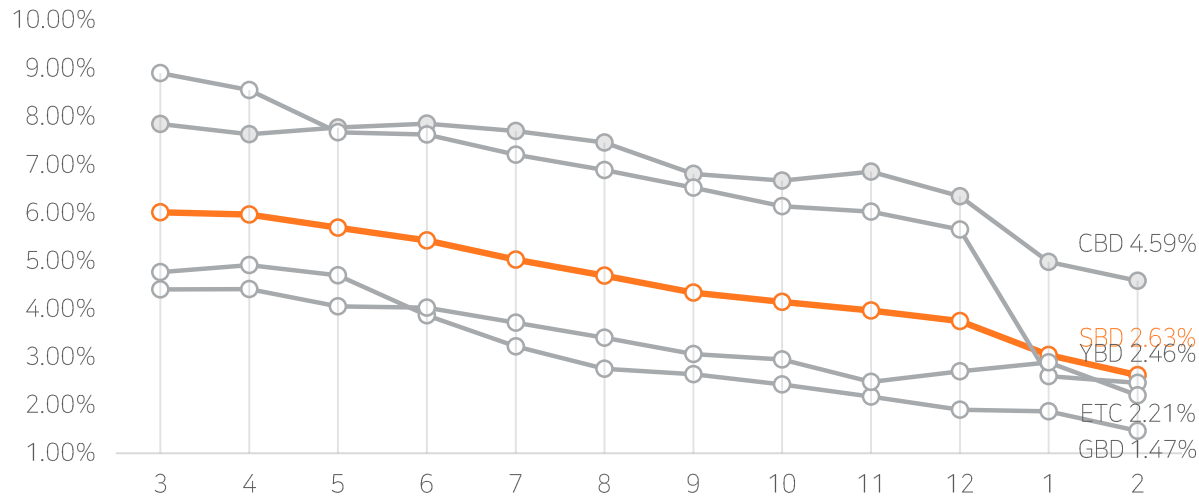
CBD의 씨티센터타워에 UBASE가 입주하며 4개 층 총 2,560평이 해소되었고,

TNS빌딩 건물 전체 1,690평에 액토즈소프트가 입주를 완료하였다.

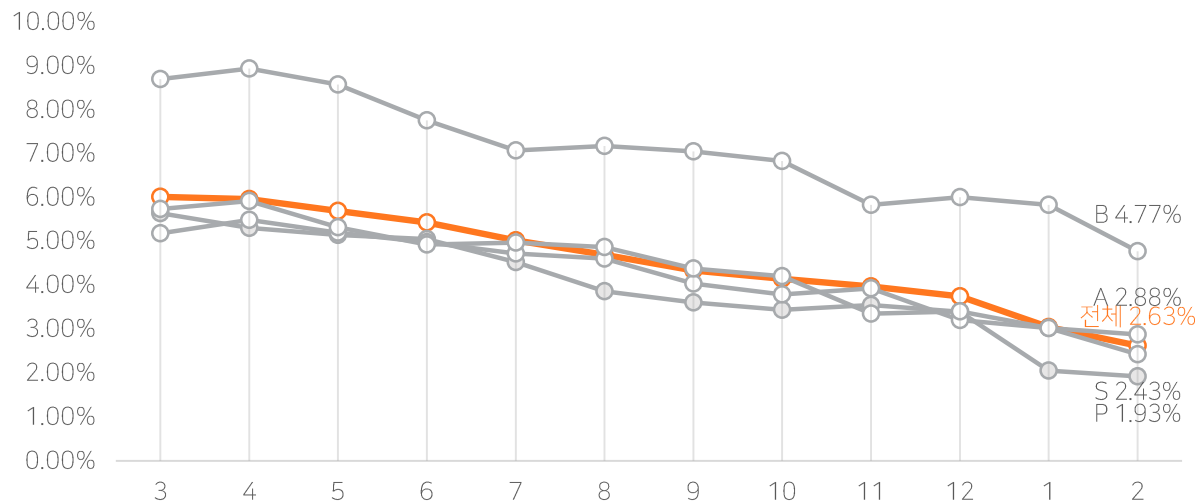
GBD의 동원에프앤비빌딩에서 현대제철 서울영업소가 사용중인 8개 층 총 3,610평이 내년 초 임대시장에 나올 예정이다.

YBD의 심팩빌딩에서 SC엔지니어링이 사용중인 2개층 반 1,030평이 올 중순 임대시장에 나올 예정이다.

상암지역의 S-City에 TK엘리베이터가 3개층 2,660평에 입주를 마쳤고, 추가로 교보문고가 2개층, 미디어지니가 2개층을 계약하는 등 총 4,220평의 공실이 해소된 것으로 조사되었다.



■ 서울 권역별 공실률 변화



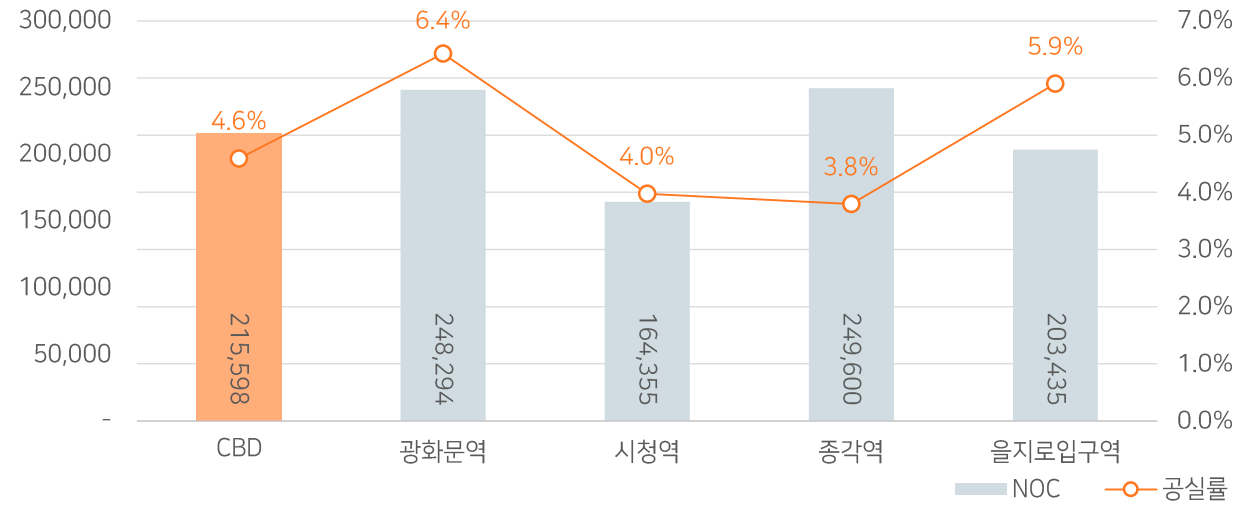
■ 서울 규모별 공실률 변화

02 CBD 도심권역

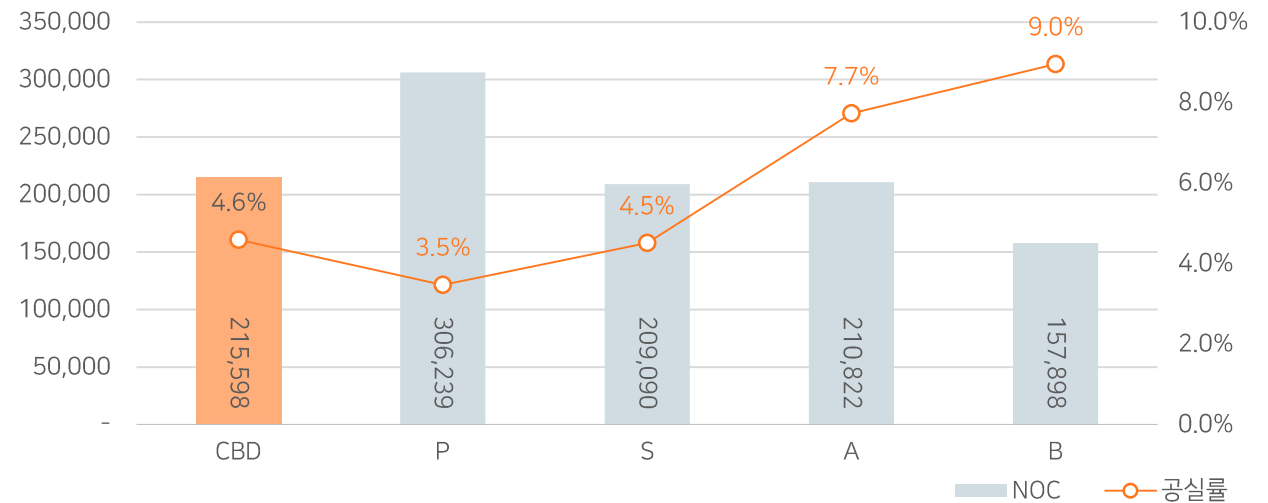
공실률 4.59% ↓ 평균 NOC ₩ 215,598 ↑

평균 임대료	평균 보증금	평균 관리비
87,867	873,080	35,761

2022년도 2월 조사한 도심지역 오피스의 평균 공실률은 4.59%로 조사되었으며, 전용면적 1평당 사용할 때 드는 비용을 계산한 평균 NOC는 215,598원으로 조사되었다.



■ CBD 지역 세부권역 별 공실률 / NOC



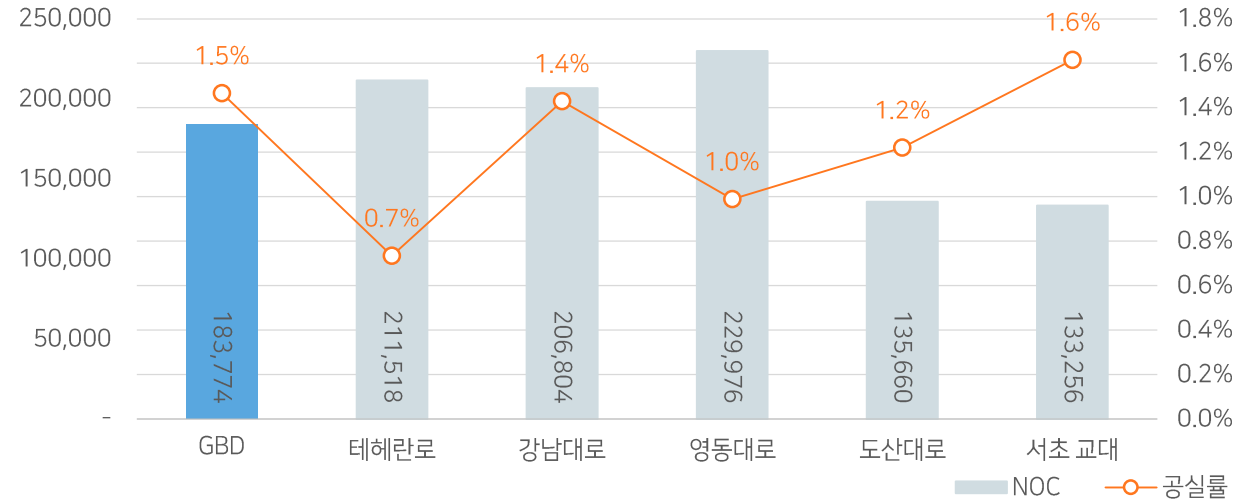
■ CBD 지역 규모 별 공실률 / NOC

73 GBD 강남권역

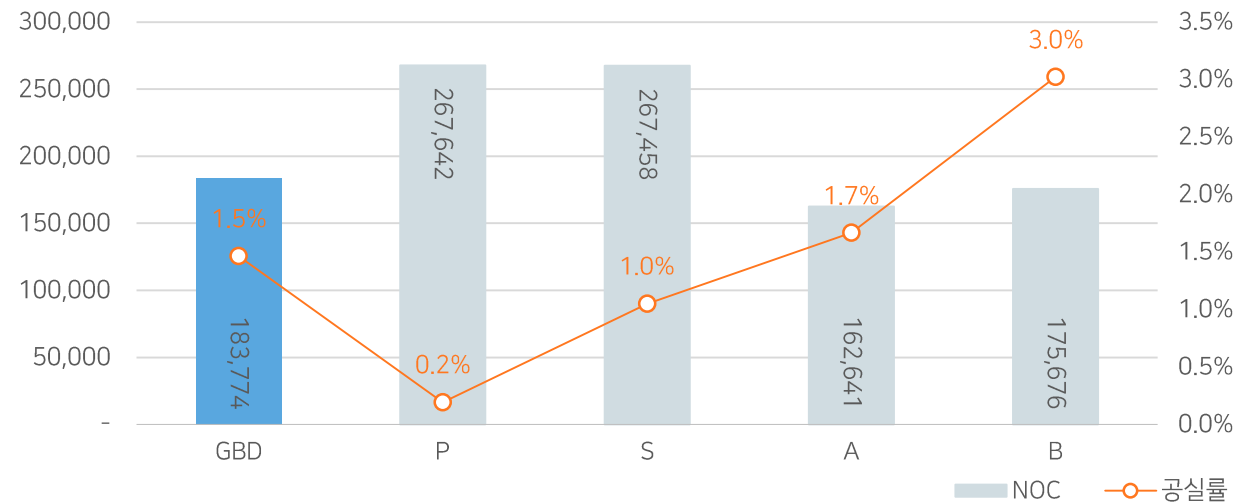
공실률 1.47% ↓ 평균 NOC ₩ 183,774 ↓

평균 임대료	평균 보증금	평균 관리비
83,302	1,195,914	26,411

2022년도 2월 조사한 강남지역 오피스의 평균 공실률은 1.47%로 조사되었으며, 전용면적 1평당 사용할 때 드는 비용을 계산한 평균 NOC는 183,774원으로 조사되었다.



■ GBD 지역 세부권역별 공실률/NOC



■ GBD 지역 규모 별 공실률/NOC

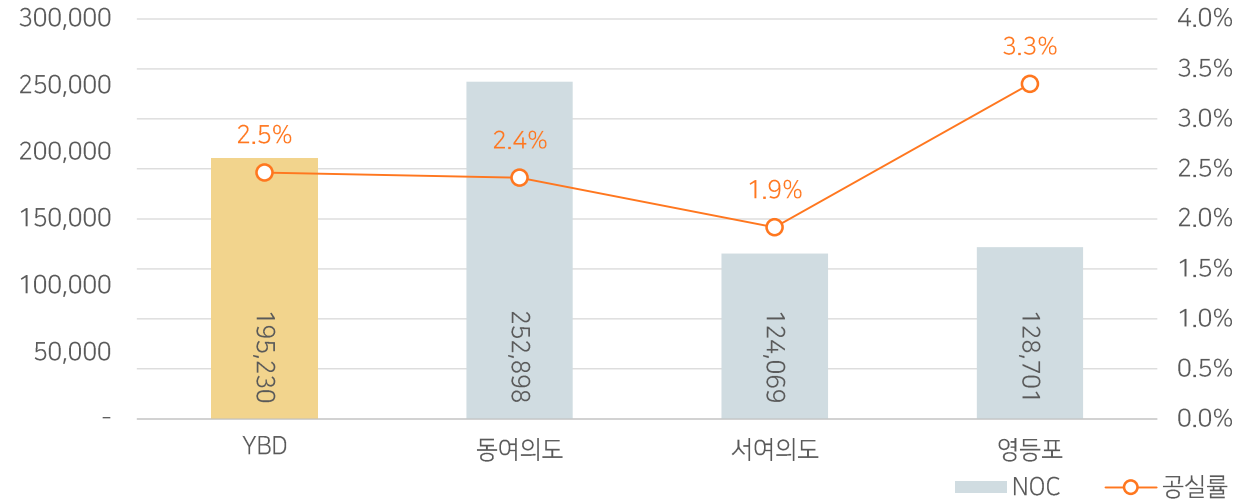
24 YBD 여의도, 영등포 권역

공실률
2.46% ↓

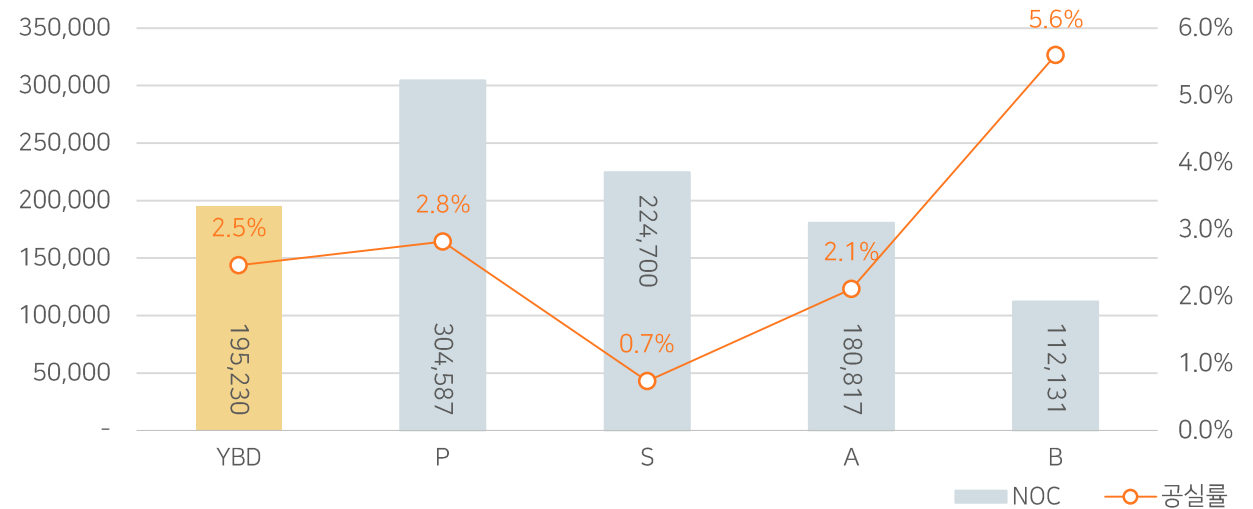
평균 NOC
₩ 195,230 ↓

평균 임대료	평균 보증금	평균 관리비
72,802	744,885	31,348

2022년도 2월 조사한 여의도, 영등포 지역
오피스의 평균 공실률은 2.46%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 195,230원으로 조사되었다.



■ YBD 지역세부권역별 공실률/NOC



■ YBD 지역규모 별 공실률/NOC

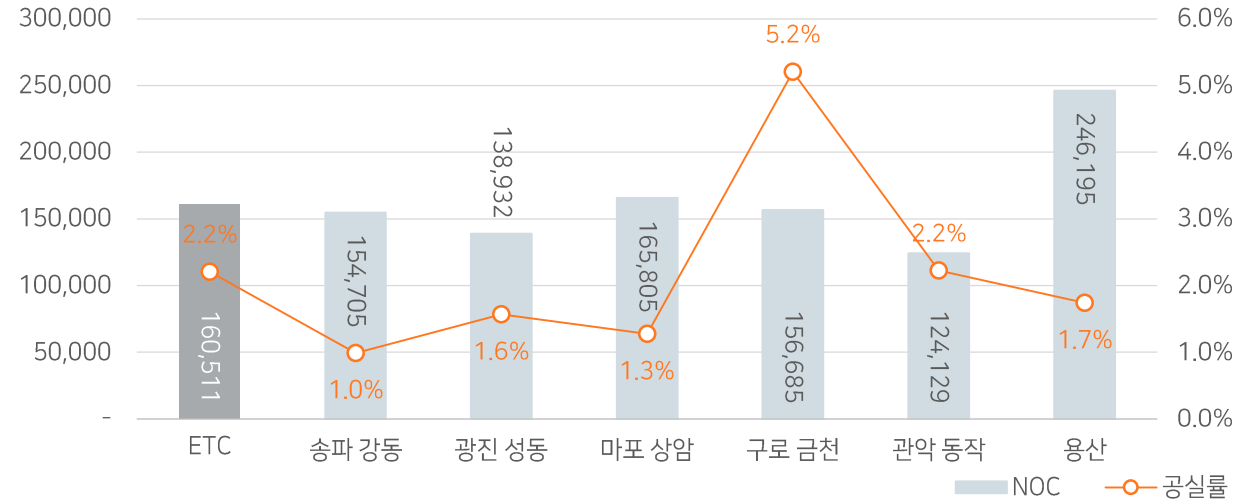
75 ETC 서울 기타권역

공실률
2.21% ↓

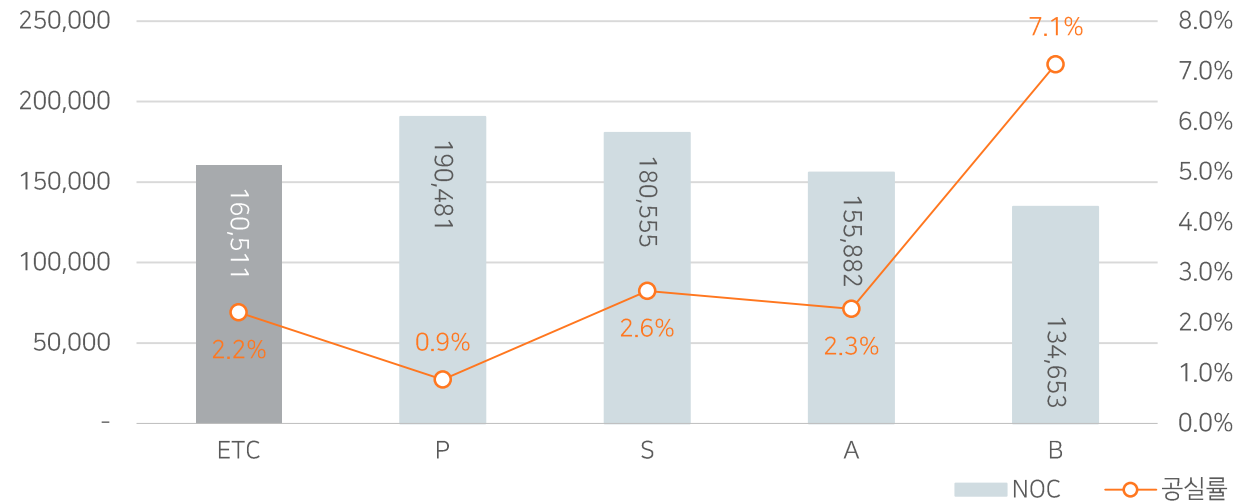
평균 NOC
₩ 160,511 ↑

평균 임대료	평균 보증금	평균 관리비
61,027	661,053	20,837

2022년도 2월 조사한 서울 기타지역 오피스의
평균 공실률은 2.21%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 160,511원으로 조사되었다.



ETC 지역 세부권역별 공실률 / NOC



ETC 지역 규모별 공실률 / NOC

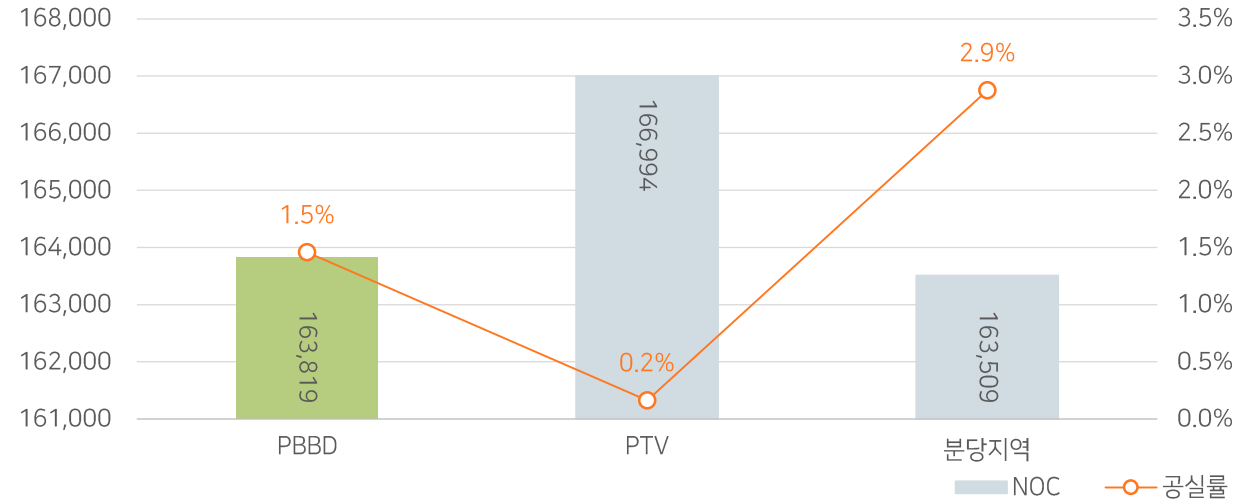
76 PBBD 판교, 분당 권역

공실률
1.46 % ↓

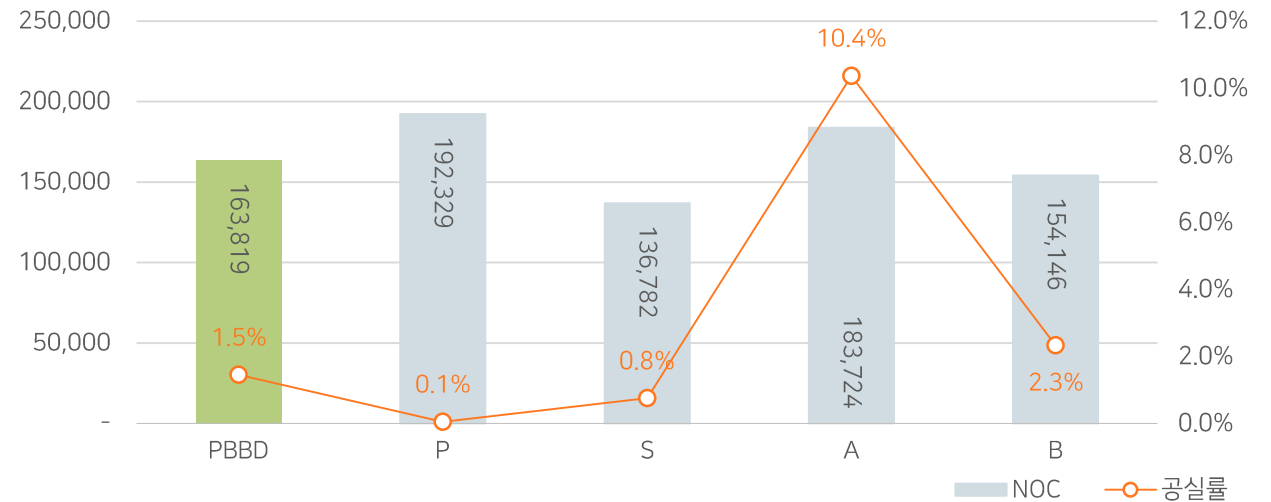
평균 NOC
₩ 163,819 ↑

평균 임대료	평균 보증금	평균 관리비
57,226	702,957	25,083

2022년도 2월 조사한 판교, 분당지역 오피스의
평균 공실률은 1.46%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 163,819원으로 조사되었다.



■ PBBD 지역 세부권역 별 공실률 / NOC



■ PBBD 지역 규모 별 공실률 / NOC

세부 지역 별 임대 현황

권역	세부권역	총임대면적	평균보증금	평균임대료	평균관리비	평균NOC	공실률
CBD	광화문역	281,068	1,039,721	104,516	37,799	248,294	6.43%
	시청역	264,684	678,556	70,226	30,247	164,355	3.97%
	종각역	312,135	905,028	92,066	38,726	249,600	3.79%
	을지로입구역	238,908	809,647	85,368	36,847	203,435	5.90%
GBD	테헤란로	983,779	1,242,414	85,514	33,201	211,518	0.73%
	강남대로	488,436	1,409,742	99,766	29,253	206,804	1.43%
	영동대로	190,397	905,747	83,915	27,974	229,976	0.99%
	도산대로	77,565	1,182,540	61,128	19,880	135,660	1.22%
	서초 교대	130,196	1,115,015	59,997	25,022	133,256	1.62%
YBD	동여의도	881,437	892,971	92,747	37,300	252,898	2.41%
	서여의도	158,600	436,130	42,244	26,355	124,069	1.92%
	영등포	151,147	799,091	60,409	18,021	128,701	3.35%
ETC	송파 강동	537,346	817,879	68,771	20,920	154,705	0.99%
	광진 성동	140,422	843,031	66,266	21,878	138,932	1.57%
	마포 상암	592,546	659,076	63,540	30,068	165,805	1.28%
	구로 금천	207,077	619,688	58,634	13,736	156,685	5.21%
	관악 동작	156,834	674,362	55,011	18,621	124,129	2.22%
	용산	278,384	791,000	79,100	37,914	246,195	1.74%
PBBD	PTV	303,241	674,581	58,093	20,375	166,994	0.16%
	분당지역	277,268	705,725	57,142	25,543	163,509	2.87%

지역 별
사용승인 현황

권역	빌딩명	소재지	주용도	연면적(m ²)	연면적(3.3m ²)	사용승인일
GBD	베네트홀딩스 사옥	서초구 방배동	업무시설	1,892	572	18-Jan
ETC	미래에코타워	구로구 구로동	공장	20,104	6,082	05-Jan
	동명M빌딩	강서구 화곡동	의료시설	9,096	2,752	04-Jan
	(주)진성테크 연구소	강서구 마곡동	교육연구시설	7,301	2,208	21-Jan
	스탈릿 성수	성동구 성수동2가	업무시설	7,148	2,162	14-Jan
	목동메디컬스퀘어	강서구 화곡동	제1종근린생활시설	6,723	2,034	10-Jan
	광진 경제허브센터	광진구 구의동	업무시설	3,321	1,005	19-Jan
	CORNER25	성동구 성수동1가	업무시설	2,999	907	06-Jan
	더305 빌딩	동대문구 이문동	제1종근린생활시설	2,987	904	12-Jan
	LG베스트샵	강북구 미아동	판매시설	2,898	877	20-Jan
	두승빌딩	강서구 화곡동	제1종근린생활시설	2,138	647	07-Jan

Survey Overview

Target Areas	All districts in Seoul and Pangyo & Bundang districts
Target Samples	Commercial properties of 4 stories or more, and with a gross floor area of 1,000m ² (=300py) or more
Survey Method	Telephone enquiry, publications from property management and Korea's government
Main Focus	Market trend in a property industry, changes in vacancy rate and tenants' inflow/outflow etc.
Survey Period	One calendar month, February 2022
DB Mangement	Okey Research Center has carried out our research with a large number of sample data and provided the vacancy and rent information of office buildings via our office lease platform 'OKEY- Office Key'.
Exchange Rate	1 USD = 1,209.90 KRW (0.83 USD = 1,000 KRW) as of 4th March 2022

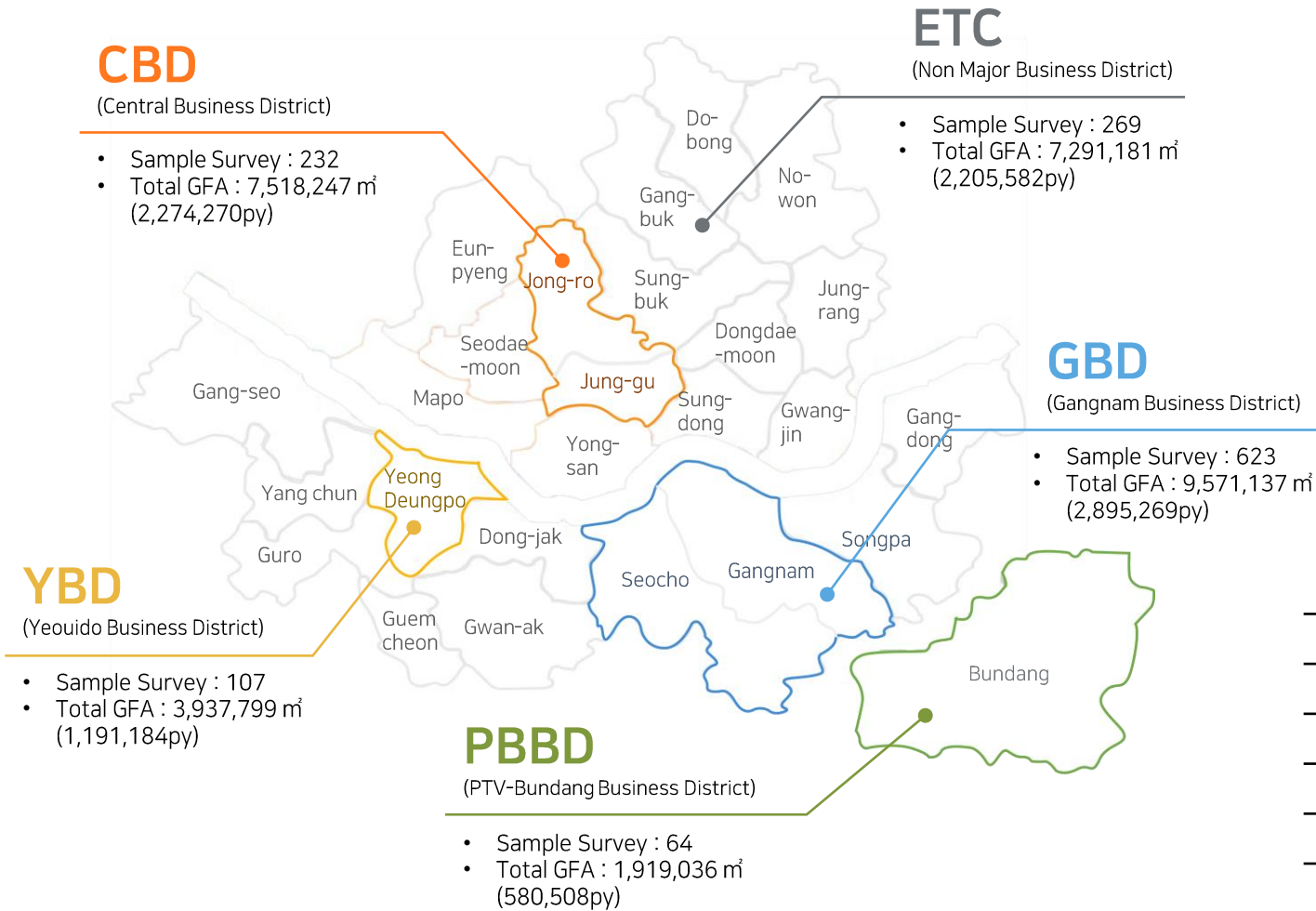
5 Regional Divisions in Seoul

CBD	GBD	YBD	ETC	PBBB
Central Business District	Gangnam Business District	Yeouido Business District	Non Major Business District	PTV-Bundang Business District
Jongro-gu, Jung-gu, etc.	Gangnam-gu, Seocho-gu, etc.	Yeouido, Yeongdeungpo-gu etc.	Songpa, Mapo, Yongsan and other areas outside Central Seoul	Pangyo Techno Valley, Bundang-gu in Sungnam-si etc.

Categories of Office Buildings by Their Sizes

OKEY	P Grade Prime Building	S Grade Large Building	A Grade Large-Medium	B Grade Medium-Small	C Grade Small Building
Gross Floor Area	49,587m ² (15,000py)	23,140m ² (7,000py)	13,223m ² (4,000py)	Above 3,306m ² (Above 1,000py)	Under 3,306m ² (Under 1,000py)
Lease Area of Sample Floor	1,653m ² (500py)	992m ² (300py)	661m ² (200py)	Above 496m ² (Above 150py)	Under 496m ² (Under 150py)

Sample Size of Each District



Building Survey : Total 1,295

	P	S	A	B
CBD	44	70	34	84
GBD	27	82	91	423
YBD	19	23	31	34
ETC	41	59	54	115
PBB	10	16	11	27

• NOC (Net Occupancy Cost)

The cost that 1m² of GFA incurs to a tenant who rents the property.
NOC can be useful to compare between different types of office buildings.

01 SBD Seoul Capital Area

Vacancy rate

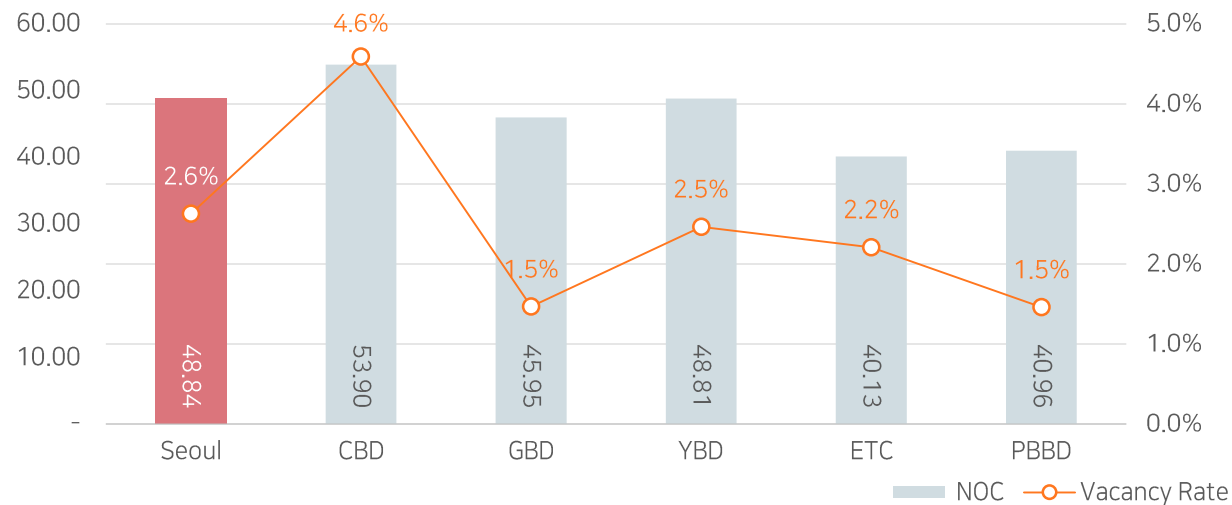
2.63% ↓

Avg, NOC

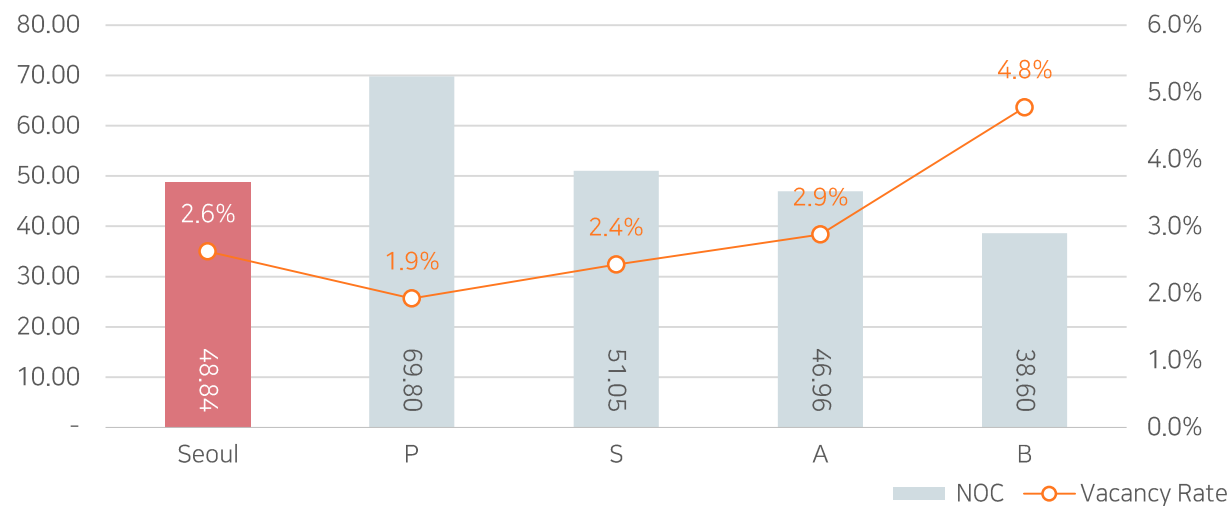
\$ 48.84 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
19.84	215.30	7.56

The average vacancy rate of the office buildings in Seoul is 2.63 % as of February 2022, and the average NOC is \$ 48.84.



■ Vacancy Rate & NOC in Seoul and Each District



■ Vacancy Rate & NOC in Seoul & Each Building Category

01 SBD Seoul Capital Area

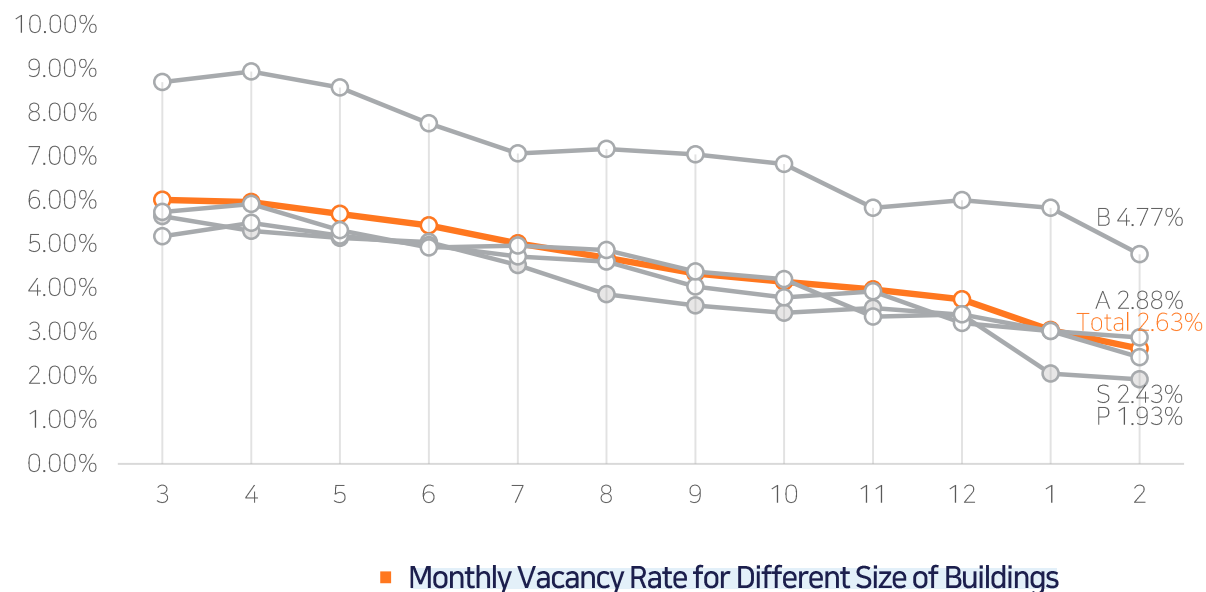
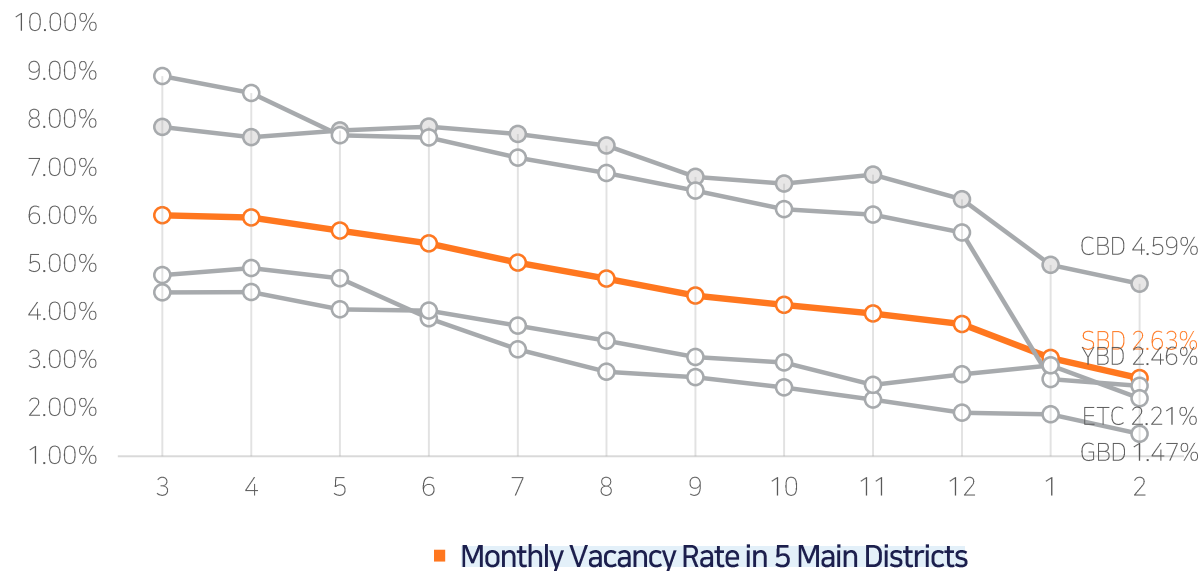
The following charts indicate the vacancy level of Seoul in Feb 2022.

UBASE moved into City Center Tower in CBD as a new tenant filling the vacancy of the 4 floors in the tower, which comes up to 8,450m². The whole TNS building, of 5,600m², was rented by ACTOZ Software Corp. who completed its moving process to the building.

The 8 floors of 11,940m² in total, in Dongwon F&B Building in GBD are currently occupied by Hyundai Steel Corp. but the whole 8 floors came out to the lease market. Similarly, the 2 and half floor of 3,400m² in total, in Simpak Building in YBD are currently occupied by SC Engineering Corp. and the floors will come out to the market in the mid year of 2022.

TK Elevator Corp. moved into S-City Building in Sangam, renting the 3 floors of 8,790m² in total, in the building.

In addition, Kyobo Books Ltd. and Media Genie Corp. signed the lease contracts to rent the 2 floors each; both companies are renting the office space of 13,950m² altogether.



02 CBD Central Seoul

Vacancy rate

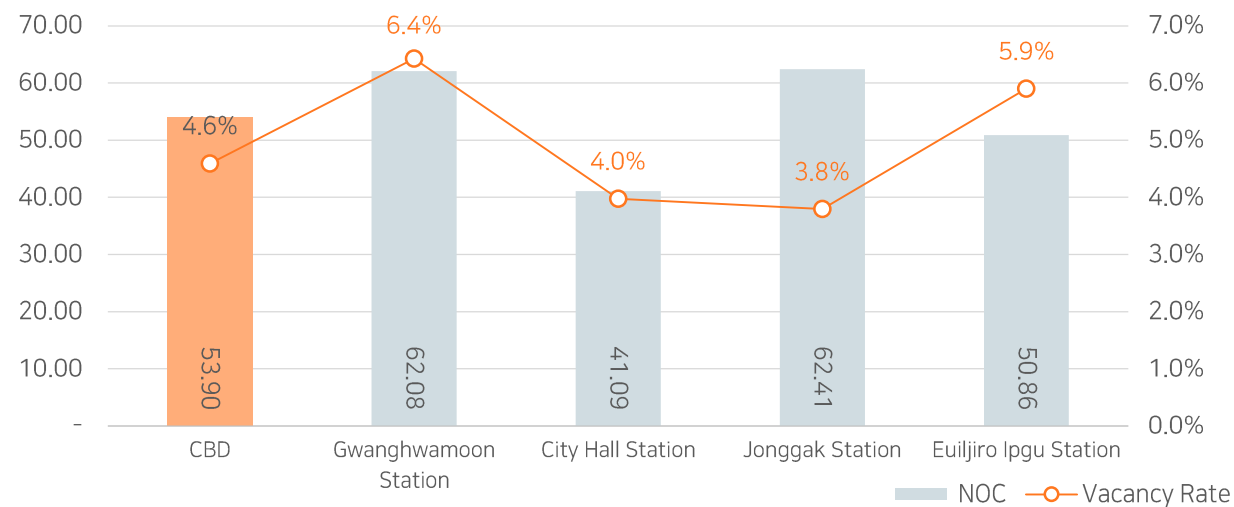
4.59% ↓

Avg, NOC

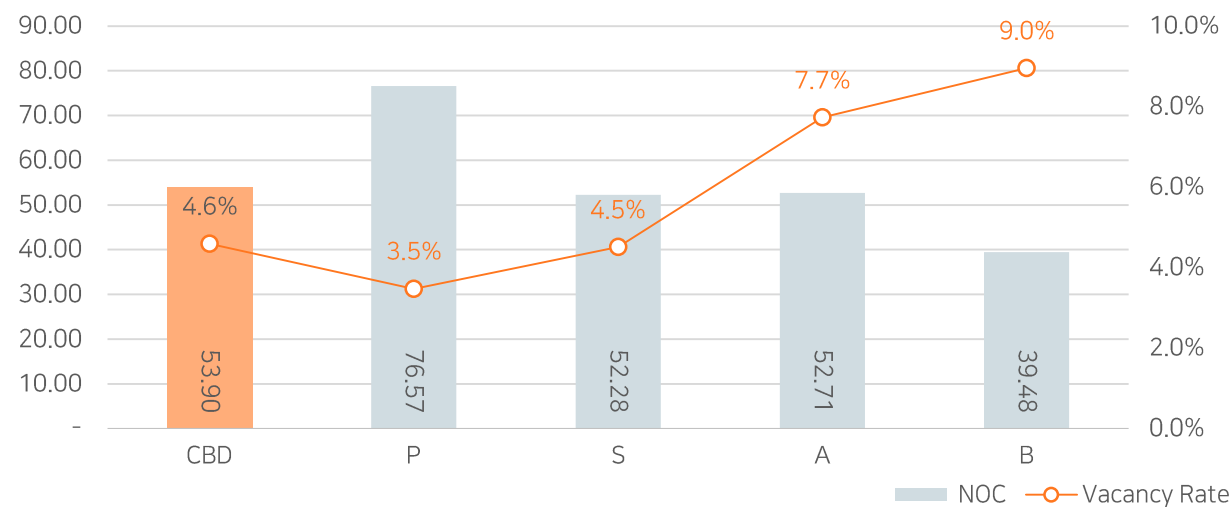
\$ 53.90 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
21.97	218.29	8.94

The average vacancy rate of the office buildings in CBD is 4.59 % as of February 2022, and the average NOC is \$ 53.90.



■ Vacancy Rate & NOC in Central Business District (CBD)



■ Vacancy Rate & NOC for Different Sizes of Building in CBD

GBD Gangnam

Vacancy rate

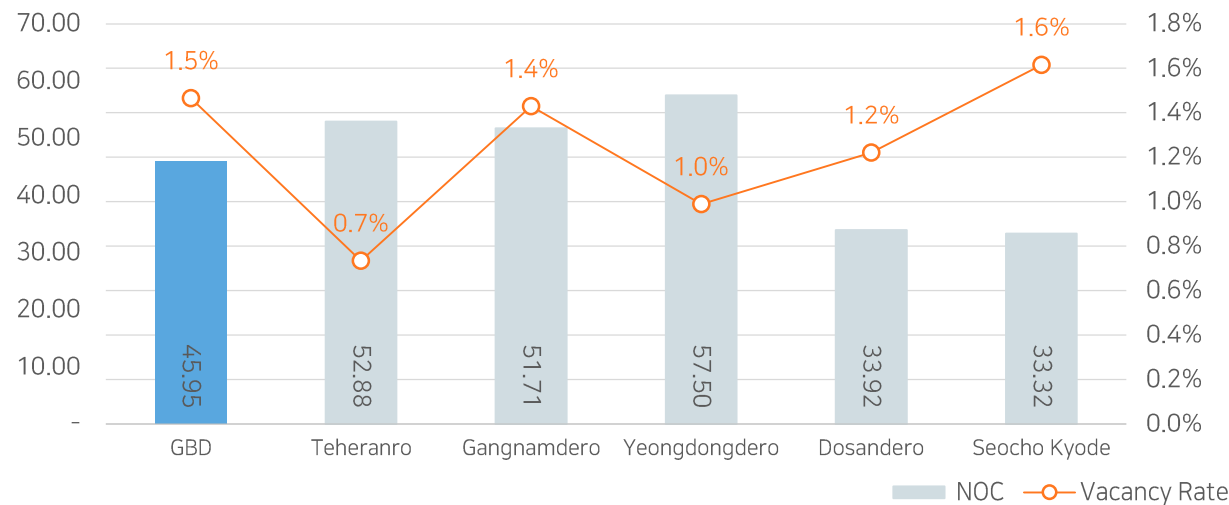
1.47% ↓

Avg, NOC

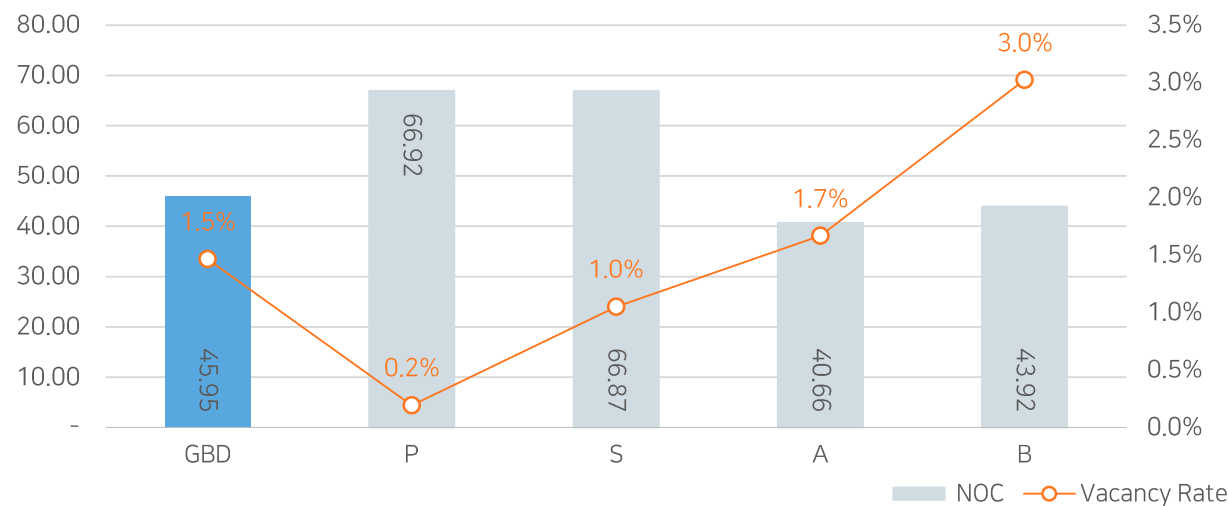
\$ 45.95 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
20.83	299.00	6.60

The average vacancy rate of the office buildings in GBD is 1.47 % as of February 2022, and the average NOC is \$ 45.95.



■ Vacancy Rate & NOC in Gangnam Business District (GBD)



■ Vacancy Rate & NOC for Different Sizes of Building in GBD

Q4 YBD Yeouido & Yeongdeungpo

Vacancy rate

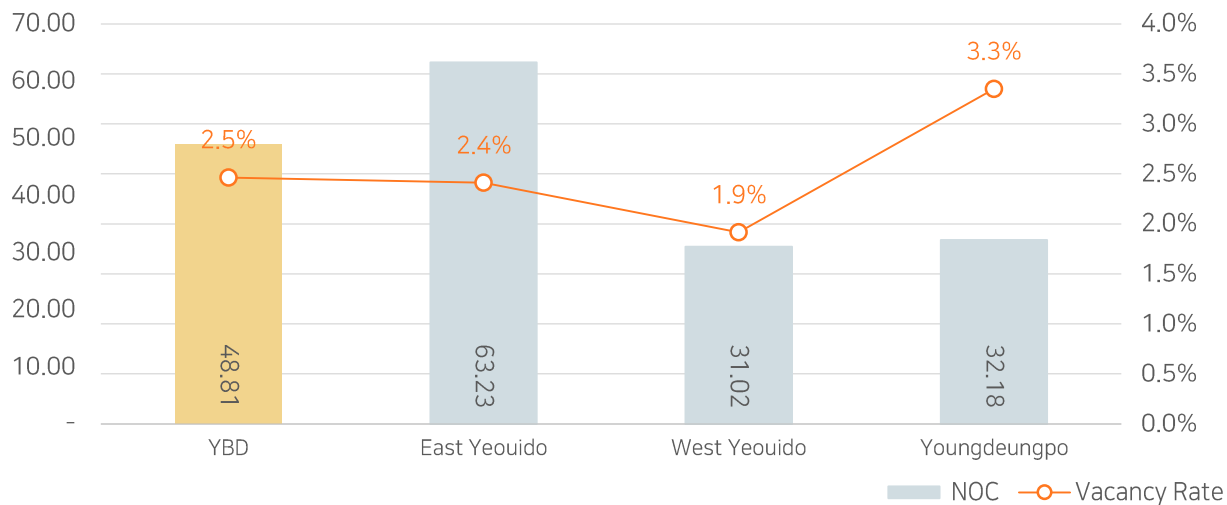
2.46% ↓

Avg, NOC

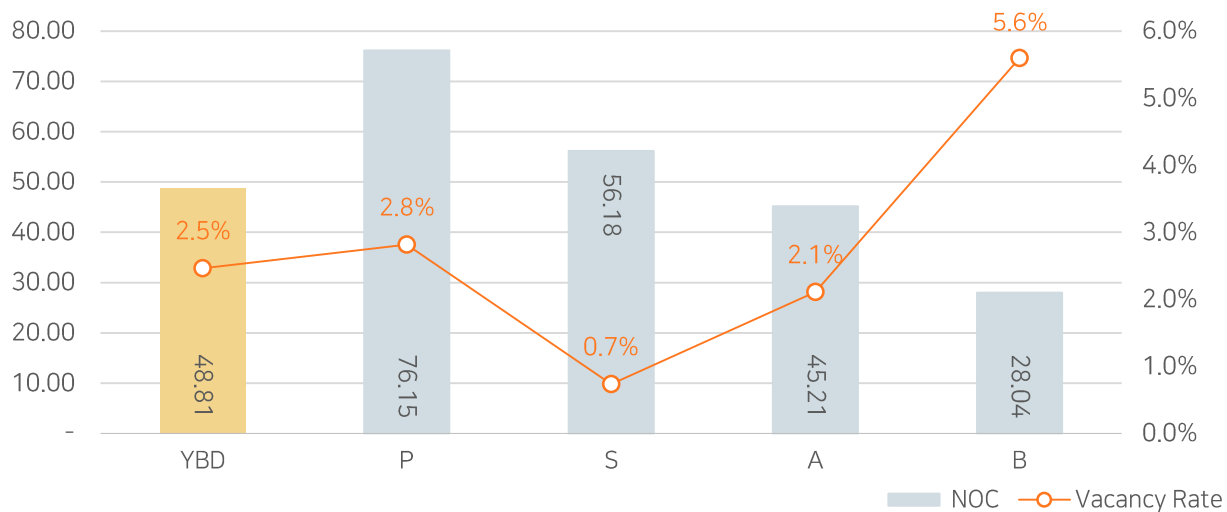
\$ 48.81 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
18.20	186.24	7.84

The average vacancy rate of the office buildings in YBD is 2.46 % as of February 2022, and the average NOC is \$ 48.81.



■ Vacancy Rate & NOC in Yeongdeungpo Business District (YBD)



■ Vacancy Rate & NOC for Different Sizes of Building in YBD

75 ETC Other District in Seoul

Vacancy rate

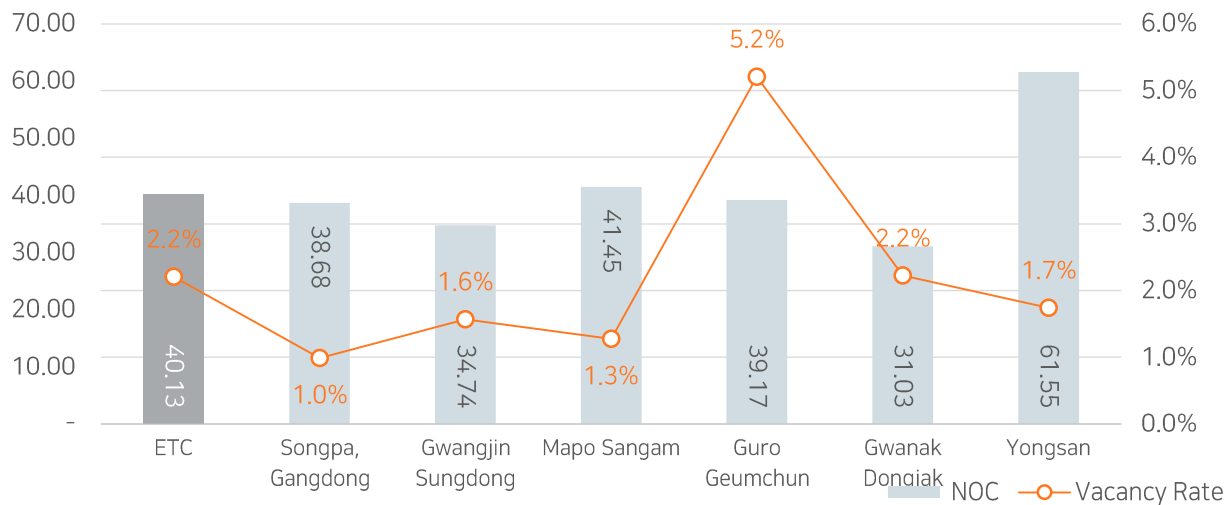
2.21 % ↓

Avg, NOC

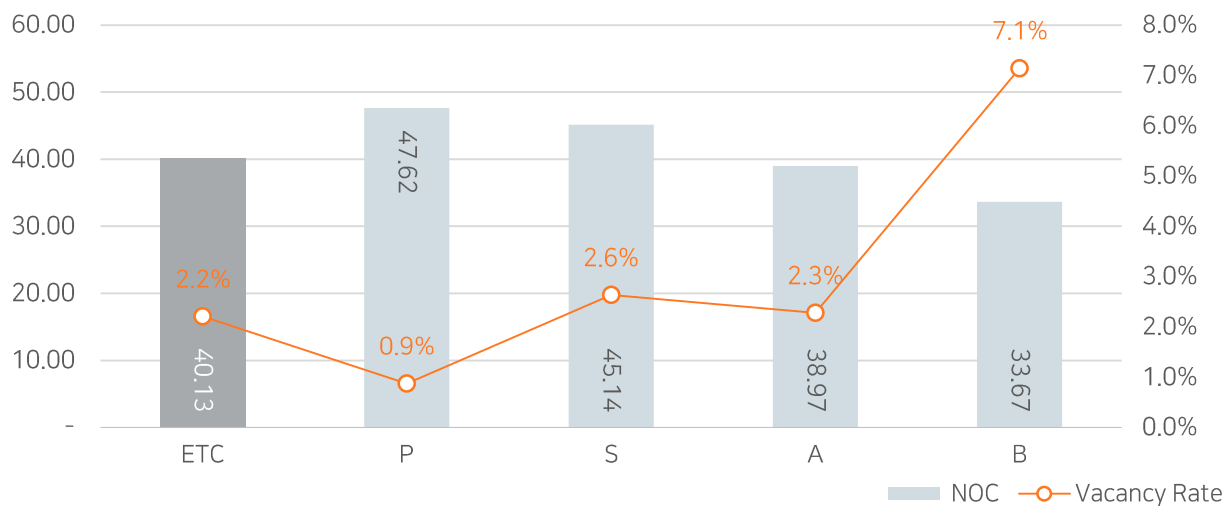
\$ 40.13 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
15.26	165.28	5.21

The average vacancy rate of the office buildings in ETC is 2.21 % as of February 2022, and the average NOC is \$ 40.13.



■ Vacancy Rate & NOC in Other District in Seoul (ETC)



■ Vacancy Rate & NOC for Different Sizes of Building in ETC

76 PBBD PANGYO & BUNDANG

Vacancy rate

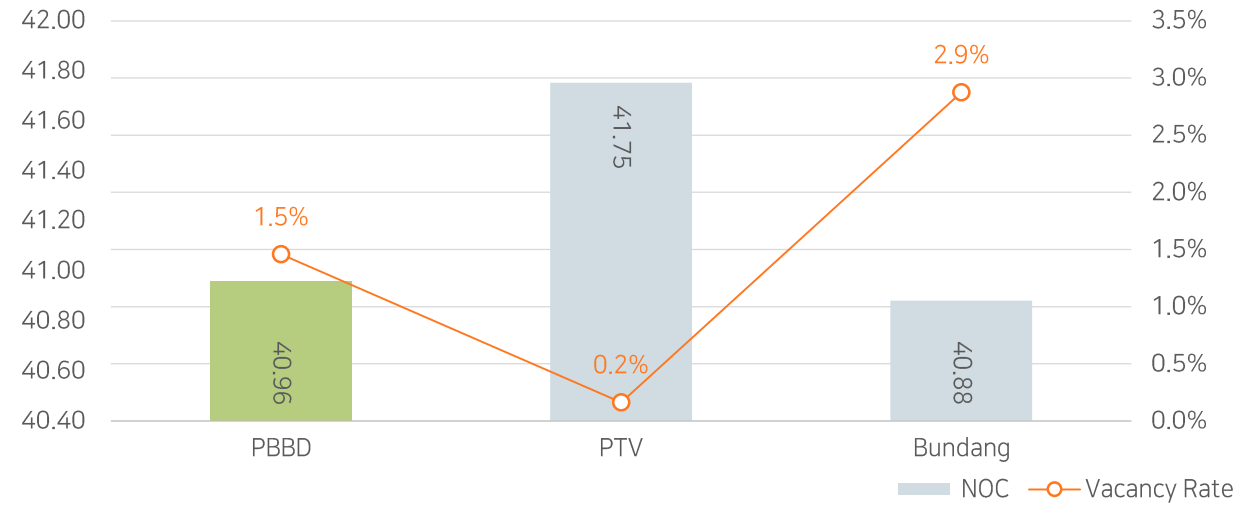
1.46 % ↓

Avg, NOC

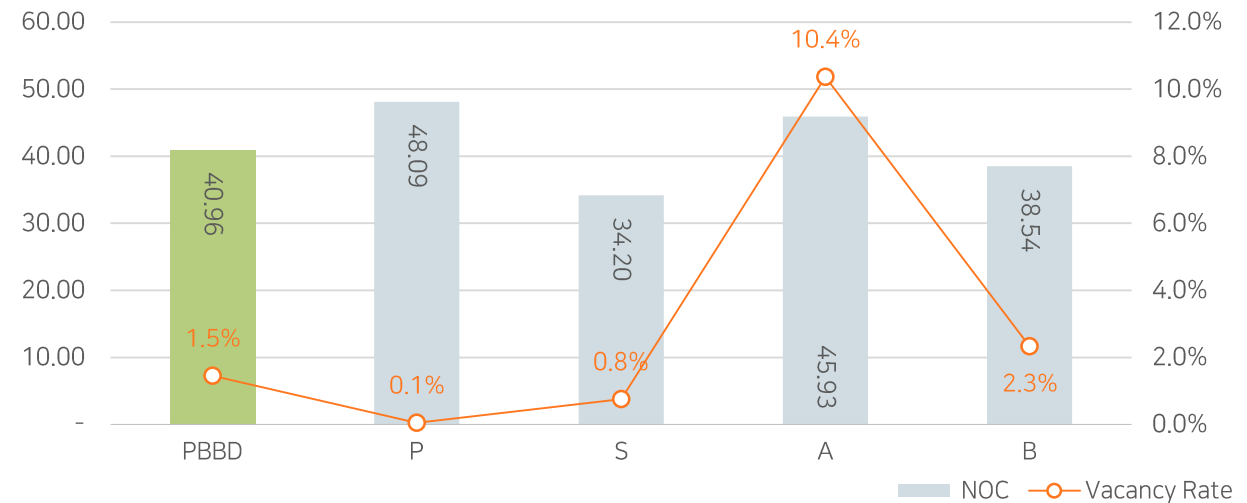
\$ 40.96 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
14.31	175.75	6.27

The average vacancy rate of the office buildings in PBBD is 1.46 % as of February 2022, and the average NOC is \$ 40.96.



■ Vacancy Rate & NOC in Pangyo & Bundang Business District (PBBD)



■ Vacancy Rate & NOC for Different Sizes of Building in PBBD



Overall Lease status

Market	Submarket	Gross Leasing Area	Avg. Deposit	Avg. Rent	Avg. Mgmt. Fee	Avg. NOC	Vacancy rate
CBD	Gwanghwamoon Station	929,151	259.95	26.13	9.45	62.08	6.43%
	City Hall Station	874,988	169.65	17.56	7.56	41.09	3.97%
	Jonggak Station	1,031,852	226.28	23.02	9.68	62.41	3.79%
	Euljiro Ipgu Station	789,777	202.43	21.34	9.21	50.86	5.90%
GBD	Teheranro	3,252,163	310.63	21.38	8.30	52.88	0.73%
	Gangnamdero	1,614,663	352.46	24.94	7.31	51.71	1.43%
	Yeongdongdero	629,411	226.46	20.98	6.99	57.50	0.99%
	Dosandero	256,412	295.66	15.28	4.97	33.92	1.22%
	Seocho Gyodae	430,399	278.78	15.00	6.26	33.32	1.62%
YBD	East Yeouido	2,913,841	223.26	23.19	9.33	63.23	2.41%
	West Yeouido	524,298	109.04	10.56	6.59	31.02	1.92%
	Youngdeungpo	499,660	199.79	15.10	4.51	32.18	3.35%
ETC	Songpa, Gangdong	1,776,349	204.49	17.19	5.23	38.68	0.99%
	Gwangjin Sungdong	464,204	210.78	16.57	5.47	34.74	1.57%
	Mapo Sangam	1,958,830	164.78	15.89	7.52	41.45	1.28%
	Guro Geumchun	684,553	154.93	14.66	3.43	39.17	5.21%
	Gwanak Dongjak	518,459	168.60	13.75	4.66	31.03	2.22%
	Yongsan	920,278	197.77	19.78	9.48	61.55	1.74%
PBBD	PTV	1,002,449	168.66	14.52	5.09	41.75	0.16%
	Bundang	916,587	176.45	14.29	6.39	40.88	2.87%



Land Use Information by District

District	Building Name	Address	Land Use	GFA (㎡)	Completion
GBD	Bennett Holdings Office Building	Seochogu Bangbaedong	Office	1,892	18-Jan
ETC	Mirae Eco Tower	Gurogu Gurodong	Factory	20,104	05-Jan
	Dongmyung M Building	Gangseogu Hwagokdong	Office	9,096	04-Jan
	Jinsung Tech Laboratory	Gangseogu Magokdong	Educational	7,301	21-Jan
	Starlit Sungsoo	Sungdonggu Sungsoodong 2ga	Office	7,148	14-Jan
	Mokdong Medical Square	Gangseogu Hwagokdong	#1 Commercial	6,723	10-Jan
	Gwangjin Economy Hub Center	Gwangjingu Gueuidong	Office	3,321	19-Jan
	CORNER25	Sungdonggu Sungsoodong 1ga	Office	2,999	06-Jan
	The 305 Building	Dongdaemoon Imoondong	#1 Commercial	2,987	12-Jan
	LG Best Shop	Gangbookgu Miadong	Sales Facilities	2,898	20-Jan
	Dooseung Building	Gangseogu Hwagokdong	#1 Commercial	2,138	07-Jan



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