

SEOUL OFFICE LEASING

June 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 5월 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

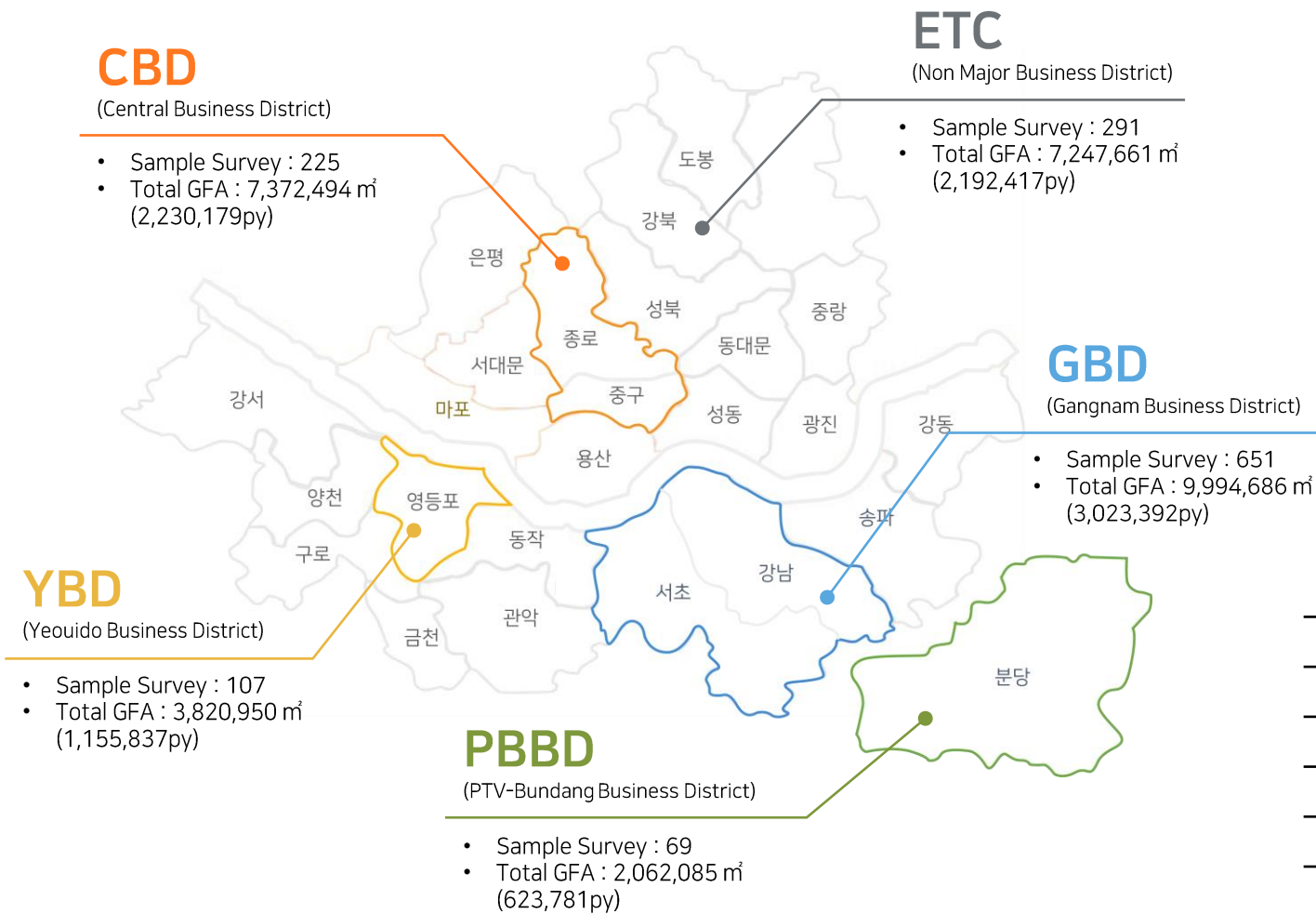
여의도권
여의도, 영등포구 일대

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 1,343

	P	S	A	B
CBD	45	65	34	81
GBD	30	83	93	445
YBD	17	24	29	37
ETC	41	56	52	142
PBBD	10	16	16	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

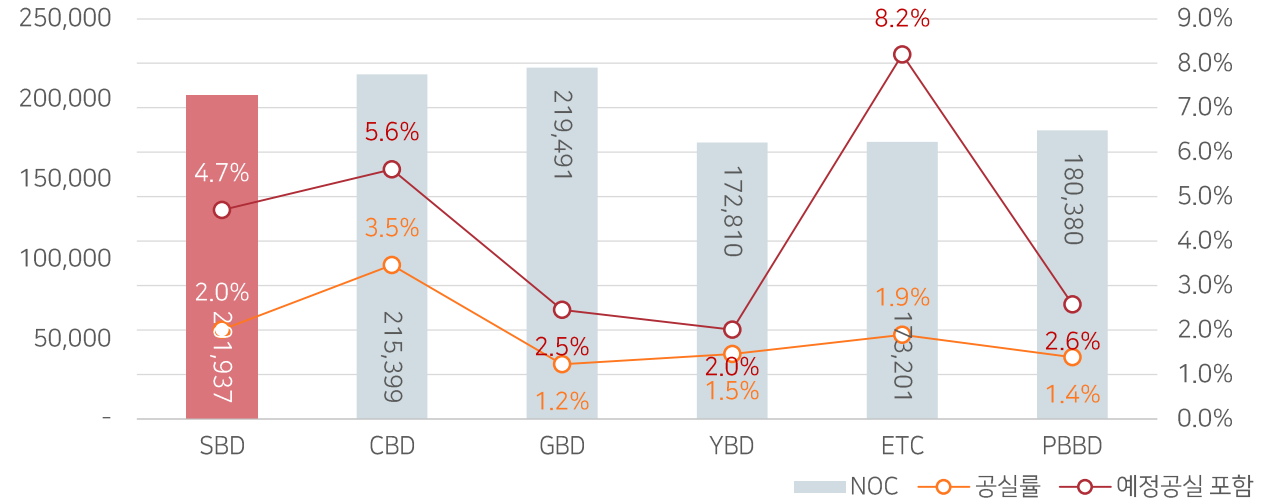
01 SBD 서울 전체

공실률
2.01% ↓

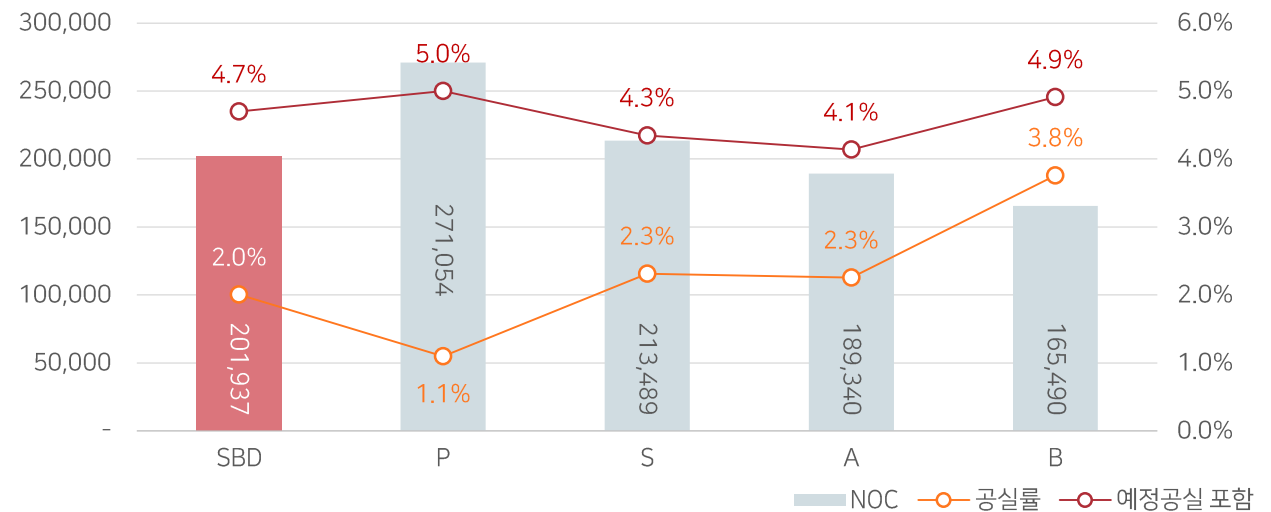
평균 NOC
₩ 201,937 ↑

평균 임대료	평균 보증금	평균 관리비
84,105	909,048	31,412

2022년도 5월 조사한 서울지역 오피스의
평균 공실률은 2.01%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 201,937원으로 조사되었다.



■ 서울 전체 권역 별 공실률 / NOC



■ 서울 전체 규모 별 공실률 / NOC

01 SBD 서울 전체

2022년 5월 서울권역의 공실률 흐름은 다음과 같이 조사되었다.

CBD의 한화금융센터에 한화생명에서 사용하던 3개층 1,770평의 공실이 임대시장에 추가되었다.

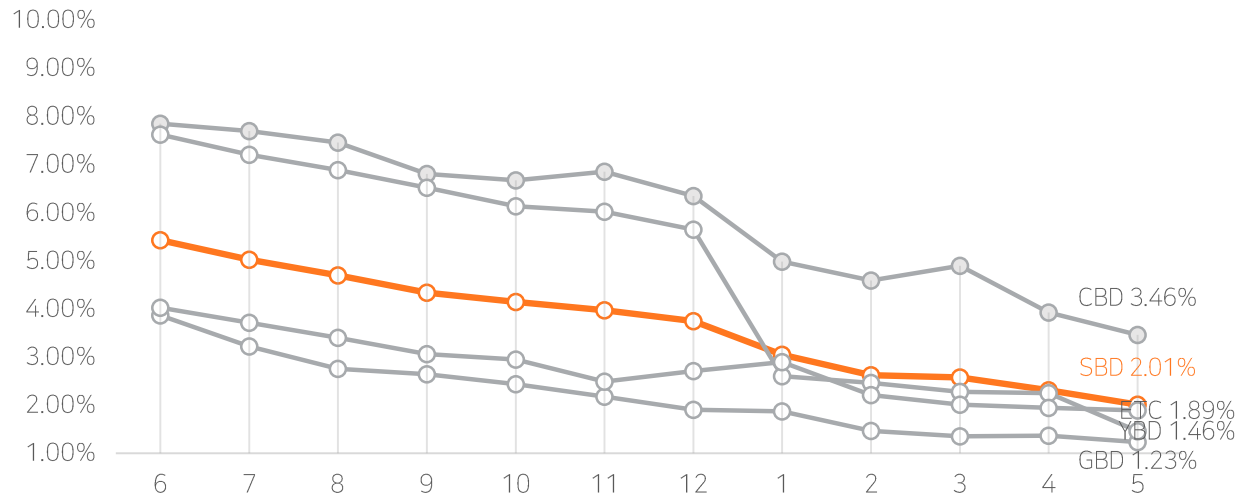
GBD의 브이플렉스에 매그나칩반도체가 사용중인 3개층 1270평의 면적이 임대시장에 추가되었고,

강남파이낸스플라자에 패스트파이브가 사용중인 3개층 1,150평의 면적이 10월 임대시장에 추가될 예정이다.

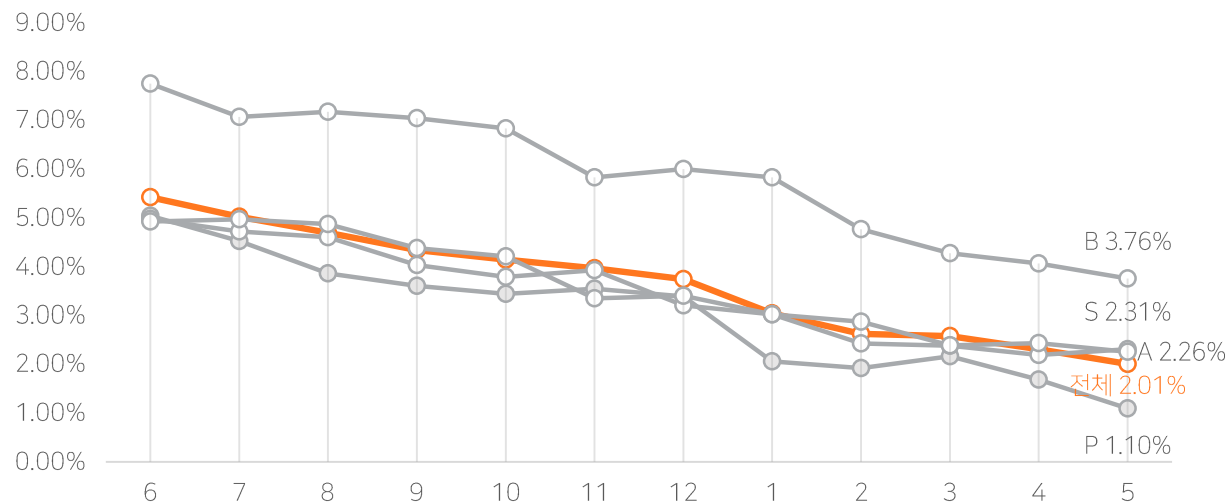
신사동에 신축 완공된 아리지빌딩에 티몬이 9월에 입주하기로 결정되며 800평의 면적이 해소되었다.

YBD의 파크원NH금융타워에 리딩투자증권이 2개층을 사용하는 등 총 6개층 5,890평의 공실이 해소되었다.

신대방 파크스퀘어에서 신한카드 TM센터 에프엠비스가 사용중인 2개층 1,760평의 면적이 임대시장에 추가되었고, 구로 태평양물산빌딩에서 웰컴그룹의 계열사들이 사용중인 3개층 반 1,290평의 면적이 하반기 임대시장에 추가될 예정이다.



■ 서울 권역별 공실률 변화



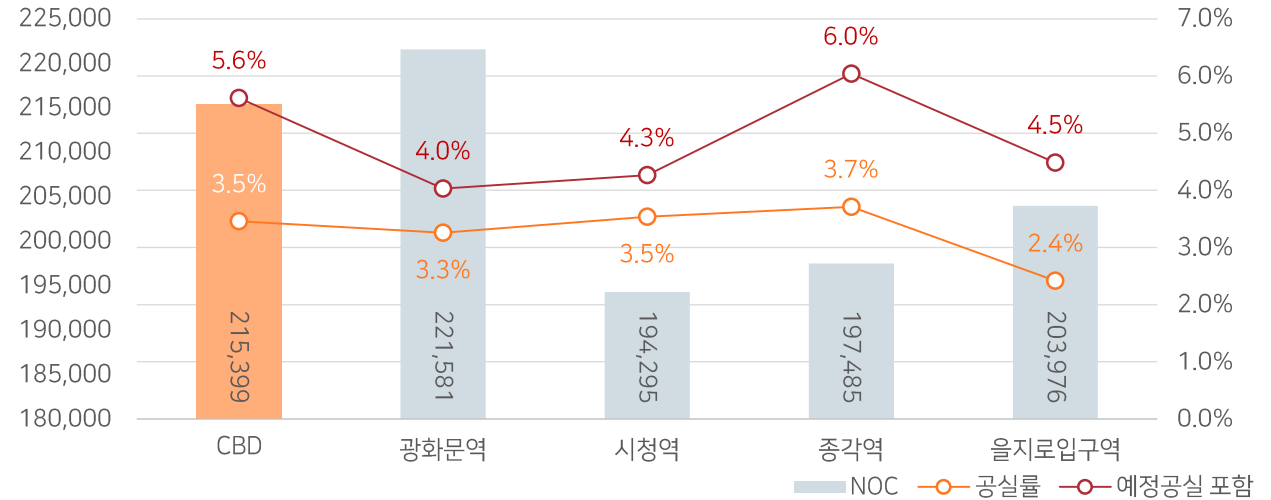
■ 서울 규모별 공실률 변화

02 CBD 도심권역

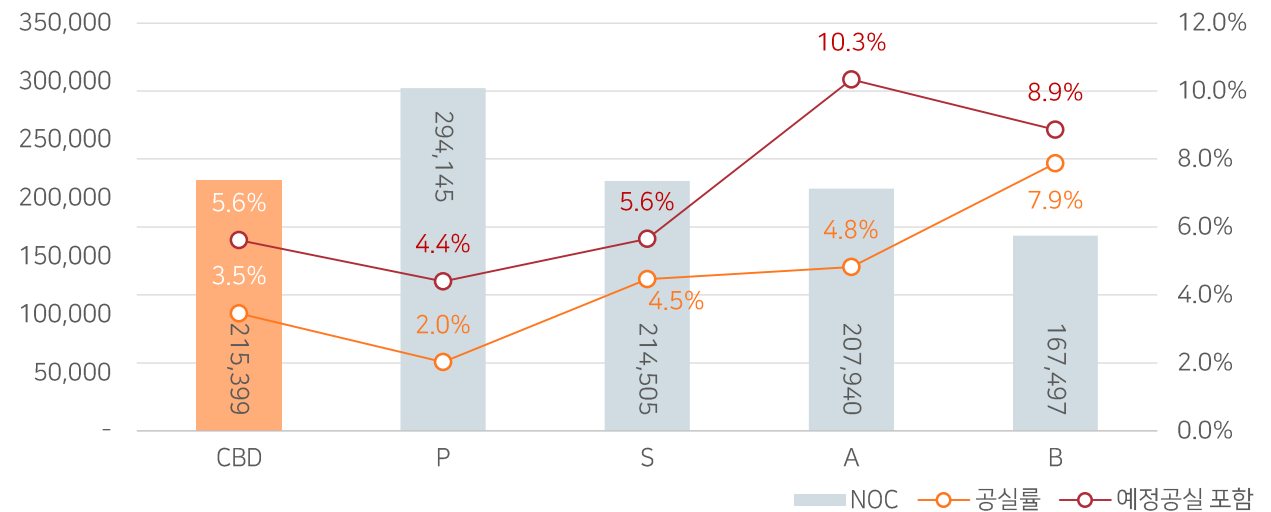
공실률 3.46% ↓ 평균 NOC ₩ 215,399 ↑

평균 임대료	평균 보증금	평균 관리비
90,404	891,279	35,791

2022년도 5월 조사한 도심지역 오피스의 평균 공실률은 3.46%로 조사되었으며, 전용면적 1평당 사용할 때 드는 비용을 계산한 평균 NOC는 215,399원으로 조사되었다.



■ CBD 지역 세부권역별 공실률/NOC



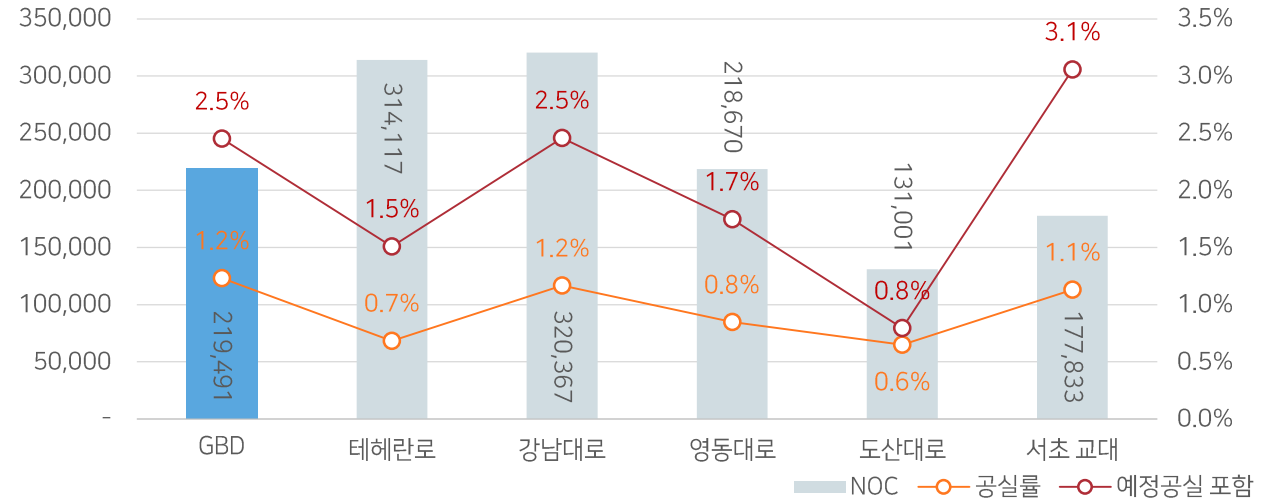
■ CBD 지역 규모별 공실률/NOC

73 GBD 강남권역

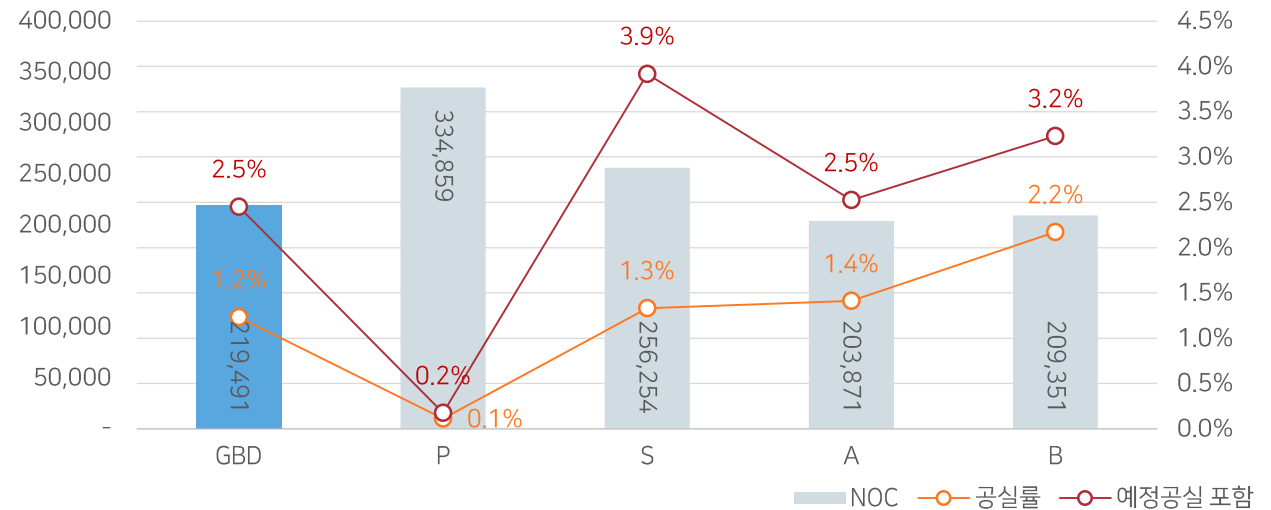
공실률 1.23% ↓ 평균 NOC ₩ 219,491 ↑

평균 임대료	평균 보증금	평균 관리비
101,398	1,294,439	28,886

2022년도 5월 조사한 강남지역 오피스의 평균 공실률은 1.23%로 조사되었으며, 전용면적 1평당 사용할 때 드는 비용을 계산한 평균 NOC는 219,491원으로 조사되었다.



GBD 지역 세부권역별 공실률/NOC



GBD 지역 규모 별 공실률/NOC

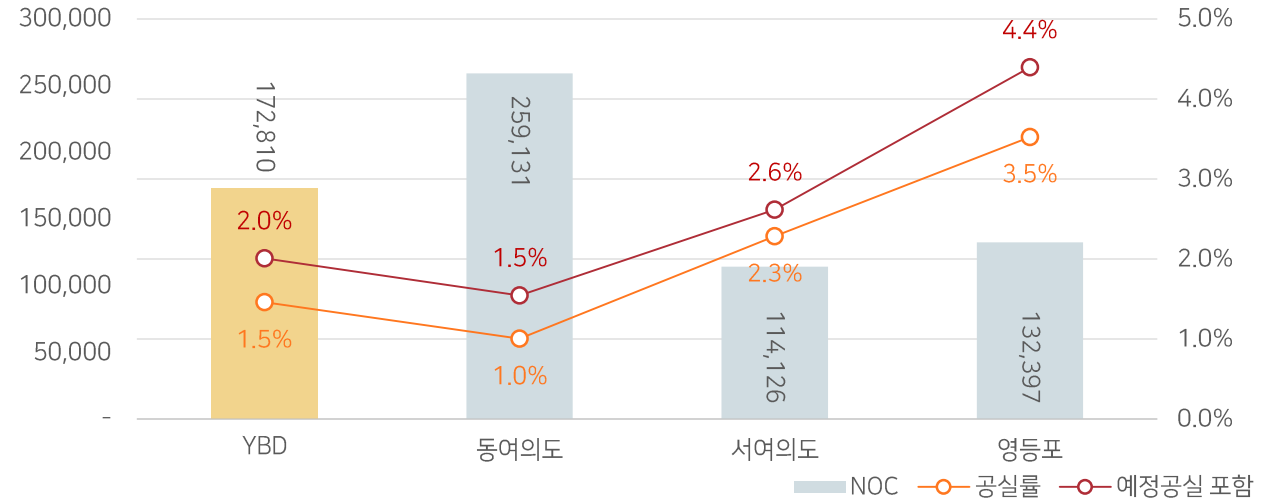
24 YBD 여의도, 영등포 권역

공실률
1.46% ↓

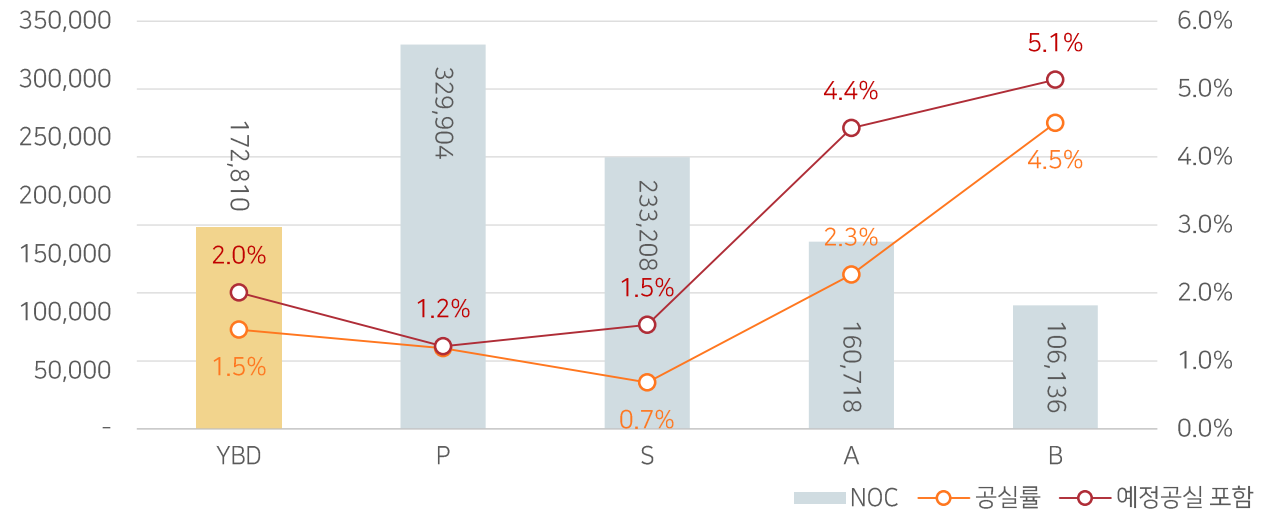
평균 NOC
₩ 172,810 ↓

평균 임대료	평균 보증금	평균 관리비
65,719	700,734	30,222

2022년도 5월 조사한 여의도, 영등포 지역
오피스의 평균 공실률은 1.46%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 172,810원으로 조사되었다.



■ YBD 지역세부권역별 공실률/NOC



■ YBD 지역규모 별 공실률/NOC

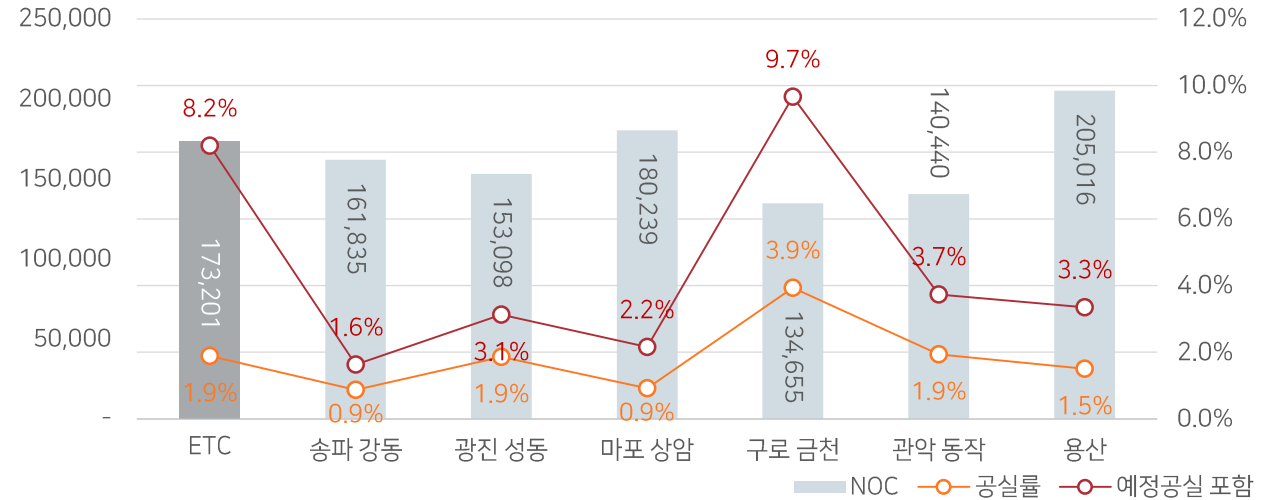
75 ETC 서울 기타권역

공실률
1.89% ↓

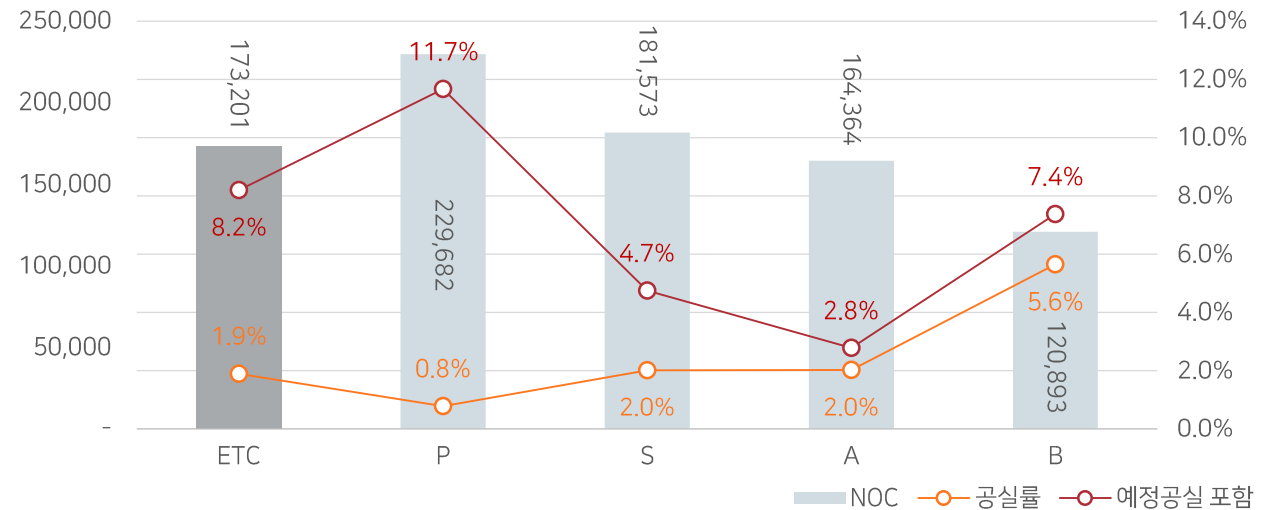
평균 NOC
₩ 173,201 ↑

평균 임대료	평균 보증금	평균 관리비
65,656	730,700	25,485

2022년도 5월 조사한 서울 기타지역 오피스의
평균 공실률은 1.89%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 173,201원으로 조사되었다.



ETC 지역 세부권역별 공실률/NOC



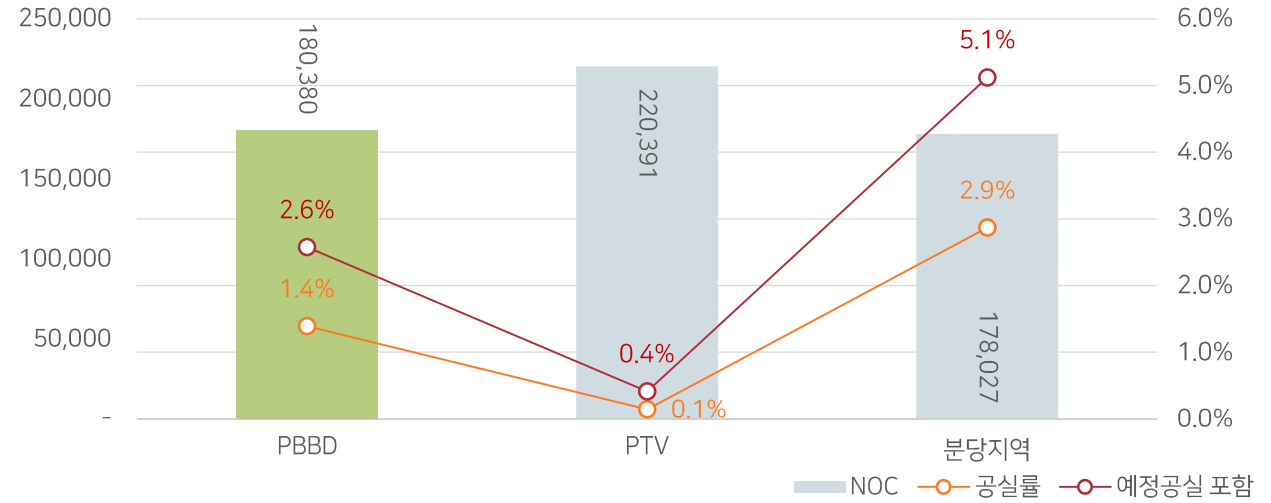
ETC 지역 규모별 공실률/NOC

76 PBBD 판교, 분당 권역

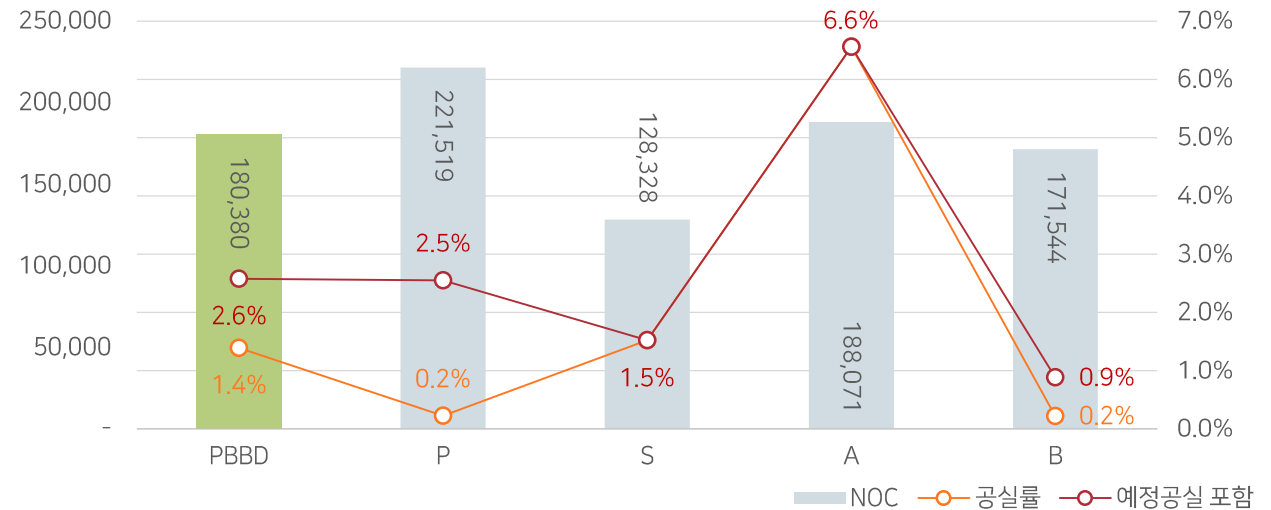
공실률 1.39% ↑
 평균 NOC ₩ 180,380 ↑

평균 임대료	평균 보증금	평균 관리비
62,771	715,251	26,543

2022년도 5월 조사한 판교, 분당지역 오피스의
 평균 공실률은 1.39%로 조사되었으며,
 전용면적 1평당 사용할 때 드는 비용을 계산한
 평균 NOC는 180,380원으로 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	287,850	977,216	98,394	34,942	221,581	3.26%
	시청역	288,244	721,367	73,615	31,896	194,295	3.54%
	종각역	303,085	823,528	84,724	36,247	197,485	3.71%
	을지로입구역	248,994	783,962	83,169	36,165	203,976	2.42%
GBD	테헤란로	999,324	1,632,001	156,369	34,915	314,117	0.68%
	강남대로	492,652	1,972,553	171,379	32,559	320,367	1.17%
	영동대로	200,043	959,288	76,042	30,446	218,670	0.85%
	도산대로	90,716	840,535	51,969	23,310	131,001	0.65%
	서초 교대	131,592	1,315,142	86,335	29,622	177,833	1.13%
YBD	동여의도	867,196	892,350	93,040	39,869	259,131	1.00%
	서여의도	161,801	426,625	42,198	23,280	114,126	2.28%
	영등포	126,840	776,442	58,618	23,561	132,397	3.52%
ETC	송파 강동	512,019	854,872	64,313	22,033	161,835	0.87%
	광진 성동	156,678	894,444	74,644	19,069	153,098	1.86%
	마포 상암	616,544	895,809	73,371	31,992	180,239	0.91%
	구로 금천	250,105	530,298	51,709	19,199	134,655	3.93%
	관악 동작	139,774	512,170	48,264	24,633	140,440	1.94%
	용산	193,449	718,338	69,393	35,469	205,016	1.51%
PBBD	PTV	338,455	950,000	95,000	15,000	220,391	0.14%
	분당지역	285,326	701,443	60,875	26,882	178,027	2.87%

지역 별
사용승인 현황

권역	빌딩명	소재지	주용도	연면적(㎡)	연면적(3.3㎡)	사용승인일
CBD	JYJ빌딩	중구 신당동	제1종근린생활시설	1,266	383	21-Apr
	케이스퀘어 강남2	강남구 역삼동	업무시설	21,942	6,638	25-Apr
	KB국민은행	강남구 신사동	업무시설	3,287	994	28-Apr
GBD	인픽스 빌딩	강남구 논현동	업무시설	2,575	779	01-Apr
	청담스타빌딩	강남구 논현동	제1종근린생활시설	2,513	760	20-Apr
	aone청담빌딩	강남구 청담동	제1종근린생활시설	2,411	729	21-Apr
	연홍메디칼센터	강남구 역삼동	제1종근린생활시설	2,381	720	07-Apr
	에스타워	강남구 역삼동	업무시설	2,000	605	01-Apr
	K8	강남구 역삼동	제2종근린생활시설	1,142	345	11-Apr
	제이타워	중랑구 망우동	제2종근린생활시설	9,880	2,989	07-Apr
ETC	SC MEDI TOWER	강동구 길동	의료시설	9,410	2,846	01-Apr
	제이메디컬	중랑구 망우동	제1종근린생활시설	4,980	1,506	06-Apr
	BMW서비스팩토리	성동구 성수동2가	자동차관련시설	2,980	902	18-Apr
	오복타워	성동구 성수동2가	업무시설	2,242	678	06-Apr
	중앙프라자	강서구 화곡동	제1종근린생활시설	1,996	604	14-Apr
	HY구의사옥	광진구 자양동	업무시설	1,823	551	25-Apr

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, May 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 = 1,242.20 KRW (0.81 USD = 1,000 KRW) as of 3rd June 2022

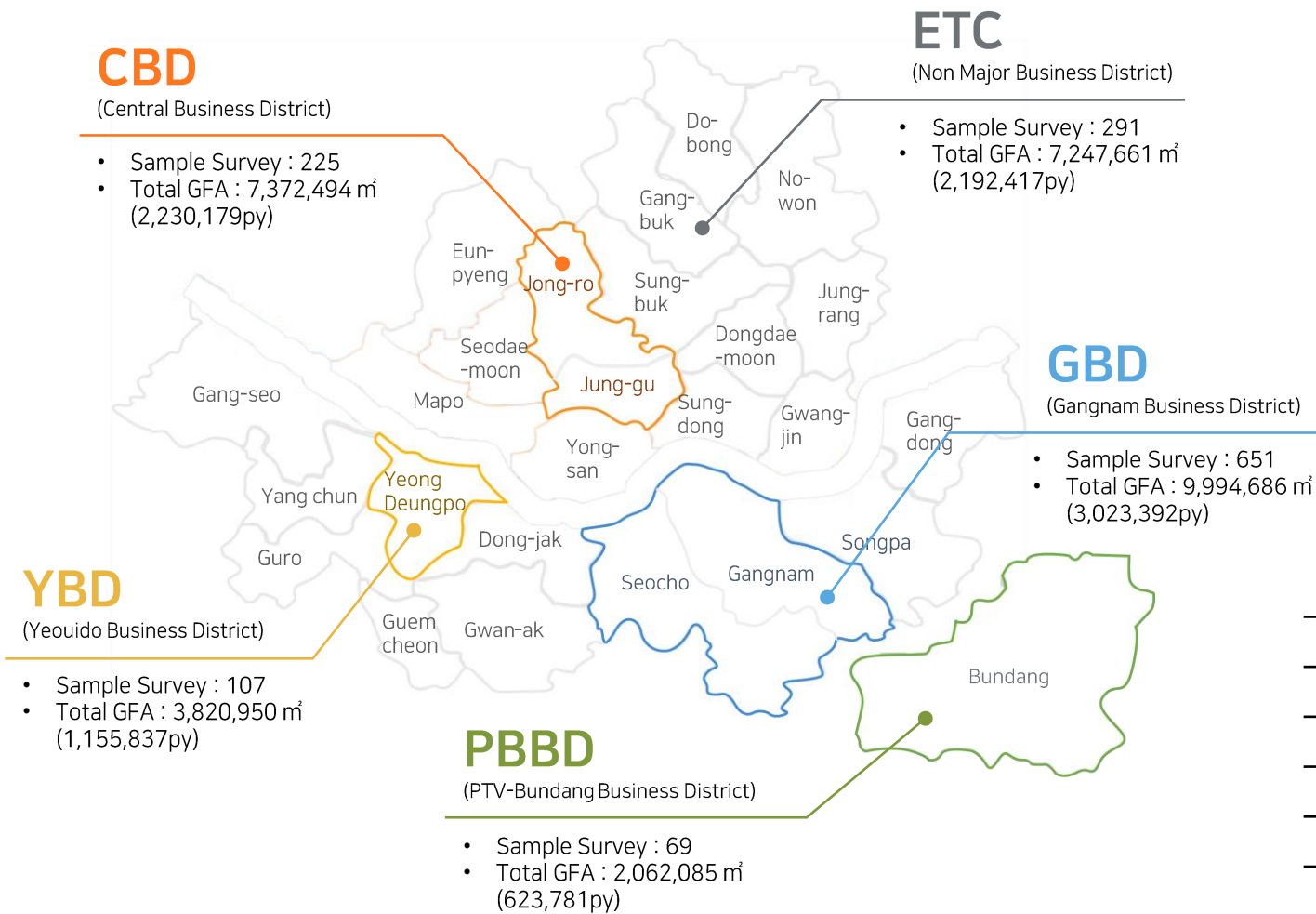
5 Regional Divisions in Seoul

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 1,343

	P	S	A	B
CBD	45	65	34	81
GBD	30	83	93	445
YBD	17	24	29	37
ETC	41	56	52	142
PBB	10	16	16	27

• NOC (Net Occupancy Cost)

The monthly cost that 1m² of net area 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

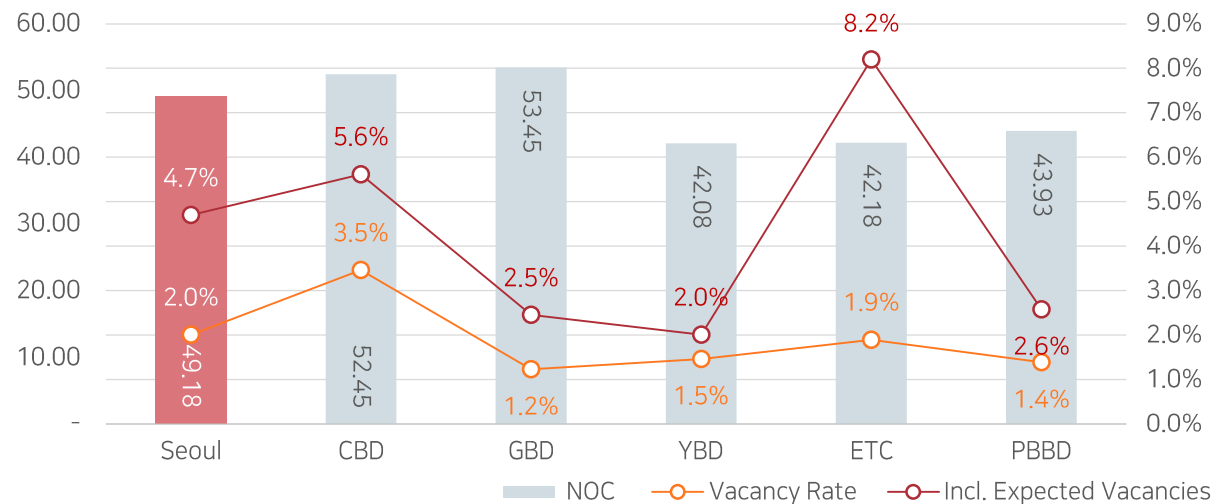
2.01 % ↓

Avg, NOC

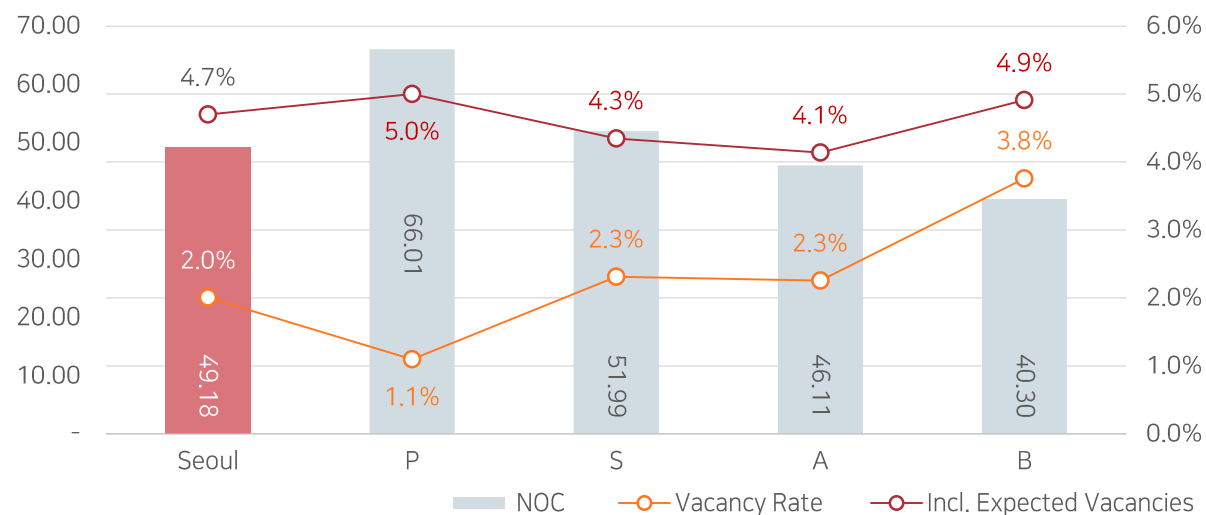
\$ 49.18 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
20.48	221.37	7.65

The average vacancy rate of the office buildings in Seoul is 2.01 % as of May 2022, and the average NOC is \$ 49.18.



■ Vacancy Rate & NOC in Seoul and Each District



■ Vacancy Rate & NOC in Seoul & Each Building Category

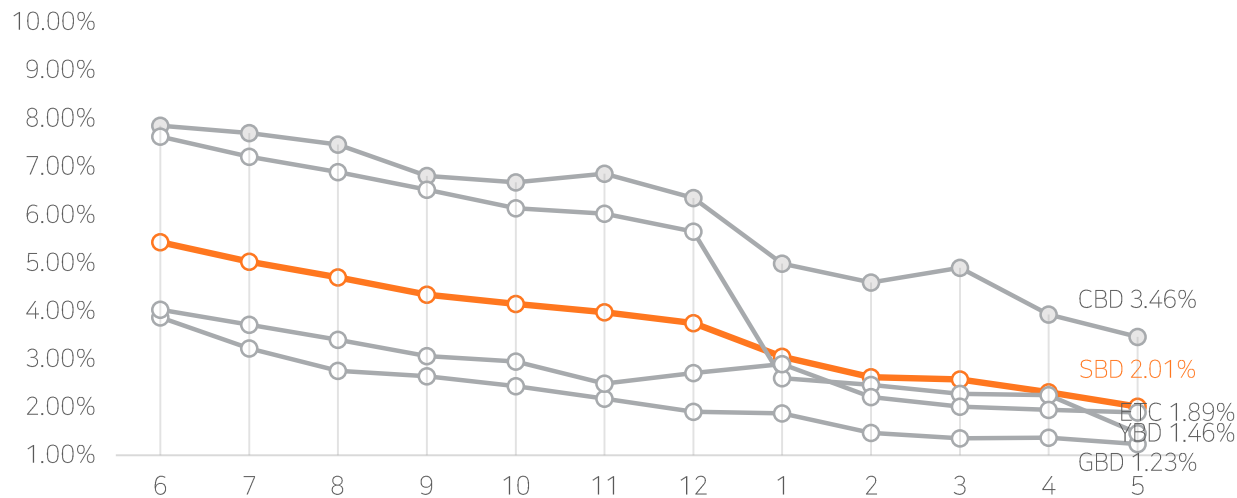
01 SBD Seoul Capital Area

The following charts indicates the vacancy level of Seoul for May 2022.

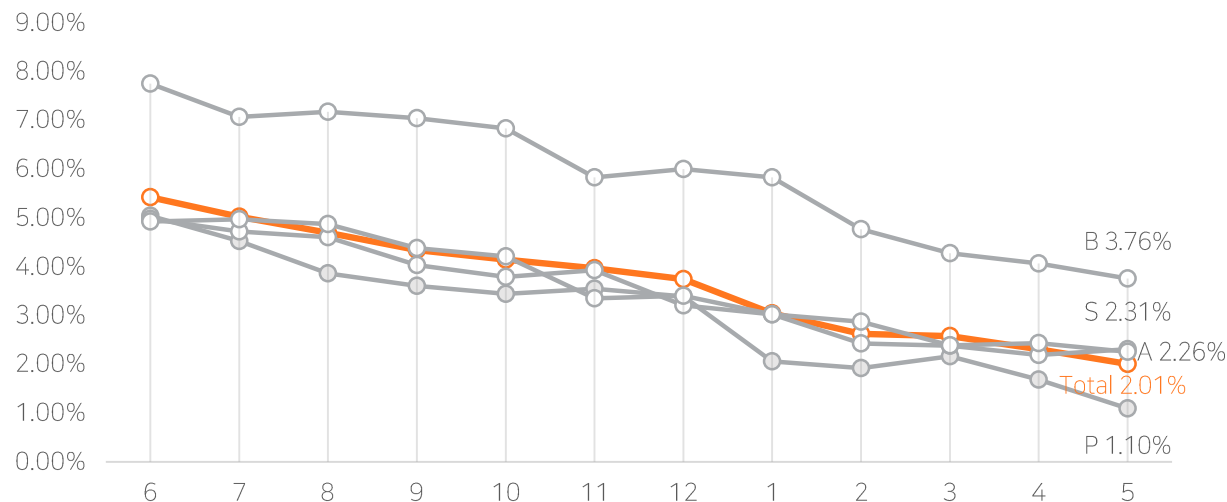
In CBD, the office units of 5,850m², located over the 3 floors in Hanhwa Finance Center and rented by Hanhwa Life Insurance Corp., came on the lease market in Seoul.

In GBD, another office units of 4,200m², located over the 3 floors in V-plex Tower and rented by Magnachip Semiconductor Ltd., came on the lease market. Additionally, the office units of 3,790m², located over the 3 floors in Gangnam Finance Plaza and rented by Fastfive, will be added to the lease market in October 2022. In Shinsa-dong, GBD, Timon Corp. decided to move into Arige Building in September 2022, occupying the office units of 2,650m² in total.

In YBD, Parc-One NH Finance Tower managed to fill the vacant units of 19,490m², located over 6 floors in the building, with the new tenants such as Leading Investment & Securities Co., Ltd. which rents the 2 out of the 6 floors in the building. In Shindaebang, the office units of 5,830m², located over the 2 floors in Park Square and rented by FMVICE (Shinhan Card TM Center), came on the lease market. In Guro, additionally, the office units of 4,270m², located over the 3 floors and a half in Pan-Pacific group Building and rented by Welcome Group Corp., will be added to the lease market in 2H 2022.



Monthly Vacancy Rate in 5 Main Districts



Monthly Vacancy Rate for Different Size of Buildings

02 CBD Central Seoul

Vacancy rate

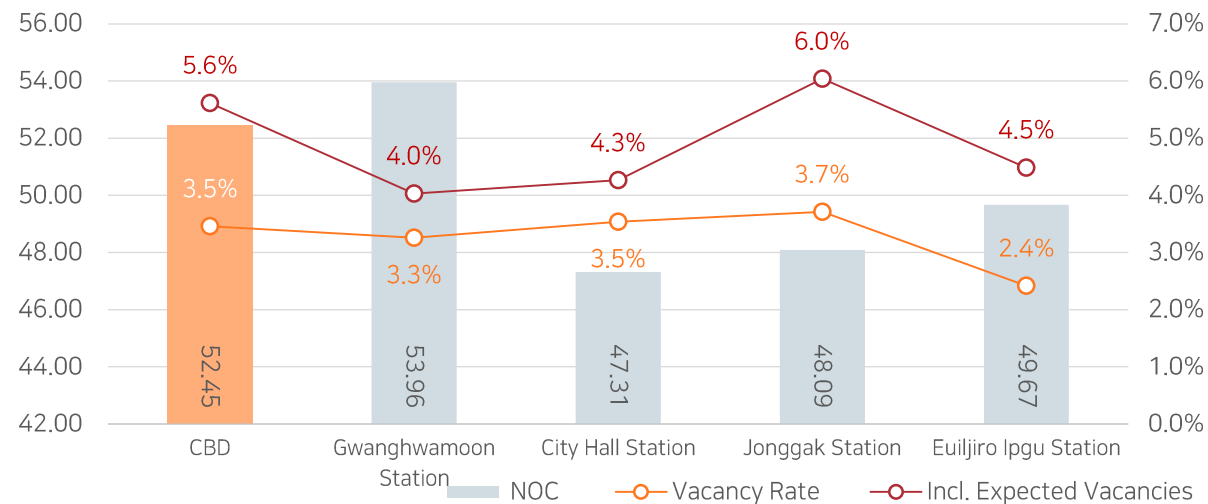
3.46% ↓

Avg, NOC

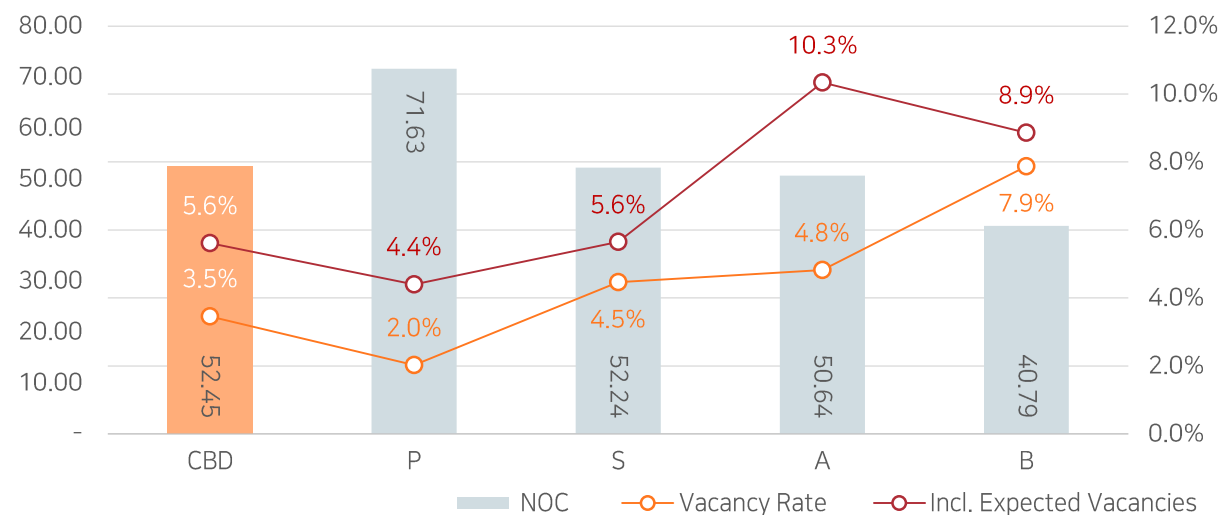
\$ 52.45 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
22.02	217.04	8.72

The average vacancy rate of the office buildings in CBD is 3.46 % as of May 2022, and the average NOC is \$ 52.45.



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



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

GBD Gangnam

Vacancy rate

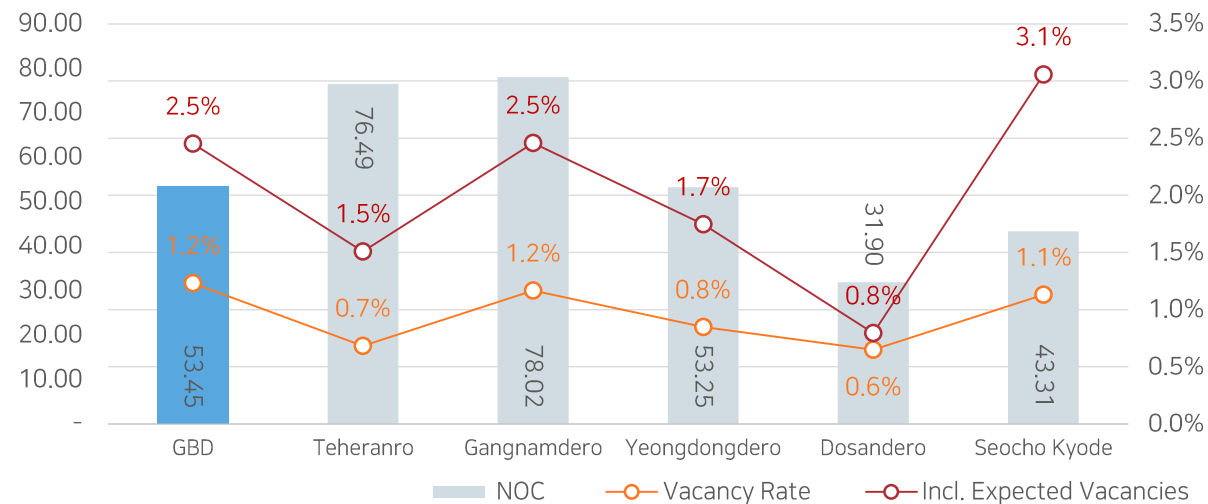
1.23% ↓

Avg, NOC

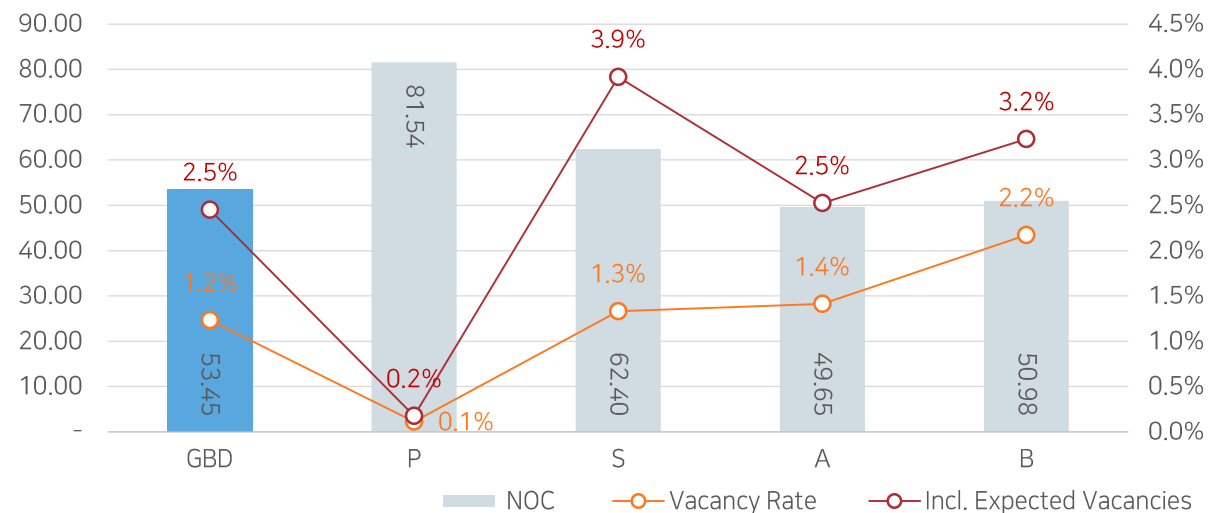
\$ 53.45 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
24.69	315.22	7.03

The average vacancy rate of the office buildings in GBD is 1.23 % as of May 2022, and the average NOC is \$ 53.45.



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



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

YBD Yeouido & Yeongdeungpo

Vacancy rate

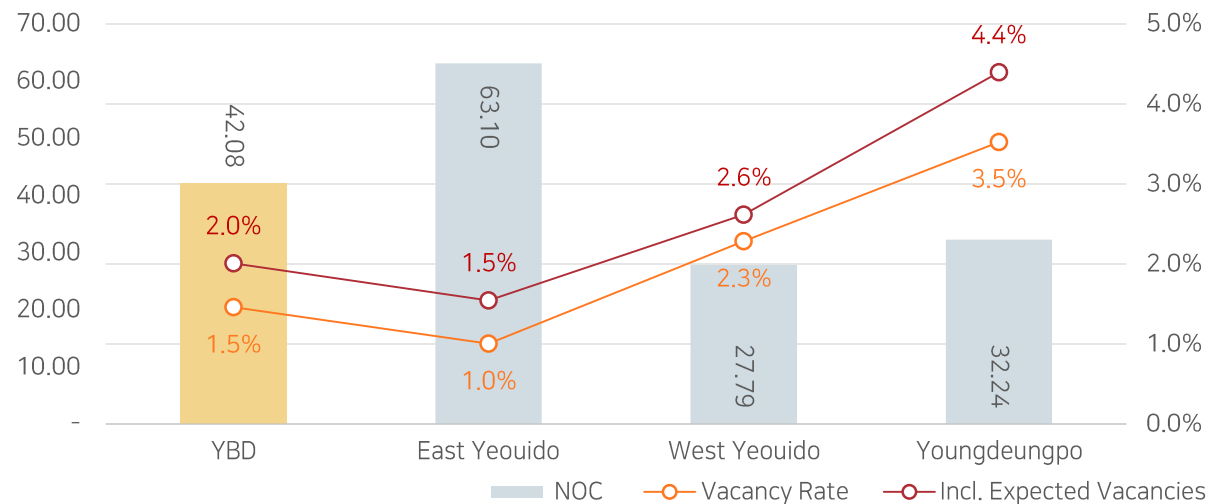
1.46 % ↓

Avg, NOC

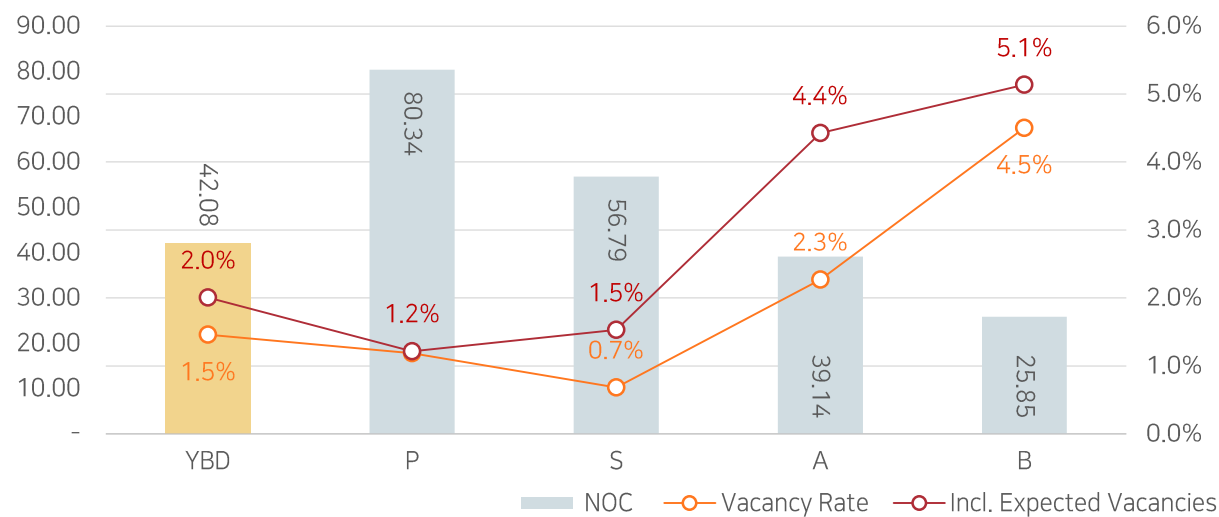
\$ 42.08 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
16.00	170.64	7.36

The average vacancy rate of the office buildings in YBD is 1.46 % as of May 2022, and the average NOC is \$ 42.08.



■ 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

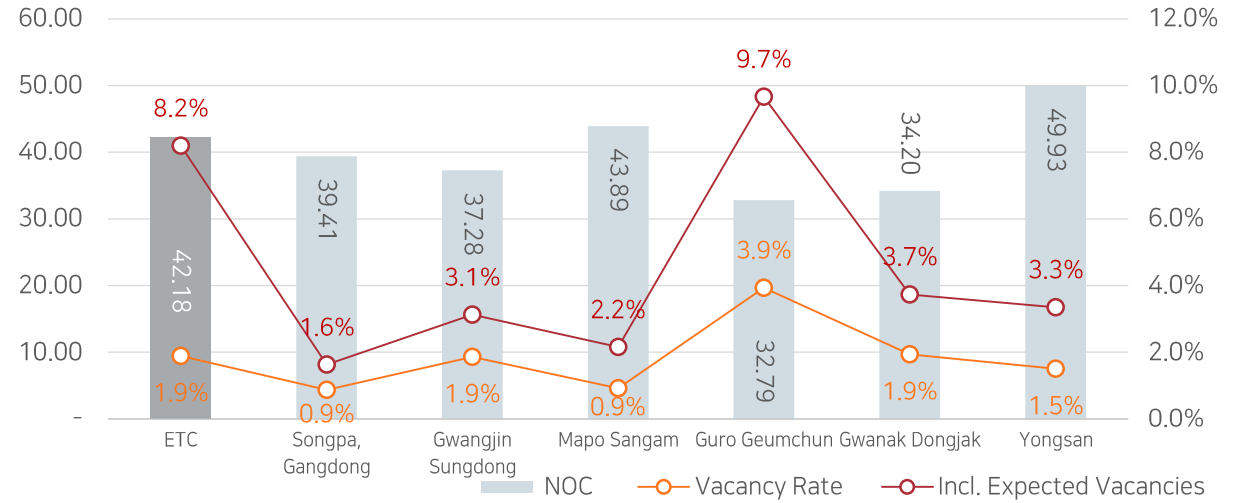
1.89% ↓

Avg, NOC

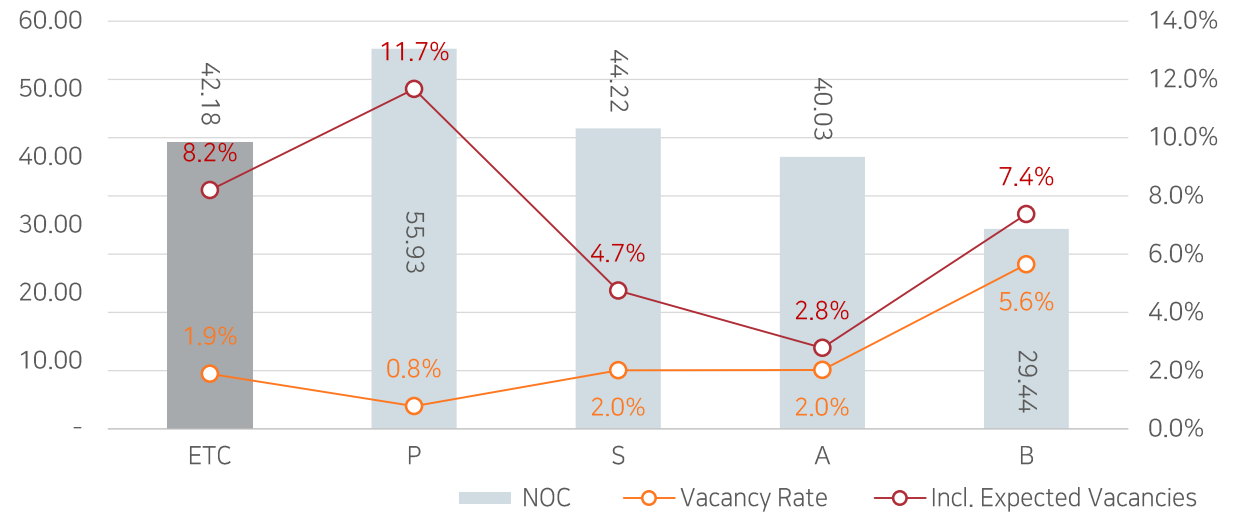
\$ 42.18 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
15.99	177.94	6.21

The average vacancy rate of the office buildings in ETC is 1.89 % as of May 2022, and the average NOC is \$ 42.18.



■ 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

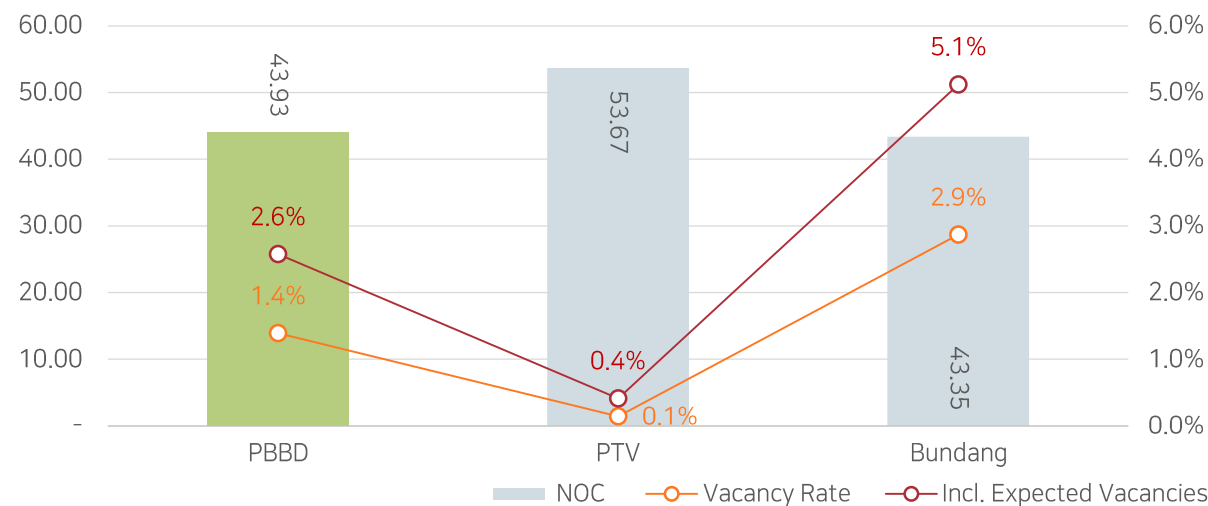
1.39% ↑

Avg, NOC

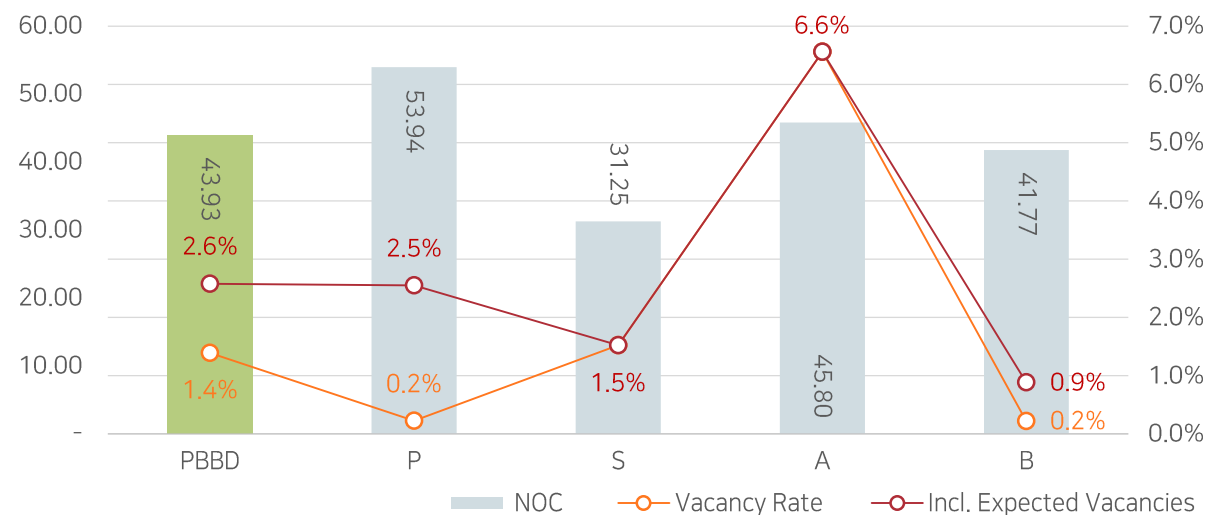
\$ 43.93 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
15.29	174.18	6.46

The average vacancy rate of the office buildings in PBBD is 1.39 % as of May 2022, and the average NOC is \$ 43.93.



■ 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	951,571	237.97	23.96	8.51	53.96	3.26%
	City Hall Station	952,872	175.67	17.93	7.77	47.31	3.54%
	Jonggak Station	1,001,933	200.55	20.63	8.83	48.09	3.71%
	Euljiro Ipgu Station	823,120	190.91	20.25	8.81	49.67	2.42%
GBD	Teheranro	3,303,552	397.42	38.08	8.50	76.49	0.68%
	Gangnamdero	1,628,601	480.36	41.73	7.93	78.02	1.17%
	Yeongdongdero	661,298	233.61	18.52	7.41	53.25	0.85%
	Dosandero	299,889	204.69	12.66	5.68	31.90	0.65%
	Seocho Gyodae	435,014	320.26	21.02	7.21	43.31	1.13%
YBD	East Yeouido	2,866,763	217.30	22.66	9.71	63.10	1.00%
	West Yeouido	534,880	103.89	10.28	5.67	27.79	2.28%
	Youngdeungpo	419,307	189.08	14.27	5.74	32.24	3.52%
ETC	Songpa, Gangdong	1,692,625	208.18	15.66	5.37	39.41	0.87%
	Gwangjin Sungdong	517,943	217.81	18.18	4.64	37.28	1.86%
	Mapo Sangam	2,038,161	218.15	17.87	7.79	43.89	0.91%
	Guro Geumchun	826,794	129.14	12.59	4.68	32.79	3.93%
	Gwanak Dongjak	462,064	124.72	11.75	6.00	34.20	1.94%
	Yongsan	639,502	174.93	16.90	8.64	49.93	1.51%
PBBD	PTV	1,118,860	231.34	23.13	3.65	53.67	0.14%
	Bundang	943,225	170.81	14.82	6.55	43.35	2.87%



Land Use Information by District

District	Building Name	Address	Land Use	GFA (㎡)	Completion
CBD	JYJ Building	Jung-gu Shindang-dong	#1 Commercial	1,266	21-Apr
	K Square Gangnam2	Yeoksam-dong Gangnam-gu	Office	21,942	25-Apr
	KB Kookmin Bank	Shinsa-dong Gangnam-gu	Office	3,287	28-Apr
GBD	Infix Building	Nonhyun-dong Gangnam-gu	Office	2,575	01-Apr
	Chungdam Building	Nonhyun-dong Gangnam-gu	#1 Commercial	2,513	20-Apr
	Aone Chungdam Building	Chungdam-dong Gangnam-gu	#1 Commercial	2,411	21-Apr
	Yeonhong Medical Center	Yeoksam-dong Gangnam-gu	#1 Commercial	2,381	07-Apr
	S Tower	Yeoksam-dong Gangnam-gu	Office	2,000	01-Apr
	K8	Yeoksam-dong Gangnam-gu	#2 Commercial	1,142	11-Apr
	J Tower	Mangwoo-dong Jungrang-gu	#2 Commercial	9,880	07-Apr
ETC	SC MEDI TOWER	Gil-dong Gangdong-gu	Medical	9,410	01-Apr
	J Medical	Mangwoo-dong Jungrang-gu	#1 Commercial	4,980	06-Apr
	BMW Service Factory	Sungsoo-dong 2ga Sungdong-gu	Automobile-related	2,980	18-Apr
	Obok Tower	Sungsoo-dong 2ga Sungdong-gu	Office	2,242	06-Apr
	Joongang Plaza	Hwagok-dong Gangseo-gu	#1 Commercial	1,996	14-Apr
	HY Gooeui Office Building	Jayang-dong Gwangjin-gu	Office	1,823	25-Apr



OKEY RESEARCH CENTER

+82.2.6205.0884 okey@naikora.com www.okeyok.com

Copyright 2019 OKEY OfficeKey All rights reserved. Office Platform OKEY OfficeKey
Okey Corp. 10F Jungheon Building Teheranro 516, Gangnam-gu, Seoul

NAIPropertree
Commercial Real Estate Services, Worldwide.

REAL ESTATE LABEL OFFICE KEY
OKEY