

SEOUL OFFICE LEASING

October 2022 Monthly Market Review

조사개요

지역	서울 전 지역 및 판교, 분당 지역
대상	연면적 1,000m ² (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 9월 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

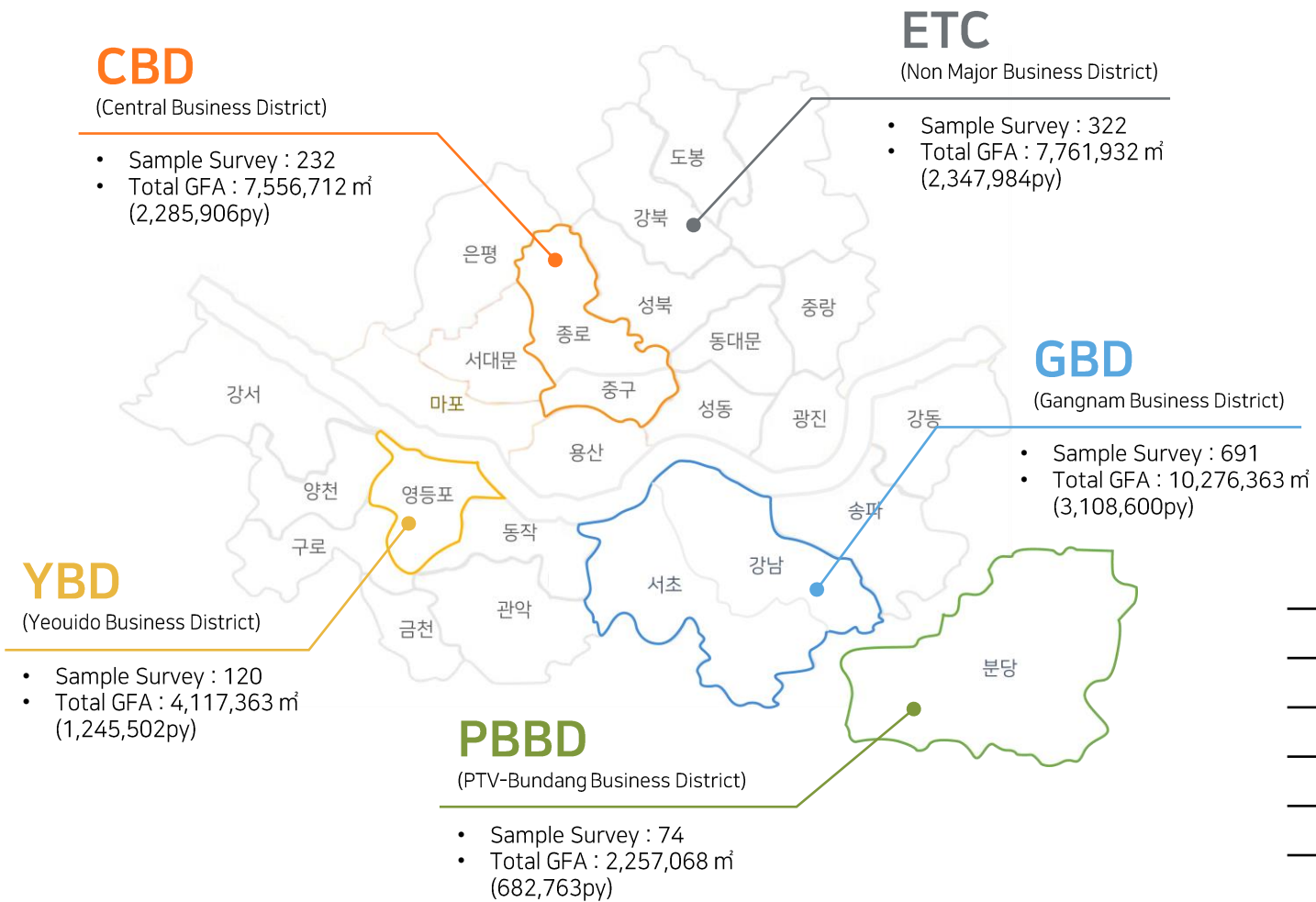
여의도권
여의도, 영등포구 일대

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 1,439

	P	S	A	B
CBD	46	70	32	84
GBD	30	81	99	481
YBD	20	25	32	43
ETC	43	62	56	161
PBBD	12	14	18	30

● 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

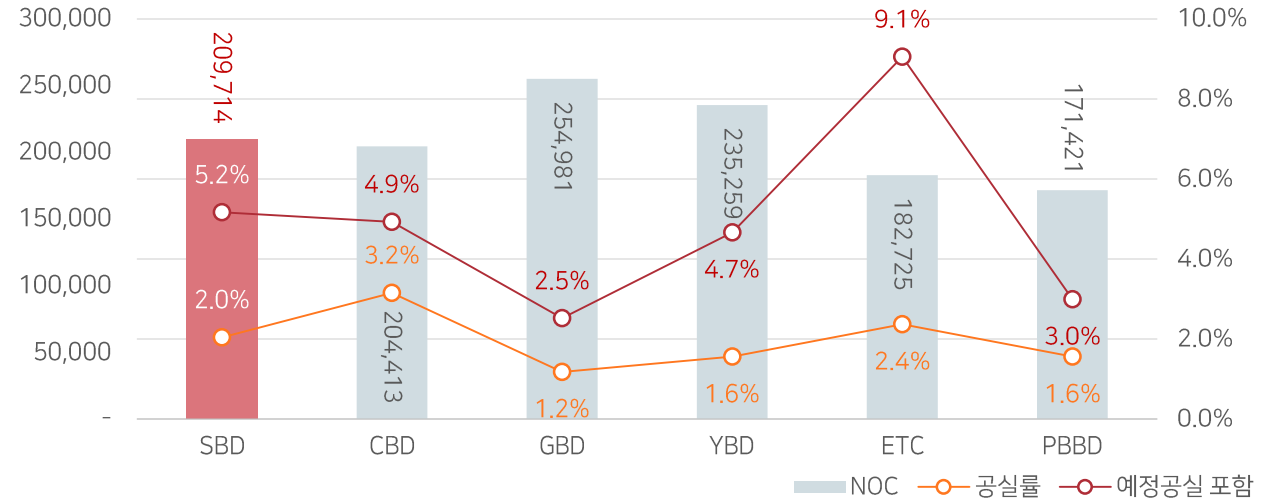
01 SBD 서울 전체

공실률
2.04% ↑

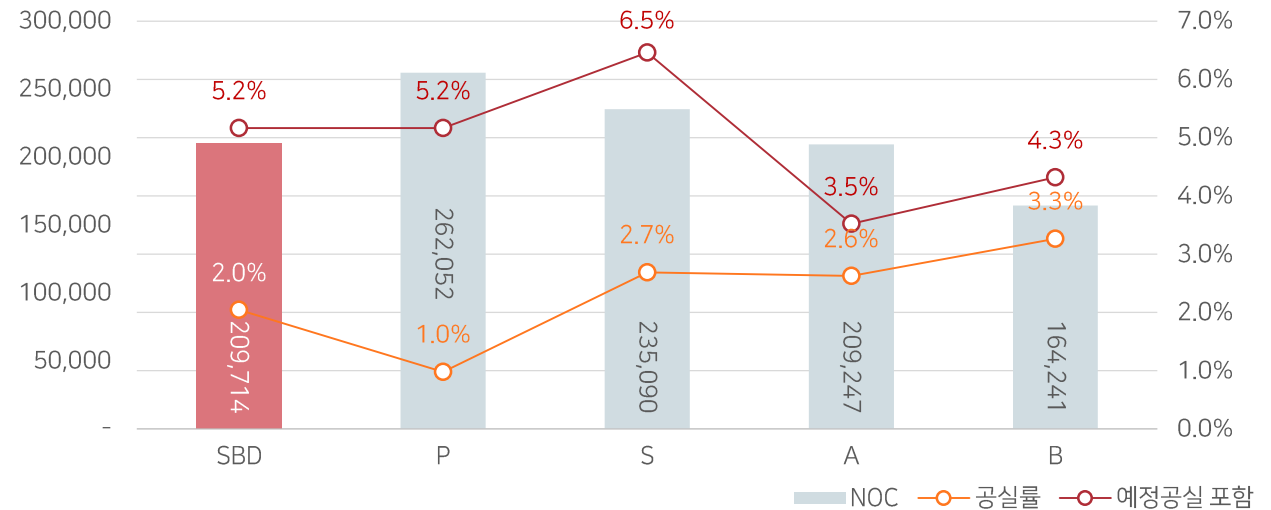
평균 NOC
₩ 209,714 ↑

평균 임대료	평균 보증금	평균 관리비
86,747	960,498	31,760

2022년도 9월 조사한 서울지역 오피스의
평균 공실률은 2.04%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 209,714원으로 조사되었다.



■ 서울 전체 권역 별 공실률 / NOC



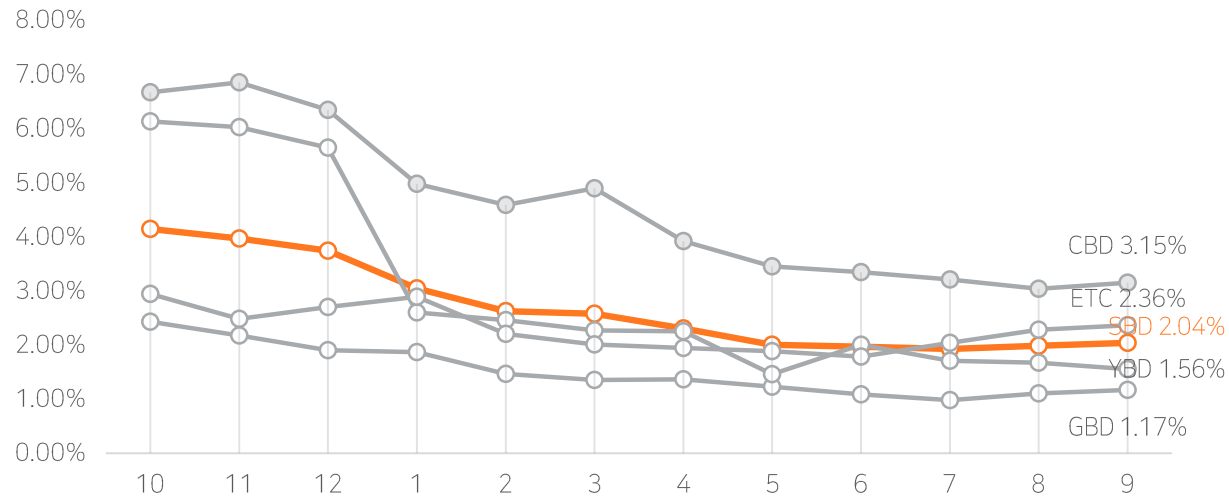
■ 서울 전체 규모 별 공실률 / NOC

01 SBD 서울 전체

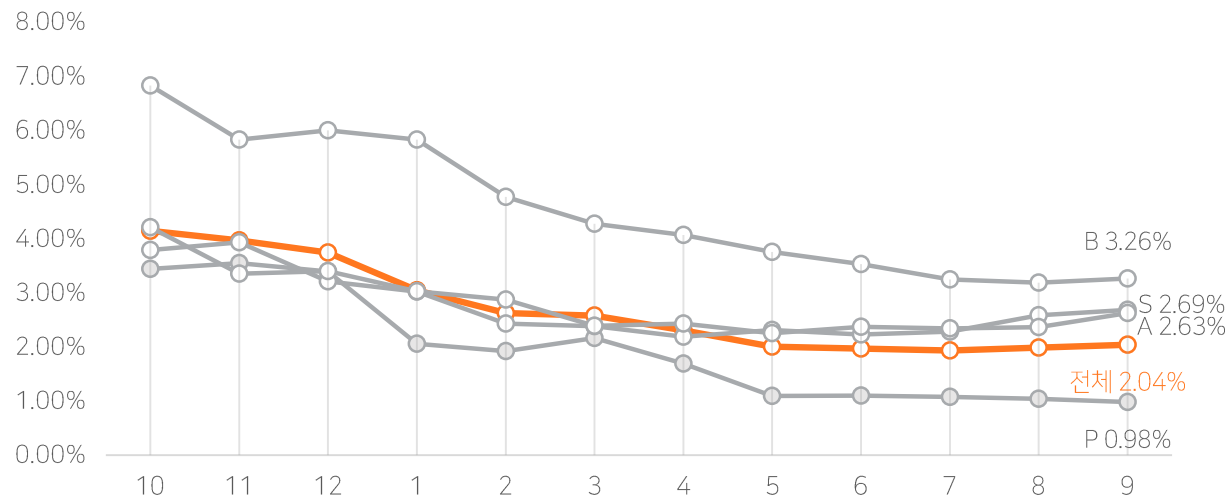
2022년 9월 서울권역의 공실률 흐름은 다음과 같이 조사되었다.

CBD의 센터원 East 센터에 SK하이닉스가 계약하며 3개층 1,790평의 면적이 해소되었고, DB다동빌딩에 국가생명윤리정책원이 사용중인 3개층과 피델리스자산운용이 사용중인 1개층 총 1,160평의 면적이 1월에 시장에 추가될 예정이고, SK네트웍스빌딩의 리모델링 공사가 완료되며 3,200평의 공실이 시장에 추가되었다.

GBD의 신영빌딩에 본사를 둔 폭스바겐코리아가 사용중인 5개 층 2,710평의 면적이 6월에, 대경타워에 슈어소프트테크가 사용 중인 11개 층 1,100평의 면적이 2월에, 동일타워에 ACN본사가 사용중인 2개 층 1,000평의 면적이 12월에 시장에 추가될 예정이다. 용산의 KDB생명빌딩에 아트웍스코리아가 1개 층 810평을 계약하는 등 1,560평의 공실이 해소되었다.



■ 서울 권역별 공실률 변화



■ 서울 규모별 공실률 변화

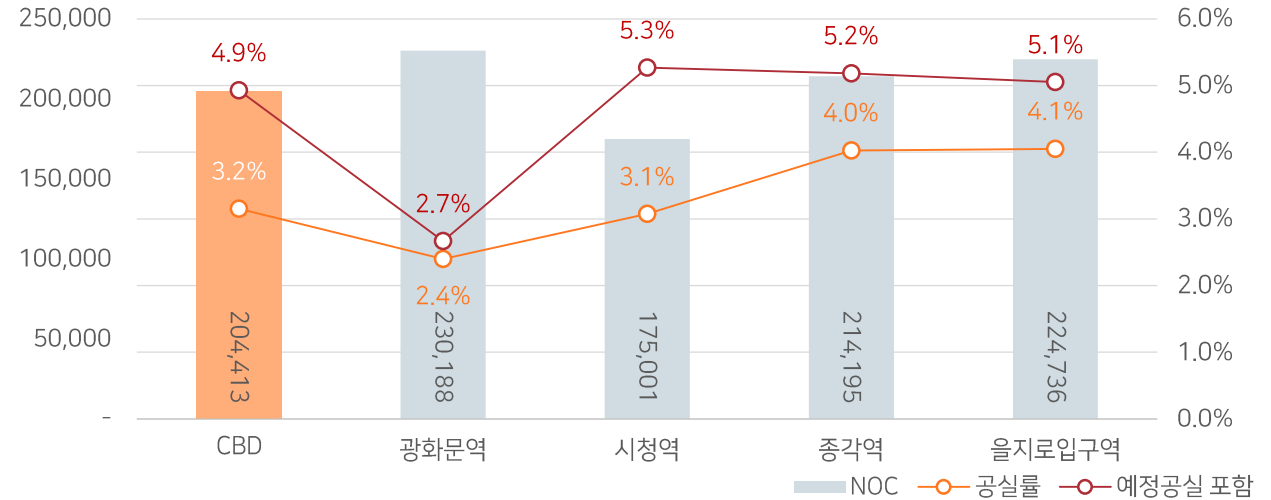
02 CBD 도심권역

공실률
3.15% ↑

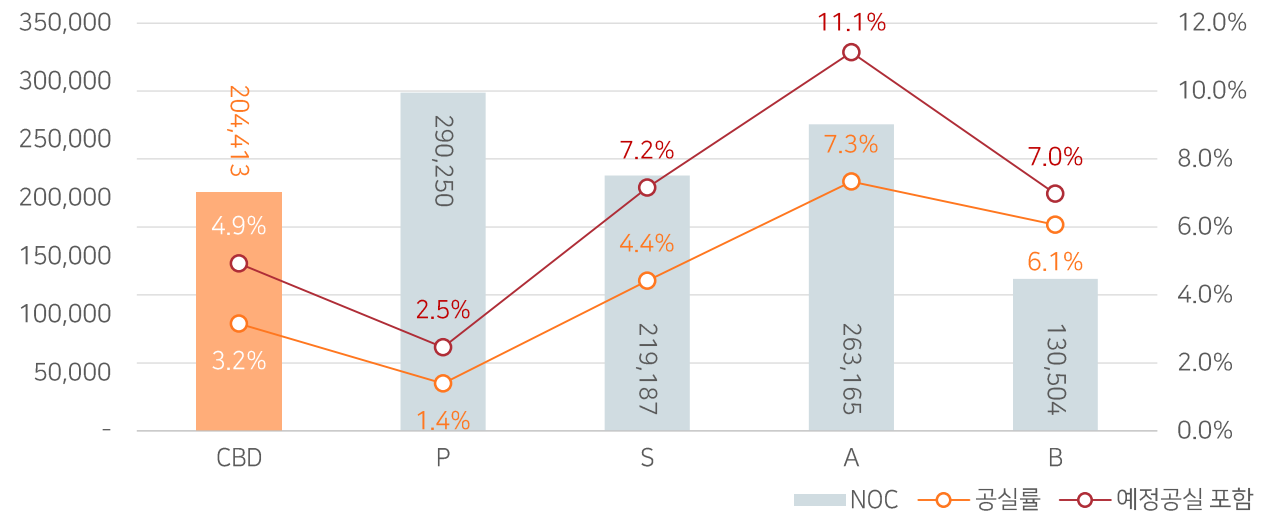
평균 NOC
₩ 204,413 ↑

평균 임대료	평균 보증금	평균 관리비
86,684	948,181	36,925

2022년도 9월 조사한 도심지역 오피스의
평균 공실률은 3.15%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 204,413원으로 조사되었다.



■ CBD 지역 세부권역별 공실률/NOC



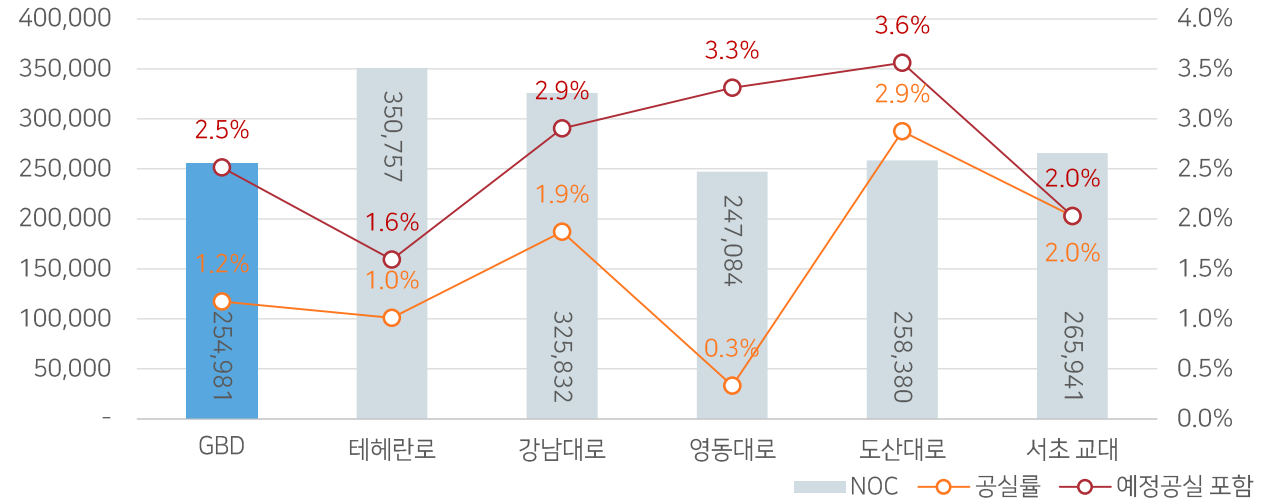
■ CBD 지역 규모별 공실률/NOC

73 GBD 강남권역

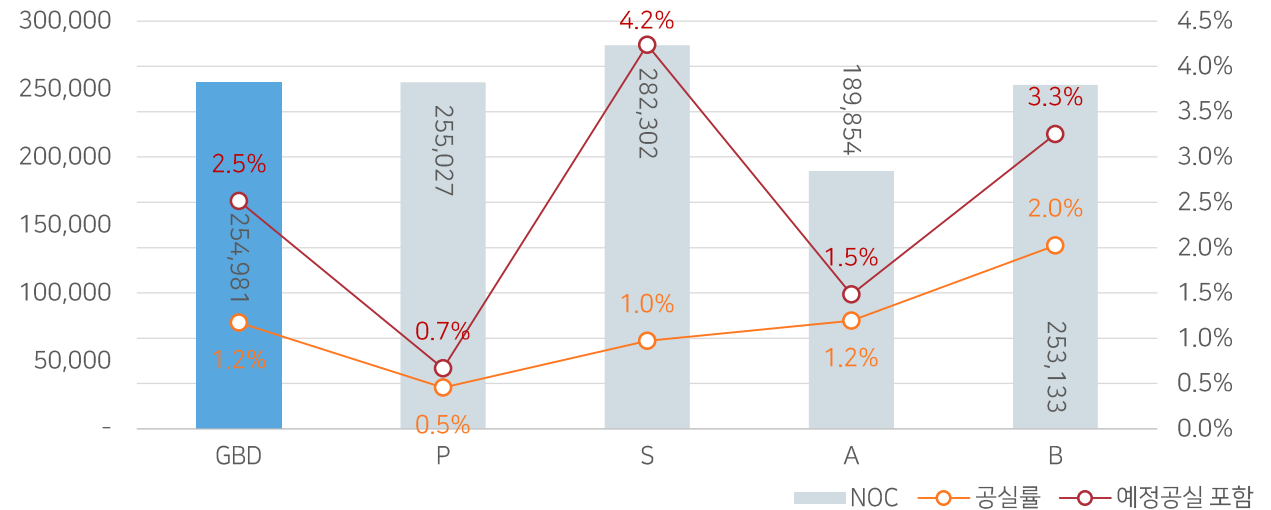
공실률 1.17% ↑
 평균 NOC ₩ 254,981 ↑

평균 임대료	평균 보증금	평균 관리비
119,755	1,424,835	30,221

2022년도 9월 조사한 강남지역 오피스의
 평균 공실률은 1.17%로 조사되었으며,
 전용면적 1평당 사용할 때 드는 비용을 계산한
 평균 NOC는 254,981원으로 조사되었다.



GBD 지역 세부권역별 공실률/NOC



GBD 지역 규모 별 공실률/NOC

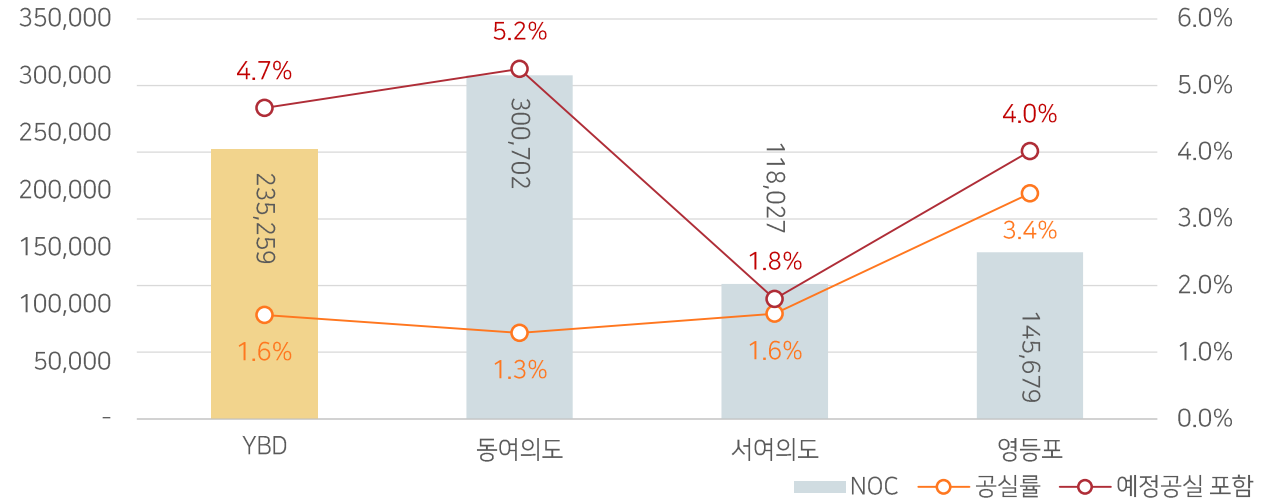
24 YBD 여의도, 영등포 권역

공실률
1.56% ↓

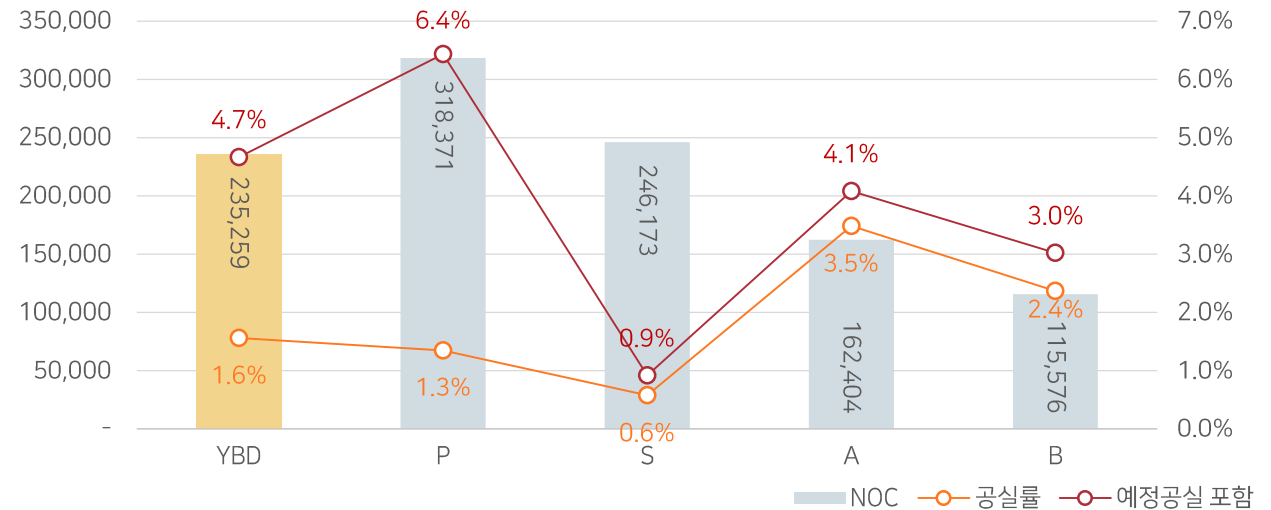
평균 NOC
₩ 235,259 ↓

평균 임대료	평균 보증금	평균 관리비
94,020	963,756	37,031

2022년도 9월 조사한 여의도, 영등포 지역
오피스의 평균 공실률은 1.56%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 235,259원으로 조사되었다.



■ YBD 지역세부권역별 공실률/NOC



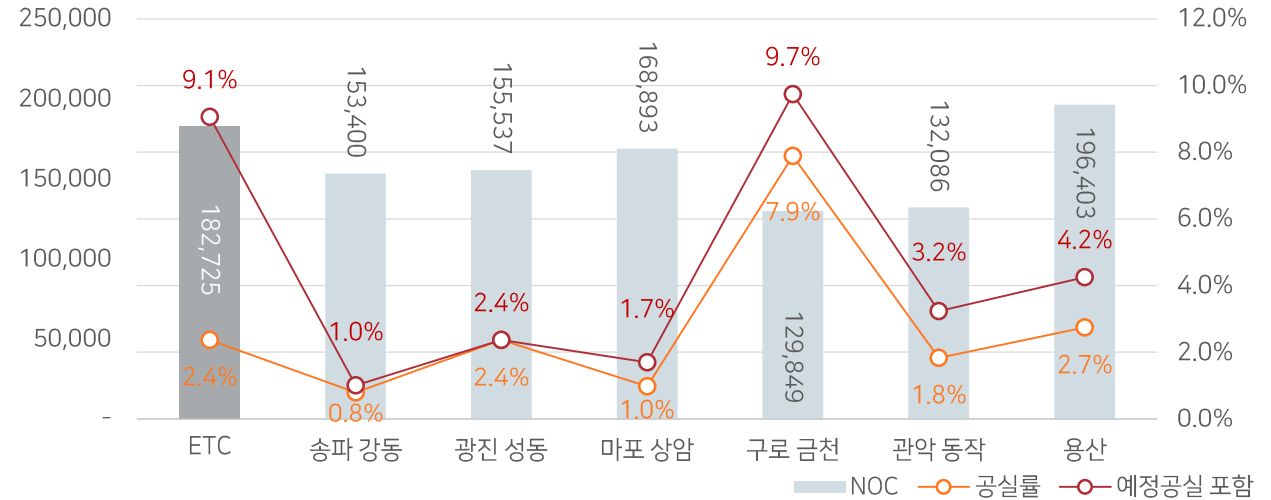
■ YBD 지역규모 별 공실률/NOC

75 ETC 서울 기타권역

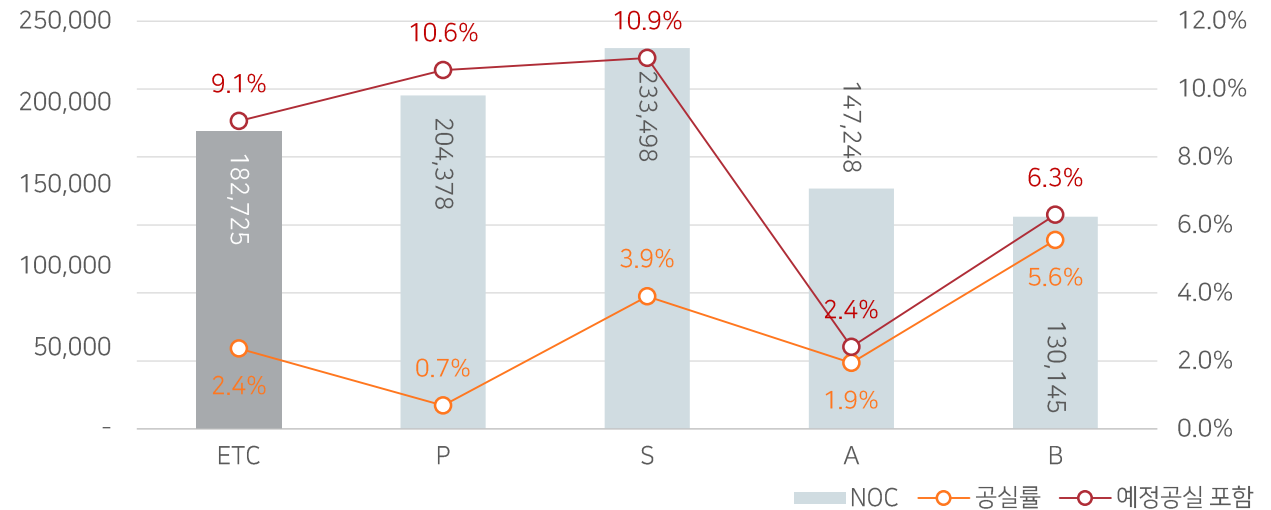
공실률 2.36% ↑
평균 NOC ₩ 182,725 ↑

평균 임대료	평균 보증금	평균 관리비
65,972	716,058	24,212

2022년도 9월 조사한 서울 기타지역 오피스의
평균 공실률은 2.36%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 182,725원으로 조사되었다.



ETC 지역 세부권역별 공실률/NOC



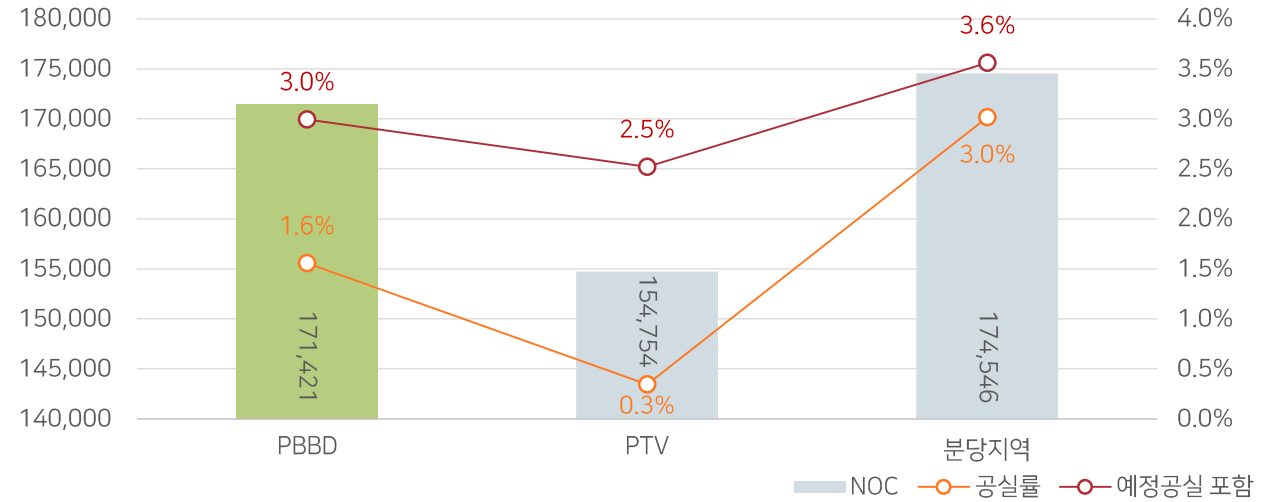
ETC 지역 규모별 공실률/NOC

76 PBBD 판교, 분당 권역

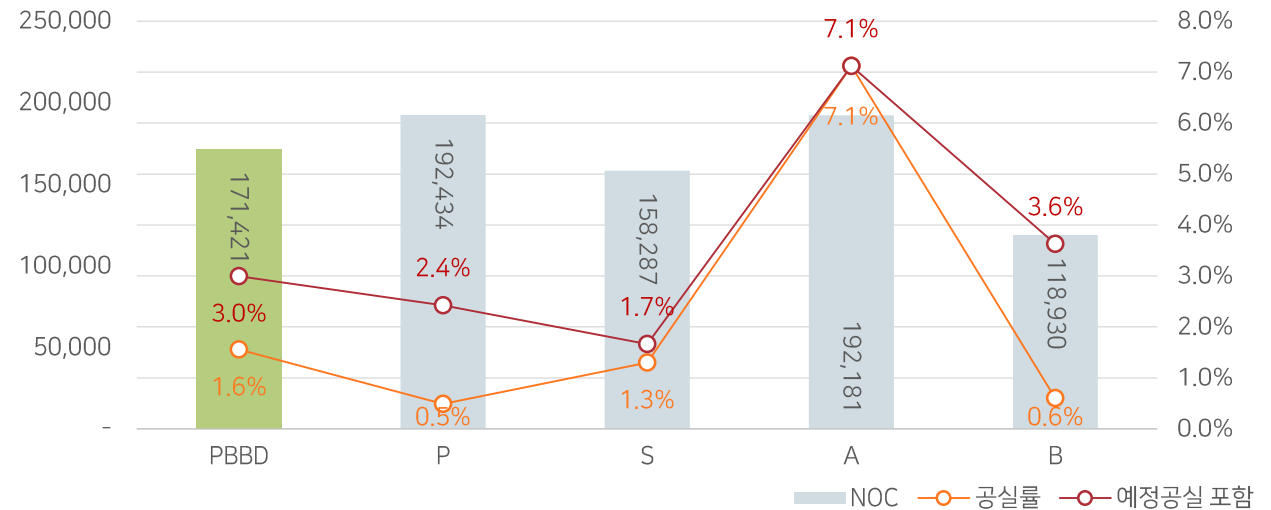
공실률 1.56% ↑ | 평균 NOC ₩ 171,421 ↓

평균 임대료	평균 보증금	평균 관리비
59,541	644,137	25,665

2022년도 9월 조사한 판교, 분당지역 오피스의 평균 공실률은 1.56%로 조사되었으며, 전용면적 1평당 사용할 때 드는 비용을 계산한 평균 NOC는 171,421원으로 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	958,152	98,736	35,853	230,188	2.40%
	시청역	288,244	735,095	74,914	34,606	175,001	3.07%
	종각역	294,217	852,702	87,376	37,820	214,195	4.03%
	을지로입구역	254,812	1,261,444	102,255	41,211	224,736	4.05%
GBD	테헤란로	1,001,304	2,045,367	181,397	32,473	350,757	1.01%
	강남대로	496,605	2,129,987	170,638	31,374	325,832	1.87%
	영동대로	195,443	843,833	84,383	34,471	247,084	0.33%
	도산대로	109,339	2,043,198	157,843	30,424	258,380	2.88%
	서초 교대	139,244	1,317,966	107,705	30,130	265,941	2.03%
YBD	동여의도	938,242	1,183,805	119,657	43,977	300,702	1.29%
	서여의도	170,150	509,066	48,298	23,324	118,027	1.58%
	영등포	137,111	738,977	58,670	24,965	145,679	3.38%
ETC	송파 강동	566,481	936,682	58,441	22,343	153,400	0.80%
	광진 성동	166,109	913,209	77,092	19,133	155,537	2.37%
	마포 상암	641,190	653,535	64,184	31,045	168,893	0.98%
	구로 금천	270,427	548,788	52,629	10,913	129,849	7.89%
	관악 동작	162,145	664,356	48,756	20,989	132,086	1.83%
	용산	202,010	778,667	74,533	34,567	196,403	2.74%
PBBD	PTV	372,597	543,491	61,862	26,400	154,754	0.34%
	분당지역	310,166	663,008	59,105	25,550	174,546	3.02%

지역 별 사용승인 현황

권역	빌딩명	소재지	주용도	연면적(m ²)	연면적(3.3m ²)	사용승인일
CBD	JS빌딩	종로구 관철동	제2종근린생활시설	1,470	445	17-Aug
GBD	비엘타워	강남구 대치동	업무시설	3,850	1,165	24-Aug
	스매치 서초 사옥	서초구 서초동	업무시설	2,244	679	08-Aug
	헤우 신사빌딩	서초구 잠원동	제1종근린생활시설	1,435	434	08-Aug
	역삼동 근생	강남구 역삼동	제1종근린생활시설	1,381	418	22-Aug
ETC	더 스테어스	강남구 신사동	제2종근린생활시설	1,132	342	03-Jun
	하나빌딩	노원구 상계동	제1종근린생활시설	2,431	735	10-Aug
	여산빌딩	송파구 방이동	업무시설	1,849	559	04-Aug
	아트플렉스	마포구 합정동	문화맞집회시설	1,802	545	17-Aug
	청목빌딩	양천구 신정동	제1종근린생활시설	1,796	543	23-Aug
	더포레스트빌딩	서대문구 연희동	제2종근린생활시설	1,595	483	23-Aug
	서교동 근생	마포구 서교동	제2종근린생활시설	1,140	345	30-Aug
	JH Building	성북구 삼선동3가	제1종근린생활시설	1,137	344	08-Aug
PBBD	쉐보레분당서비스센터	성남시 분당구	자동차관련시설	5,704	1,725	18-Aug

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, September 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 = 1,436.00 KRW (0.70 USD = 1,000 KRW) as of 17th October 2022

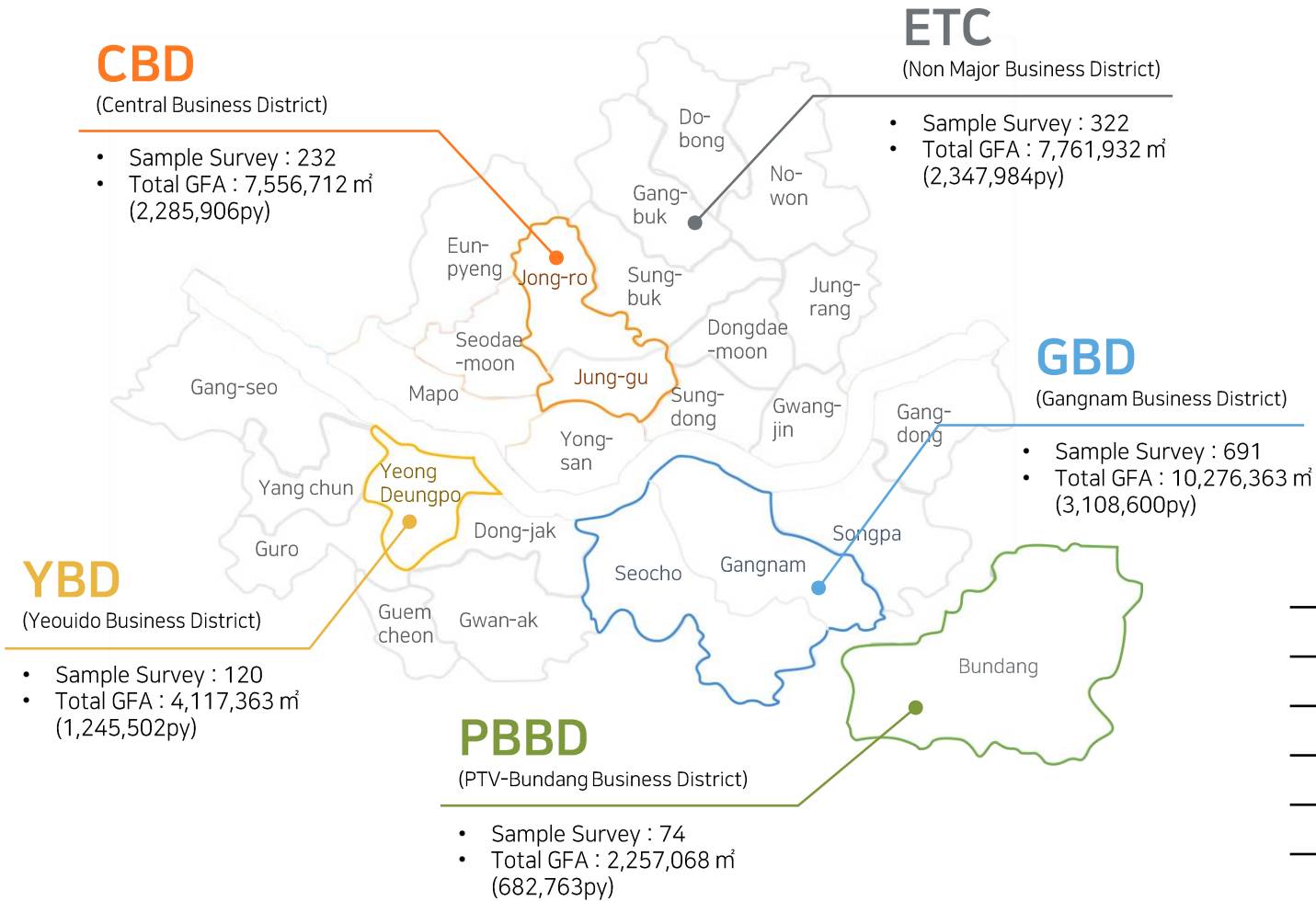
5 Regional Divisions in Seoul

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 1,439

	P	S	A	B
CBD	46	70	32	84
GBD	30	81	99	481
YBD	20	25	32	43
ETC	43	62	56	161
PBSD	12	14	18	30

• 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

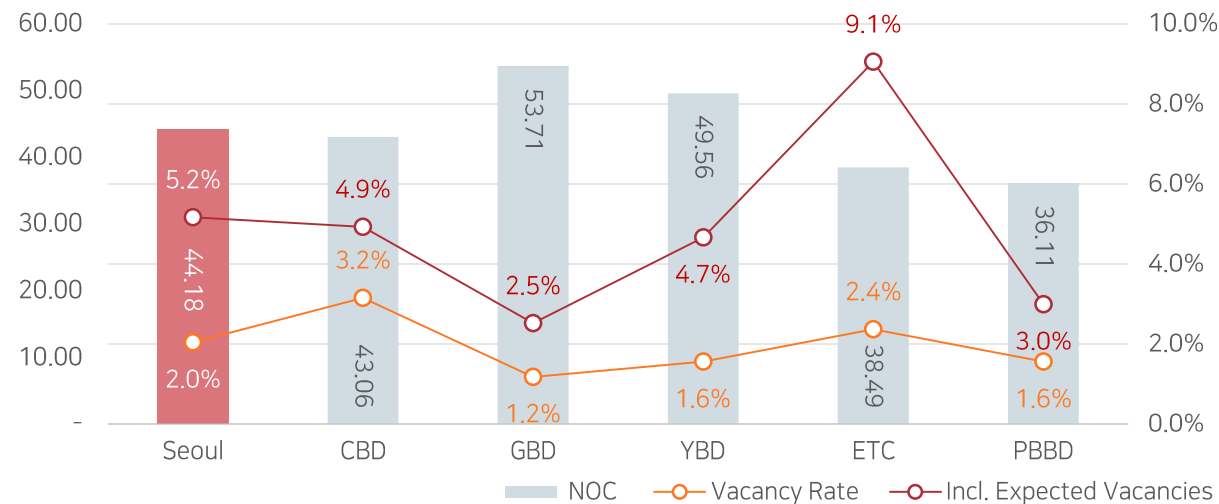
2.04% ↑

Avg, NOC

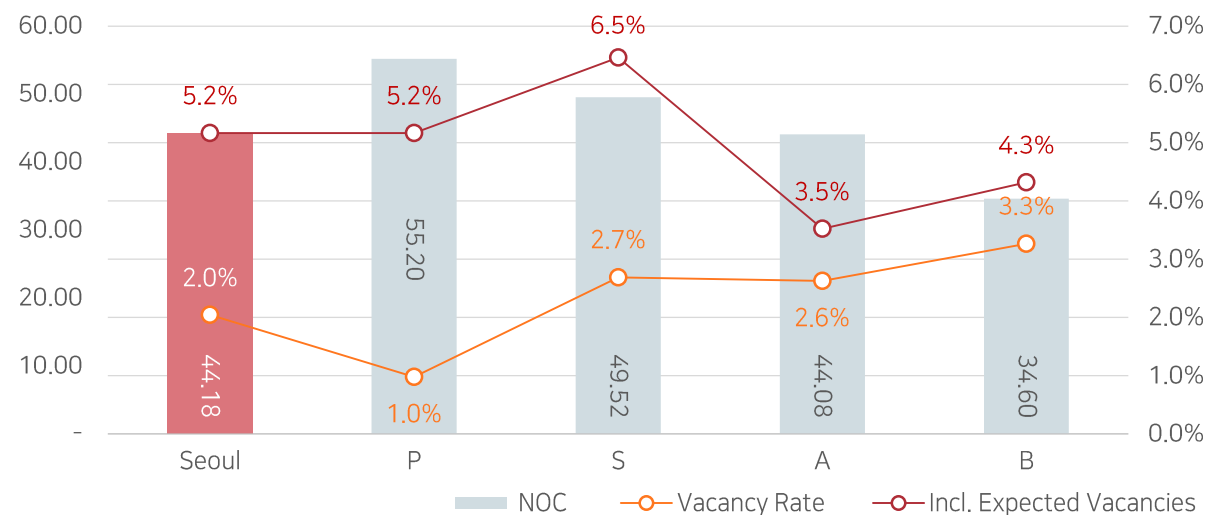
\$ 44.18 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
18.27	202.33	6.69

The average vacancy rate of the office buildings in Seoul is 2.04 % as of September 2022, and the average NOC is \$ 44.18.



■ Vacancy Rate & NOC in Seoul and Each District



■ Vacancy Rate & NOC in Seoul & Each Building Category

01 SBD Seoul Capital Area

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

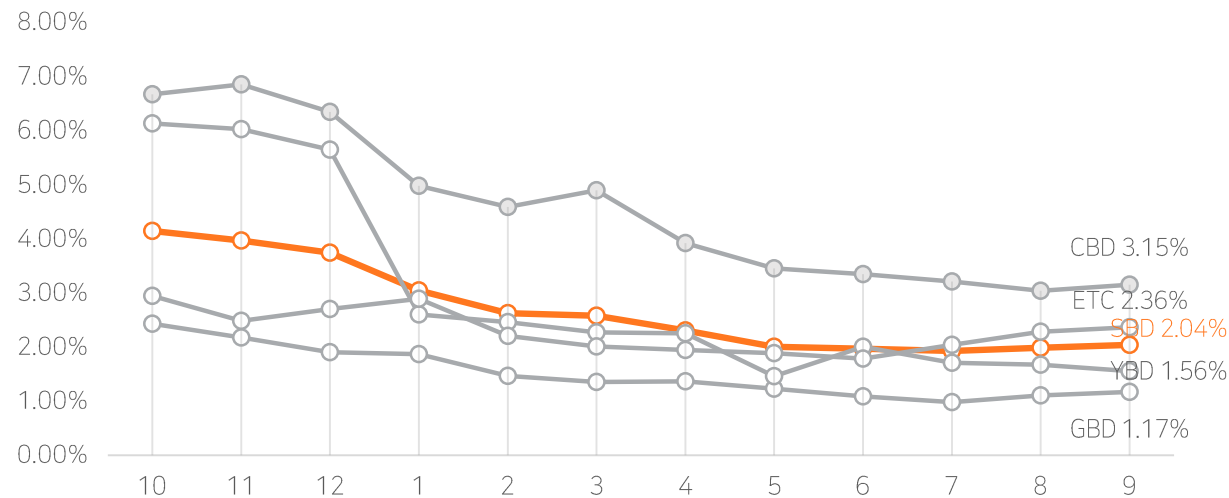
In CBD, East Center of Center 1 building filled its 3 vacant floors of 5,920㎡ thanks to the new quality tenant, SK Hynix. And 4 floors of 3,840㎡ in DB Da-dong Building is coming on the lease market in Seoul in Jan 2023, which are currently leased to Korea National Institute for Bioethics Policy (KoNIBP) with the 3 floors and to Fidelity Asset Management with the 1 floor.

In addition, the remodeling work of SK Networks building was completed and its leasing area of 10,590㎡ already came on the market.

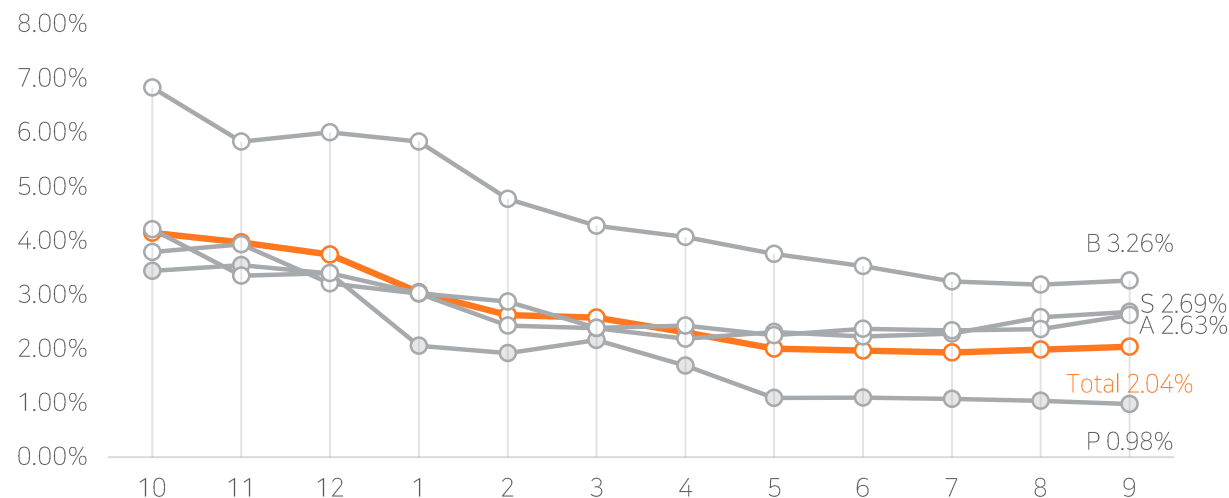
In GBD, the office units of 8,940㎡ in Shinyoung Building currently rented by Volkswagen Korea will come on the market in June 2023.

In addition, the 11 floors of 3,630㎡ in Daegyeong Tower and another 2 floors of 3,320㎡ in Dongil Tower will come on the market in December 2022, which are currently leased to Sure Soft Tech and ACN head office, respectively.

On the other hand, KDB Life Insurance Building in Yongsan-gu filled its vacant units of 5,140㎡ with new tenants; Artworks Korea as one of the new tenants signed the lease contract for the one entire floor in the building.



■ Monthly Vacancy Rate in 5 Main Districts



■ Monthly Vacancy Rate for Different Size of Buildings

02 CBD Central Seoul

Vacancy rate

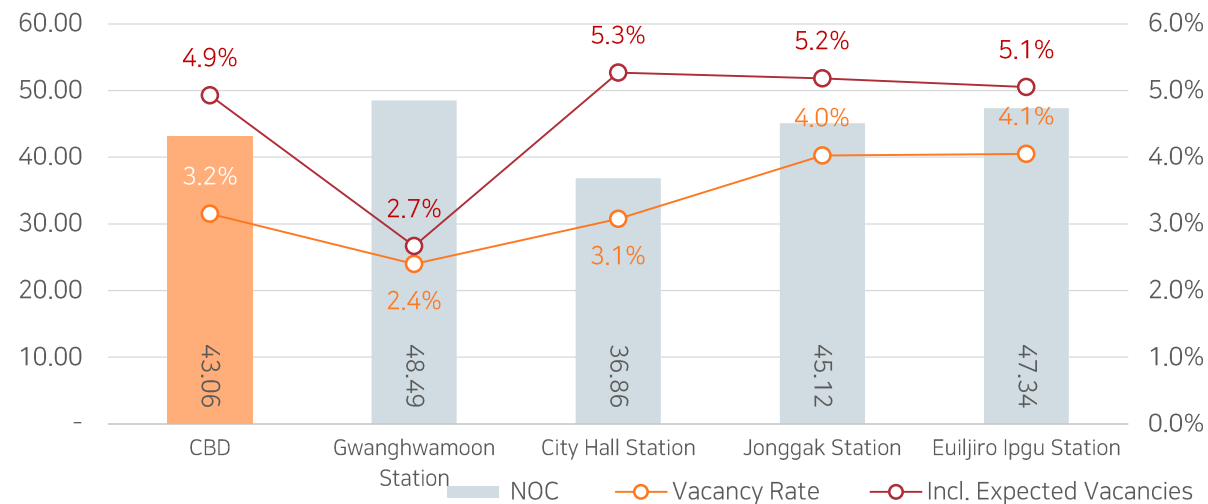
3.15% ↑

Avg, NOC

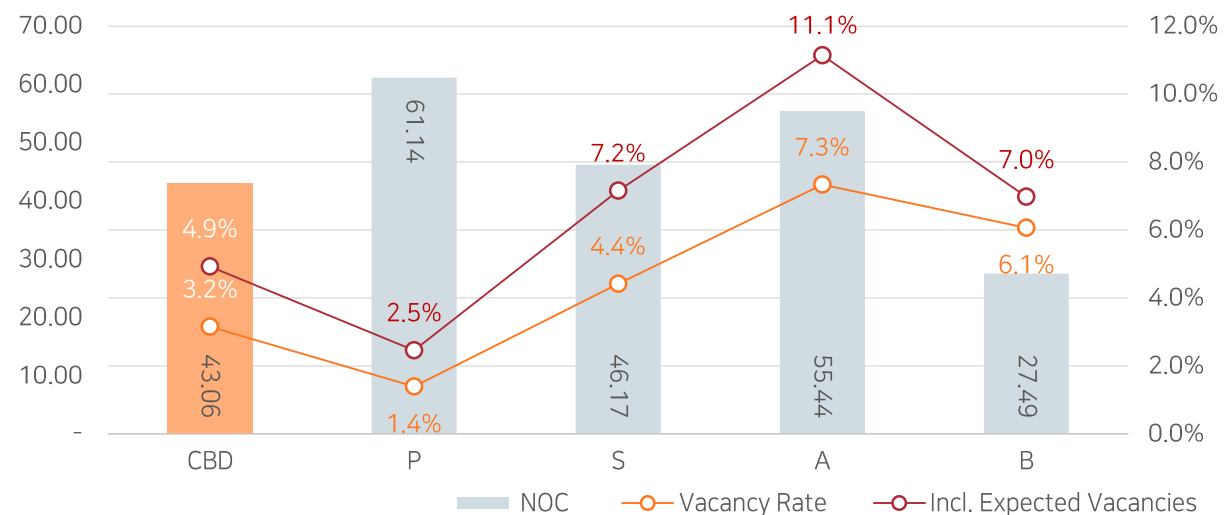
\$ 43.06 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
18.26	199.74	7.78

The average vacancy rate of the office buildings in CBD is 3.15 % as of September 2022, and the average NOC is \$ 43.06.



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



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

GBD Gangnam

Vacancy rate

1.17% ↑

Avg, NOC

\$ 53.71 ↑

Avg.
Rent

25.23

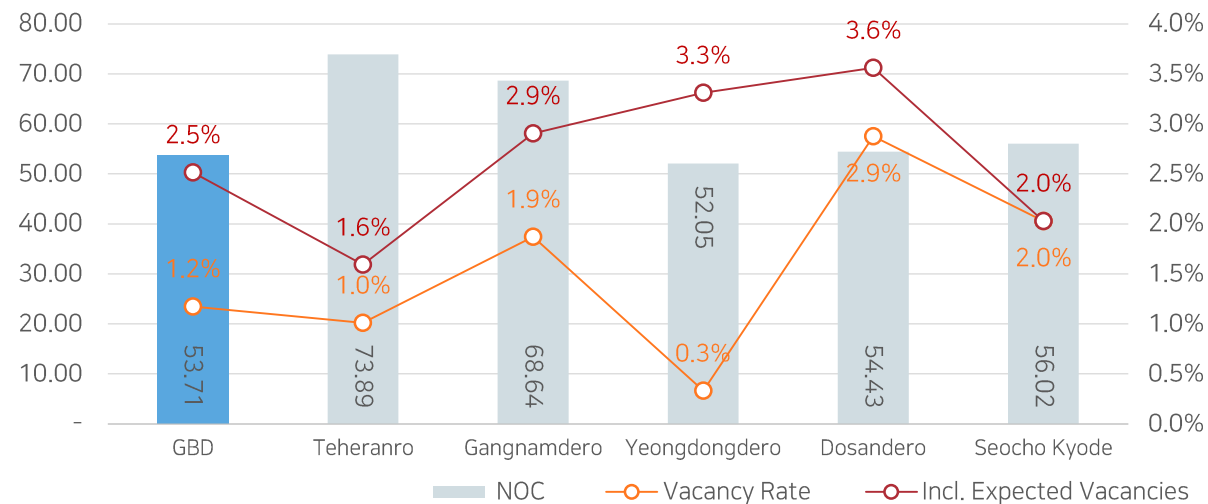
Avg.
Deposit

300.15

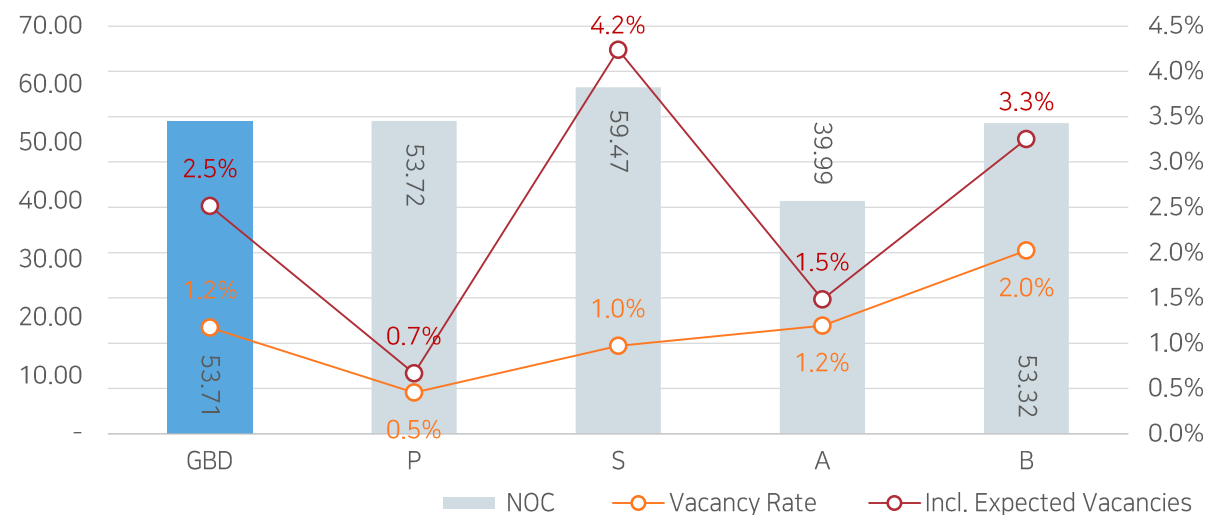
Avg.
Management.
Fee

6.37

The average vacancy rate of the office buildings in GBD is 1.17 % as of September 2022, and the average NOC is \$ 53.71.



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



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

24 YBD Yeouido & Yeongdeungpo

Vacancy rate

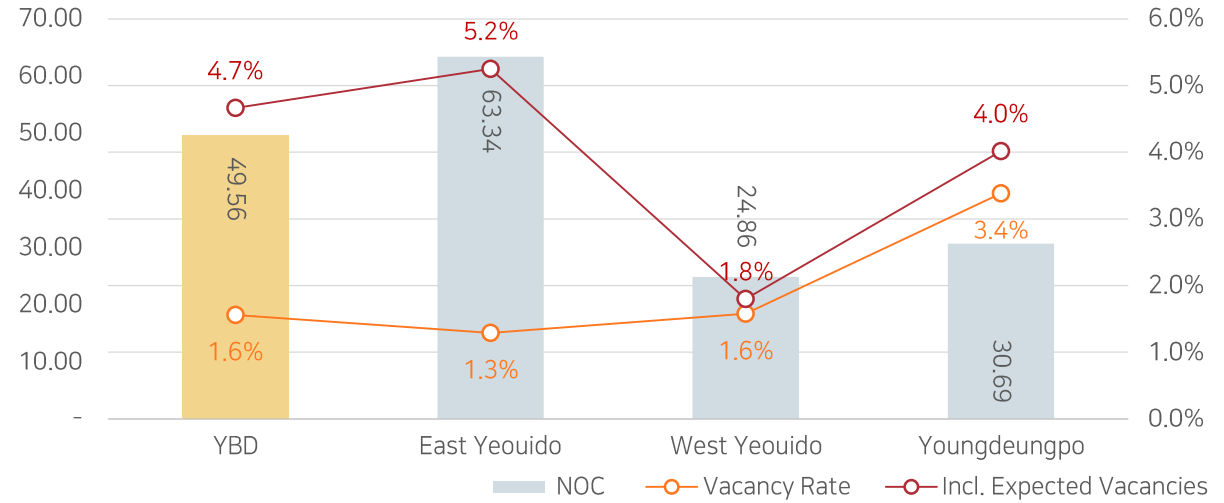
1.56 % ↓

Avg, NOC

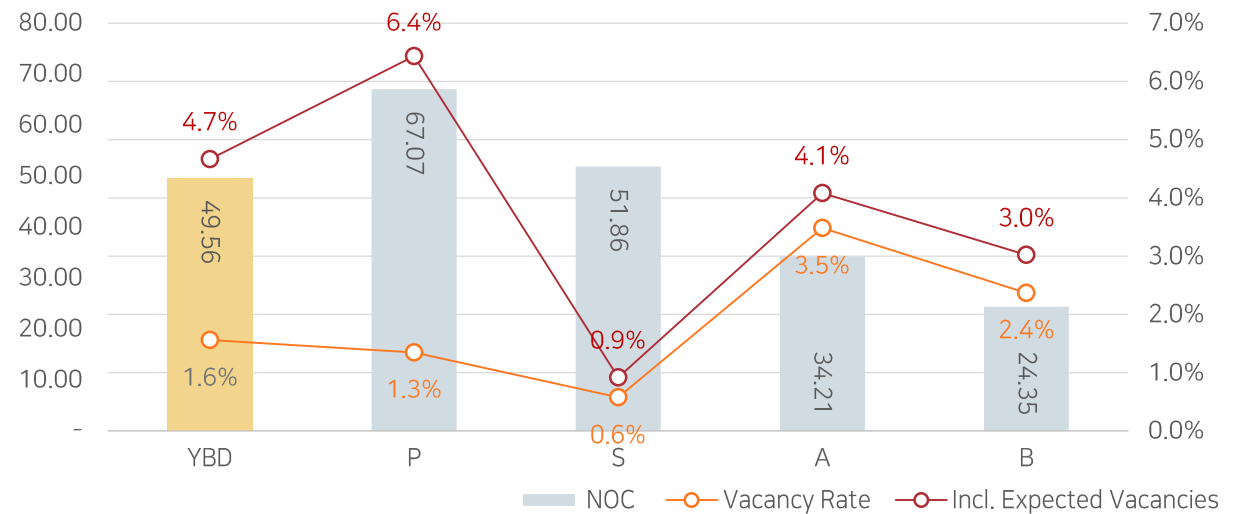
\$ 49.56 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
19.81	203.02	7.80

The average vacancy rate of the office buildings in YBD is 1.56 % as of September 2022, and the average NOC is \$ 49.56.



■ 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

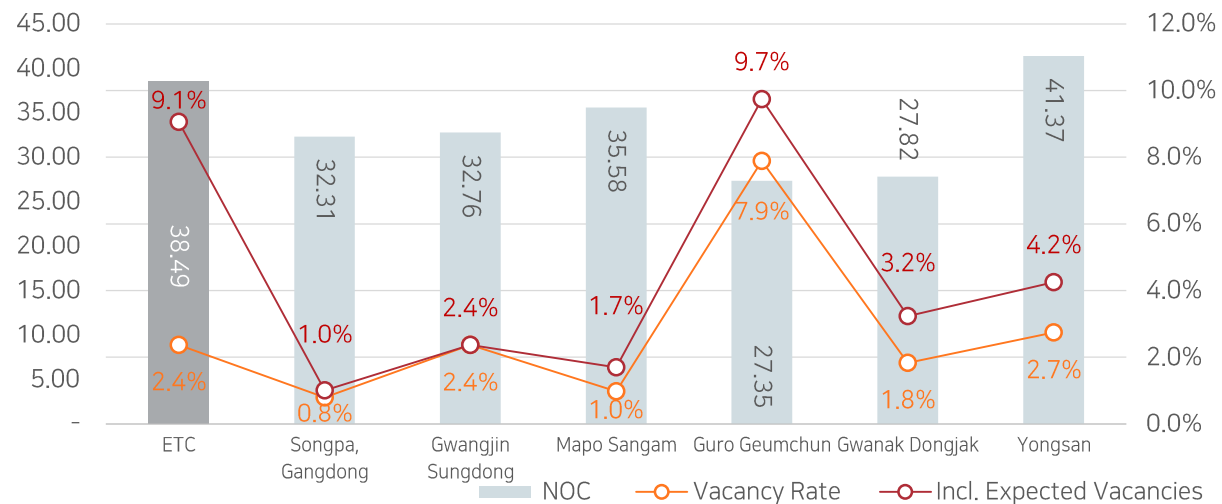
2.36 % ↑

Avg, NOC

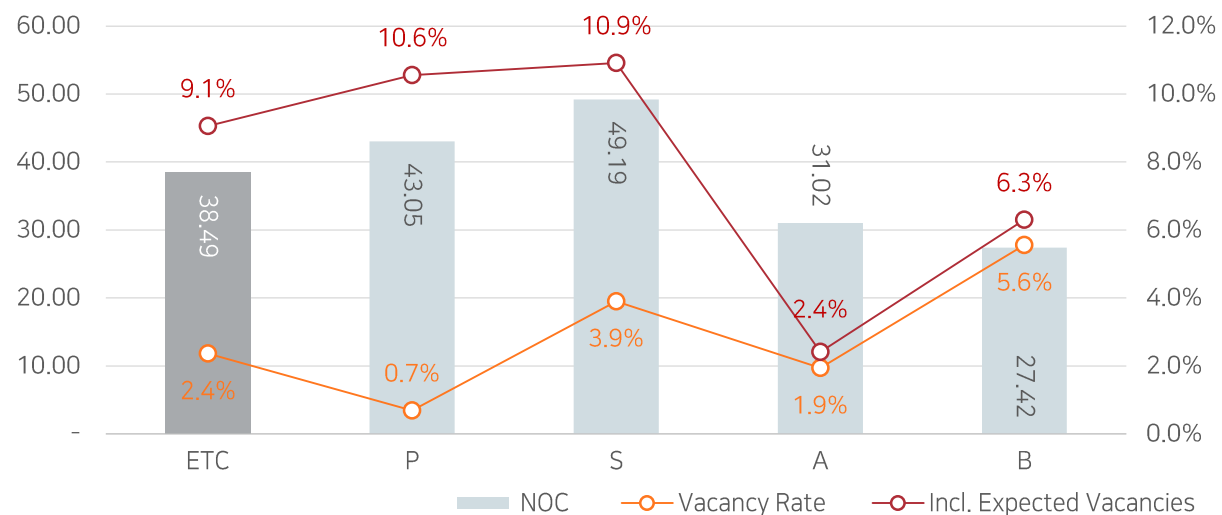
\$ 38.49 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
13.90	150.84	5.10

The average vacancy rate of the office buildings in ETC is 2.36 % as of September 2022, and the average NOC is \$ 38.49.



■ 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

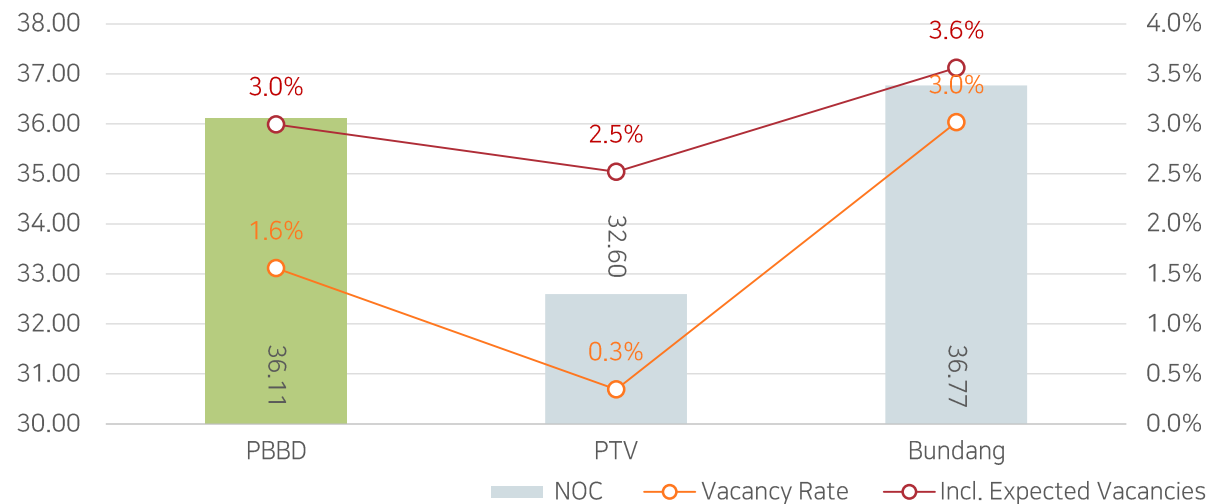
1.56 % ↑

Avg, NOC

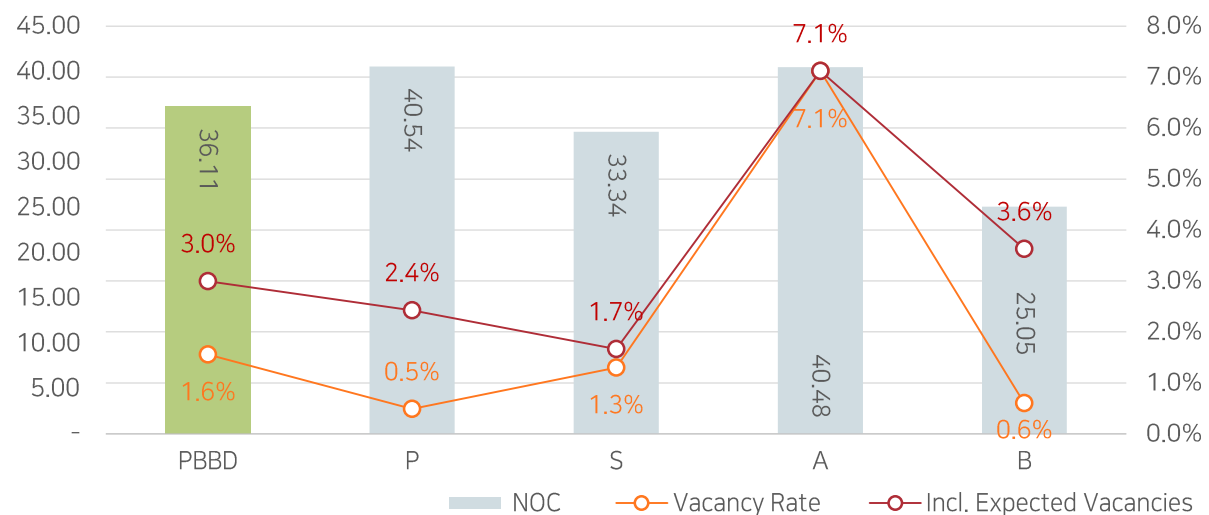
\$ 36.11 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
12.54	135.69	5.41

The average vacancy rate of the office buildings in PBBD is 1.56 % as of September 2022, and the average NOC is \$ 36.11.



■ 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	201.84	20.80	7.55	48.49	2.40%
	City Hall Station	952,872	154.85	15.78	7.29	36.86	3.07%
	Jonggak Station	972,618	179.63	18.41	7.97	45.12	4.03%
	Euljiro Ipgu Station	842,354	265.73	21.54	8.68	47.34	4.05%
GBD	Teheranro	3,310,095	430.87	38.21	6.84	73.89	1.01%
	Gangnamdero	1,641,668	448.69	35.95	6.61	68.64	1.87%
	Yeongdongdero	646,094	177.76	17.78	7.26	52.05	0.33%
	Dosandero	361,451	430.41	33.25	6.41	54.43	2.88%
	Seocho Gyodae	460,312	277.64	22.69	6.35	56.02	2.03%
YBD	East Yeouido	3,101,626	249.37	25.21	9.26	63.34	1.29%
	West Yeouido	562,479	107.24	10.17	4.91	24.86	1.58%
	Youngdeungpo	453,258	155.67	12.36	5.26	30.69	3.38%
ETC	Songpa, Gangdong	1,872,665	197.32	12.31	4.71	32.31	0.80%
	Gwangjin Sungdong	549,120	192.37	16.24	4.03	32.76	2.37%
	Mapo Sangam	2,119,636	137.67	13.52	6.54	35.58	0.98%
	Guro Geumchun	893,973	115.60	11.09	2.30	27.35	7.89%
	Gwanak Dongjak	536,018	139.95	10.27	4.42	27.82	1.83%
	Yongsan	667,802	164.03	15.70	7.28	41.37	2.74%
PBBD	PTV	1,231,725	114.49	13.03	5.56	32.60	0.34%
	Bundang	1,025,342	139.67	12.45	5.38	36.77	3.02%



Land Use Information by District

District	Building Name	Address	Land Use	GFA (㎡)	Completion
CBD	JS Building	Gwancheol-dong Jongno-gu	#2 Commercial	1,470	17-Aug
GBD	BL Tower	Daechi-dong Gangnam-gu	Office	3,850	24-Aug
	Smatch Seocho Office Building	Seocho-dong Seocho-gu	Office	2,244	08-Aug
	Hye Woo Shinsa Building	Jamwon-dong Seocho-gu	#1 Commercial	1,435	08-Aug
	Yeoksamdong Geunseng	Yeoksam-dong Gangnam-gu	#1 Commercial	1,381	22-Aug
	The Stairs	Sinsa-dong Gangnam-gu	#2 Commercial	3,855	25-Aug
ETC	Hana Building	Sanggye-dong Nowon-gu	#1 Commercial	2,431	10-Aug
	Yeo San Building	Bangi-dong Songpa-gu	Office	1,849	04-Aug
	Art Plex	Hapjeong-dong Mapo-gu	Cultural & Social	1,802	17-Aug
	Cheong Mok Building	Sinjeong-dong Yangcheon-gu	#1 Commercial	1,796	23-Aug
	The Forest Building	Yeonhui-dong Seodaemun-gu	#2 Commercial	1,595	23-Aug
	Seogyodong Geunseng	Seogyo-dong Mapo-gu	#2 Commercial	1,140	30-Aug
	JH Building	Samseon-dong 3-ga Seongbuk-gu	#1 Commercial	1,137	08-Aug
PBBD	Chevrolet Bundang Service Center	Bundang-gu Seongnam-si	Automobile-related	5,704	18-Aug



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