

SEOUL OFFICE LEASING

August 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 7월 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

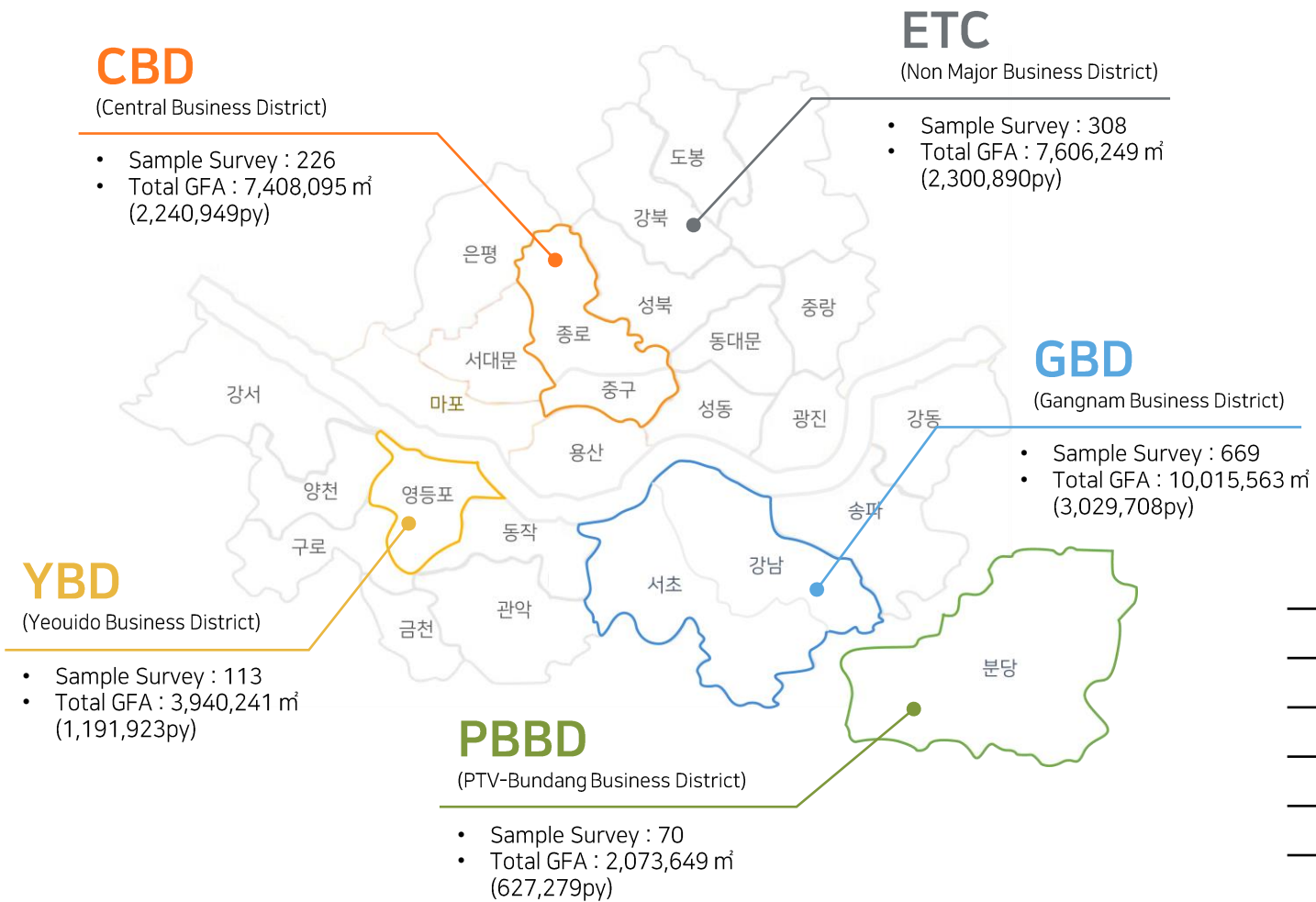
여의도권
여의도, 영등포구 일대

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 1,386

	P	S	A	B
CBD	45	66	34	81
GBD	29	78	98	464
YBD	18	25	32	38
ETC	43	60	53	152
PBBD	10	16	16	28

● 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

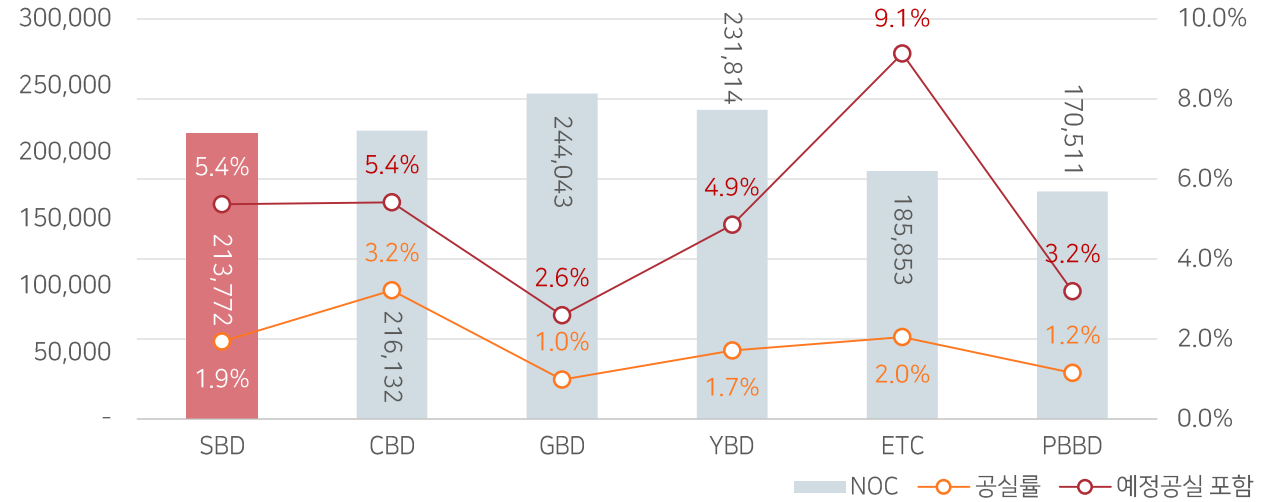
01 SBD 서울 전체

공실률
1.93% ↓

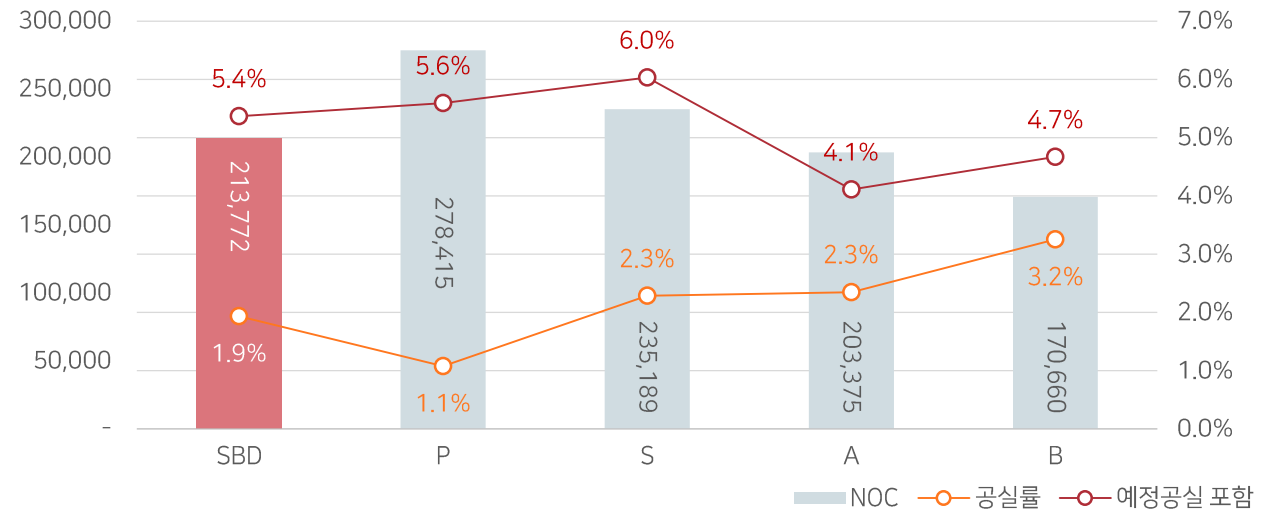
평균 NOC
₩ 213,772 ↑

평균 임대료	평균 보증금	평균 관리비
89,925	937,595	31,561

2022년도 7월 조사한 서울지역 오피스의
평균 공실률은 1.93%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 213,772원으로 조사되었다.



■ 서울 전체 권역 별 공실률 / NOC



■ 서울 전체 규모 별 공실률 / NOC

01 SBD 서울 전체

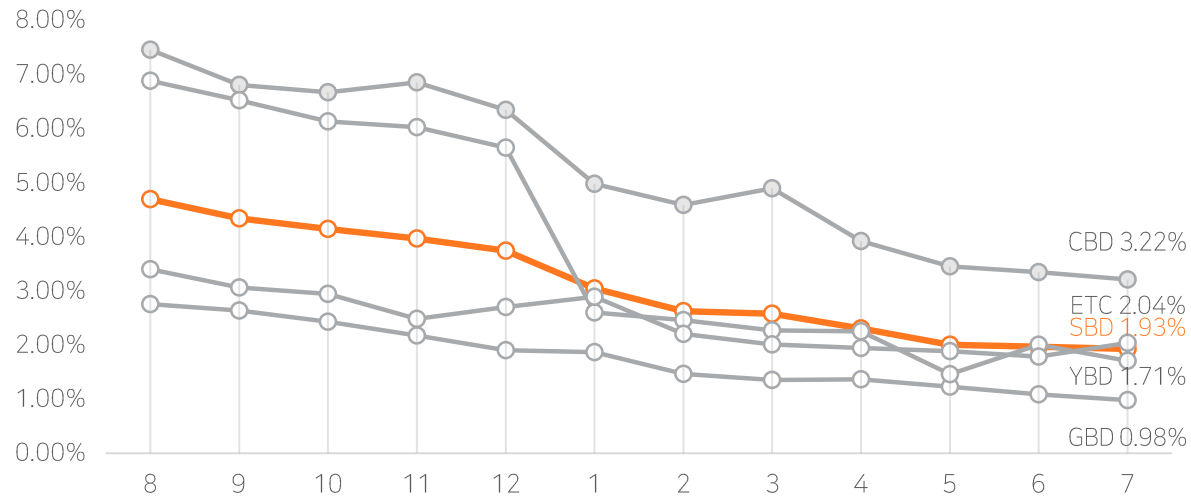
2022년 7월 서울권역의 공실률 흐름은 다음과 같이 조사되었다.

CBD의 코리안리 빌딩에서 손해보험협회에서 사용중인 3개층 1,550평을 포함, 총 1,810평의 면적이 10월 임대시장에 추가될 예정이다.

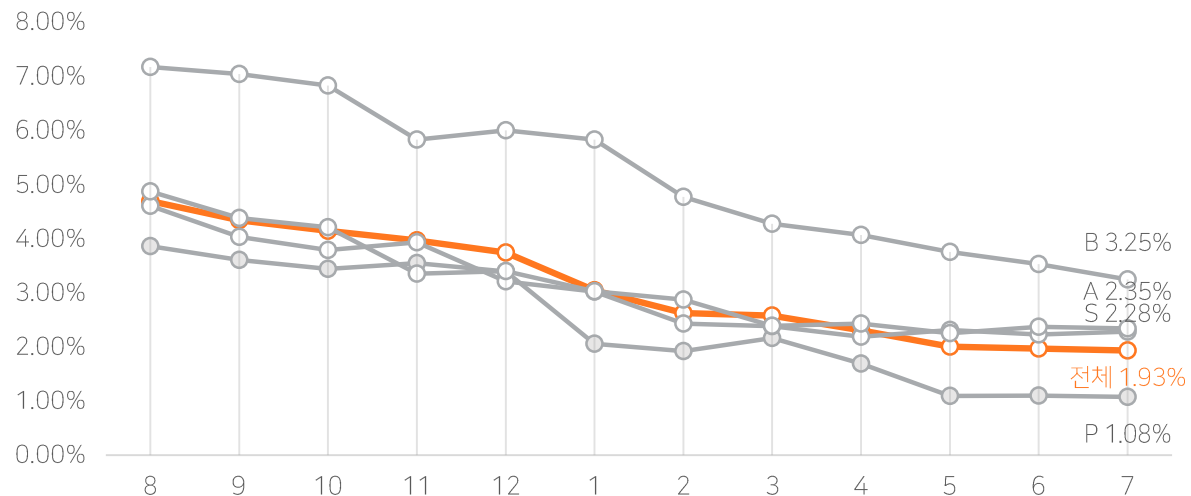
GFC에서 2개층 1,680평의 면적을 사용하던 BAT로스만스가 센터원 1개층반 1,010평을 사용하며 이전을 완료하였다.

GBD의 삼원타워에서는 지난달에 시장에 나왔던 2개층 1,140평의 면적이 내부임차인 증평으로 모두 해소되었다.

YBD에서는 SK증권빌딩에 미래에셋생명보험이 사용중인 1개층반 1,400평의 면적이 10월 임대시장에 추가될 예정이다.



■ 서울 권역별 공실률 변화



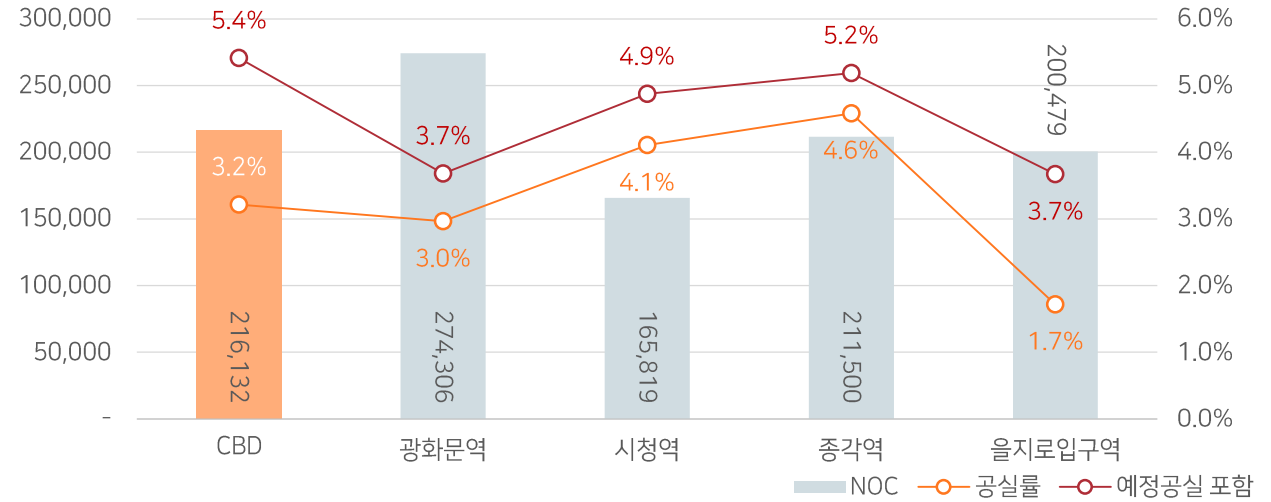
■ 서울 규모별 공실률 변화

02 CBD 도심권역

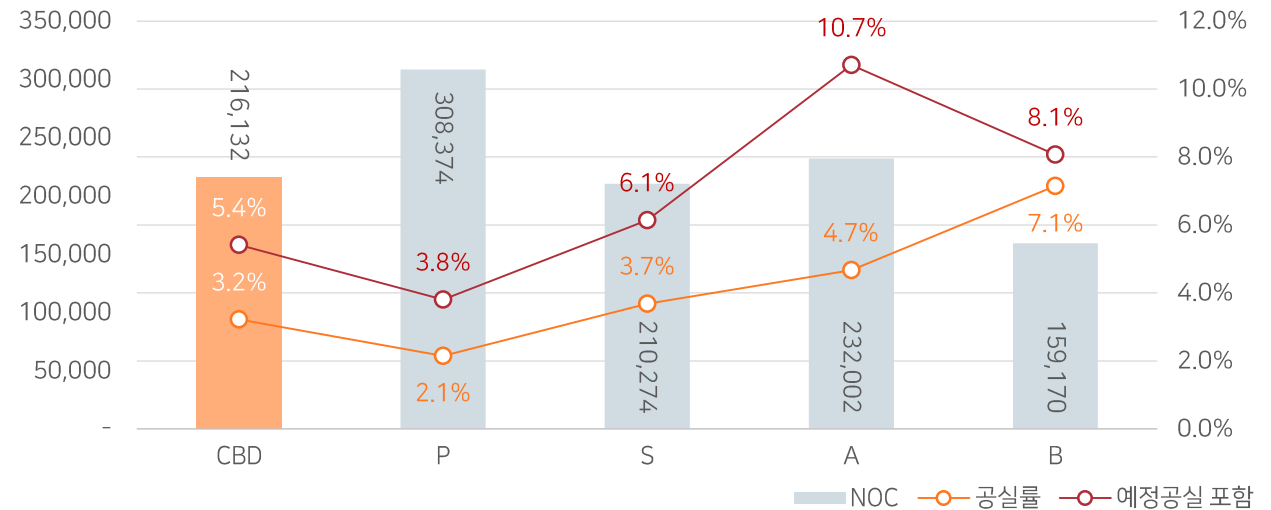
공실률 3.22% ↓ 평균 NOC ₩ 216,132 ↑

평균 임대료	평균 보증금	평균 관리비
91,555	881,279	36,098

2022년도 7월 조사한 도심지역 오피스의 평균 공실률은 3.22%로 조사되었으며, 전용면적 1평당 사용할 때 드는 비용을 계산한 평균 NOC는 216,132원으로 조사되었다.



■ CBD 지역 세부권역별 공실률/NOC



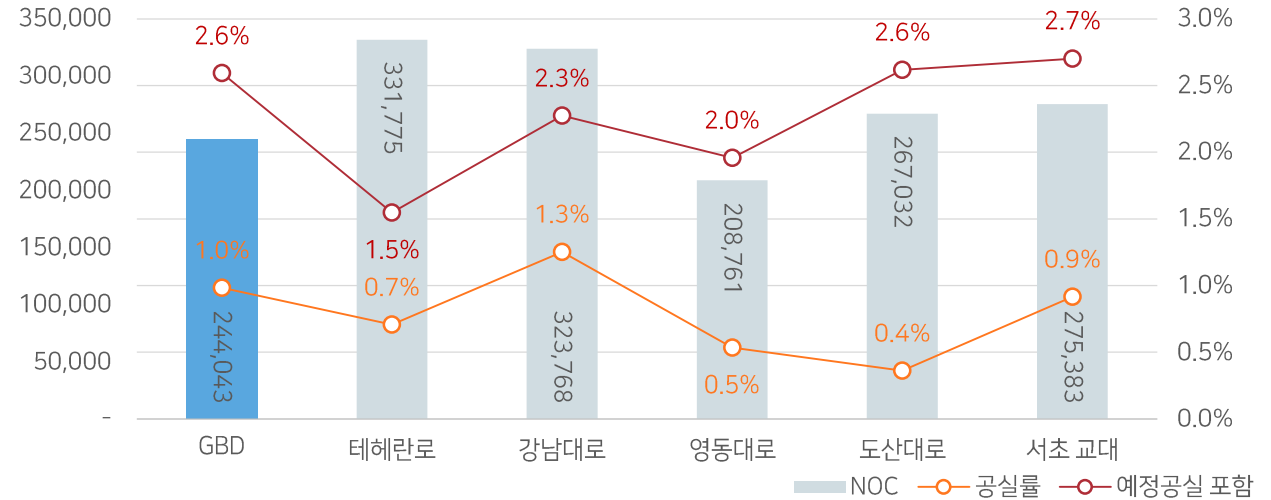
■ CBD 지역 규모별 공실률/NOC

73 GBD 강남권역

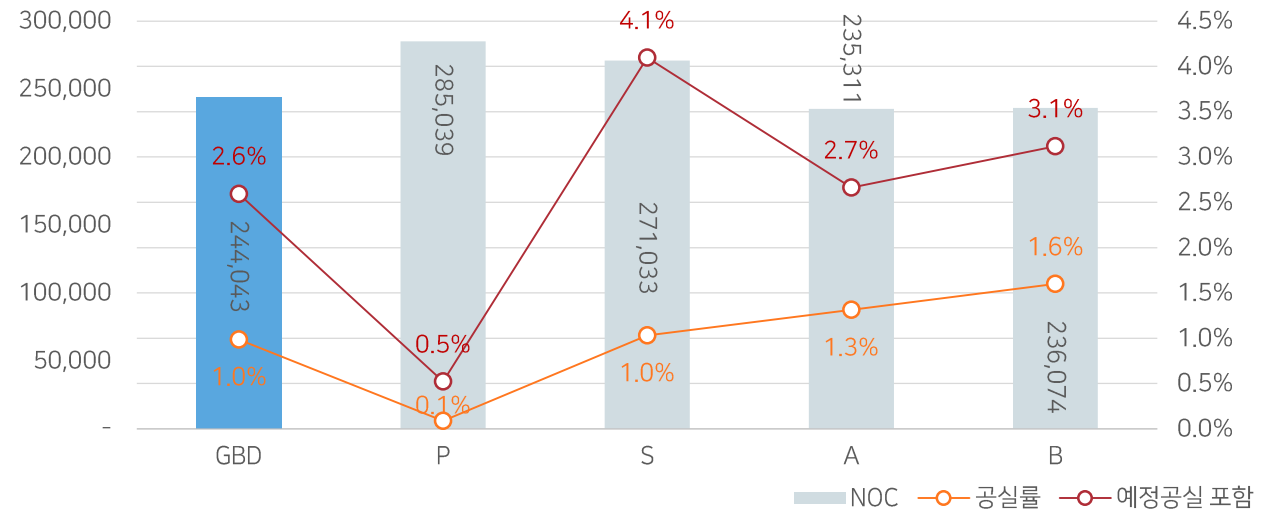
공실률 0.98% ↓ 평균 NOC ₩ 244,043 ↑

평균 임대료	평균 보증금	평균 관리비
118,558	1,392,168	30,563

2022년도 7월 조사한 강남지역 오피스의 평균 공실률은 0.98%로 조사되었으며, 전용면적 1평당 사용할 때 드는 비용을 계산한 평균 NOC는 244,043원으로 조사되었다.



■ GBD 지역 세부권역별 공실률/NOC



■ GBD 지역 규모 별 공실률/NOC

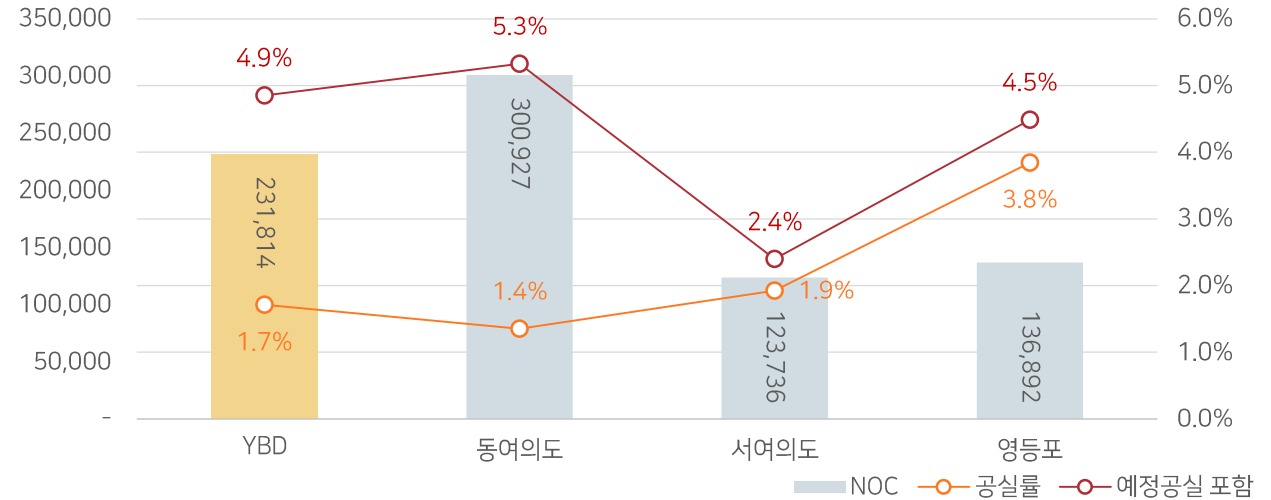
24 YBD 여의도, 영등포 권역

공실률
1.71% ↓

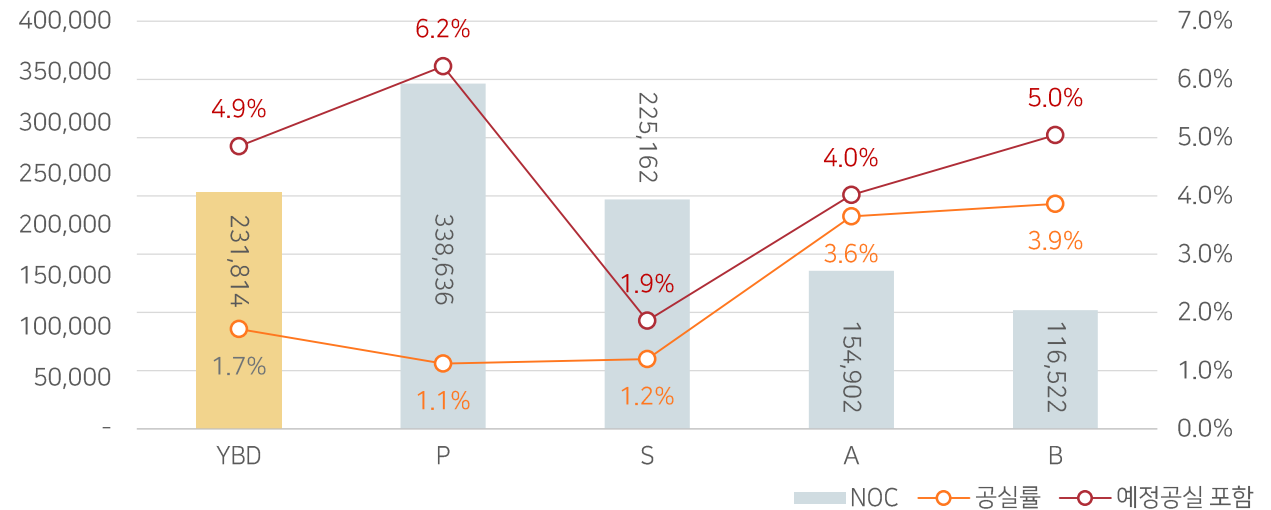
평균 NOC
₩ 231,814 ↑

평균 임대료	평균 보증금	평균 관리비
94,152	967,719	38,392

2022년도 7월 조사한 여의도, 영등포 지역
오피스의 평균 공실률은 1.71%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 231,814원으로 조사되었다.



■ YBD 지역세부권역별 공실률/NOC



■ YBD 지역규모 별 공실률/NOC

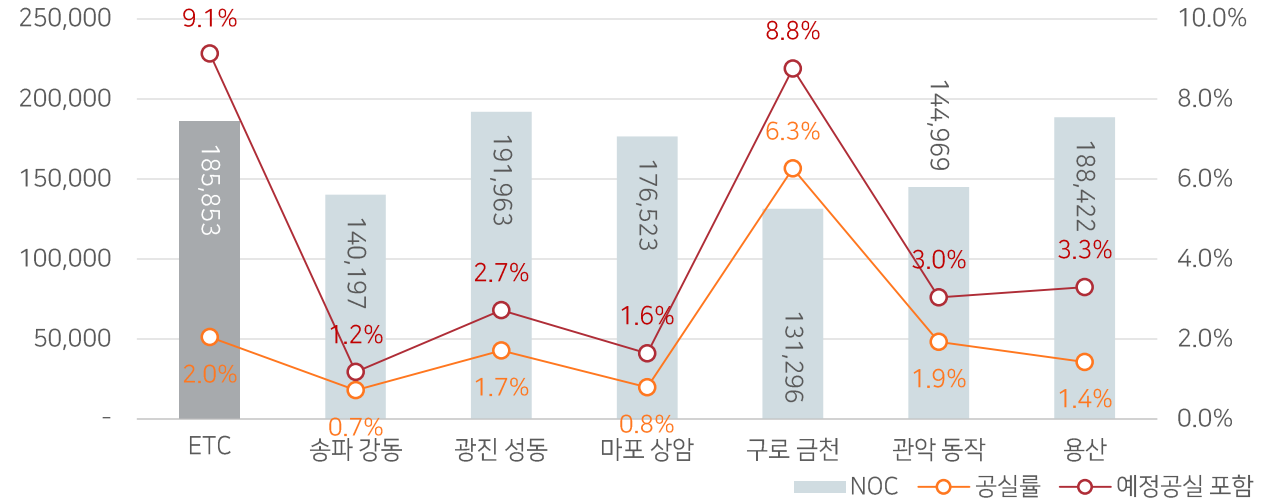
75 ETC 서울 기타권역

공실률
2.04% ↑

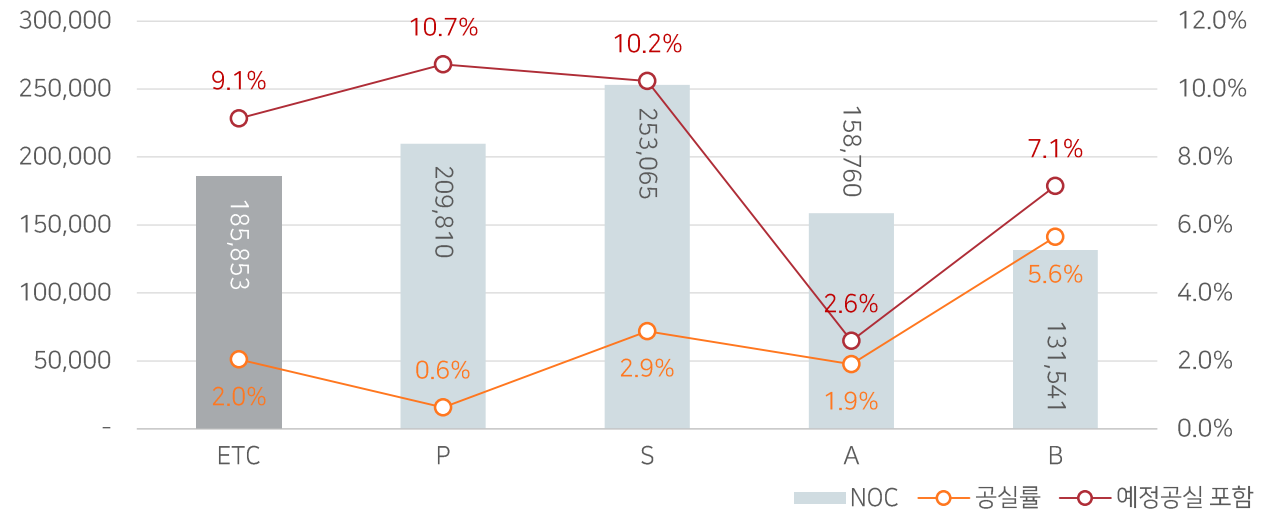
평균 NOC
₩ 185,853 ↑

평균 임대료	평균 보증금	평균 관리비
68,633	724,120	23,986

2022년도 7월 조사한 서울 기타지역 오피스의
평균 공실률은 2.04%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 185,853원으로 조사되었다.



ETC 지역 세부권역별 공실률/NOC



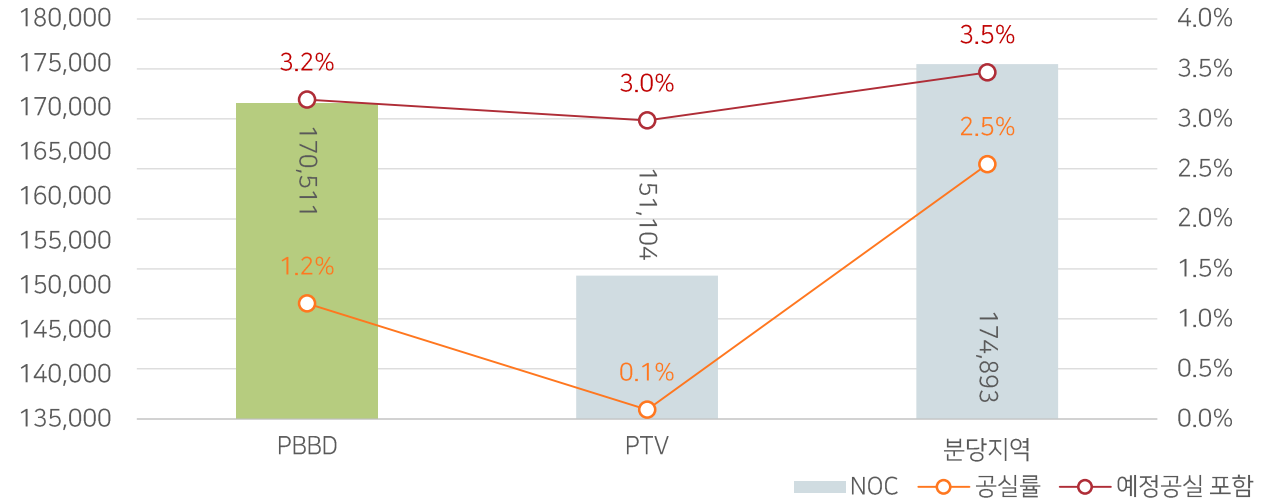
ETC 지역 규모별 공실률/NOC

76 PBBD 판교, 분당 권역

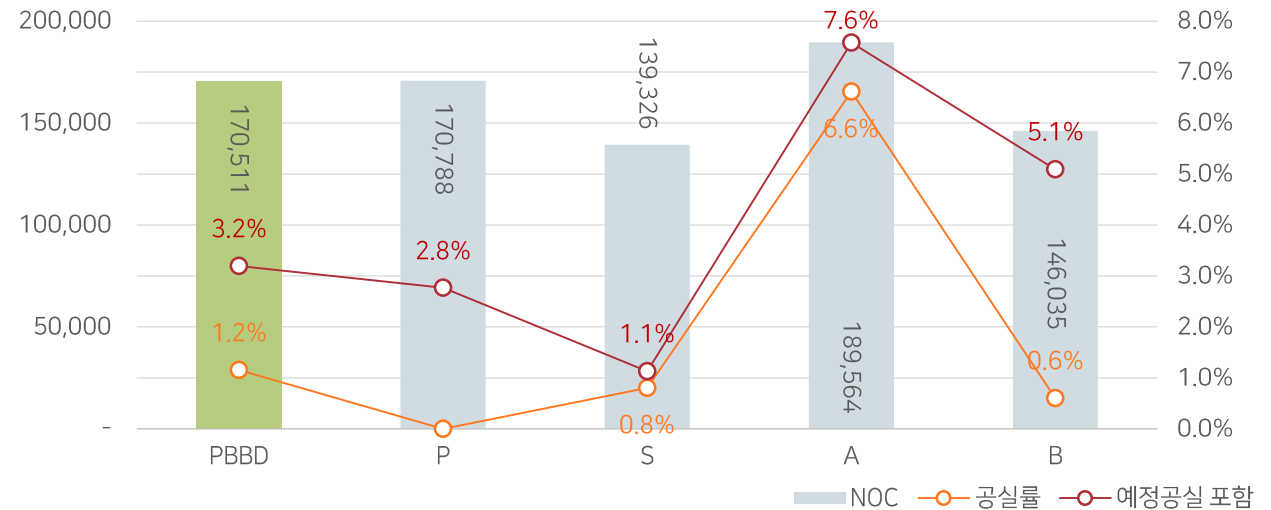
공실률 1.15% ↓
 평균 NOC ₩ 170,511 ↓

평균 임대료	평균 보증금	평균 관리비
57,850	638,108	26,280

2022년도 7월 조사한 판교, 분당지역 오피스의
 평균 공실률은 1.15%로 조사되었으며,
 전용면적 1평당 사용할 때 드는 비용을 계산한
 평균 NOC는 170,511원으로 조사되었다.



■ PBBD 지역 세부권역 별 공실률 / NOC



■ PBBD 지역 규모 별 공실률 / NOC

세부 지역 별 임대 현황

구역	세부구역	총임대면적	평균보증금	평균임대료	평균관리비	평균NOC	공실률
CBD	광화문역	287,850	978,260	119,896	36,534	274,306	2.96%
	시청역	279,687	692,366	70,690	31,920	165,819	4.11%
	종각역	300,735	870,240	88,990	37,888	211,500	4.58%
	을지로입구역	248,994	748,647	80,097	36,429	200,479	1.72%
GBD	테헤란로	968,317	1,840,060	179,759	35,904	331,775	0.71%
	강남대로	481,413	2,151,415	187,640	33,032	323,768	1.25%
	영동대로	195,569	864,970	81,419	29,294	208,761	0.53%
	도산대로	114,440	2,149,902	175,588	32,248	267,032	0.36%
	서초 교대	133,656	1,270,759	106,990	35,002	275,383	0.92%
YBD	동여의도	894,887	1,199,241	120,972	46,164	300,927	1.35%
	서여의도	161,343	529,849	51,887	23,285	123,736	1.92%
	영등포	135,693	740,715	57,706	24,790	136,892	3.85%
ETC	송파 강동	568,690	899,254	59,251	19,347	140,197	0.72%
	광진 성동	159,164	932,514	99,265	18,689	191,963	1.71%
	마포 상암	641,190	700,989	69,027	32,554	176,523	0.79%
	구로 금천	259,436	563,991	55,292	10,996	131,296	6.26%
	관악 동작	145,951	512,464	51,706	24,333	144,969	1.93%
	용산	200,749	671,184	64,352	32,643	188,422	1.43%
PBBD	PTV	356,136	573,636	53,468	25,604	151,104	0.09%
	분당지역	271,143	652,666	58,840	26,432	174,893	2.55%

지역 별
사용승인 현황

권역	빌딩명	소재지	주용도	연면적(m ²)	연면적(3.3m ²)	사용승인일
GBD	크레아2	서초구 서초동	제1종근린생활시설	2,949	892	23-Jun
	MK빌딩	서초구 서초동	업무시설	2,670	808	16-Jun
	JGYJ120	서초구 방배동	제1종근린생활시설	2,614	791	15-Jun
	삼원가든 다동	강남구 신사동	제2종근린생활시설	2,611	790	03-Jun
	역삼동 636-7	강남구 역삼동	업무시설	1,666	504	14-Jun
	유진세라빌딩	강남구 역삼동	제1종근린생활시설	1,566	474	24-Jun
	더 스테어스	강남구 신사동	제2종근린생활시설	1,132	342	03-Jun
ETC	신라교역 신사옥	강동구 고덕동	업무시설	21,847	6,609	44,729
	KMH	강동구 고덕동	업무시설	19,666	5,949	15-Jun
	CORNER50	성동구 성수동2가	업무시설	11,465	3,468	27-Jun
	디투엔지니어링	강서구 마곡동	교육연구시설	3,977	1,203	28-Jun
	장지동 904-6	송파구 장지동	업무시설	2,016	610	24-Jun
	원김빌딩	강서구 화곡동	제2종근린생활시설	1,177	356	02-Jun
PBBD	the 지음	성남시 분당구	제1종근린생활시설	3,225	976	10-Jun

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, July 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 = 1,327.50 KRW (0.75 USD = 1,000 KRW) as of 19th August 2022

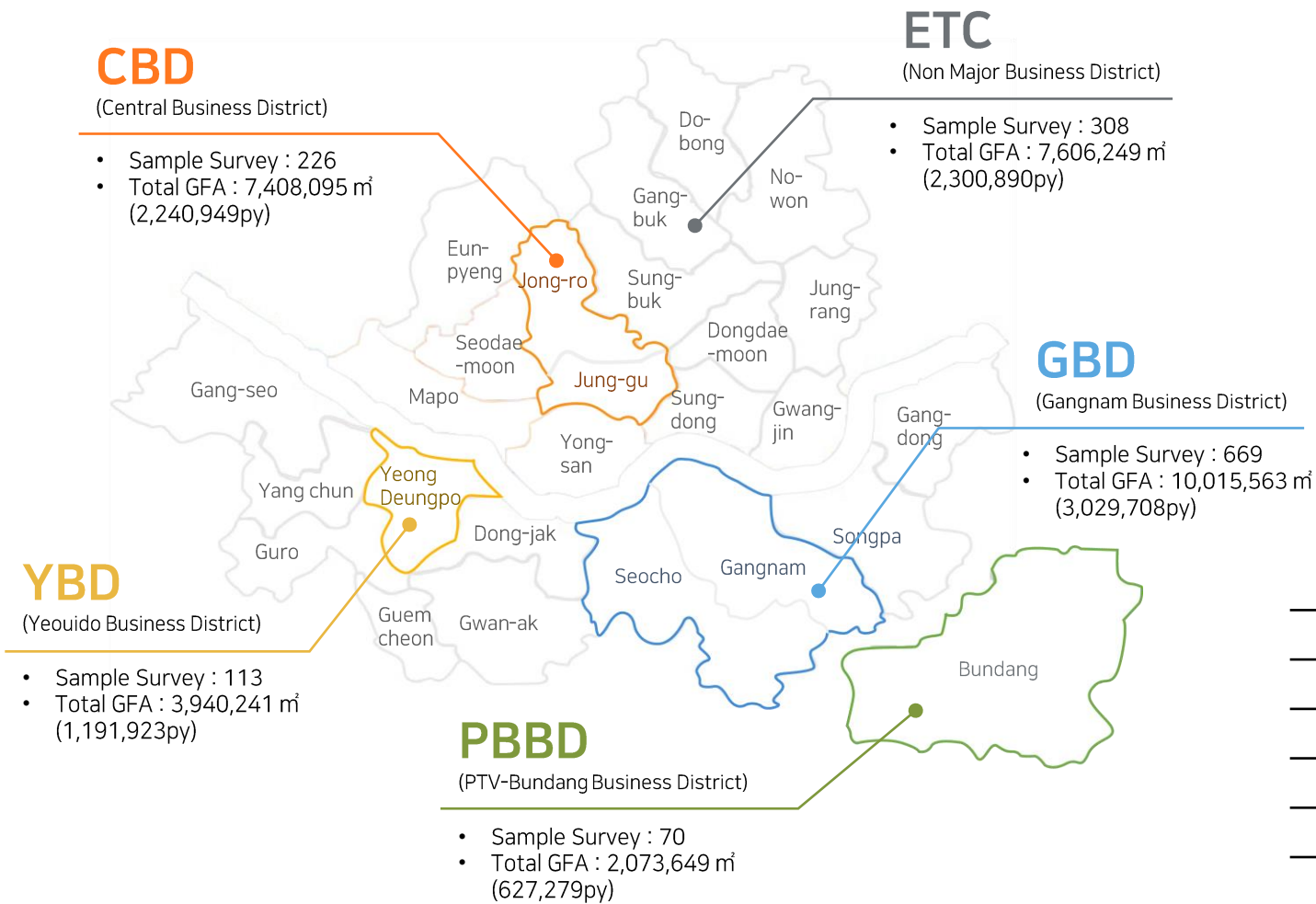
5 Regional Divisions in Seoul

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 1,386

	P	S	A	B
CBD	45	66	34	81
GBD	29	78	98	464
YBD	18	25	32	38
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PBB	10	16	16	28

• 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

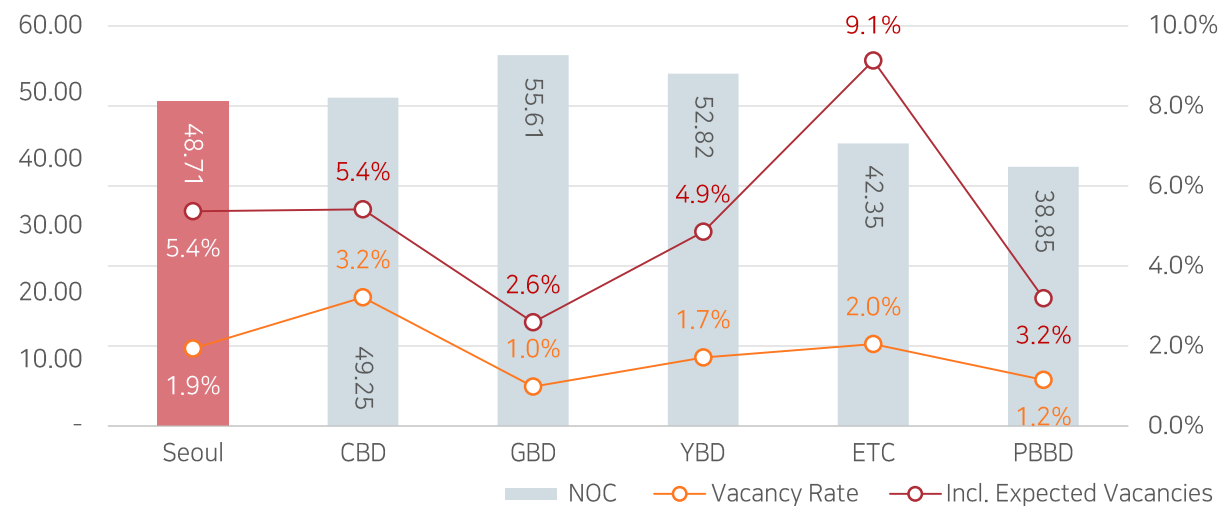
1.93% ↓

Avg, NOC

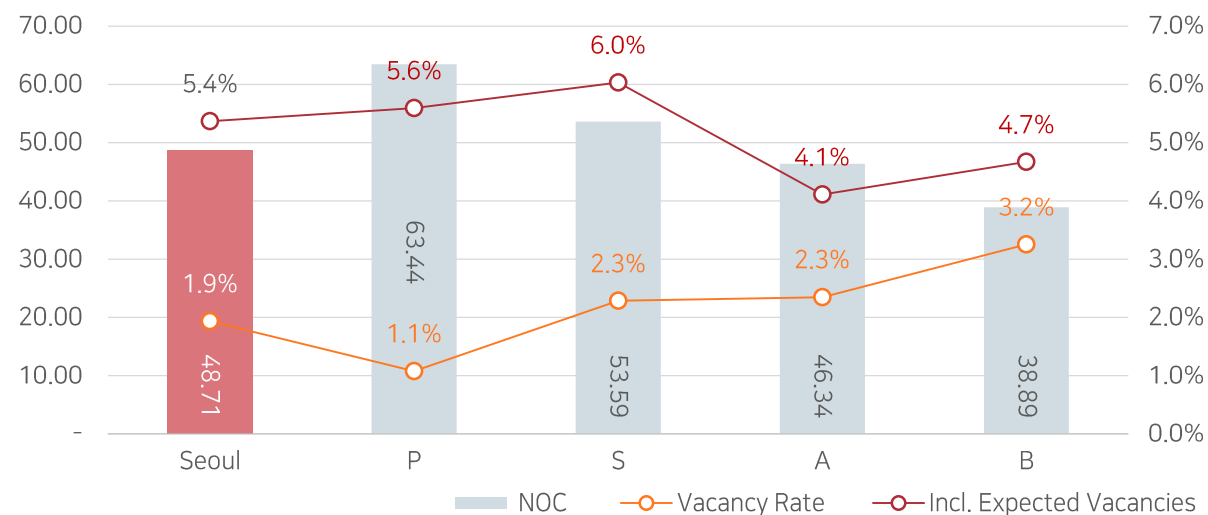
\$48.71 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
20.49	213.65	7.19

The average vacancy rate of the office buildings in Seoul is 1.93 % as of July 2022, and the average NOC is \$ 48.71.



■ Vacancy Rate & NOC in Seoul and Each District



■ Vacancy Rate & NOC in Seoul & Each Building Category

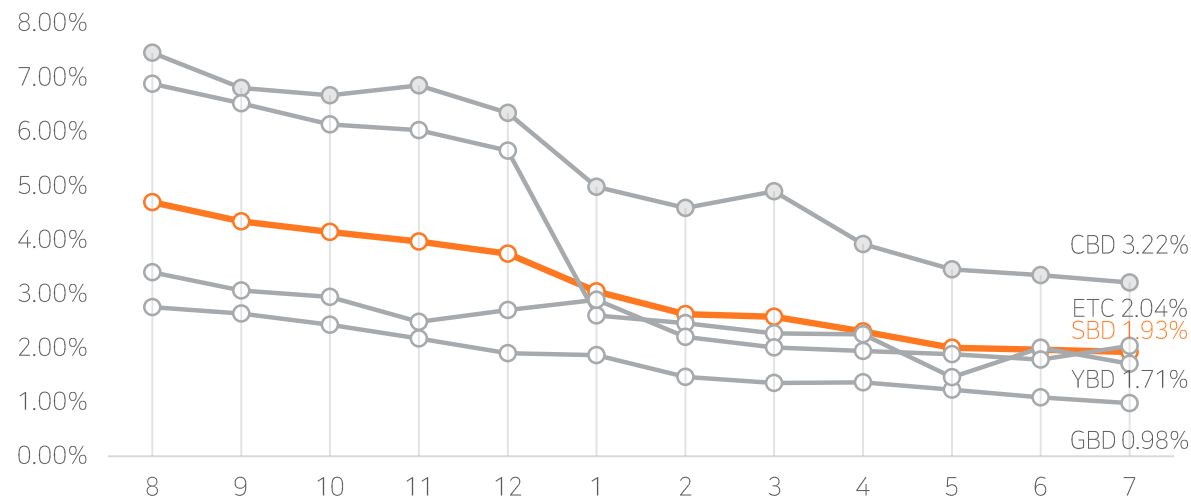
01 SBD Seoul Capital Area

The following charts indicate the vacancy level of Seoul during July 2022.

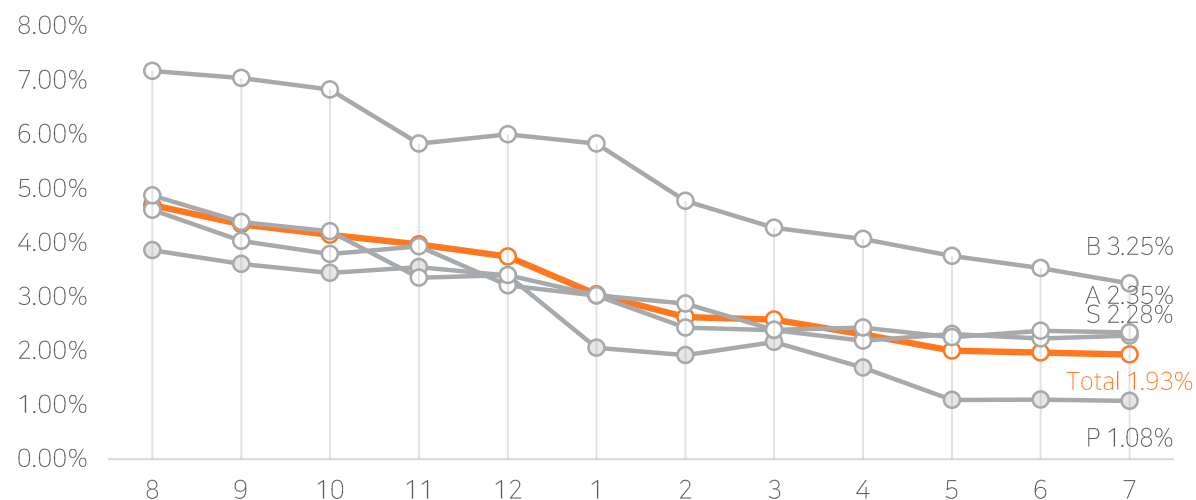
In CBD, the office units of 5,970m² including the three floors of 5,110m² currently occupied by General Insurance Association of Korea, will come on the lease market in Seoul. And in GFC, BAT Rothmans that used to rent the two floors of 5,540m² in GFC moved into the one and half floor of 3,330m² in Center I.

On the other hand, Samwon Tower in GBD managed to fill all the units in the building because the existing tenant decided to rent the extra units of 3,770m² that came on the market in July, the last month.

Lastly, the one and half floor of 4,640m² in SK Securities Building in YBD, which is currently occupied by Mirae Asset Life Insurance, will come on the lease market in this coming October 2022.



Monthly Vacancy Rate in 5 Main Districts



Monthly Vacancy Rate for Different Size of Buildings

02 CBD Central Seoul

Vacancy rate

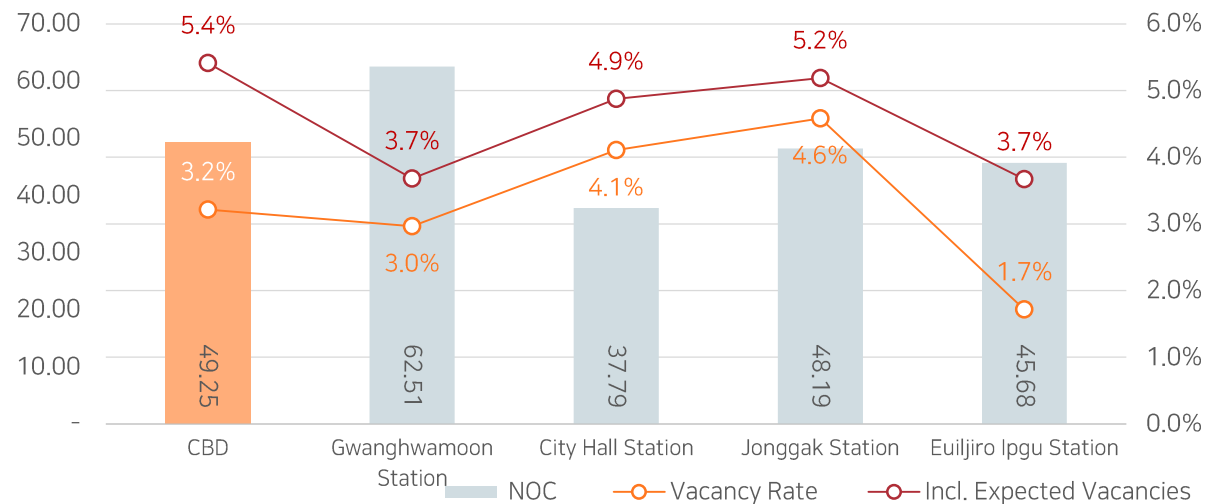
3.22% ↓

Avg, NOC

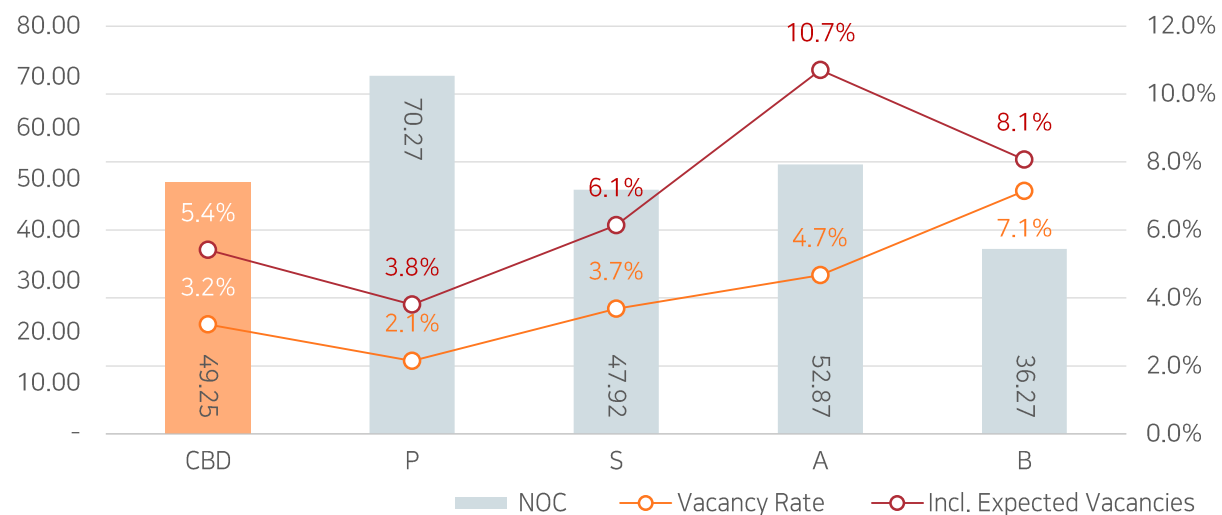
\$49.25 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
20.86	200.82	8.23

The average vacancy rate of the office buildings in CBD is 3.22 % as of July 2022, and the average NOC is \$ 49.25.



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



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

GBD Gangnam

Vacancy rate

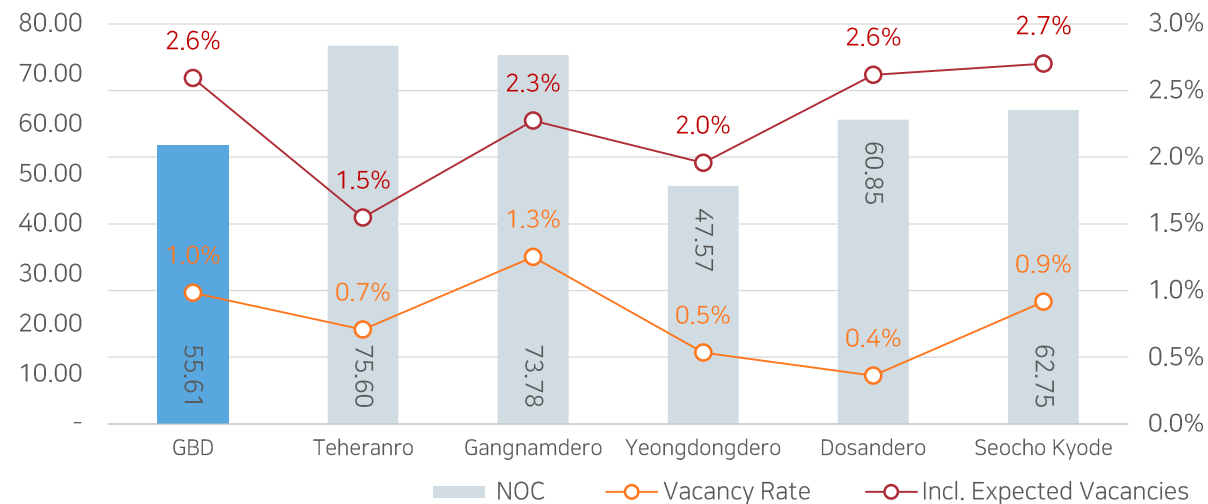
0.98% ↓

Avg, NOC

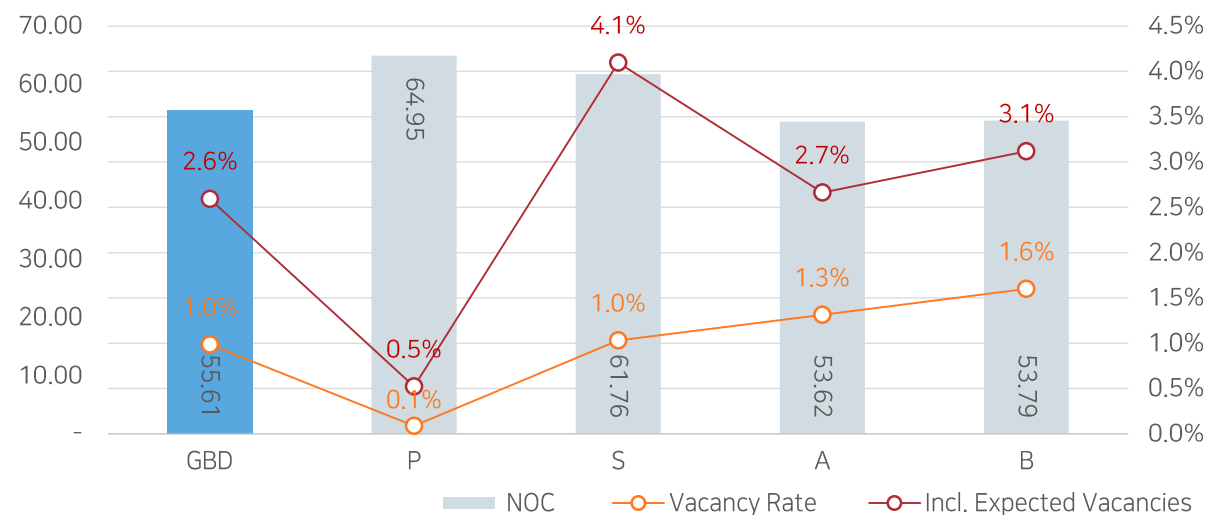
\$ 55.61 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
27.02	317.24	6.96

The average vacancy rate of the office buildings in GBD is 0.98 % as of July 2022, and the average NOC is \$ 55.61.



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



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

24 YBD Yeouido & Yeongdeungpo

Vacancy rate

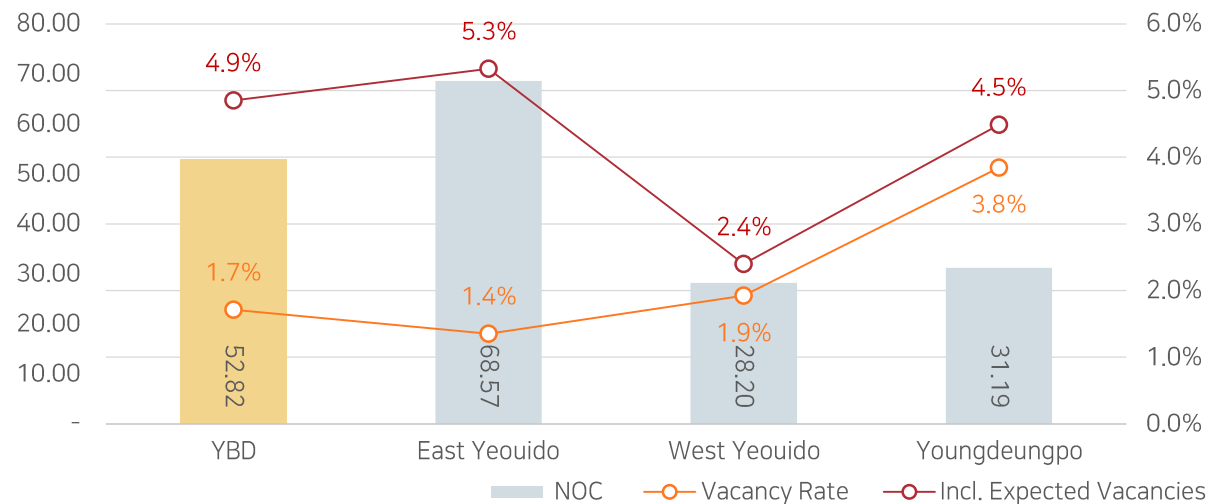
1.71% ↓

Avg, NOC

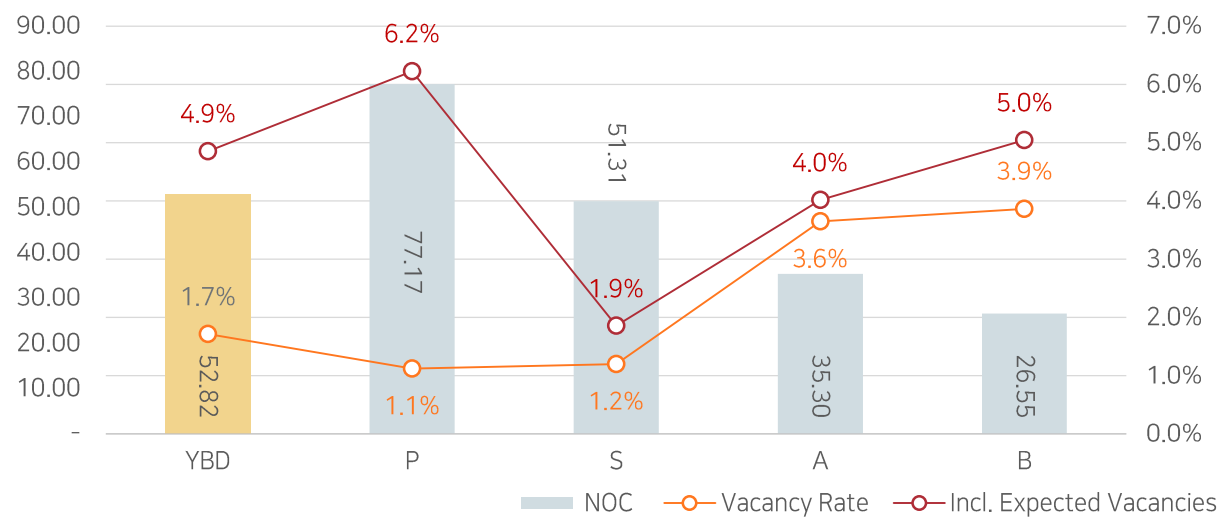
\$ 52.82 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
21.45	220.52	8.75

The average vacancy rate of the office buildings in YBD is 1.71 % as of July 2022, and the average NOC is \$ 52.82.



■ 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

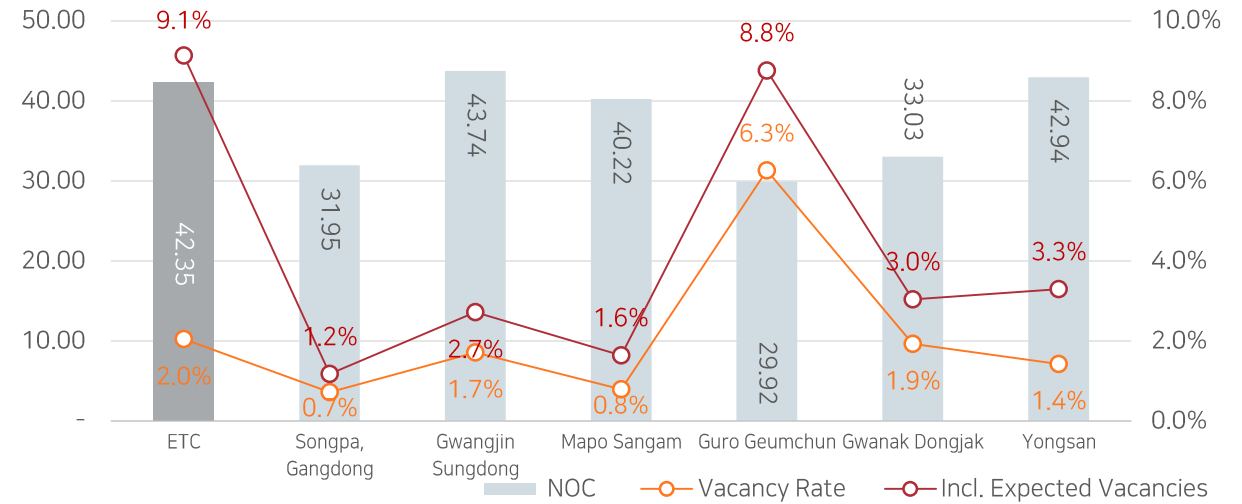
2.04 % ↑

Avg, NOC

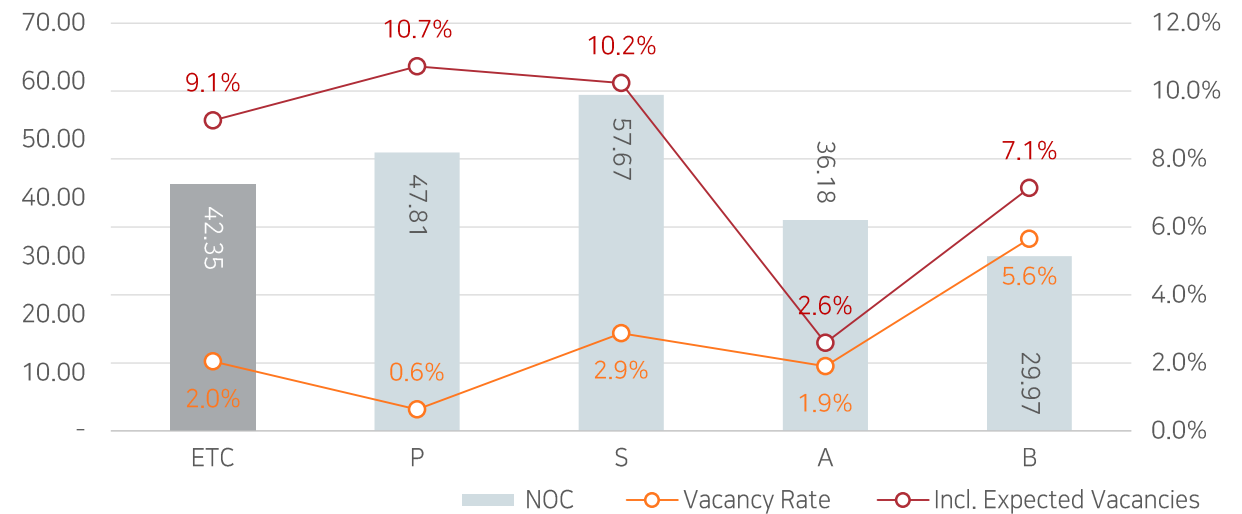
\$ 42.35 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
15.64	165.01	5.47

The average vacancy rate of the office buildings in ETC is 2.04 % as of July 2022, and the average NOC is \$ 42.35.



■ 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

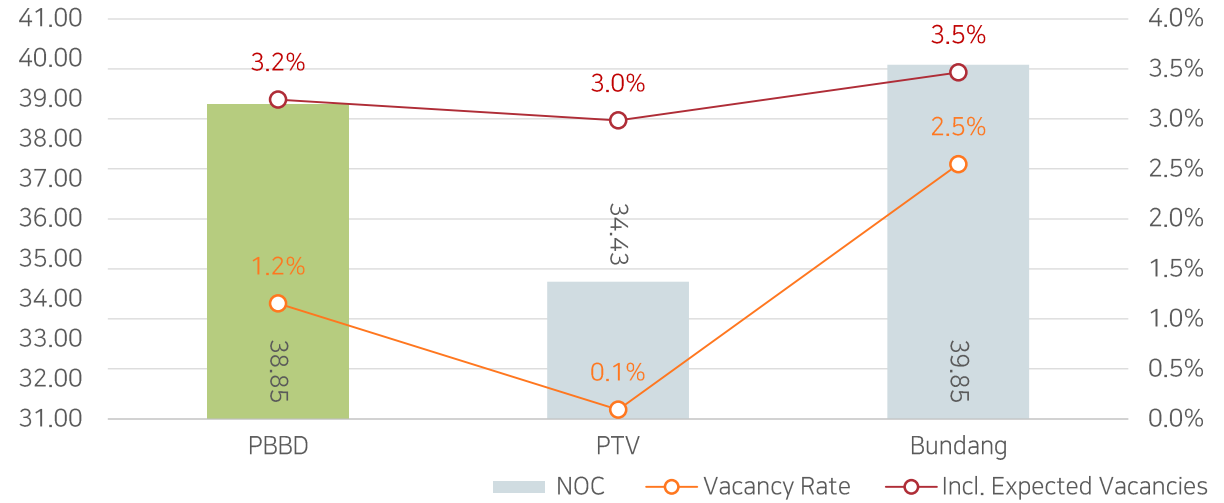
1.15 % ↓

Avg, NOC

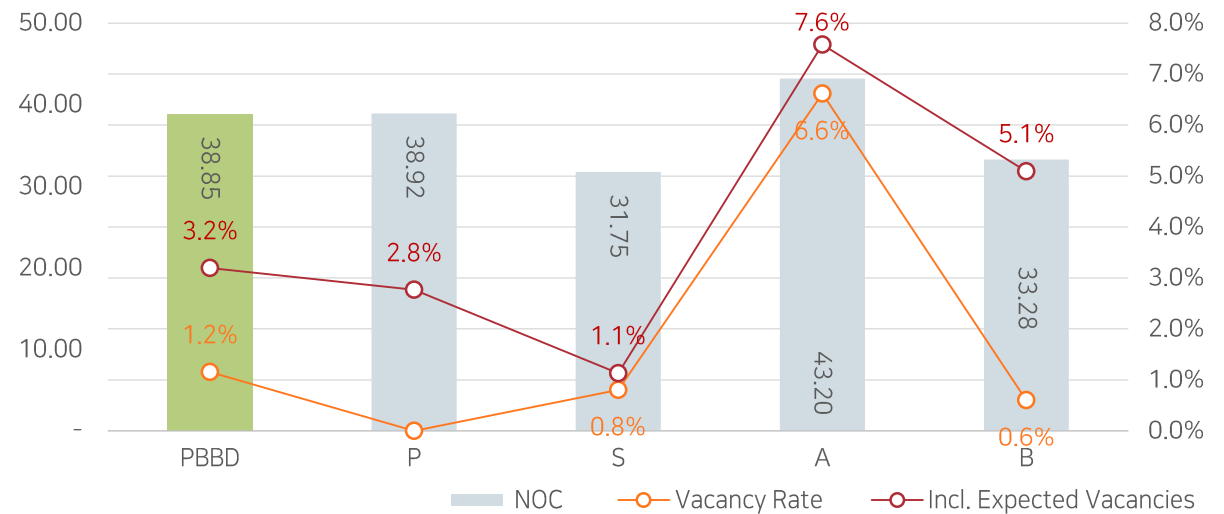
\$ 38.85 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
13.18	145.41	5.99

The average vacancy rate of the office buildings in PBBD is 1.15 % as of July 2022, and the average NOC is \$ 38.85.



■ 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	222.92	27.32	8.33	62.51	2.96%
	City Hall Station	924,585	157.77	16.11	7.27	37.79	4.11%
	Jonggak Station	994,166	198.30	20.28	8.63	48.19	4.58%
	Euiljiro Ipgu Station	823,120	170.60	18.25	8.30	45.68	1.72%
GBD	Teheranro	3,201,048	419.30	40.96	8.18	75.60	0.71%
	Gangnamdero	1,591,446	490.25	42.76	7.53	73.78	1.25%
	Yeongdongdero	646,509	197.10	18.55	6.68	47.57	0.53%
	Dosandero	378,314	489.90	40.01	7.35	60.85	0.36%
	Seochogyeongdaehyeon	441,837	289.57	24.38	7.98	62.75	0.92%
YBD	East Yeouido	2,958,304	273.27	27.57	10.52	68.57	1.35%
	West Yeouido	533,365	120.74	11.82	5.31	28.20	1.92%
	Youngdeungpo	448,572	168.79	13.15	5.65	31.19	3.85%
ETC	Songpa, Gangdong	1,879,967	204.91	13.50	4.41	31.95	0.72%
	Gwangjin Sungdong	526,161	212.49	22.62	4.26	43.74	1.71%
	Mapo Sangam	2,119,636	159.74	15.73	7.42	40.22	0.79%
	Guro Geumchun	857,640	128.52	12.60	2.51	29.92	6.26%
	Gwanak Dongjak	482,483	116.78	11.78	5.54	33.03	1.93%
	Yongsan	663,634	152.94	14.66	7.44	42.94	1.43%
PBBD	PTV	1,177,308	130.72	12.18	5.83	34.43	0.09%
	Bundang	896,341	148.72	13.41	6.02	39.85	2.55%



Land Use Information by District

District	Building Name	Address	Land Use	GFA (㎡)	Completion
GBD	CREA 2	Seocho-dong Seocho-gu	#1 Commercial	2,949	23-Jun
	MK Building	Seocho-dong Seocho-gu	Office	2,670	16-Jun
	JGYJ120	Bangbae-dong Seocho-gu	#1 Commercial	2,614	15-Jun
	Samwon Garden Unit-D	Sinsa-dong Gangnam-gu	#2 Commercial	2,611	03-Jun
	Yeoksam-dong 636-7	Yeoksam-dong Gangnam-gu	Office	1,666	14-Jun
	Yujin Cera Building	Yeoksam-dong Gangnam-gu	#1 Commercial	1,566	24-Jun
	The Stairs	Sinsa-dong Gangnam-gu	#2 Commercial	1,132	03-Jun
ETC	SILLA Co. Office Building	Godeok-dong Gangdong-gu	Office	21,847	17-Jun
	KMH	Godeok-dong Gangdong-gu	Office	19,666	15-Jun
	CORNER50	Seongsu-dong 2-ga Seongdong-gu	Office	11,465	27-Jun
	D2ENGINEERING R&D CENTER	Magok-dong Gangseo-gu	Research	3,977	28-Jun
	Jangji-dong 904-6	Jangji-dong Songpa-gu	Office	2,016	24-Jun
	Wonkim Building	Hwagok-dong Gangseo-gu	#2 Commercial	1,177	02-Jun
PBBD	the Geum	Bundang-gu Seongnam-si	#1 Commercial	3,225	10-Jun



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