

SEOUL OFFICE LEASING

July 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 6월 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

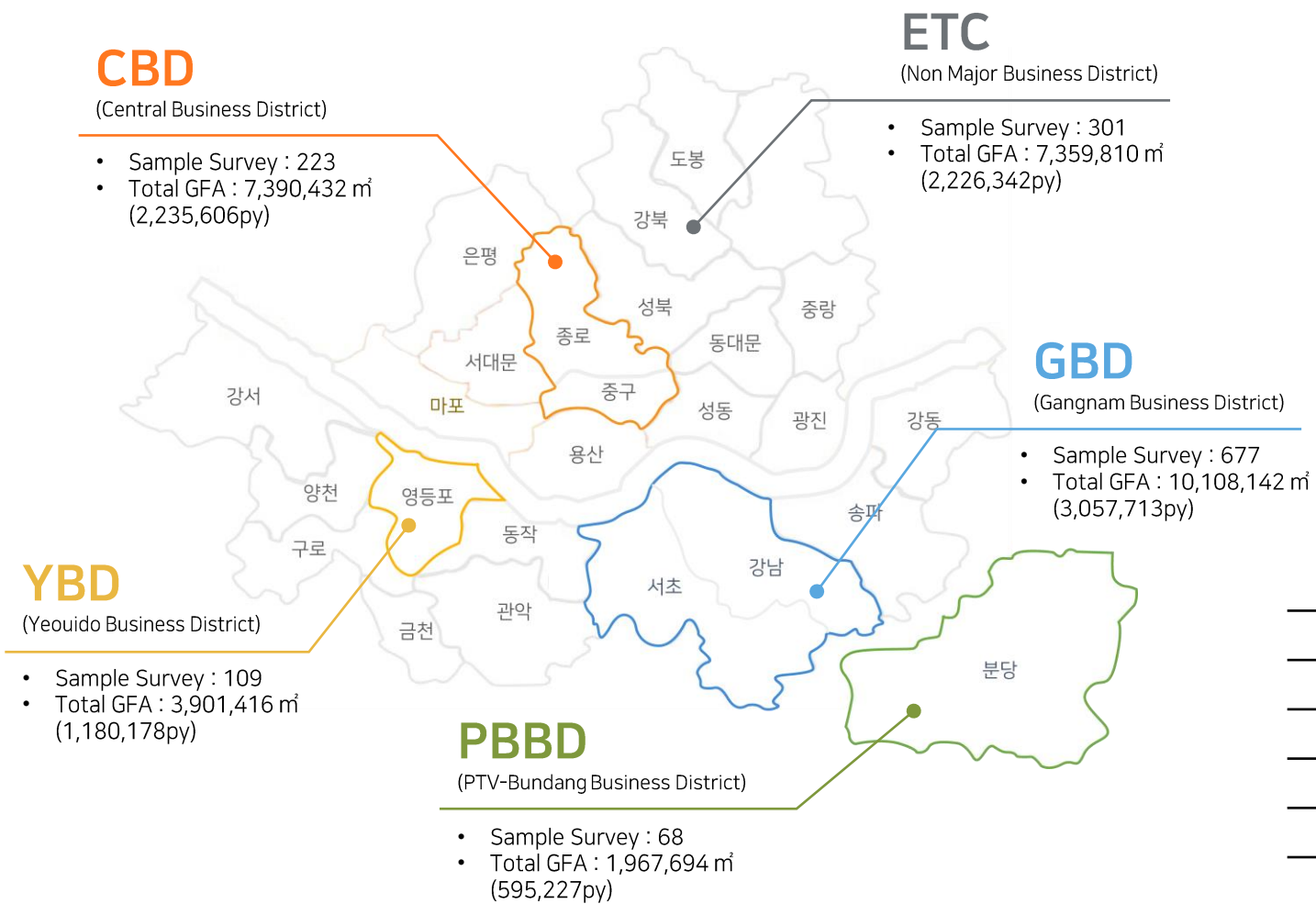
여의도권
여의도, 영등포구 일대

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 1,367

	P	S	A	B
CBD	45	66	34	78
GBD	30	82	97	458
YBD	18	24	29	38
ETC	43	56	51	150
PBBD	9	15	17	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

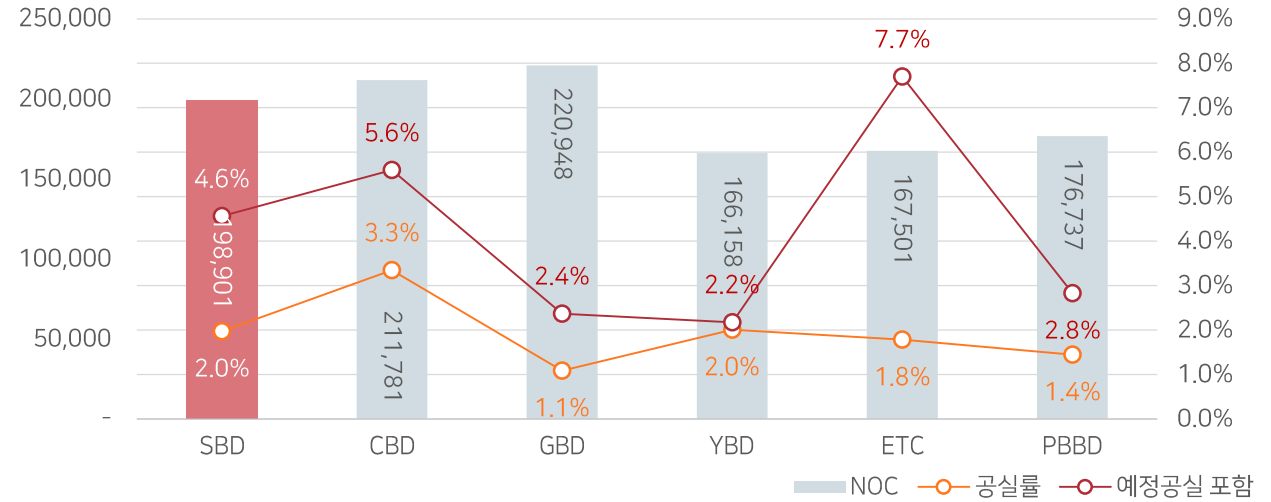
1.97% ↓

평균 NOC

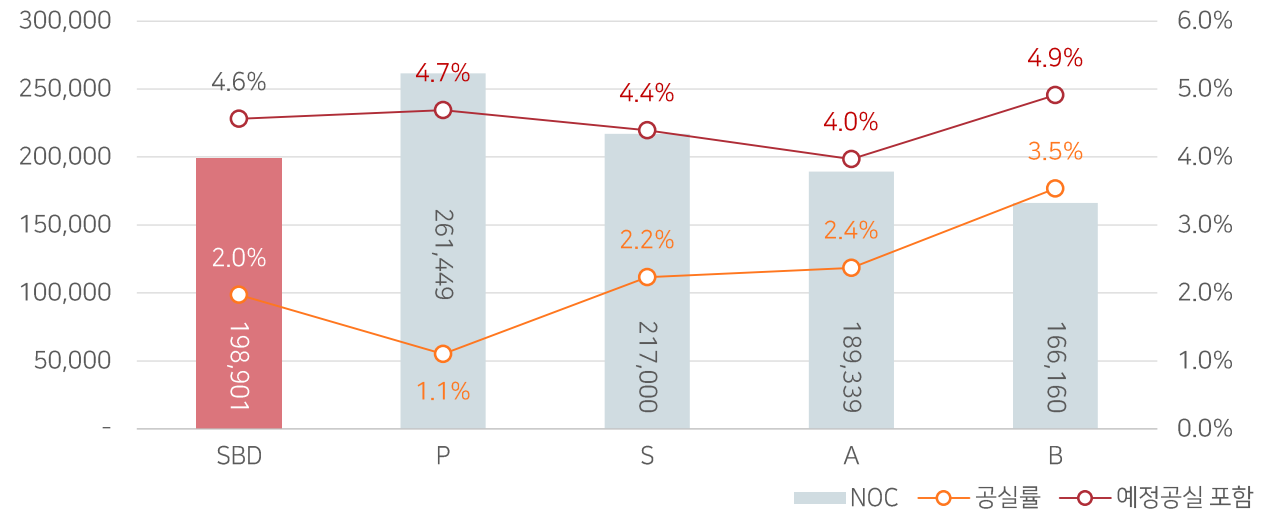
₩ 198,901 ↓

평균 임대료	평균 보증금	평균 관리비
82,986	893,087	30,760

2022년도 6월 조사한 서울지역 오피스의
평균 공실률은 1.97%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 198,901원으로 조사되었다.



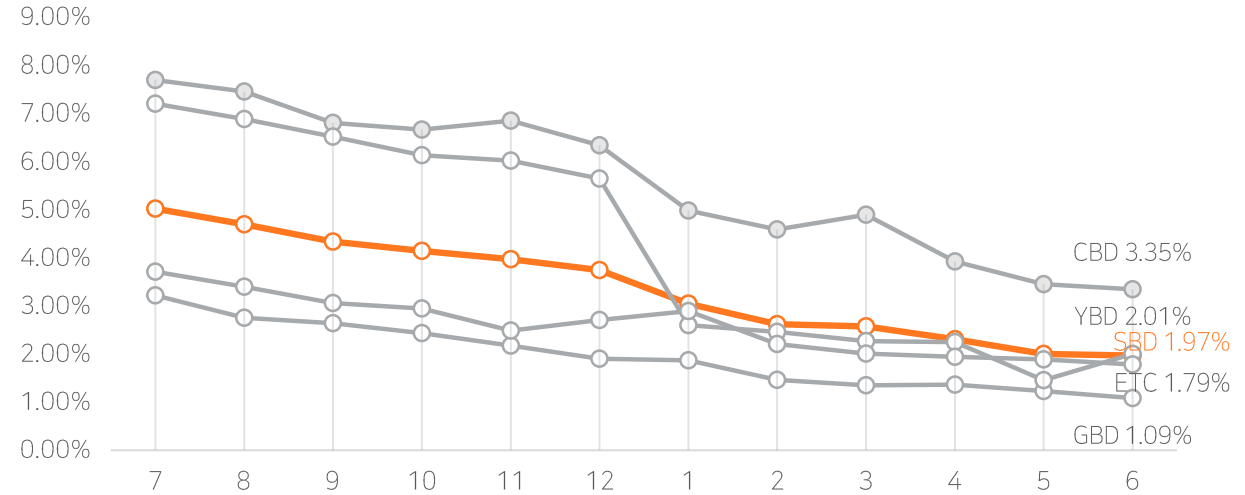
■ 서울 전체 권역 별 공실률 / NOC



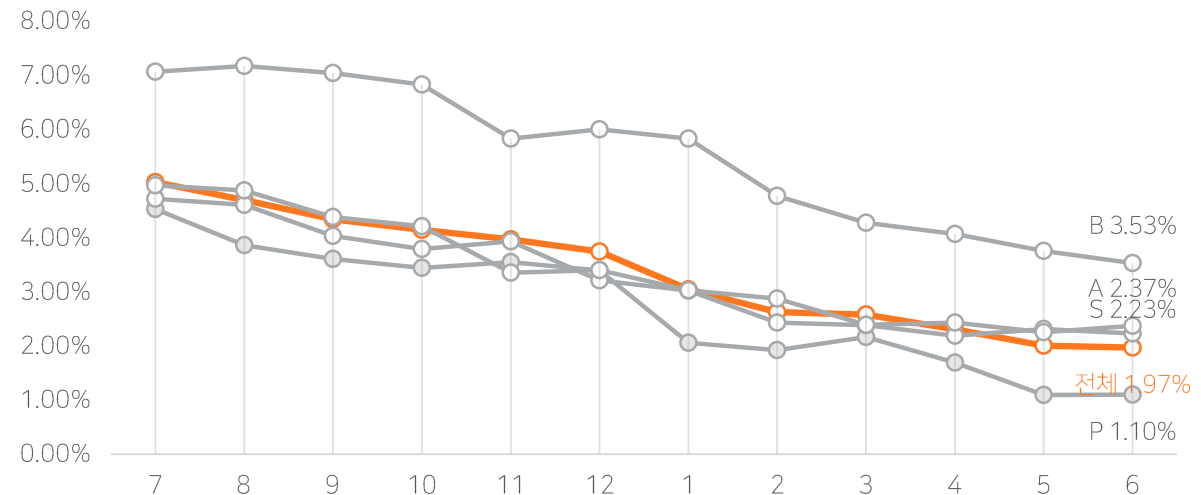
■ 서울 전체 규모 별 공실률 / NOC

01 SBD 서울 전체

2022년 6월 서울권역의 공실률 흐름은 다음과 같이 조사되었다.
 CBD의 한국프레스센터에 국가기관이 계약하며 2개층 1,220평의 공실이 해소되었고, ENA센터에서 삼성카드가 사용하던 2개층을 포함한 총 1,110평의 공실이 발생하였다.
 GBD의 큰길타워에서 한국도시가스협회가 사용중인 1개층, 팩토리얼게임즈가 사용중인 면적중 1개층 등 총 1,590평의 면적이 임대시장에 새로 추가되었고, 삼원타워에서 대한변호사협회와 대한변협법률구조재단에서 사용중인 총 2개층 1,140평의 면적이 임대시장에 추가되었다.
 강남파이낸스프라자에서는 패스트파이브가 사용중인 3개층을 포함한 총 4개층에 IT 스타트업기업이 1,310평을 계약하였고, 라인빌딩에 포지큐브가 1개층, 메가존이 3개층을 계약하며 총 1,060평의 공실이 해소되었다.
 상암 DDMC에서 SKY라이프 TV가 사용하던 1개층을 CJ E&M에서 증평하여 1,700평의 공실이 해소되었다.



■ 서울 권역별 공실률 변화



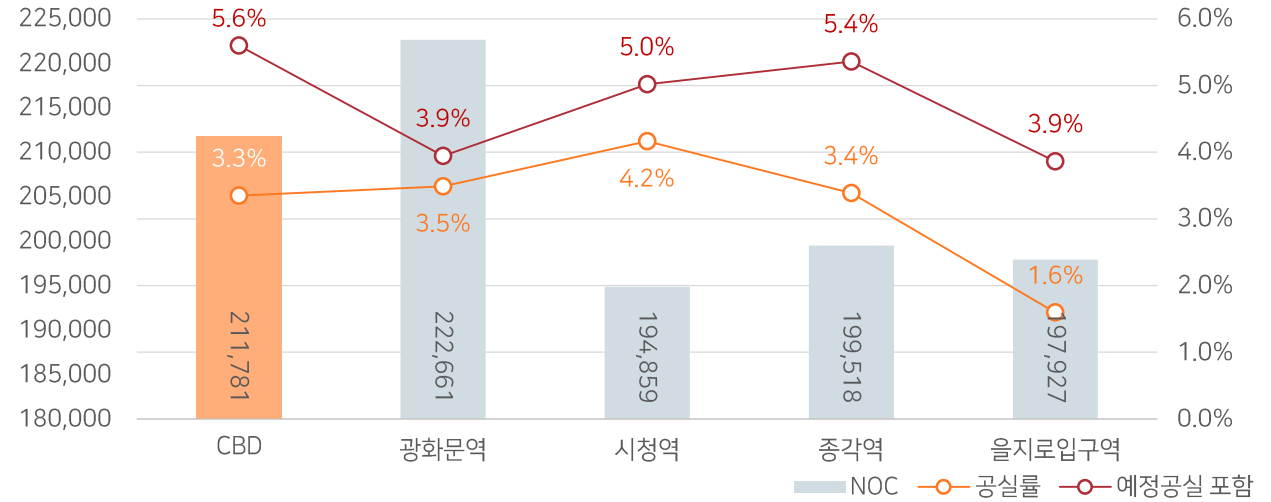
■ 서울 규모별 공실률 변화

02 CBD 도심권역

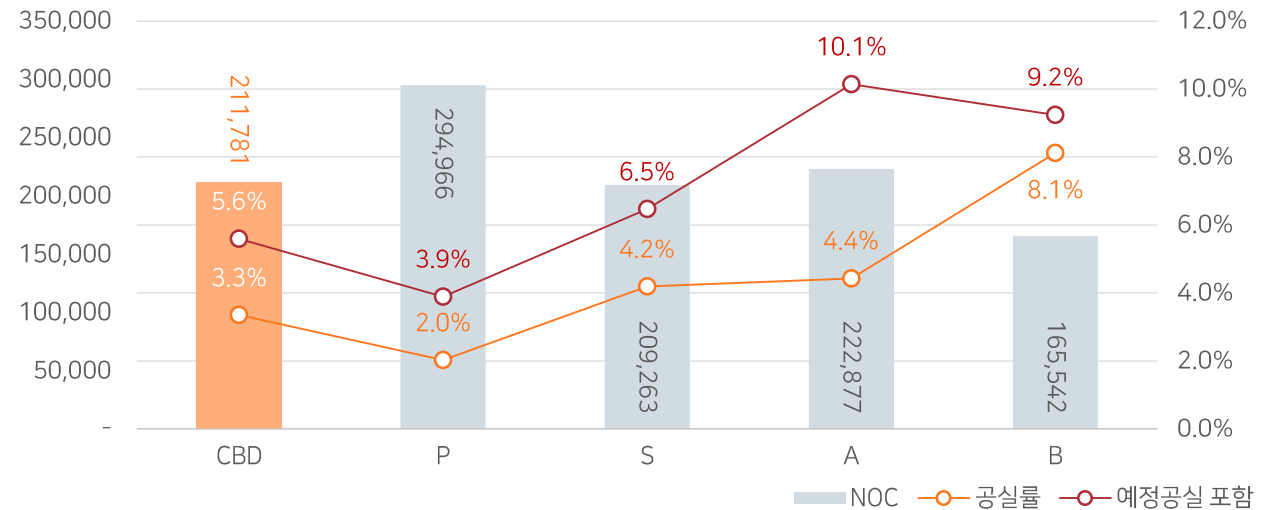
공실률 3.35% ↓ 평균 NOC ₩ 211,781 ↓

평균 임대료	평균 보증금	평균 관리비
88,411	875,401	35,335

2022년도 6월 조사한 도심지역 오피스의 평균 공실률은 3.35%로 조사되었으며, 전용면적 1평당 사용할 때 드는 비용을 계산한 평균 NOC는 211,781원으로 조사되었다.



■ CBD 지역 세부권역별 공실률/NOC



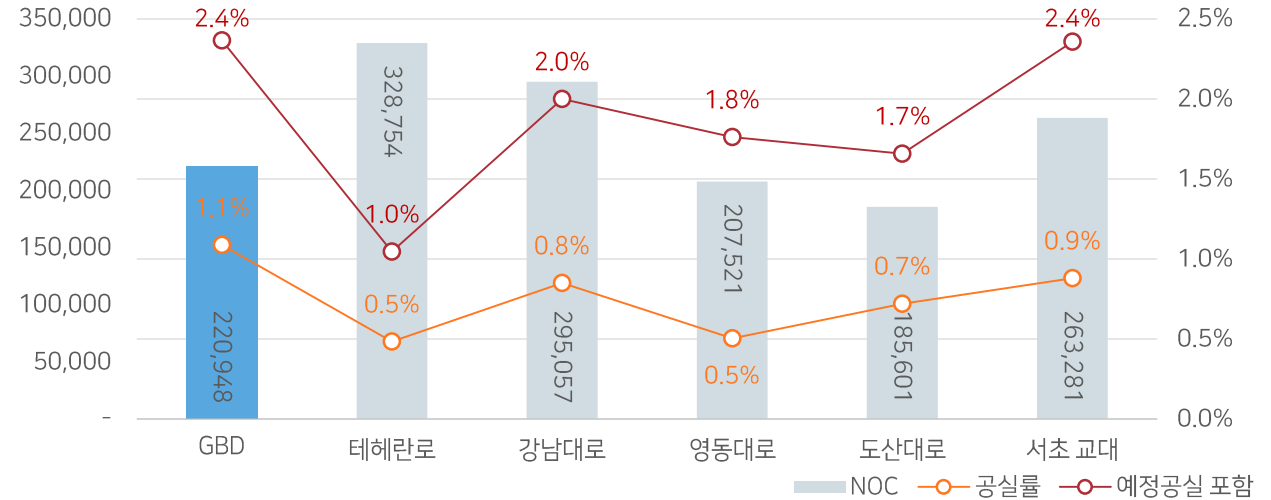
■ CBD 지역 규모별 공실률/NOC

73 GBD 강남권역

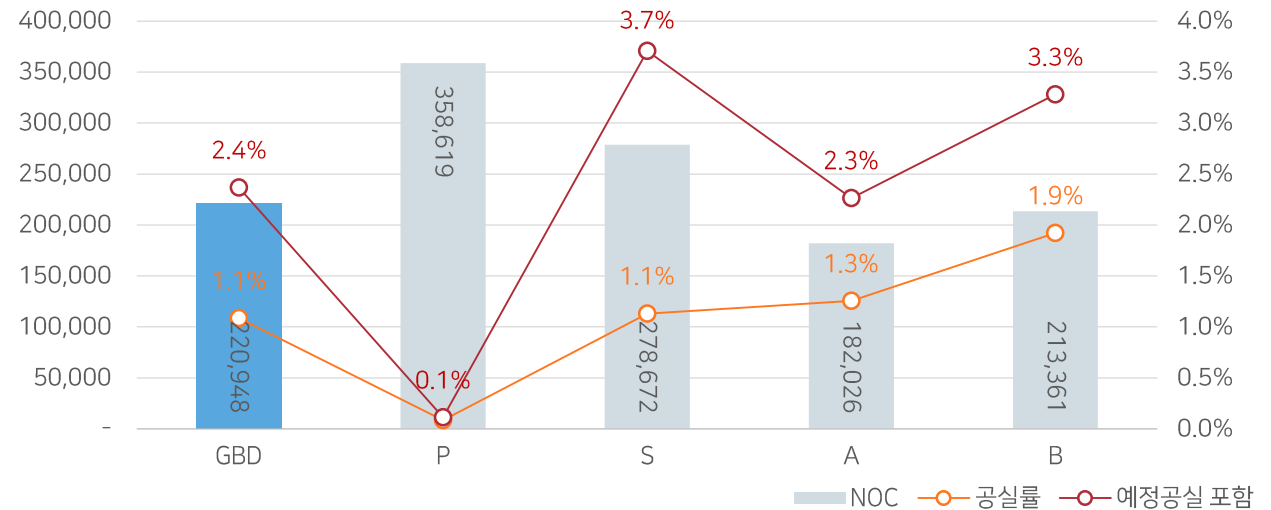
공실률 1.09% ↓ 평균 NOC ₩ 220,948 ↑

평균 임대료	평균 보증금	평균 관리비
99,505	1,238,972	28,845

2022년도 6월 조사한 강남지역 오피스의 평균 공실률은 1.09%로 조사되었으며, 전용면적 1평당 사용할 때 드는 비용을 계산한 평균 NOC는 220,948원으로 조사되었다.



■ GBD 지역 세부권역별 공실률/NOC



■ GBD 지역 규모 별 공실률/NOC

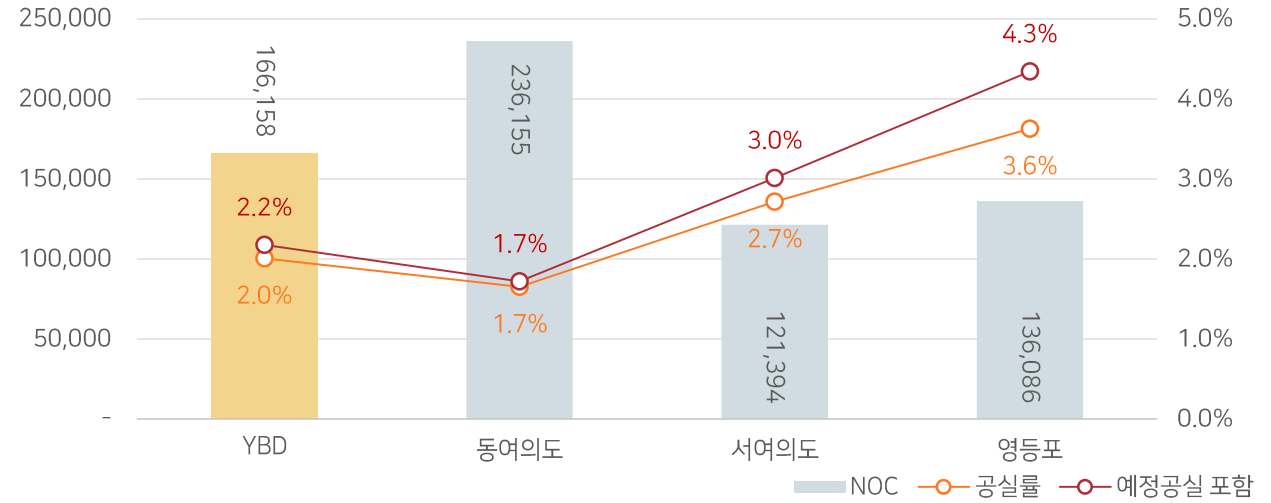
24 YBD 여의도, 영등포 권역

공실률
2.01% ↑

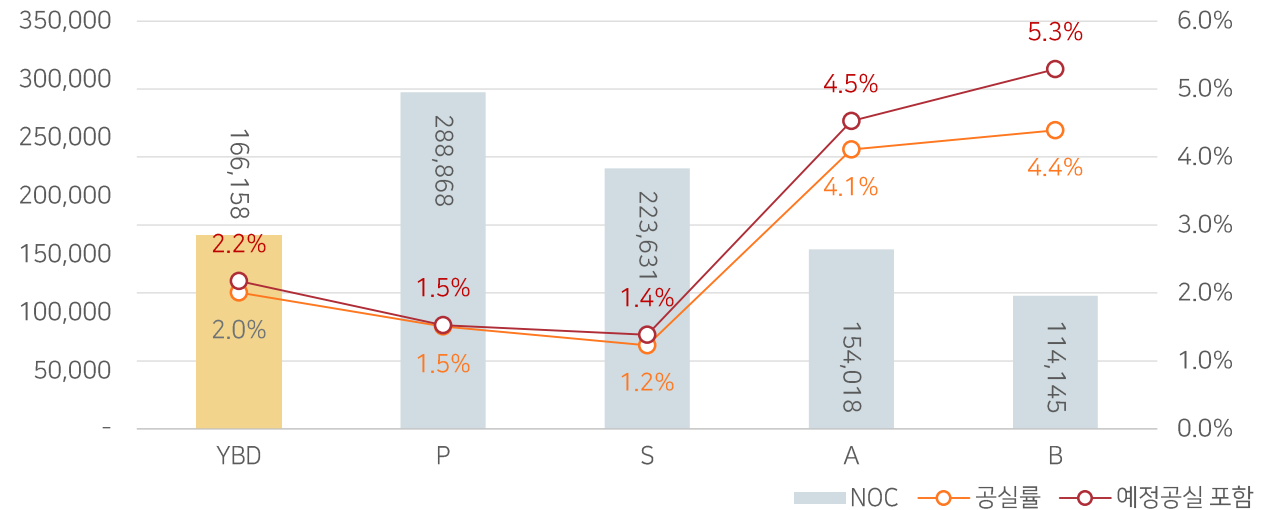
평균 NOC
₩ 216,158 ↓

평균 임대료	평균 보증금	평균 관리비
65,744	685,557	28,549

2022년도 6월 조사한 여의도, 영등포 지역
오피스의 평균 공실률은 2.01%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 166,158원으로 조사되었다.



■ YBD 지역세부권역별 공실률/NOC



■ YBD 지역규모 별 공실률/NOC

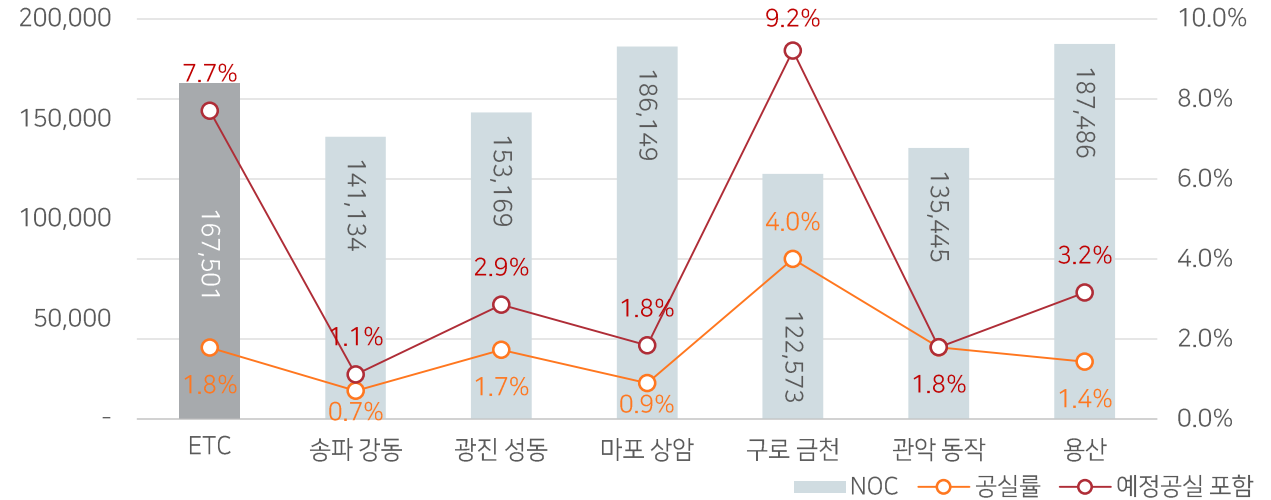
75 ETC 서울 기타권역

공실률
1.79% ↓

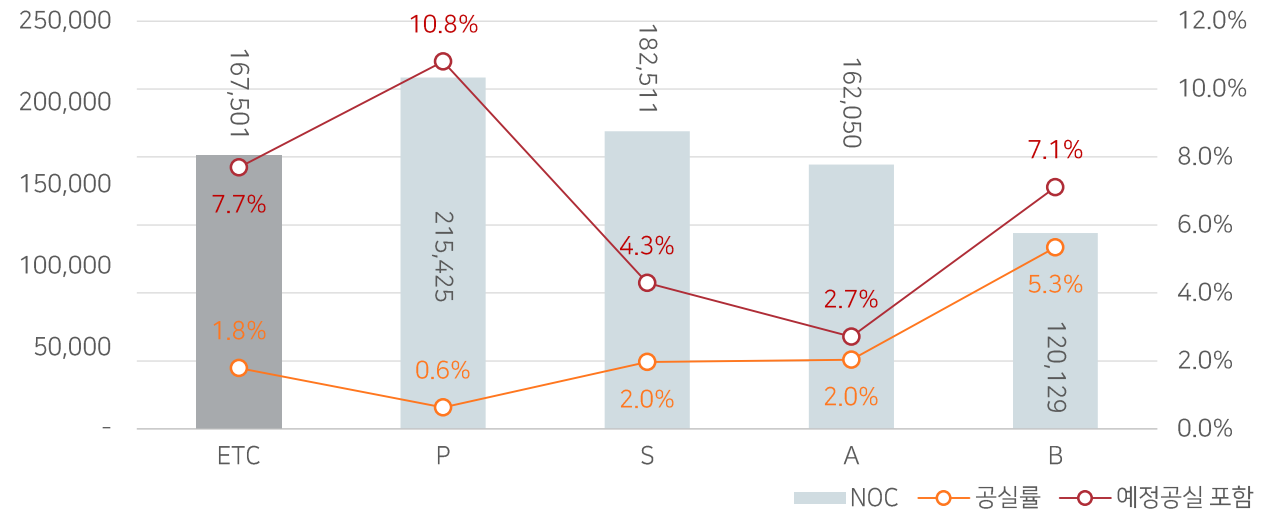
평균 NOC
₩ 167,501 ↓

평균 임대료	평균 보증금	평균 관리비
65,221	720,800	24,276

2022년도 6월 조사한 서울 기타지역 오피스의
평균 공실률은 1.79%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 167,501원으로 조사되었다.



ETC 지역 세부권역별 공실률/NOC



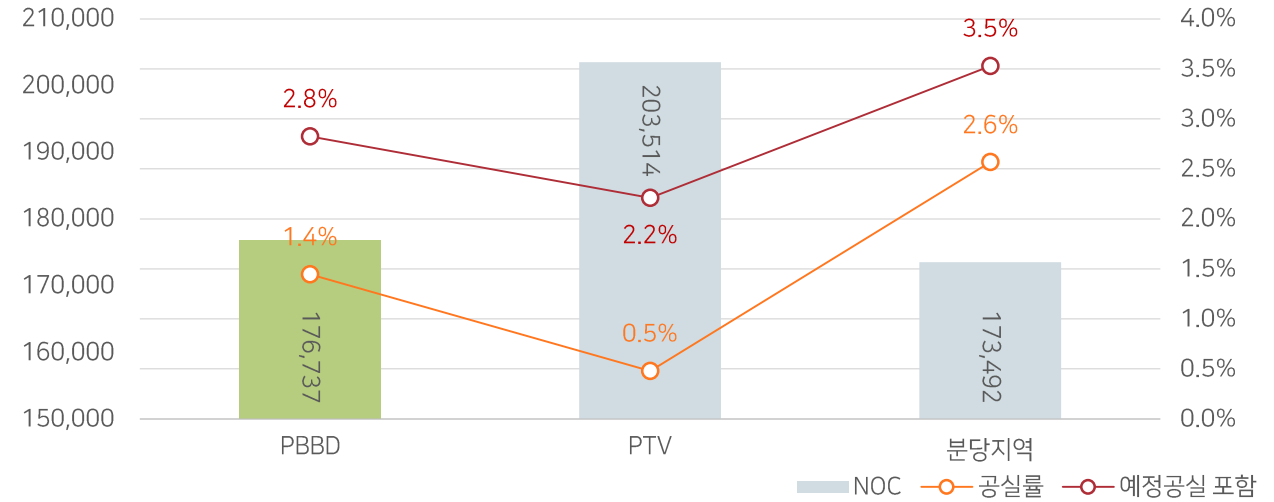
ETC 지역 규모별 공실률/NOC

76 PBBD 판교, 분당 권역

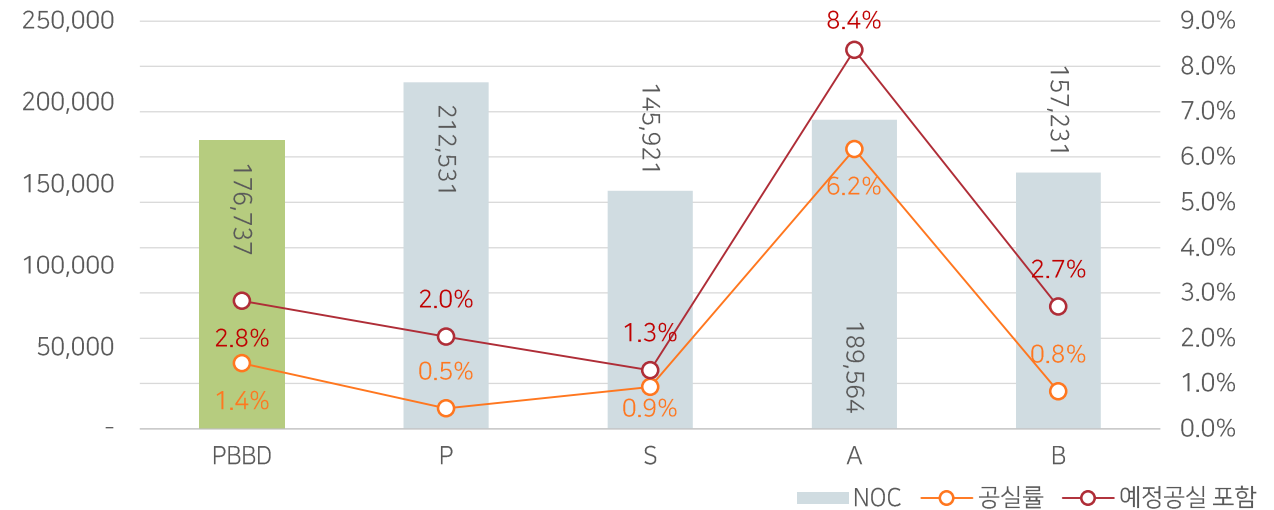
공실률 1.45% ↑ | 평균 NOC ₩ 176,737 ↓

평균 임대료	평균 보증금	평균 관리비
61,014	675,897	26,504

2022년도 6월 조사한 판교, 분당지역 오피스의 평균 공실률은 1.45%로 조사되었으며, 전용면적 1평당 사용할 때 드는 비용을 계산한 평균 NOC는 176,737원으로 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	979,830	98,678	34,762	222,661	3.49%
	시청역	279,687	715,618	73,285	31,227	194,859	4.16%
	종각역	303,085	841,175	85,452	36,335	199,518	3.39%
	을지로입구역	248,994	752,746	80,229	35,881	197,927	1.60%
GBD	테헤란로	984,033	1,682,215	176,410	33,061	328,754	0.48%
	강남대로	469,366	1,759,805	158,163	30,505	295,057	0.85%
	영동대로	207,908	882,342	82,521	30,838	207,521	0.50%
	도산대로	102,697	1,246,359	93,834	26,196	185,601	0.72%
	서초 교대	132,555	1,278,158	104,079	38,400	263,281	0.88%
YBD	동여의도	892,660	839,226	86,647	35,945	236,155	1.65%
	서여의도	163,240	494,931	50,258	23,314	121,394	2.71%
	영등포	124,278	758,069	59,942	24,625	136,086	3.63%
ETC	송파 강동	512,669	875,339	61,546	19,235	141,134	0.71%
	광진 성동	153,208	933,860	76,194	18,887	153,169	1.73%
	마포 상암	612,615	800,801	77,198	33,032	186,149	0.90%
	구로 금천	250,931	512,445	49,304	16,671	122,573	3.99%
	관악 동작	147,339	574,234	53,363	23,048	135,445	1.79%
	용산	221,927	719,959	64,687	32,982	187,486	1.43%
PBBD	PTV	319,861	761,601	80,611	25,114	203,514	0.48%
	분당지역	275,366	665,508	58,639	26,588	173,492	2.57%

지역 별
사용승인 현황

권역	빌딩명	소재지	주용도	연면적(㎡)	연면적(3.3㎡)	사용승인일
CBD	효제동 175-3	종로구 효제동	제2종근린생활시설	1,025	310	06-May
	근정빌딩	서초구 서초동	업무시설	4,607	1,394	18-May
GBD	SMG빌딩	강남구 역삼동	제1종근린생활시설	2,534	767	11-May
	리손빌	강남구 논현동	제2종근린생활시설	1,499	453	25-May
	대치동 953-24	강남구 대치동	제2종근린생활시설	1,077	326	18-May
ETC	잔카드림타워	금천구 가산동	공장	23,402	7,079	25-May
	무신사 캠퍼스	성동구 성수동2가	업무시설	19,005	5,749	04-May
	우성어반타워	송파구 거여동	제2종근린생활시설	12,731	3,851	03-May
	한강 G트리타워	강서구 염창동	공장	12,400	3,751	18-May
	NK빌딩	송파구 송파동	제1종근린생활시설	2,069	626	12-May
	태림	마포구 상암동	제2종근린생활시설	2,028	613	10-May
	성림빌딩	서대문구 대현동	제1종근린생활시설	1,745	528	18-May
	헤스티아 플렉스	마포구 상수동	제2종근린생활시설	1,480	448	30-May
	제이제이빌딩	동대문구 신설동	제1종근린생활시설	1,380	418	13-May
	가락동 146	송파구 가락동	제2종근린생활시설	1,368	414	17-May

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, June 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 = 1,308.70 KRW (0.76 USD = 1,000 KRW) as of 25th July 2022

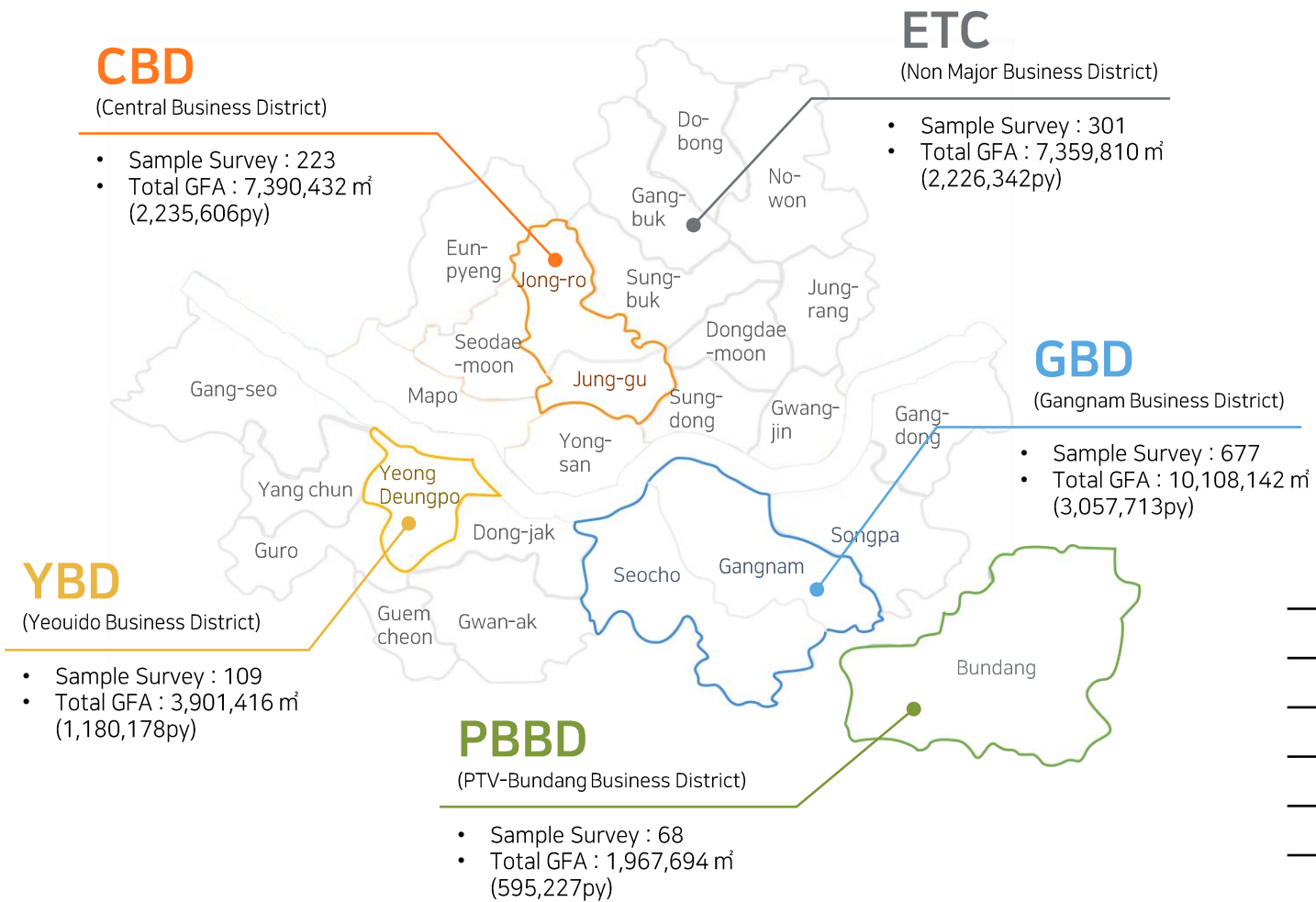
5 Regional Divisions in Seoul

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 Sunghnam-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 1,367

	P	S	A	B
CBD	45	66	34	78
GBD	30	82	97	458
YBD	18	24	29	38
ETC	43	56	51	150
PBB	9	15	17	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

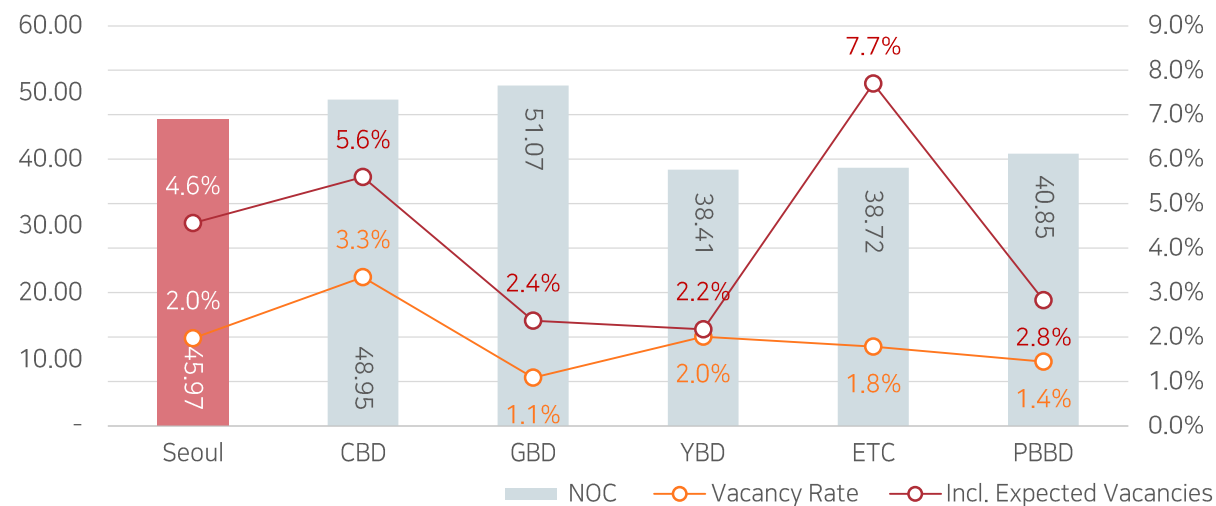
1.97% ↓

Avg, NOC

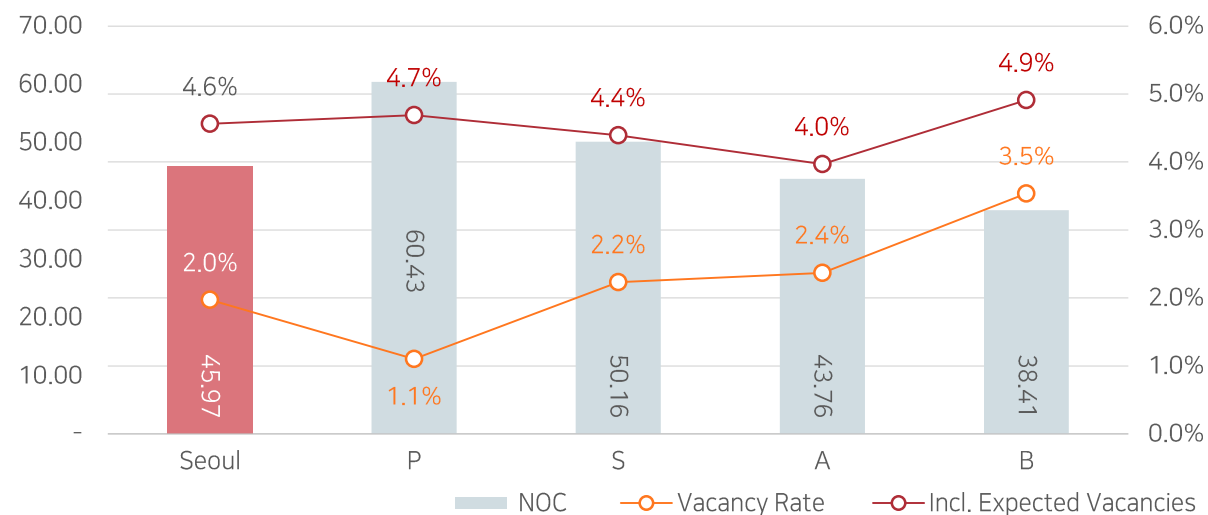
\$45.97 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
19.18	206.43	7.11

The average vacancy rate of the office buildings in Seoul is 1.97 % as of June 2022, and the average NOC is \$ 45.97.



■ Vacancy Rate & NOC in Seoul and Each District



■ Vacancy Rate & NOC in Seoul & Each Building Category

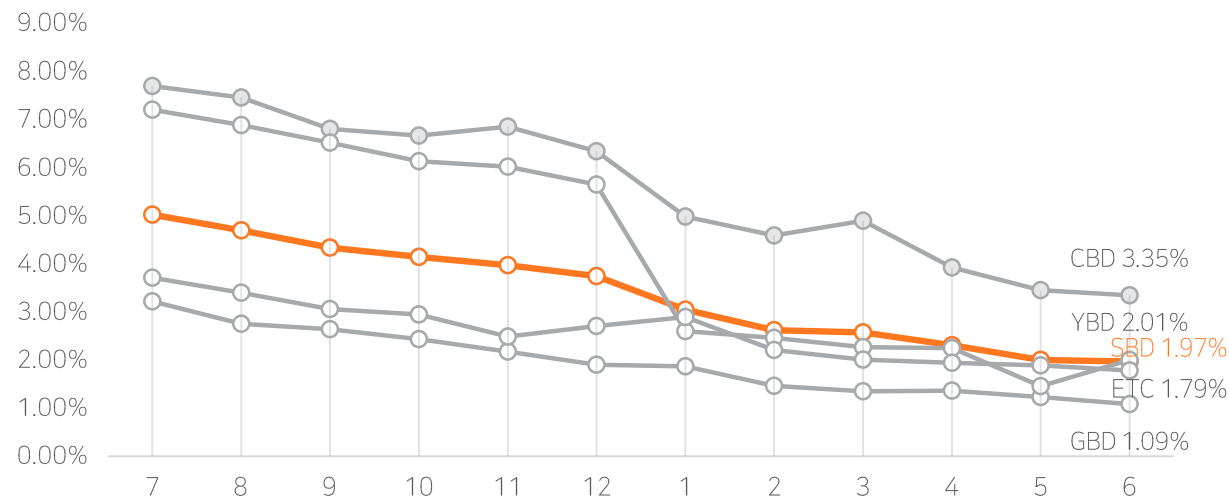
01 SBD Seoul Capital Area

The following charts indicate the vacancy level of Seoul for June 2022.

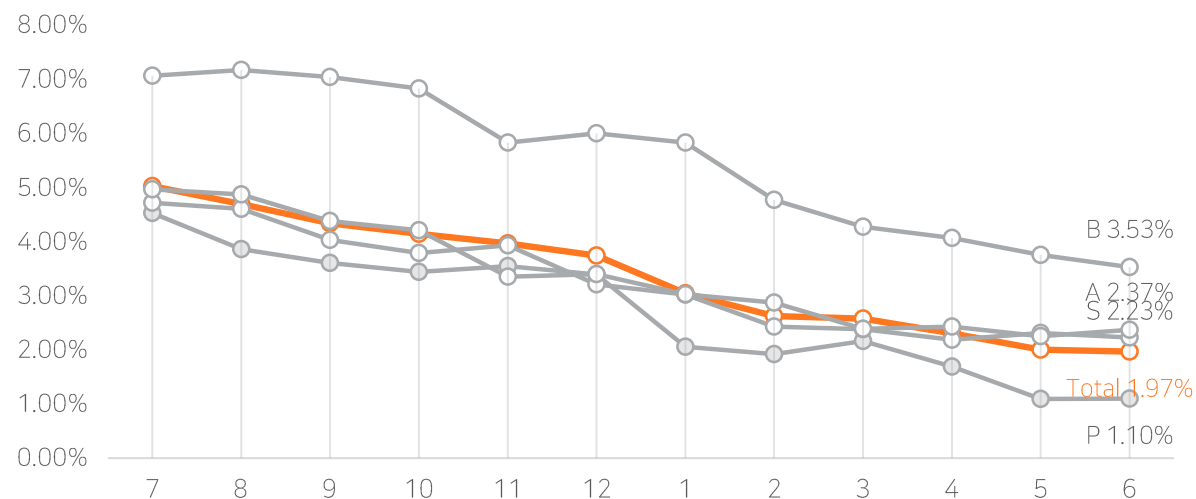
Korean Press Center building in CBD filled the vacant second floor of 4,050m² with the governmental office and on contrary, ENA Center building produced the additional vacancies of 3,660m² which includes the two floors previously rented by Samsung Card Corp.

The vacant office units of 5,250m² in Keungil Tower in GBD came on the local lease market, which includes the one floor currently occupied by Korea City Gas Association and another floor currently occupied by Factorial Games Corporation. Similarly in Samwon Tower, the additional office units of 3,770m² came on the lease market, which includes the two floors currently occupied by Korean Bar Association and KBA Legal Aid Foundation. Gangnam Finance Plaza signed the lease contract with an IT Startup company to rent the four floors in the plaza, including three floors currently occupied by Fastfive Corp. Line Building also signed the contract with Posicube Ltd. Co. and Mega Zone to rent the one floor and the three floors, respectively, in the building and the total leasing area of the four floors was 3,520m².

In Sangam DDMC Center, CJ E&M moved in as a new tenant after SKY Life TV and began renting the extra leasing area in addition to the existing leasing area. Consequently, the center could fill the office units of 5,620m² in total.



Monthly Vacancy Rate in 5 Main Districts



Monthly Vacancy Rate for Different Size of Buildings

02 CBD Central Seoul

Vacancy rate

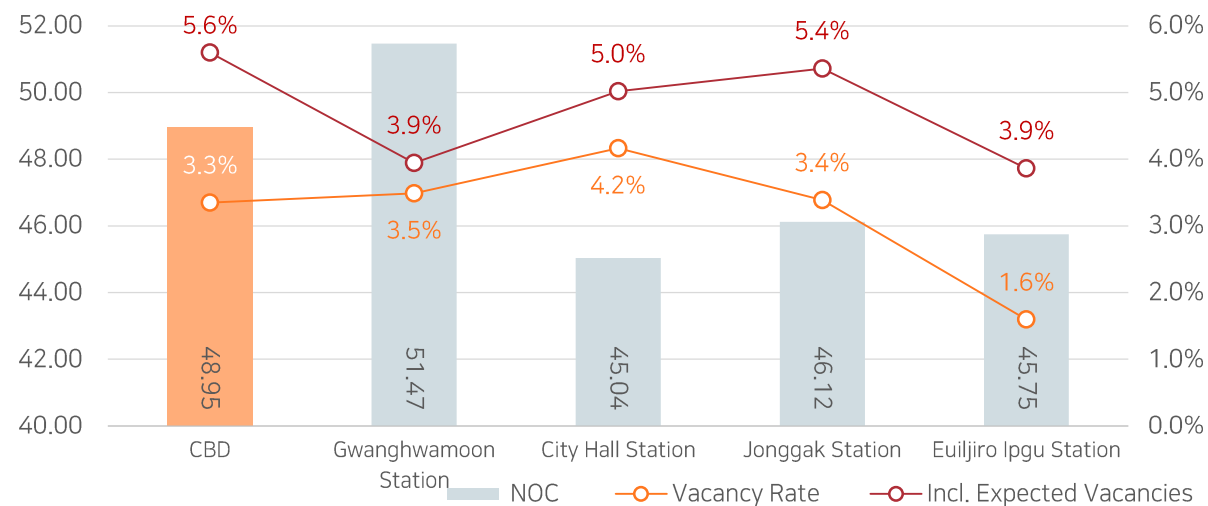
3.35% ↓

Avg, NOC

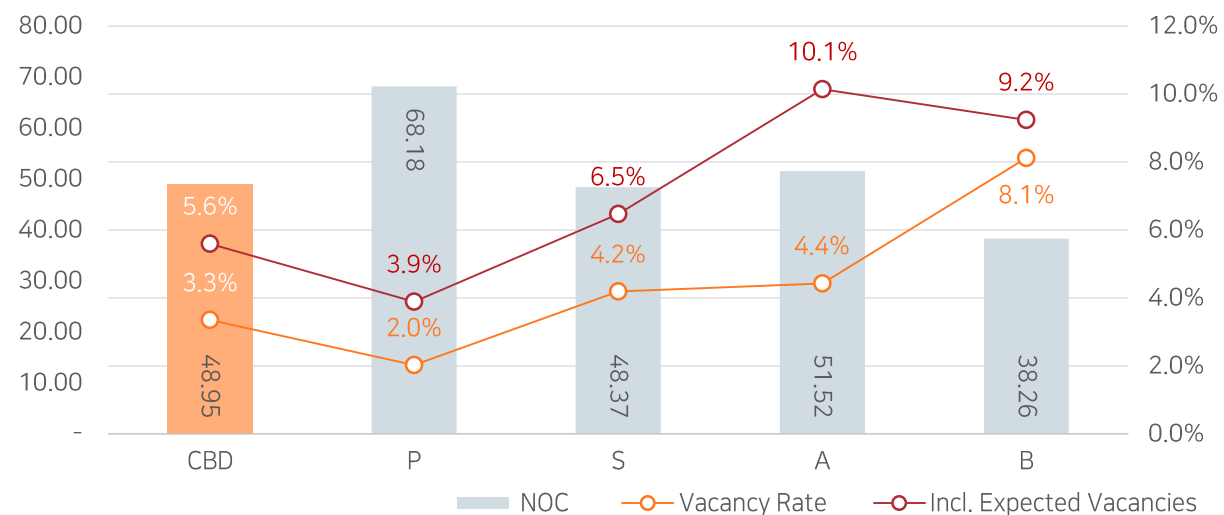
\$48.95 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
20.44	202.34	8.17

The average vacancy rate of the office buildings in CBD is 3.35 % as of June 2022, and the average NOC is \$ 48.95.



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



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

GBD Gangnam

Vacancy rate

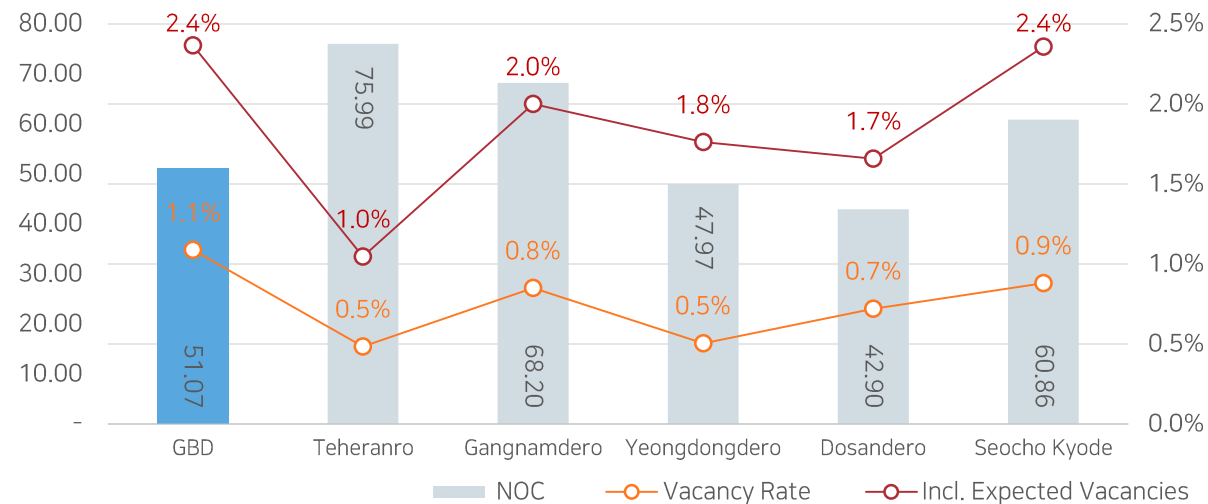
1.09% ↓

Avg, NOC

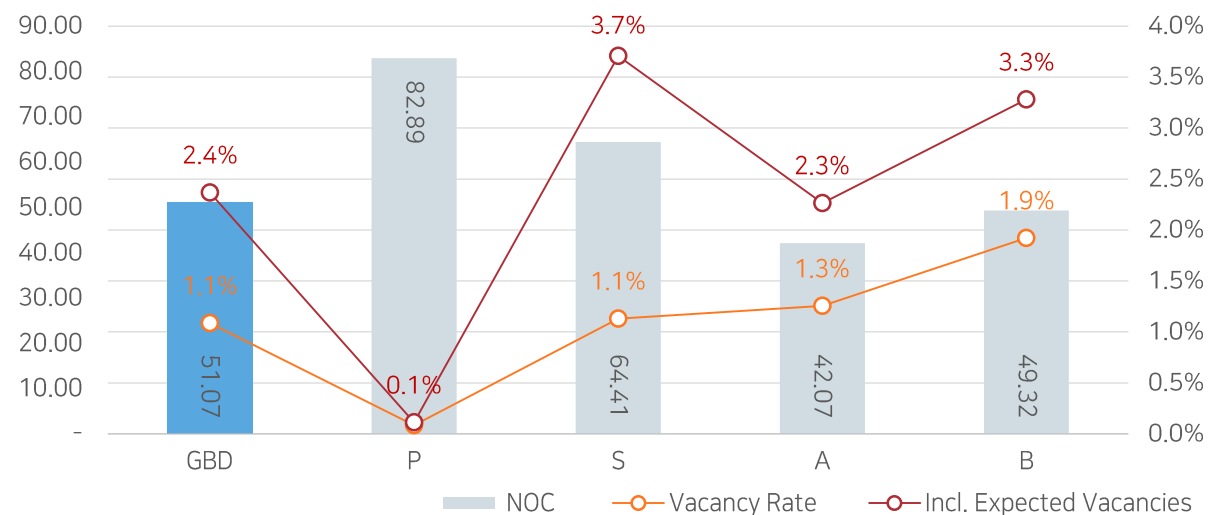
\$ 51.07 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
23.00	286.38	6.67

The average vacancy rate of the office buildings in GBD is 1.09 % as of June 2022, and the average NOC is \$ 51.07.



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



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

24 YBD Yeouido & Yeongdeungpo

Vacancy rate

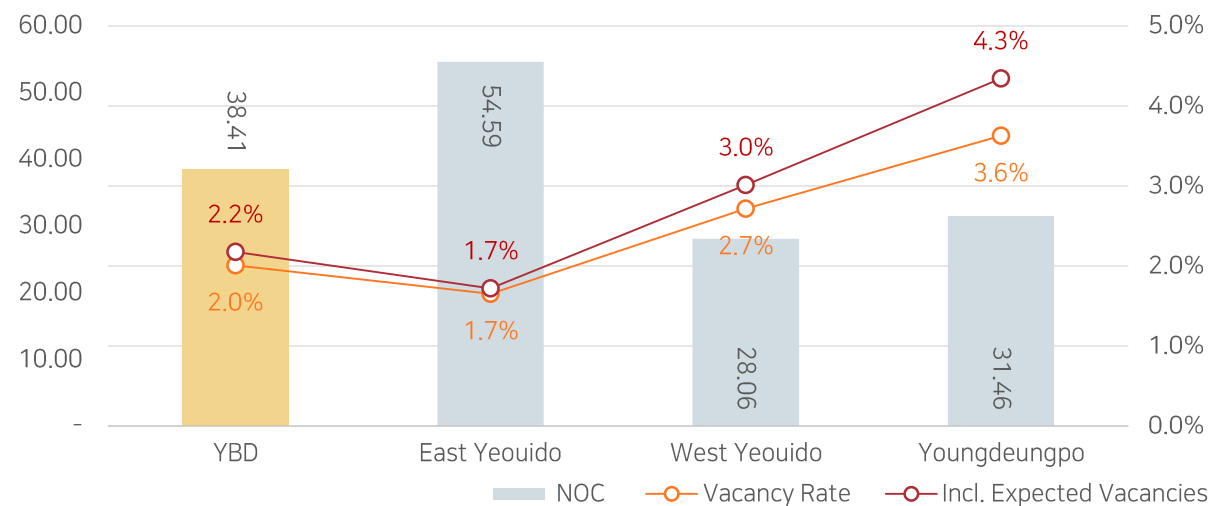
2.01 % ↑

Avg, NOC

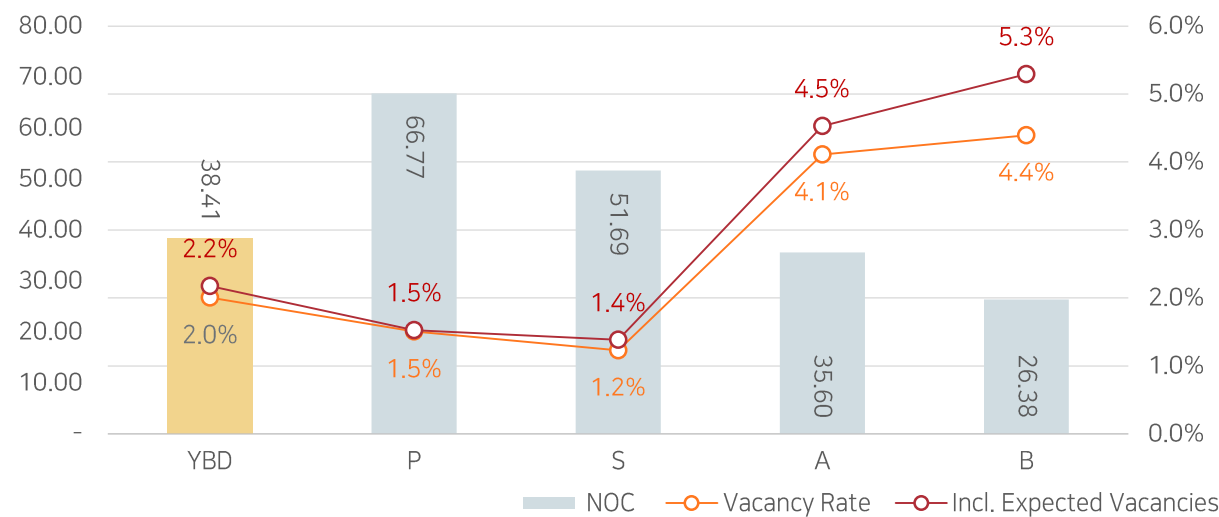
\$ 38.41 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
15.20	158.46	6.60

The average vacancy rate of the office buildings in YBD is 2.01 % as of June 2022, and the average NOC is \$ 38.41.



■ 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

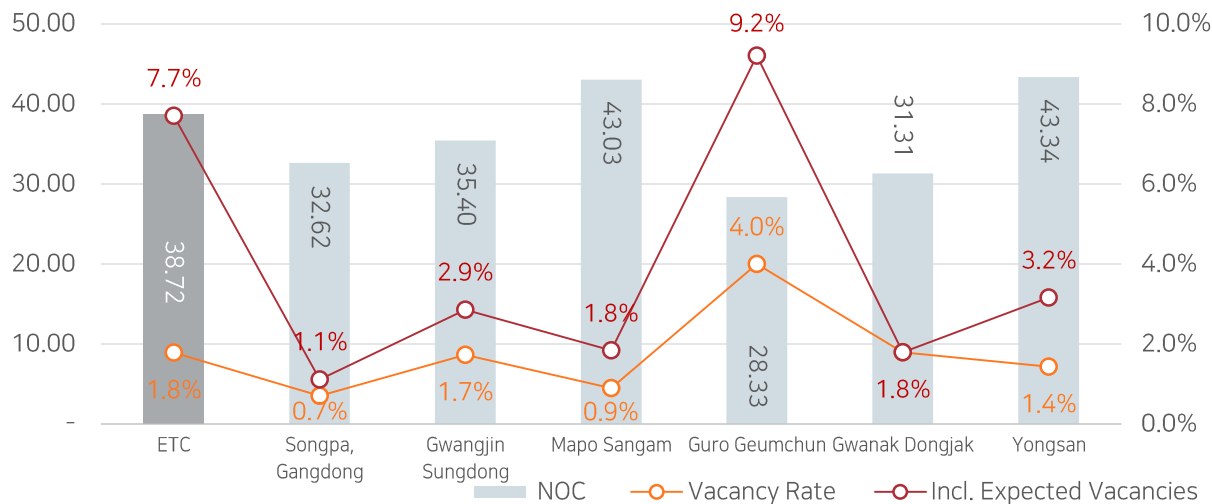
1.79% ↓

Avg, NOC

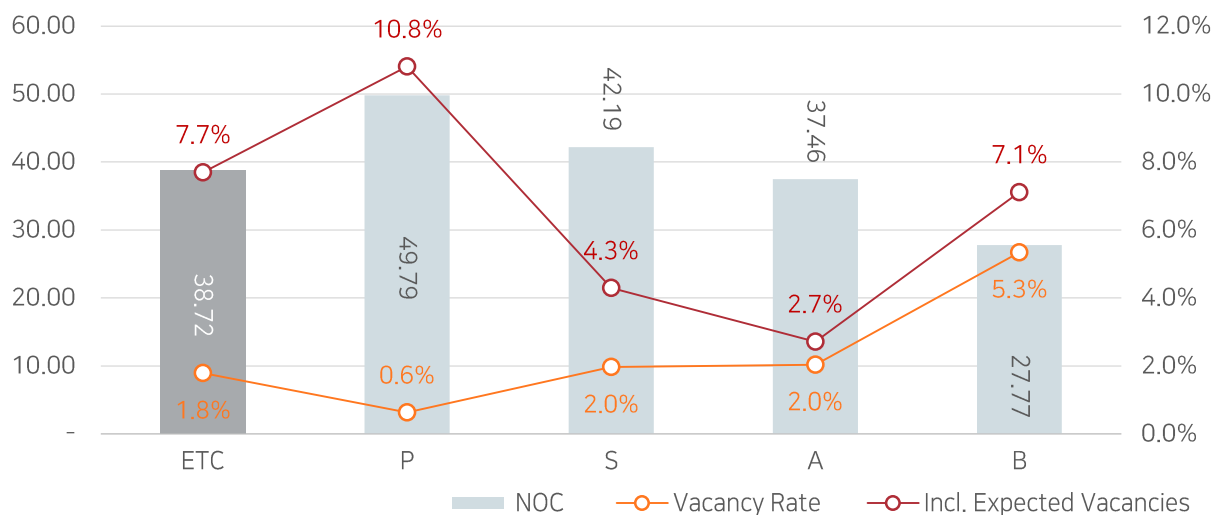
\$ 38.72 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
15.08	166.61	5.61

The average vacancy rate of the office buildings in ETC is 1.79 % as of June 2022, and the average NOC is \$ 38.72.



■ 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

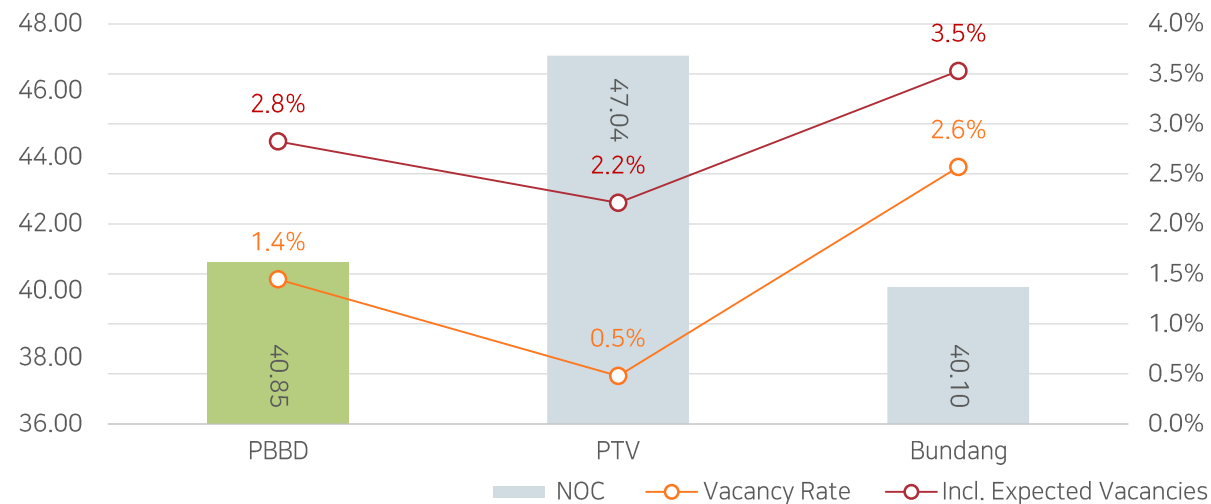
1.45% ↑

Avg, NOC

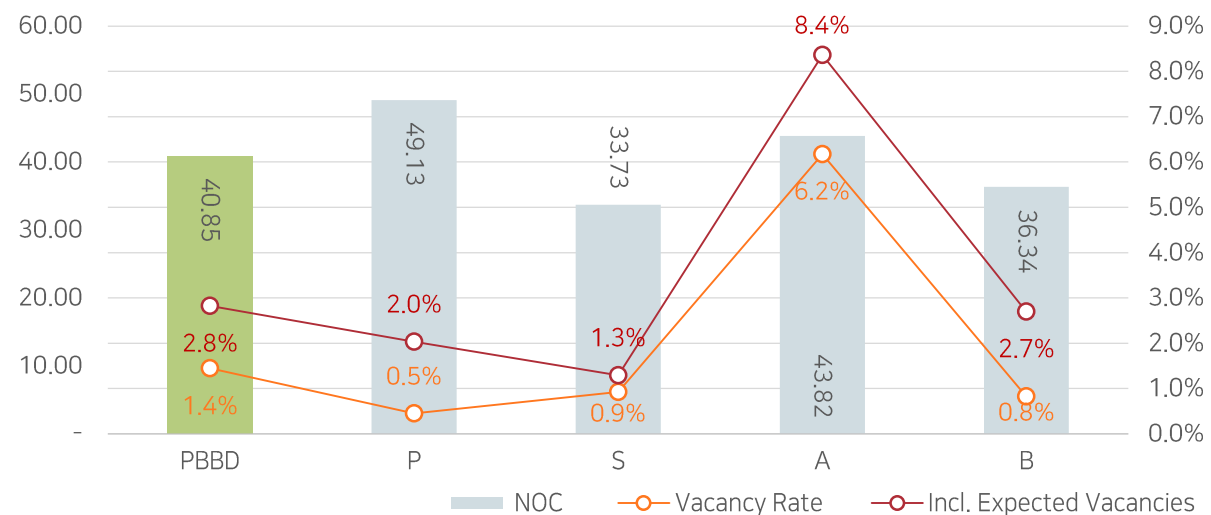
\$ 40.85 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
14.10	156.23	6.13

The average vacancy rate of the office buildings in PBBD is 1.45 % as of June 2022, and the average NOC is \$ 40.85.



■ 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	226.48	22.81	8.04	51.47	3.49%
	City Hall Station	924,585	165.41	16.94	7.22	45.04	4.16%
	Jonggak Station	1,001,933	194.43	19.75	8.40	46.12	3.39%
	Euljiro Ipgu Station	823,120	173.99	18.54	8.29	45.75	1.60%
GBD	Teheranro	3,253,000	388.84	40.78	7.64	75.99	0.48%
	Gangnamdero	1,551,625	406.77	36.56	7.05	68.20	0.85%
	Yeongdongdero	687,300	203.95	19.07	7.13	47.97	0.50%
	Dosandero	339,493	288.09	21.69	6.06	42.90	0.72%
	Seocho Gyodae	438,197	295.44	24.06	8.88	60.86	0.88%
YBD	East Yeouido	2,950,943	193.98	20.03	8.31	54.59	1.65%
	West Yeouido	539,635	114.40	11.62	5.39	28.06	2.71%
	Youngdeungpo	410,837	175.22	13.86	5.69	31.46	3.63%
ETC	Songpa, Gangdong	1,694,775	202.33	14.23	4.45	32.62	0.71%
	Gwangjin Sungdong	506,474	215.86	17.61	4.37	35.40	1.73%
	Mapo Sangam	2,025,174	185.10	17.84	7.64	43.03	0.90%
	Guro Geumchun	829,525	118.45	11.40	3.85	28.33	3.99%
	Gwanak Dongjak	487,070	132.73	12.33	5.33	31.31	1.79%
	Yongsan	733,641	166.42	14.95	7.62	43.34	1.43%
PBBD	PTV	1,057,391	176.04	18.63	5.80	47.04	0.48%
	Bundang	910,302	153.83	13.55	6.15	40.10	2.57%



Land Use Information by District

District	Building Name	Address	Land Use	GFA (㎡)	Completion
CBD	175-3 Hyoje-dong	Hyoje-dong Jongro-gu	#2 Commercial	1,025	06-May
GBD	Geunjung Building	Seocho-dong Seocho-gu	Office	4,607	18-May
	SMG Building	Yeoksam-dong Gangnam-gu	#1 Commercial	2,534	11-May
	Lison Vill	Nonhyun-dong Gangnam-gu	#2 Commercial	1,499	25-May
	953-24 Daechi-dong	Daechi-dong Gangnam-gu	#2 Commercial	1,077	18-May
	Zanca Dream Tower	Gasam-dong Geumchun-gu	Factory	23,402	25-May
ETC	Mushinsa Campus	Seongsu-dong 2-ga Seongdong-gu	Office	19,005	04-May
	Woosung Urban Tower	Guyeodong Songpa-gu	#2 Commercial	12,731	03-May
	Hangang G-tree Tower	Yeomchang-dong Gangseo-gu	Factory	12,400	18-May
	NK Building	Songpa-dong Songpa-gu	#1 Commercial	2,069	12-May
	Taerim	Sangam-dong Mapo-gu	#2 Commercial	2,028	10-May
	Sunglim Building	Daehyun-dong Seodemun-gu	#1 Commercial	1,745	18-May
	Hestia plex	Sangsoo-dong Mapo-gu	#2 Commercial	1,480	30-May
	JJ Building	Sinsul-dong Dongdaemun-gu	#1 Commercial	1,380	13-May
	146 Garak-dong	Garak-dong Songpa-gu	#2 Commercial	1,368	17-May



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