

SEOUL OFFICE LEASING

April 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 3월 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

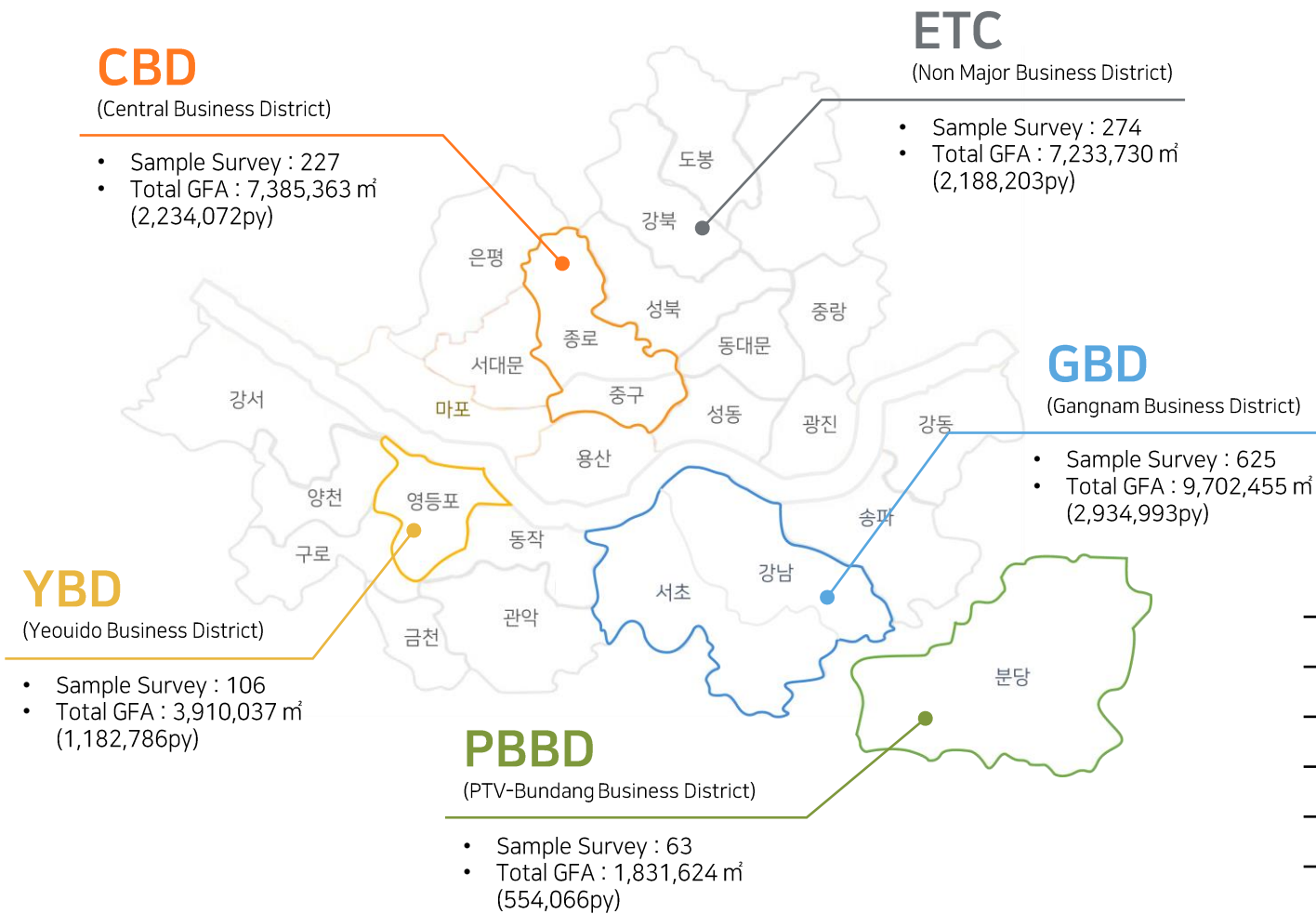
여의도권
여의도, 영등포구 일대

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	67	34	82
GBD	29	80	90	426
YBD	19	23	31	33
ETC	41	59	50	124
PBBD	9	15	12	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

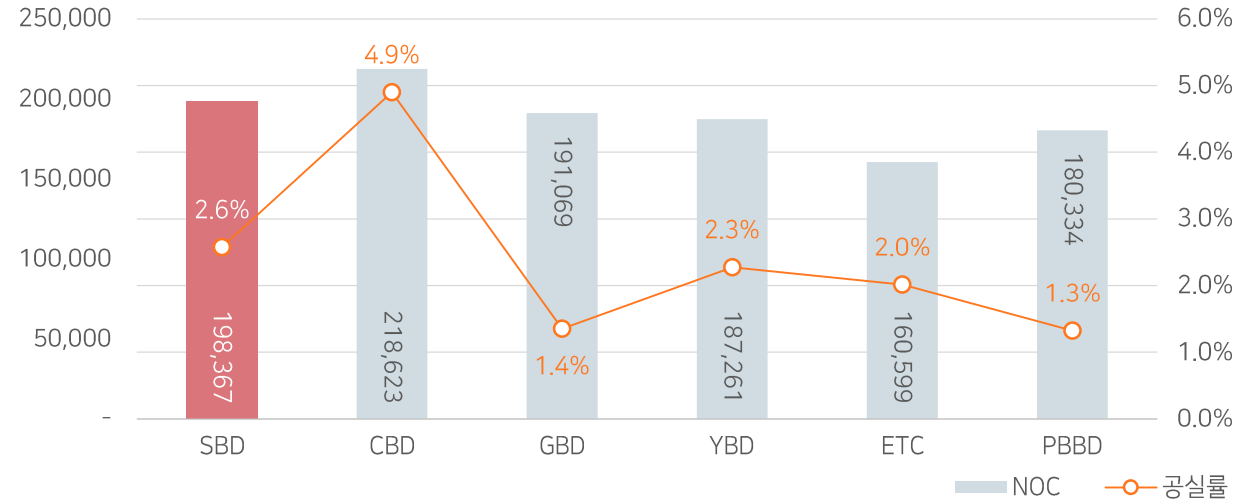
01 SBD 서울 전체

공실률
2.58% ↓

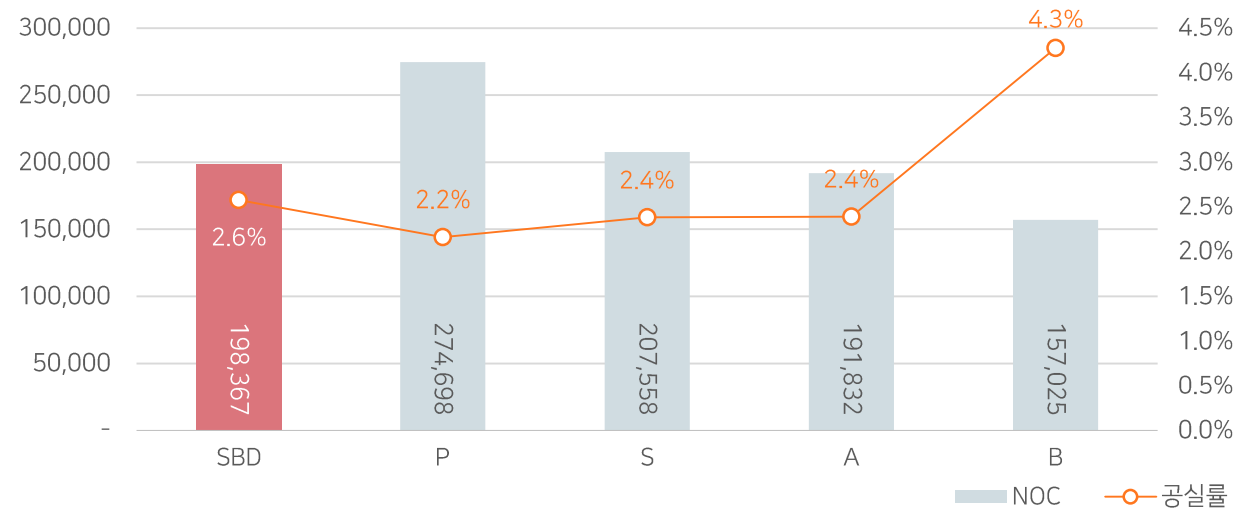
평균 NOC
₩ 198,367 ↑

평균 임대료	평균 보증금	평균 관리비
80,970	877,619	31,147

2022년도 3월 조사한 서울지역 오피스의
평균 공실률은 2.58%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 198,367원으로 조사되었다.



■ 서울 전체 권역 별 공실률 / NOC



■ 서울 전체 규모 별 공실률 / NOC

01 SBD 서울 전체

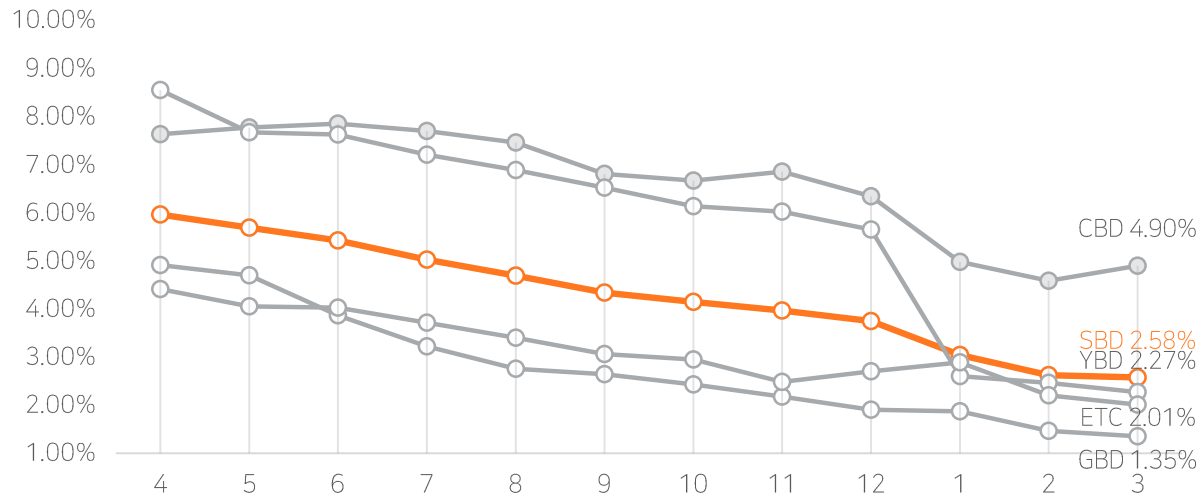
2022년 3월 서울권역의 공실률 흐름은 다음과 같이 조사되었다.

CBD의 현대그룹빌딩에 HMM이 떠날 자리에 현대 계열사 등이 계약하며 총 6,690평의 면적이 해소되었고, 타임워크명동에 에이블씨앤씨가 계약을 맺으며 2개층 1,190평의 공실이 해소되었다.

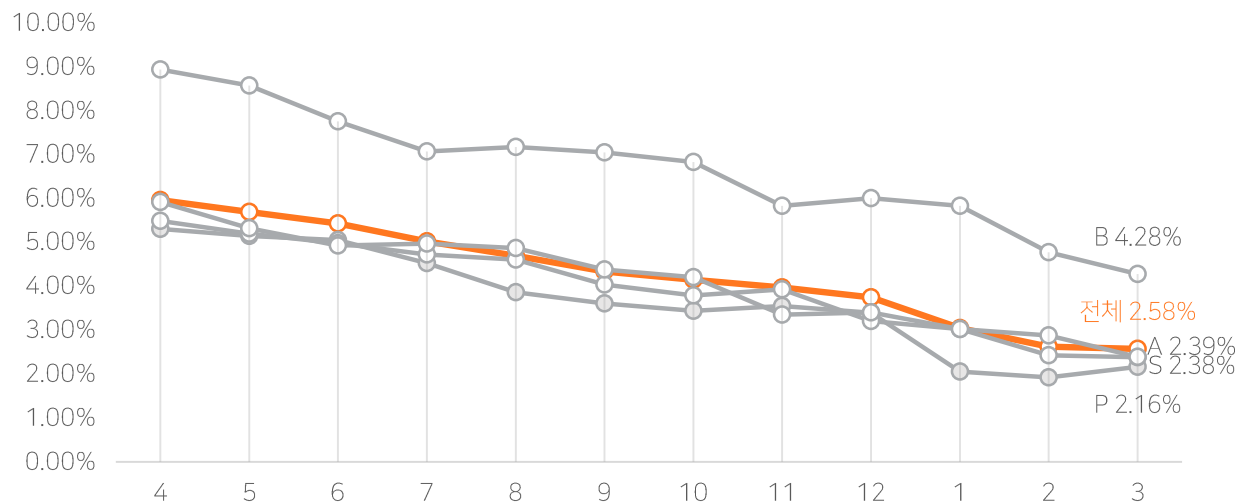
GBD의 동일타워에 임차중인 티몬의 임대계약이 9월에 종료됨에 따라 6,080평의 면적이 임대시장에 추가되었다. 동국제약이 청담동 신사옥(연면적 7,980㎡)으로, HDC랩스가 서초동 신사옥(연면적 9,310㎡)으로 각각 입주를 완료하였다.

성수동의 용운빌딩에 임차중인 도요타의 임대계약이 12월에 종료되어 건물전체 총 1,260평이 임대시장에 추가되었다.

PBB의 분당퍼스트타워에서 현대건설기계, 현대에너지솔루션, 현대일렉트릭, 한국조선해양 등 현대그룹의 계열사들이 사용중인 5개층 총 6,070평의 면적이 내년 초 임대시장에 추가될 예정이다.



■ 서울 권역별 공실률 변화



■ 서울 규모별 공실률 변화

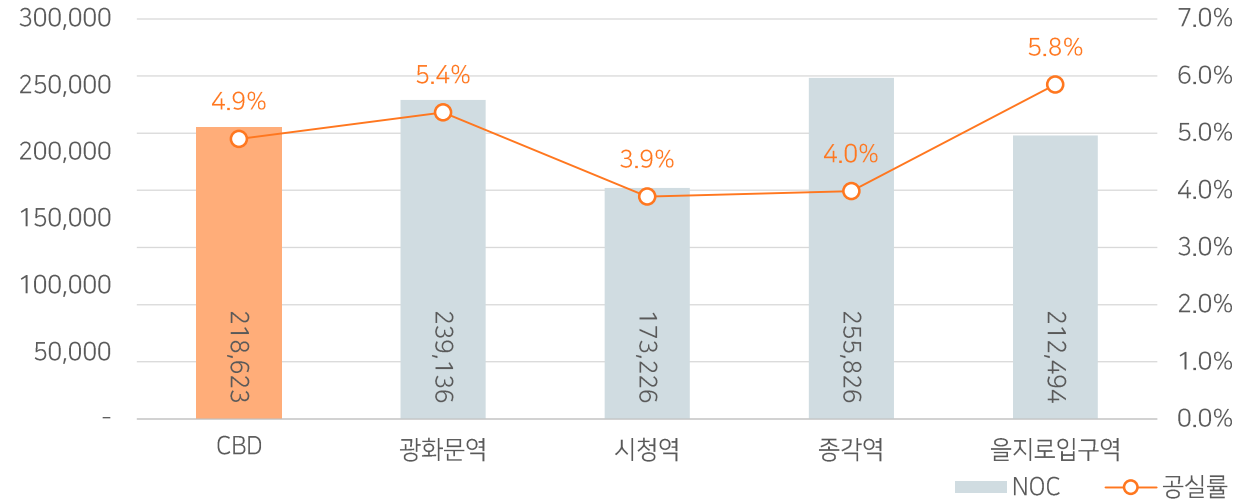
02 CBD 도심권역

공실률
4.90% ↑

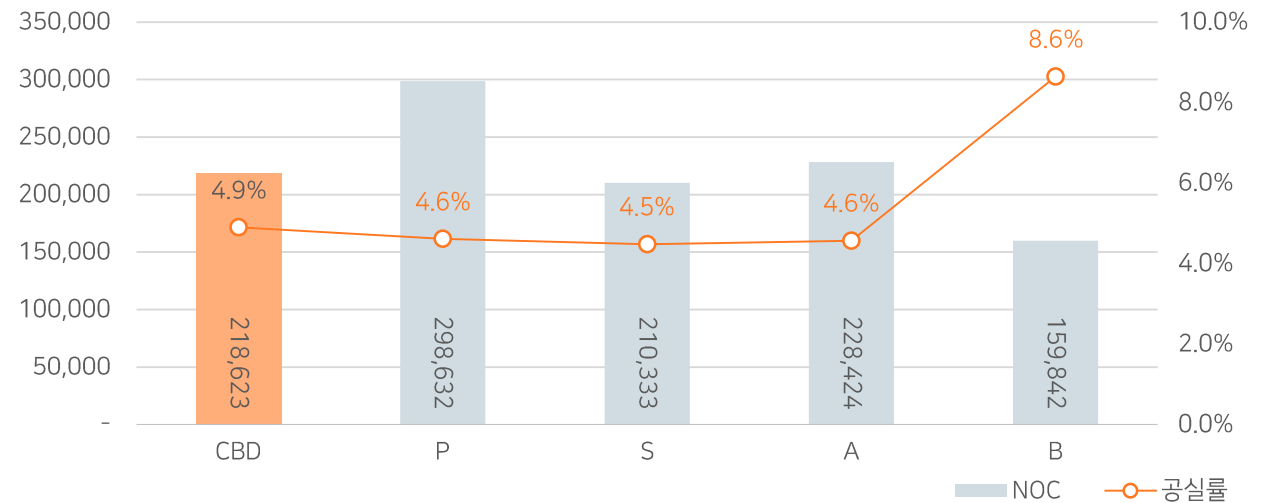
평균 NOC
₩ 218,623 ↑

평균 임대료	평균 보증금	평균 관리비
89,419	890,003	35,896

2022년도 3월 조사한 도심지역 오피스의
평균 공실률은 4.90%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 218,623원으로 조사되었다.



■ CBD 지역 세부권역 별 공실률 / NOC



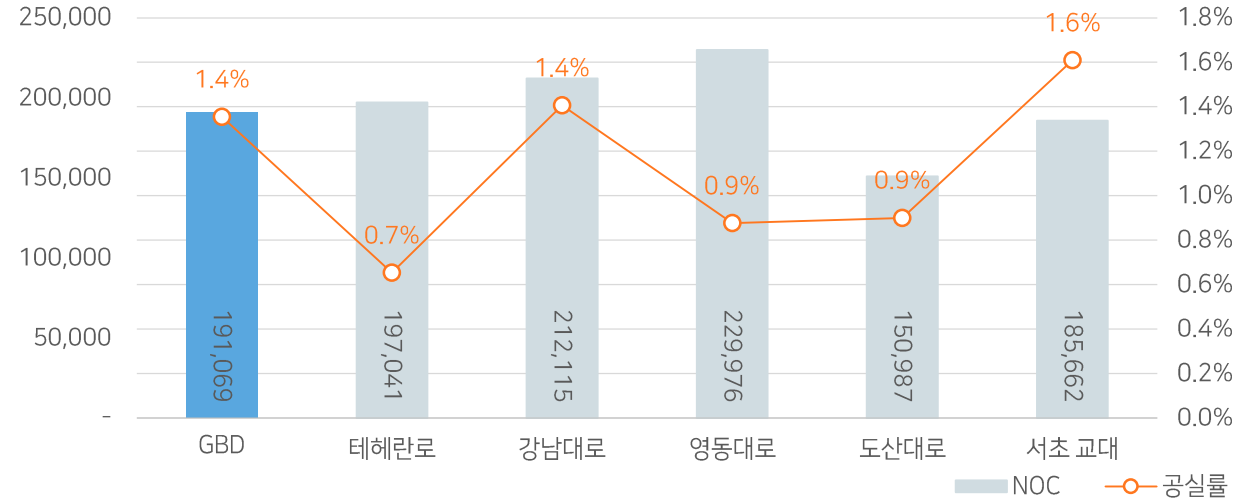
■ CBD 지역 규모 별 공실률 / NOC

73 GBD 강남권역

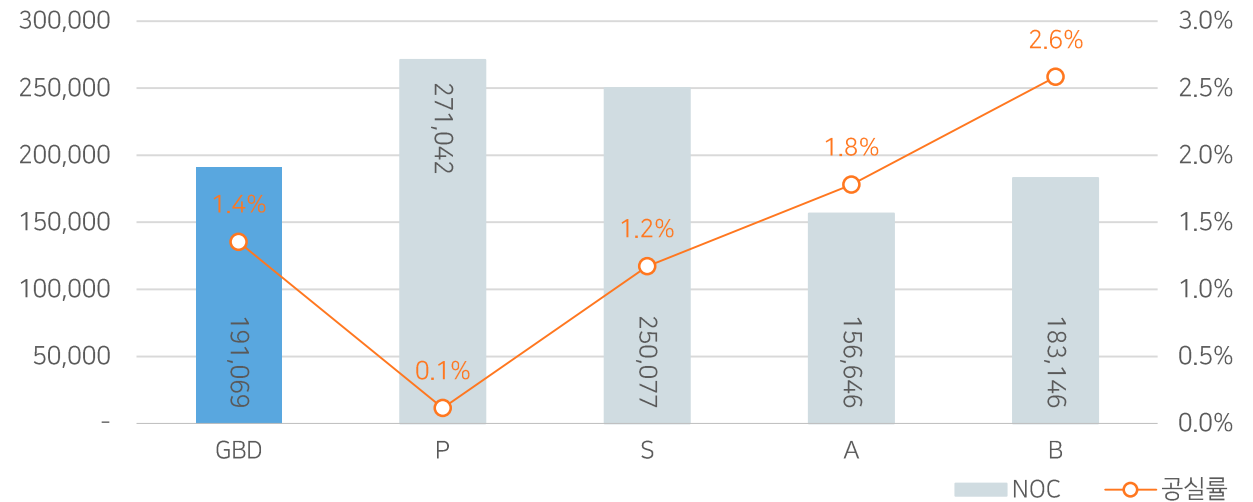
공실률 1.35% ↓ 평균 NOC ₩ 191,069 ↑

평균 임대료	평균 보증금	평균 관리비
84,590	1,142,792	27,078

2022년도 3월 조사한 강남지역 오피스의 평균 공실률은 1.35%로 조사되었으며, 전용면적 1평당 사용할 때 드는 비용을 계산한 평균 NOC는 191,069원으로 조사되었다.



GBD 지역 세부권역별 공실률/NOC



GBD 지역 규모 별 공실률/NOC

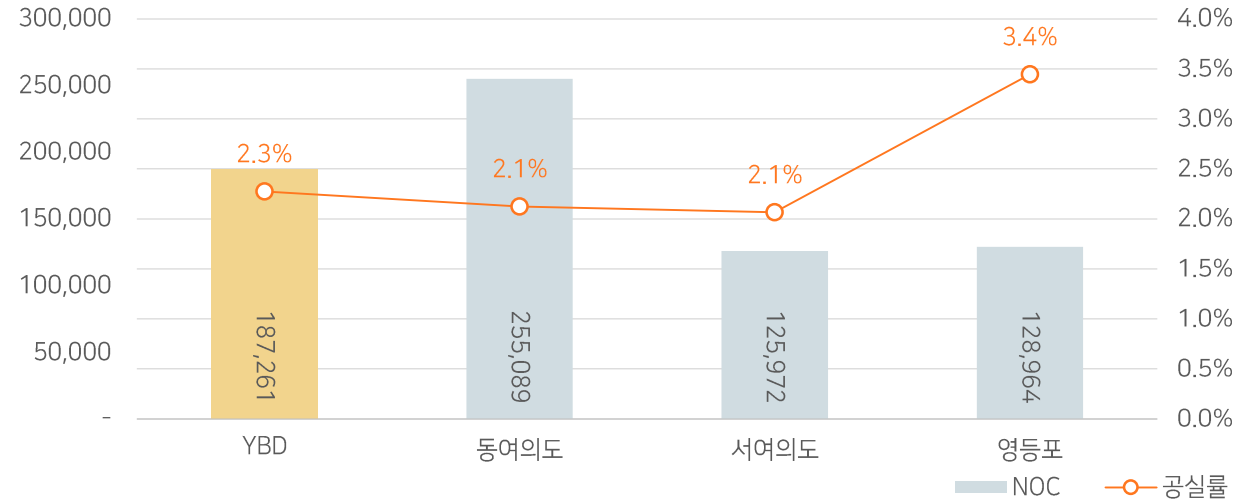
24 YBD 여의도, 영등포 권역

공실률
2.27% ↓

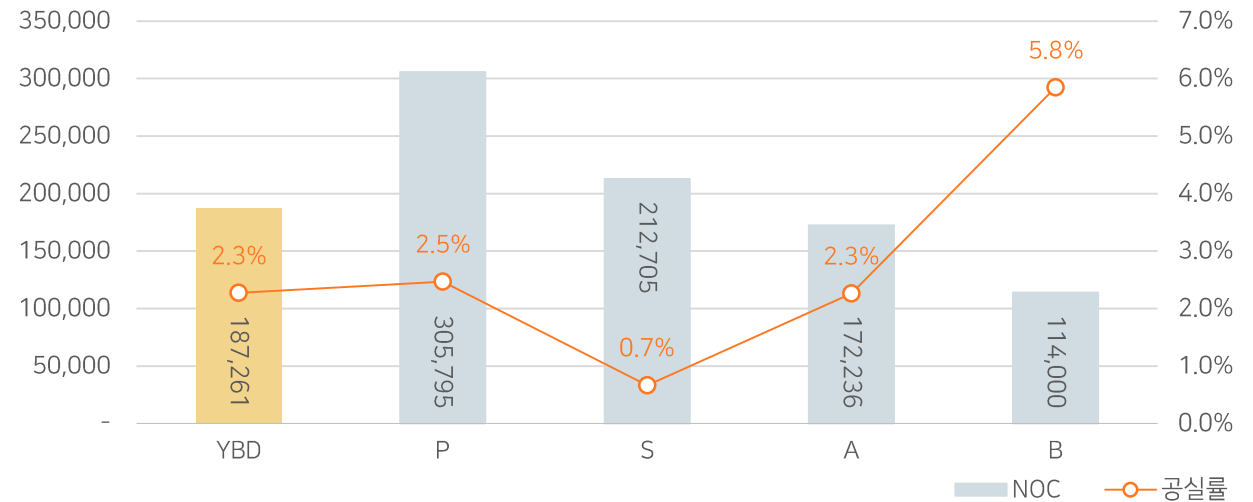
평균 NOC
₩ 187,261 ↓

평균 임대료	평균 보증금	평균 관리비
70,264	731,330	30,973

2022년도 3월 조사한 여의도, 영등포 지역
오피스의 평균 공실률은 2.27%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 187,261원으로 조사되었다.



■ YBD 지역세부권역별 공실률/NOC



■ YBD 지역규모 별 공실률/NOC

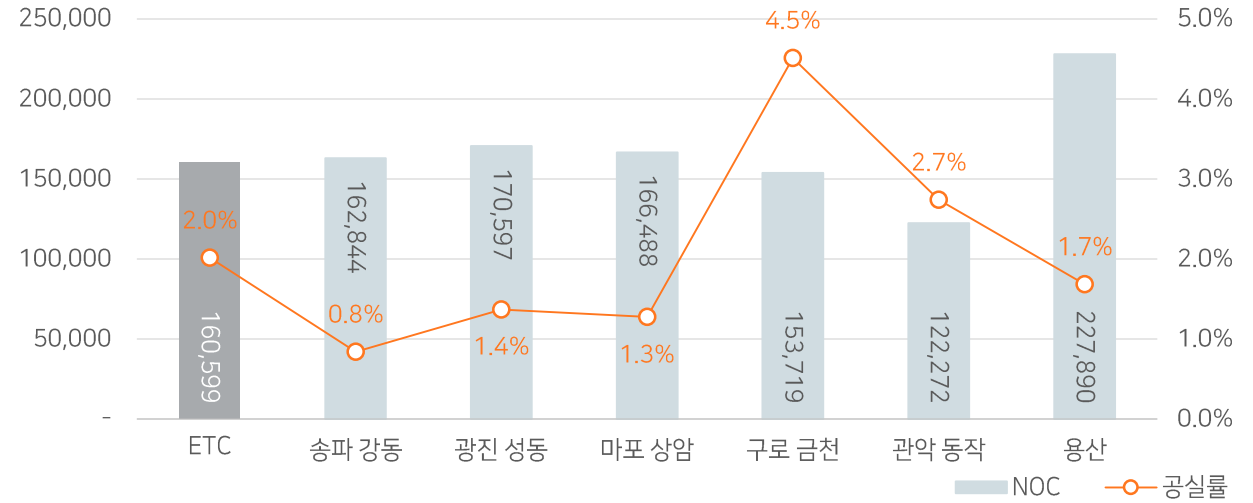
75 ETC 서울 기타권역

공실률
2.01% ↓

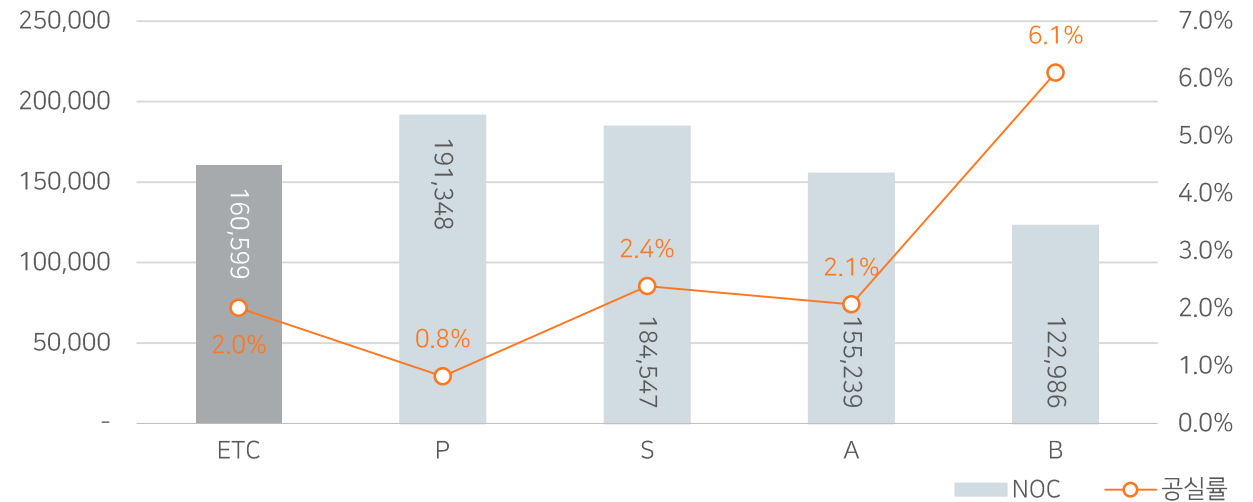
평균 NOC
₩ 160,599 ↑

평균 임대료	평균 보증금	평균 관리비
61,813	678,552	23,342

2022년도 3월 조사한 서울 기타지역 오피스의
평균 공실률은 2.01%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 160,599원으로 조사되었다.



ETC 지역 세부권역별 공실률/NOC



ETC 지역 규모별 공실률/NOC

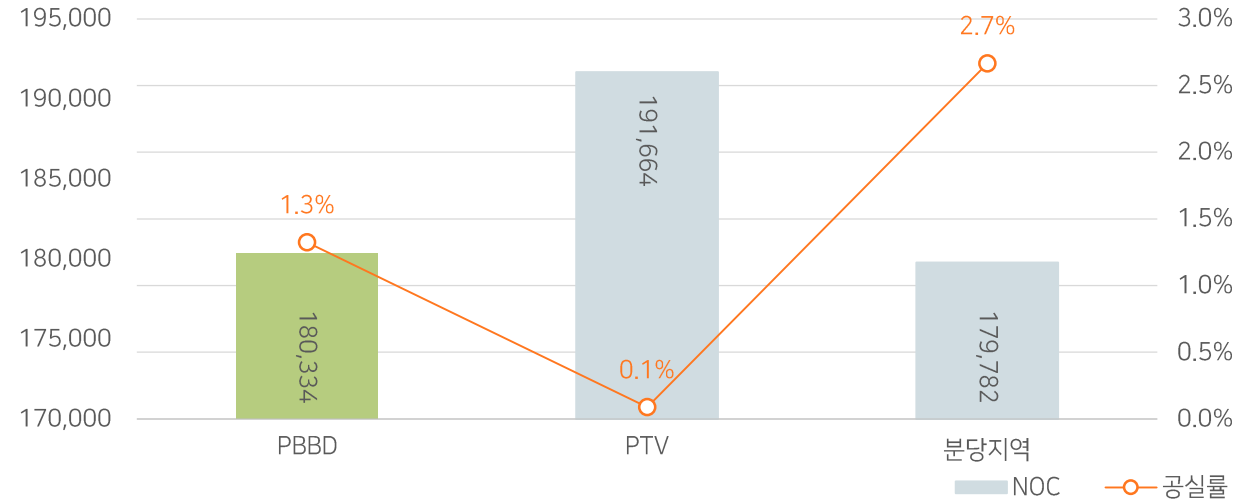
76 PBBD 판교, 분당 권역

공실률
1.32% ↓

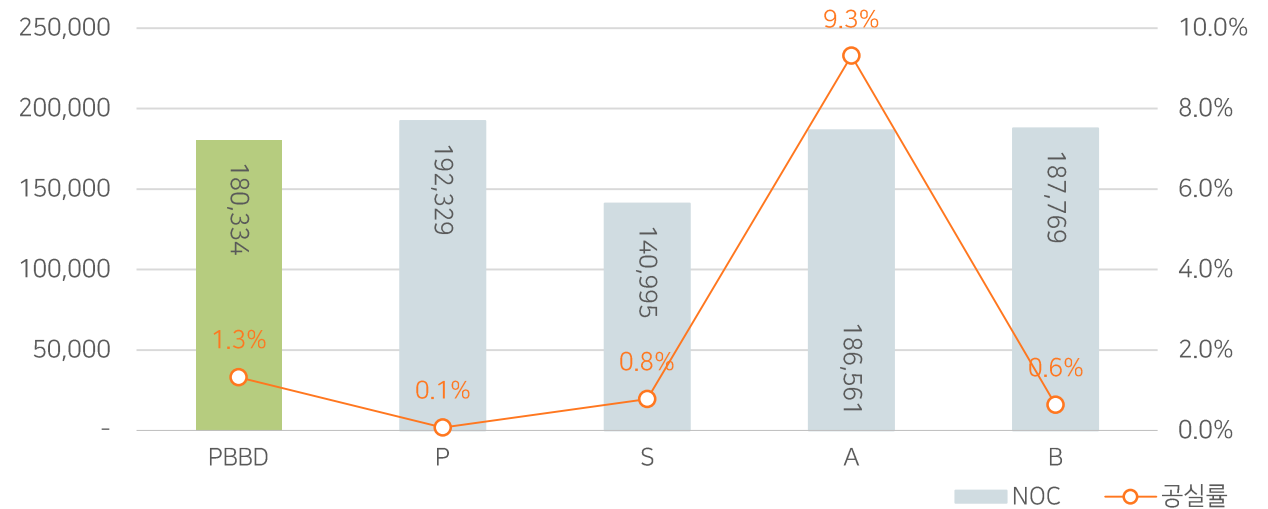
평균 NOC
₩ 180,334 ↑

평균 임대료	평균 보증금	평균 관리비
62,679	692,179	27,395

2022년도 3월 조사한 판교, 분당지역 오피스의
평균 공실률은 1.32%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 180,334원으로 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	1,027,498	102,874	36,952	239,136	5.36%
	시청역	270,324	680,382	70,469	30,799	173,226	3.89%
	종각역	303,807	932,124	95,927	39,309	255,826	3.98%
	을지로입구역	244,548	828,771	87,412	37,265	212,494	5.85%
GBD	테헤란로	967,286	1,118,265	79,072	32,070	197,041	0.65%
	강남대로	472,703	1,299,243	98,398	29,026	212,115	1.41%
	영동대로	193,214	905,747	83,915	27,974	229,976	0.88%
	도산대로	81,021	1,088,348	67,738	22,135	150,987	0.90%
	서초 교대	131,592	1,189,927	84,349	28,449	185,662	1.61%
YBD	동여의도	881,437	894,741	93,278	37,226	255,089	2.13%
	서여의도	161,026	466,424	44,845	26,395	125,972	2.06%
	영등포	140,323	825,381	59,734	19,664	128,964	3.45%
ETC	송파 강동	505,526	791,364	67,565	23,500	162,844	0.84%
	광진 성동	141,117	976,837	85,060	20,572	170,597	1.37%
	마포 상암	602,251	681,234	65,751	30,866	166,488	1.27%
	구로 금천	201,175	625,563	57,316	17,522	153,719	4.51%
	관악 동작	158,337	662,632	53,561	18,815	122,272	2.74%
	용산	278,384	751,500	73,588	36,738	227,890	1.68%
PBBD	PTV	288,412	590,000	59,000	30,000	191,664	0.09%
	분당지역	265,654	697,163	62,859	27,268	179,782	2.67%

지역 별
사용승인 현황

권역	빌딩명	소재지	주용도	연면적(m ²)	연면적(3.3m ²)	사용승인일
GBD	친우빌딩	강남구 삼성동	업무시설	3,195	966	08-Feb
	신사동 신축	강남구 신사동	업무시설	2,992	905	09-Feb
	KNJ빌딩	서초구 반포동	제1종근린생활시설	2,097	634	15-Feb
	덕대건설빌딩	서초구 내곡동	제1종근린생활시설	1,743	527	03-Feb
ETC	센트럴오금 A	송파구 오금동	제2종근린생활시설	3,947	1,194	11-Feb
	서평프라자	송파구 거여동	제2종근린생활시설	2,995	906	15-Feb
	성수HKS빌딩	성동구 성수동2가	업무시설	2,849	862	04-Feb
	큐브스테이트	용산구 청파동1가	업무시설	2,278	689	11-Feb
	화영빌딩	서대문구 대현동	제1종근린생활시설	2,259	683	11-Feb
	방이동 신축	송파구 방이동	제2종근린생활시설	1,577	477	23-Feb
	정석빌딩	동대문구 제기동	제2종근린생활시설	1,563	473	11-Feb
	센트럴오금 B	송파구 오금동	제1종근린생활시설	1,217	368	10-Feb
	독산동 인터넷센터	금천구 독산동	방송통신시설	1,198	362	11-Feb
	살롬빌딩	마포구 성산동	제2종근린생활시설	1,085	328	22-Feb

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, March 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 = 1,237.3 KRW (0.81 USD = 1,000 KRW) as of 12th April 2022

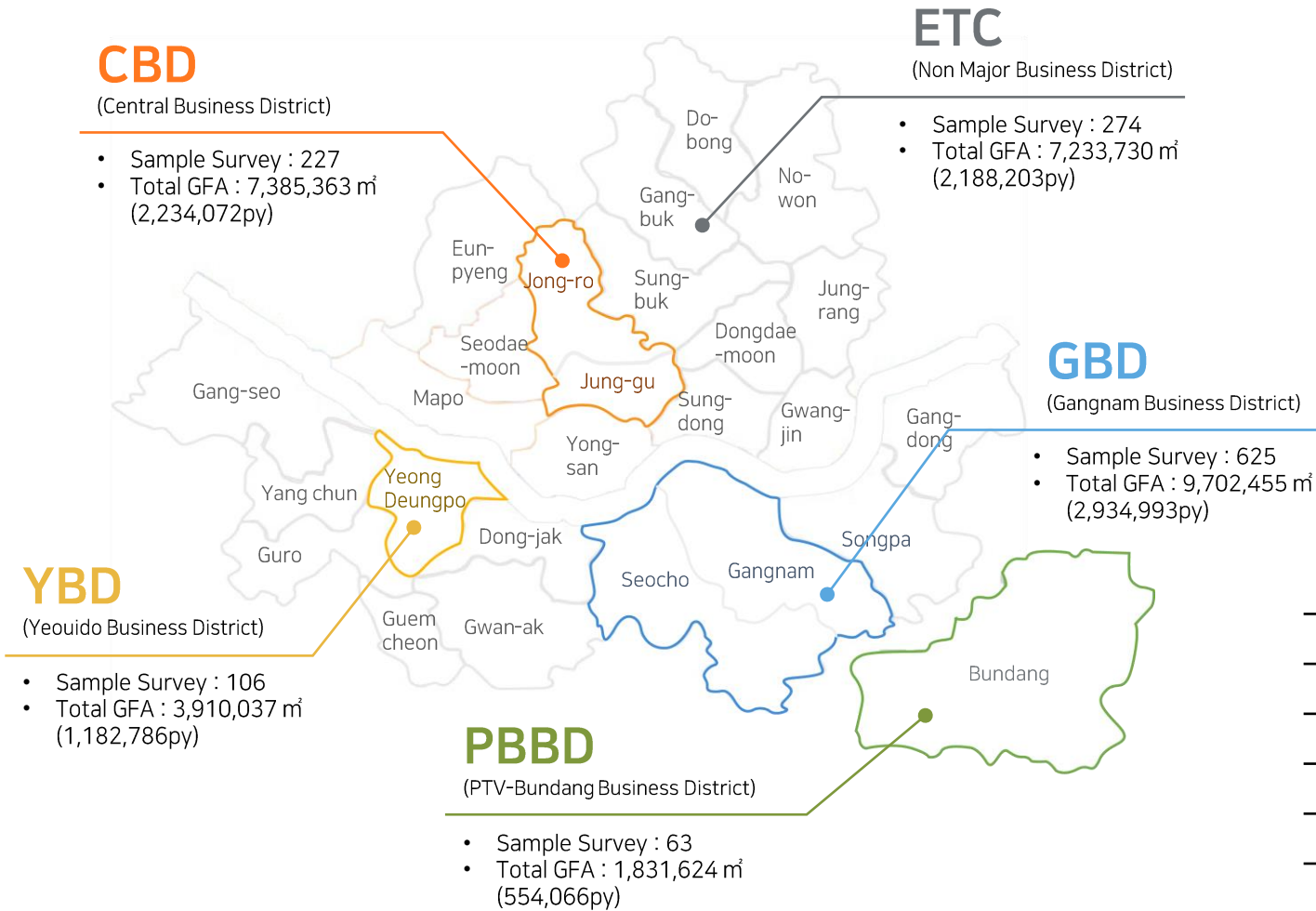
5 Regional Divisions in Seoul

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	67	34	82
GBD	29	80	90	426
YBD	19	23	31	33
ETC	41	59	50	124
PBSD	9	15	12	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

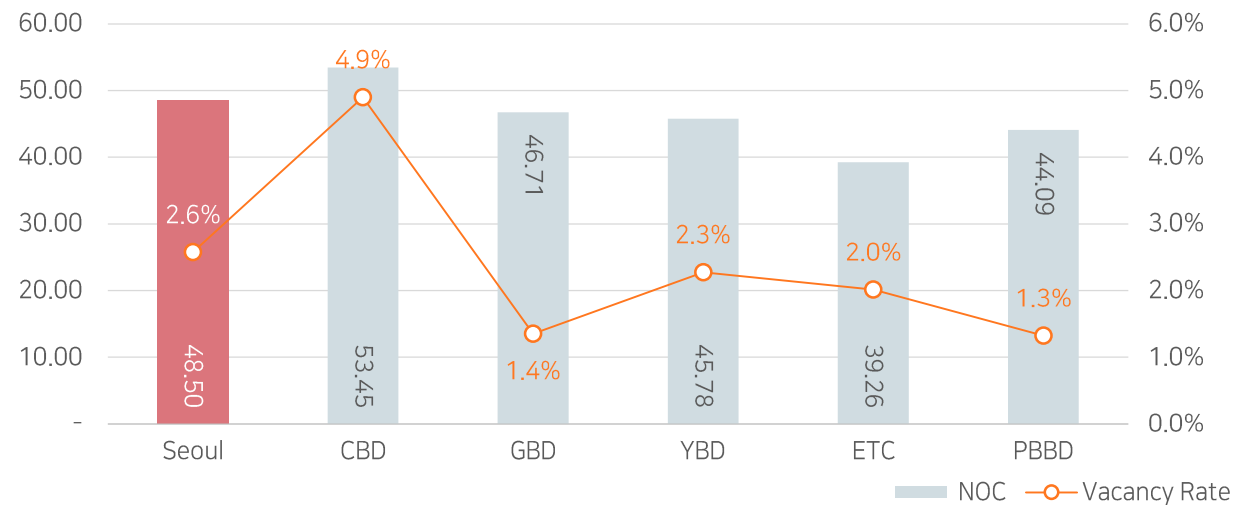
2.58 % ↓

Avg, NOC

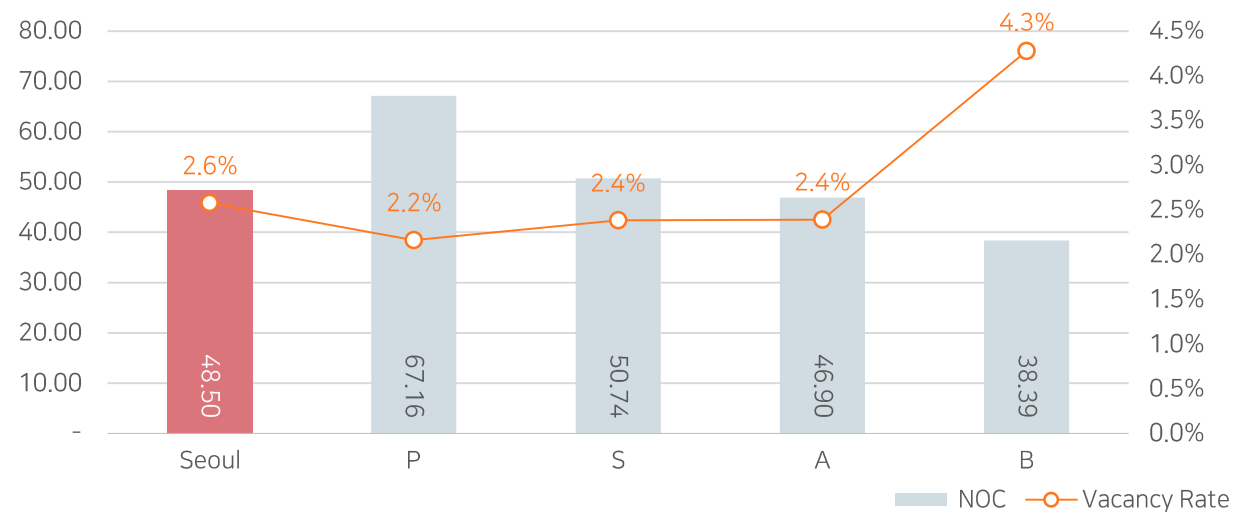
\$ 48.50 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
19.80	214.56	7.61

The average vacancy rate of the office buildings in Seoul is 2.58 % as of March 2022, and the average NOC is \$ 48.50.



■ 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 during March 2022.

HMM is planning to leave the office units in Hyundai Group Building in CBD, and Hyundai's affiliates signed the lease contract to move in to these soon-to-be vacancies of 22,120㎡ in total.

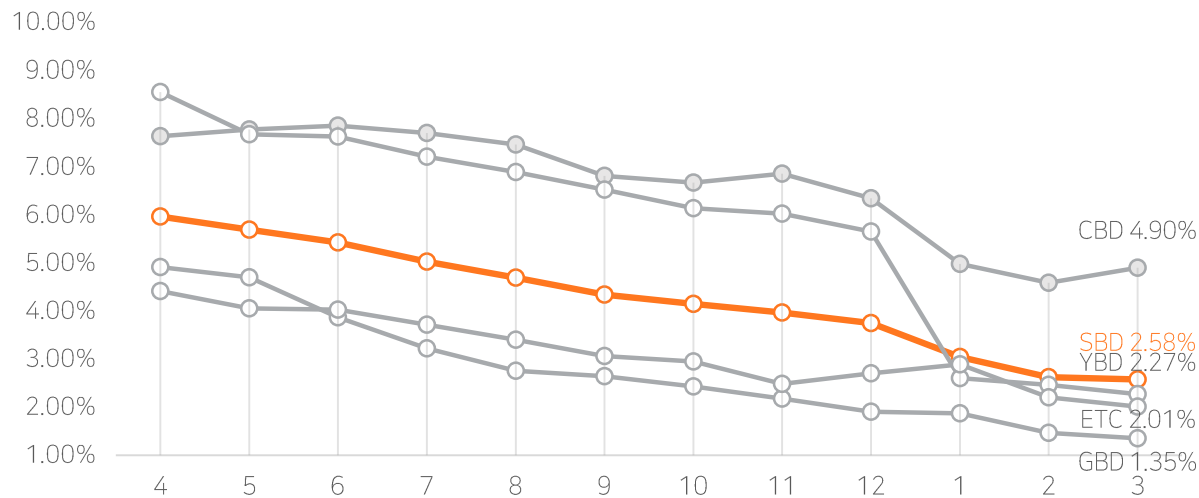
Able C&C also closed the lease contract as a tenant for Time Walk Building in Myungdong, filling out the vacant units of 3,950㎡.

The new vacancies of 20,090㎡ came out on the lease market in GBD as the lease contract of Timon Corp. with Dongil Tower expires in this coming September.

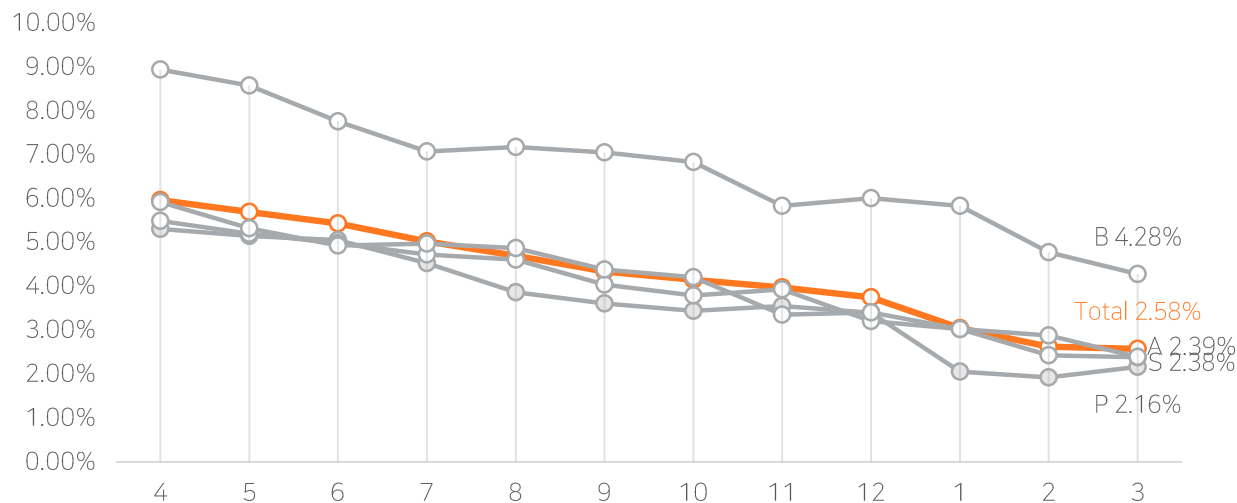
Dongkook Pharmaceuticals and HDC Labs completed their moving-in process to the brand new building (GFA: 7,980㎡) in Chungdamdong and another brand new building (GFA:9,310㎡) in Seochodong, respectively.

New vacant units of 4,270㎡ came out on the market as the lease contract of Toyota Motors with Yongwoon Building in Sungsoodong expires in December 2022.

The units of 20,080㎡, located in the 5 floors in Bundang First Tower in PBBD, is going to come out on the lease market early next year as Hyundai's affiliates such as Hyundai Construction Equipment, Hyundai Electric, Hyundai Energy Solutions, Korea Shipbuilding & Offshore Engineering Co., Ltd. plan to move out from the tower by then.



Monthly Vacancy Rate in 5 Main Districts



Monthly Vacancy Rate for Different Size of Buildings

02 CBD Central Seoul

Vacancy rate

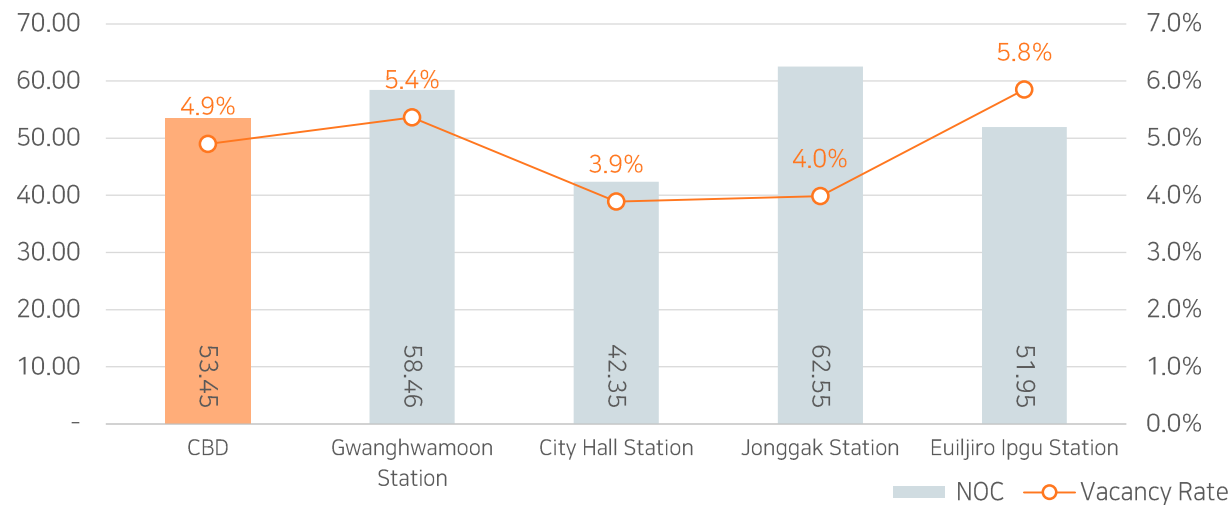
4.90% ↑

Avg, NOC

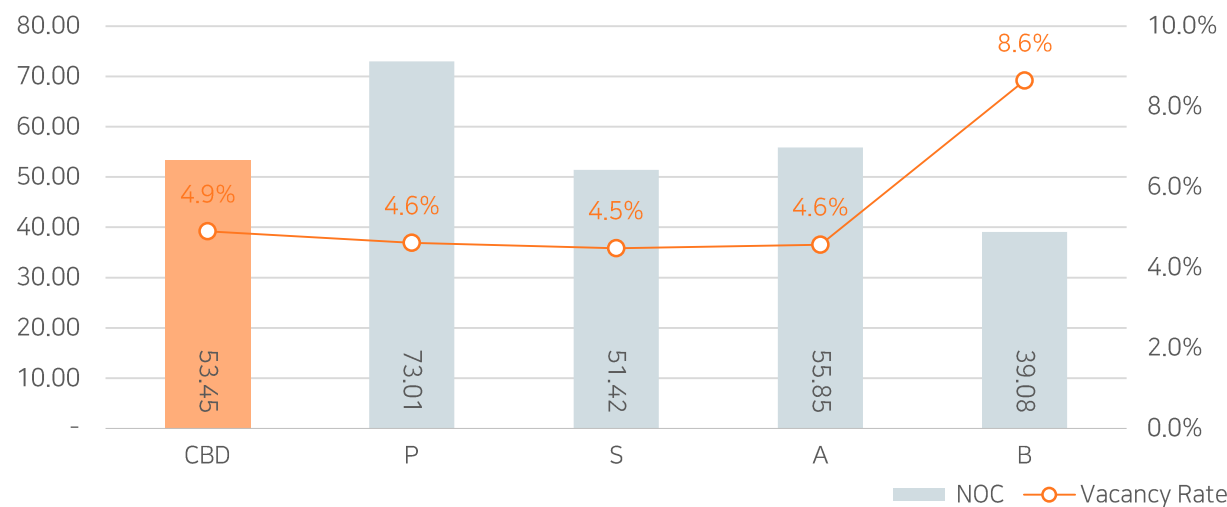
\$ 53.45 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
21.86	217.59	8.78

The average vacancy rate of the office buildings in CBD is 4.90 % as of March 2022, and the average NOC is \$ 53.45.



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



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

GBD Gangnam

Vacancy rate

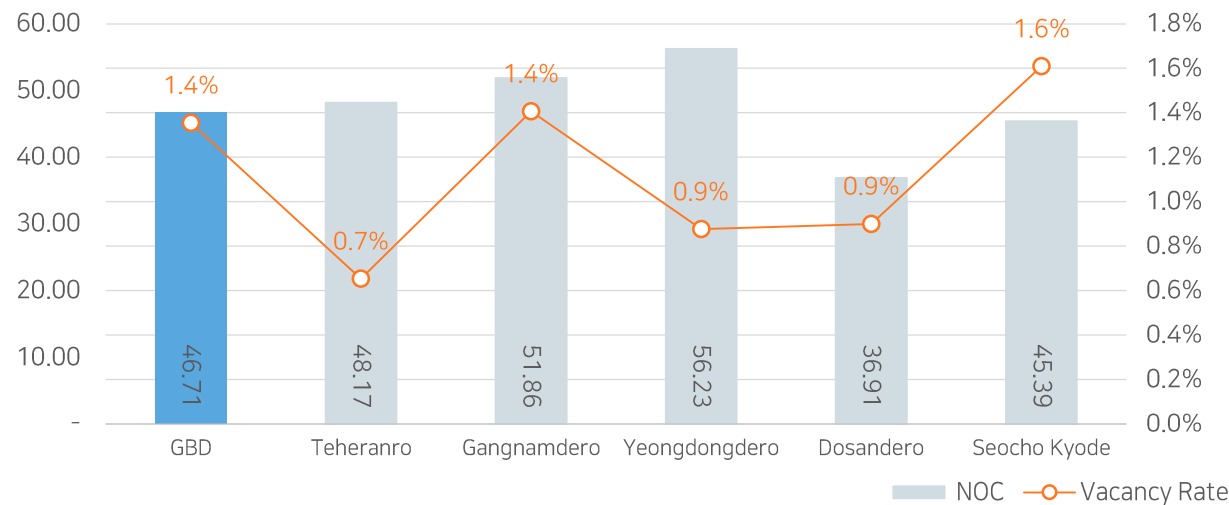
1.35% ↓

Avg, NOC

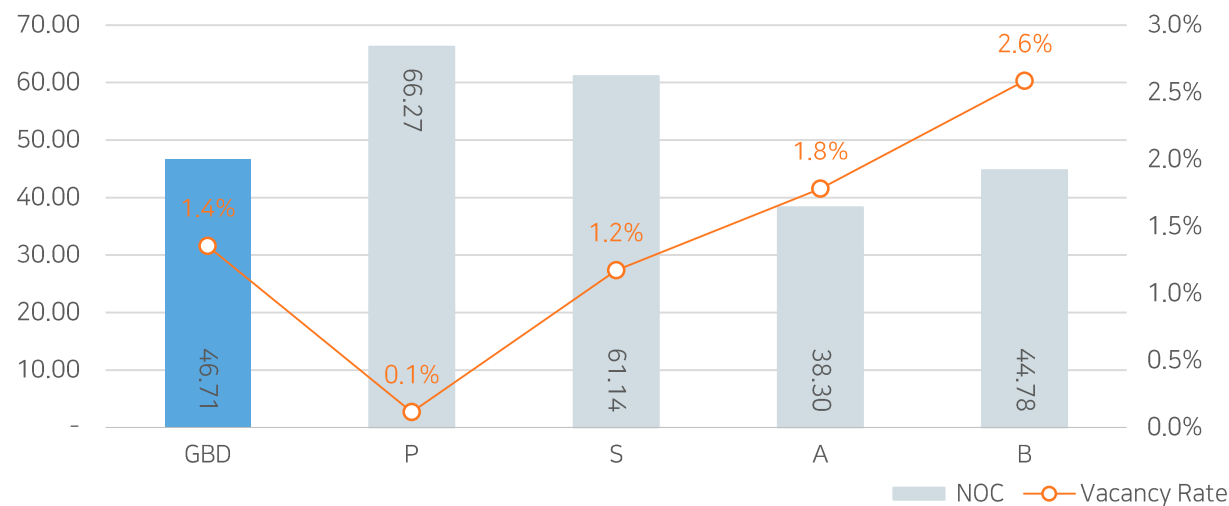
\$ 46.71 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
20.68	279.39	6.62

The average vacancy rate of the office buildings in GBD is 1.35 % as of March 2022, and the average NOC is \$ 46.71.



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



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

Q4 YBD Yeouido & Yeongdeungpo

Vacancy rate

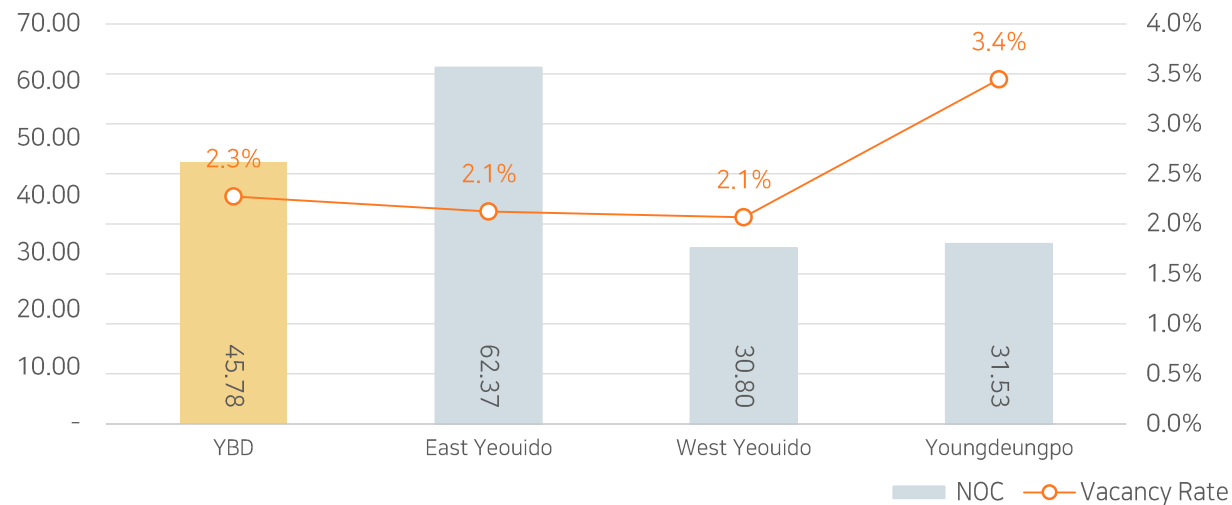
2.27% ↓

Avg, NOC

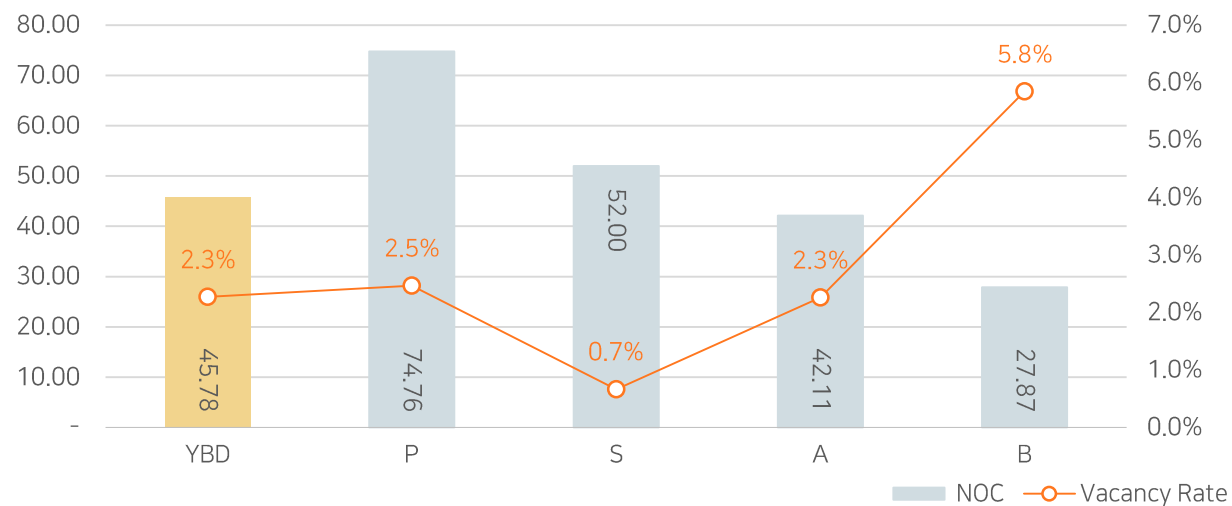
\$ 45.78 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
17.18	178.80	7.57

The average vacancy rate of the office buildings in YBD is 2.27 % as of March 2022, and the average NOC is \$ 45.78.



■ 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

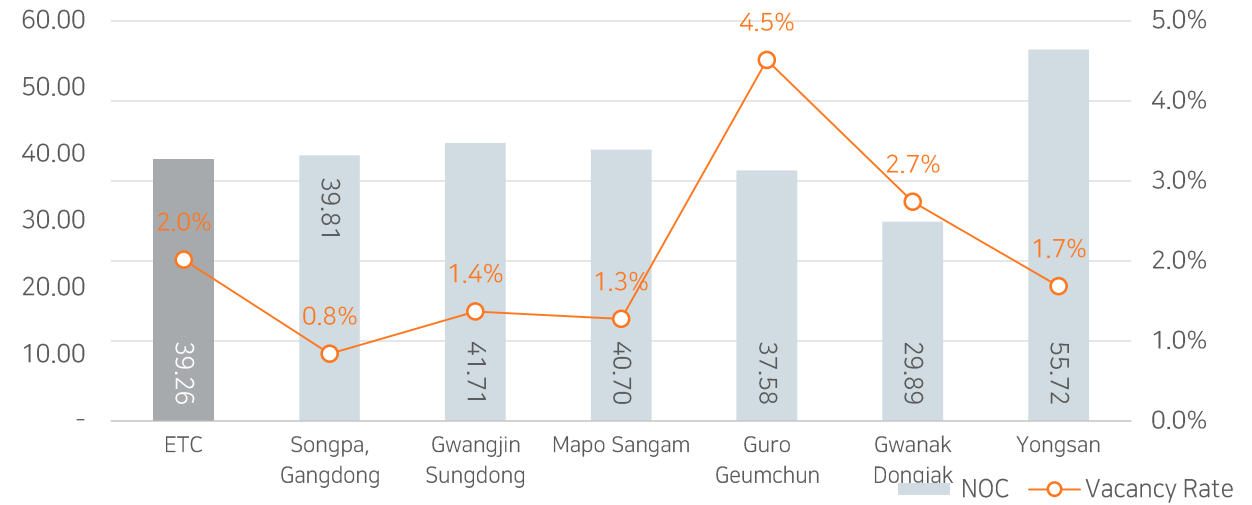
2.01 % ↓

Avg, NOC

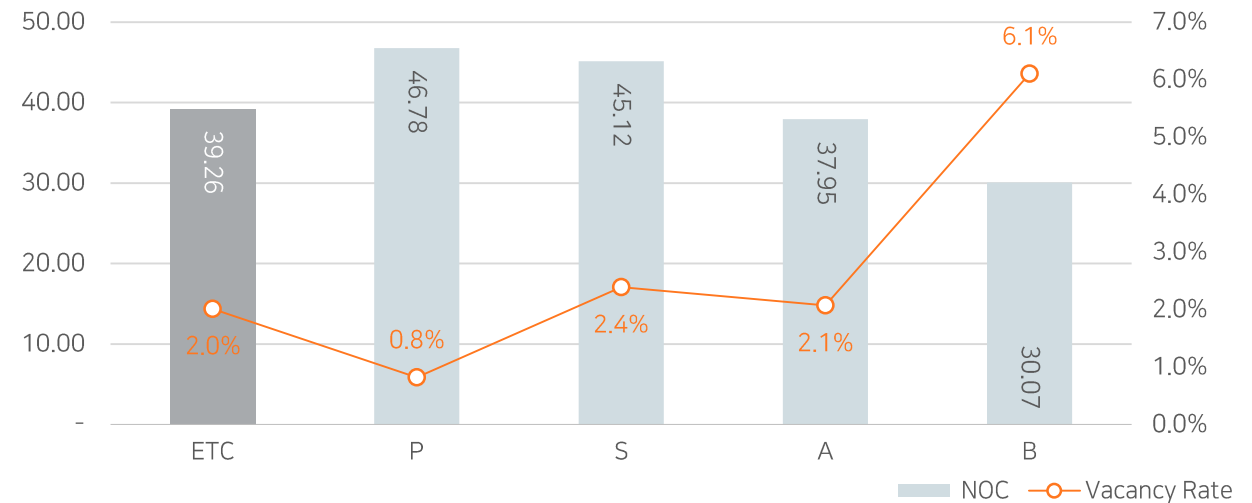
\$ 39.26 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
15.11	165.89	5.71

The average vacancy rate of the office buildings in ETC is 2.01 % as of March 2022, and the average NOC is \$ 39.26.



■ 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

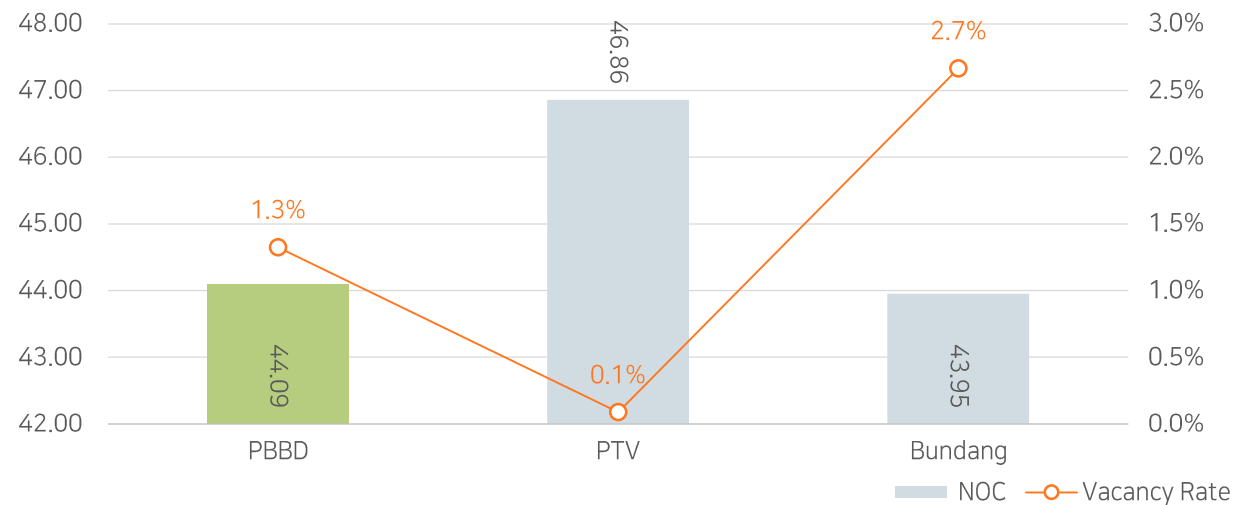
1.32% ↓

Avg, NOC

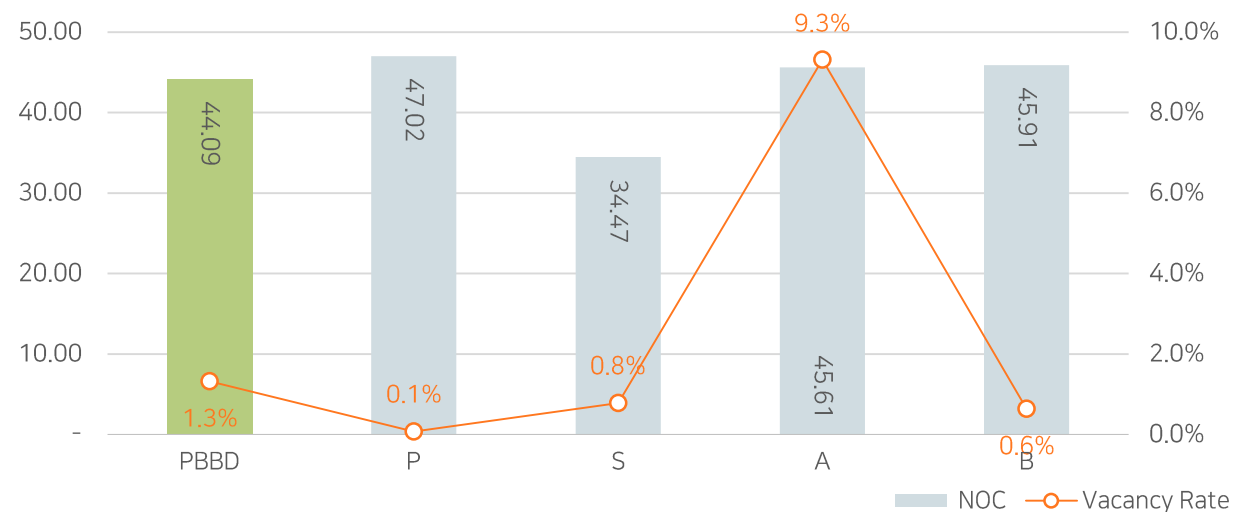
\$ 44.09 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
15.32	169.23	6.70

The average vacancy rate of the office buildings in PBBD is 1.32 % as of March 2022, and the average NOC is \$ 44.09.



■ 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	251.21	25.15	9.03	58.46	5.36%
	City Hall Station	893,633	166.34	17.23	7.53	42.35	3.89%
	Jonggak Station	1,004,321	227.89	23.45	9.61	62.55	3.98%
	Euiljiro Ipgu Station	808,422	202.62	21.37	9.11	51.95	5.85%
GBD	Teheranro	3,197,641	273.40	19.33	7.84	48.17	0.65%
	Gangnamdero	1,562,653	317.64	24.06	7.10	51.86	1.41%
	Yeongdongdero	638,725	221.44	20.52	6.84	56.23	0.88%
	Dosandero	267,839	266.08	16.56	5.41	36.91	0.90%
	Seocho Gyodae	435,014	290.92	20.62	6.96	45.39	1.61%
YBD	East Yeouido	2,913,841	218.75	22.80	9.10	62.37	2.13%
	West Yeouido	532,318	114.03	10.96	6.45	30.80	2.06%
	Youngdeungpo	463,878	201.79	14.60	4.81	31.53	3.45%
ETC	Songpa, Gangdong	1,671,159	193.48	16.52	5.75	39.81	0.84%
	Gwangjin Sungdong	466,501	238.82	20.80	5.03	41.71	1.37%
	Mapo Sangam	1,990,911	166.55	16.08	7.55	40.70	1.27%
	Guro Geumchun	665,040	152.94	14.01	4.28	37.58	4.51%
	Gwanak Dongjak	523,427	162.00	13.09	4.60	29.89	2.74%
	Yongsan	920,278	183.73	17.99	8.98	55.72	1.68%
PBBD	PTV	953,430	144.25	14.42	7.33	46.86	0.09%
	Bundang	878,194	170.45	15.37	6.67	43.95	2.67%



Land Use Information by District

District	Building Name	Address	Land Use	GFA (㎡)	Completion
GBD	Chinwoo Building	Samsungdong Gangnamgu	Office	3,195	08-Feb
	TBC (Brand New Building)	Shinsadong Gangnamgu	Office	2,992	09-Feb
	KNJ Building	Banpodong Seochogu	#1 Commercial	2,097	15-Feb
	Dukdae Construction Building	Negokdong Seochogu	#1 Commercial	1,743	03-Feb
ETC	Central Ogeum A	Ogeumdong Songpagu	#2 Commercial	3,947	11-Feb
	Seopyeong	Geoyeodong Songpagu	#2 Commercial	2,995	15-Feb
	Sungsoo HKS Building	Sungsoodong 2ga Sungdonggu	Office	2,849	04-Feb
	Cube State	Chungpadong 1ga Yongsangu	Office	2,278	11-Feb
	Hwa Young Building	Daehyundong Seodaemoongu	#1 Commercial	2,259	11-Feb
	TBC (Brand New)	Bangidong Songpagu	#2 Commercial	1,577	23-Feb
	JungSeok Building	Jegidong Dongdaemoongu	#2 Commercial	1,563	11-Feb
	Central Ogeum B	Ogeumdong Songpagu	#1 Commercial	1,217	10-Feb
	Doksandong Internet Center	Doksandong Geumchungu	Broadcasting Facility	1,198	11-Feb
	Shalom Building	Sungsandong Mapogu	#2 Commercial	1,085	22-Feb



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