

SEOUL OFFICE LEASING

November 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 10월 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

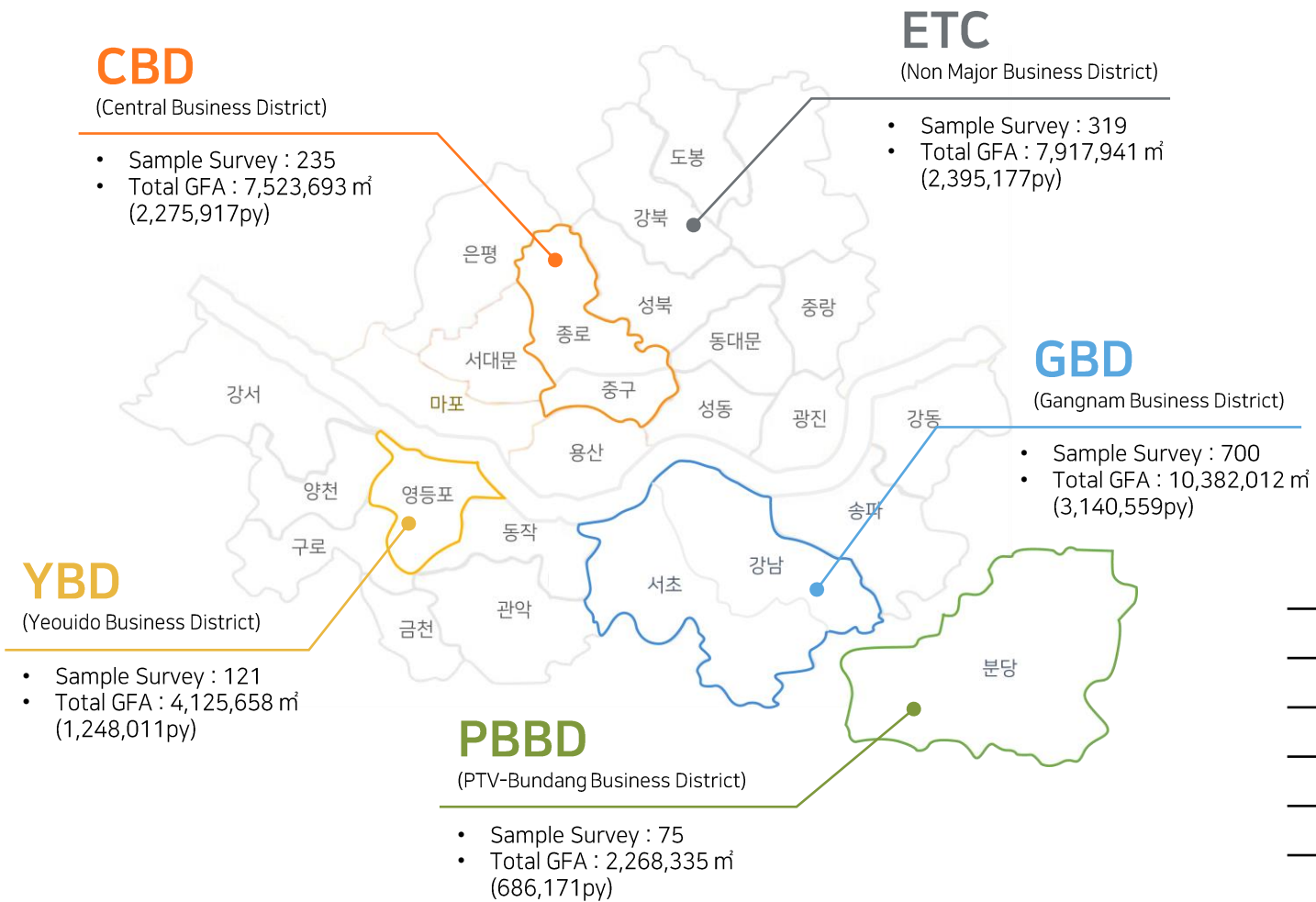
여의도권
여의도, 영등포구 일대

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 1,450

	P	S	A	B
CBD	45	68	34	88
GBD	30	81	98	491
YBD	20	25	32	44
ETC	45	62	55	157
PBBD	12	15	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

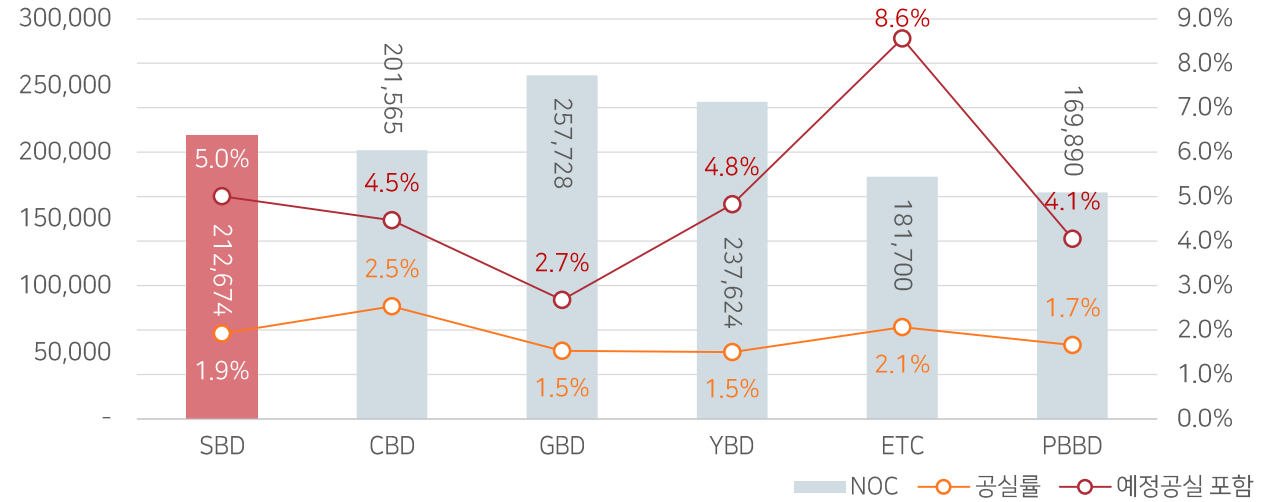
01 SBD 서울 전체

공실률
1.92% ↓

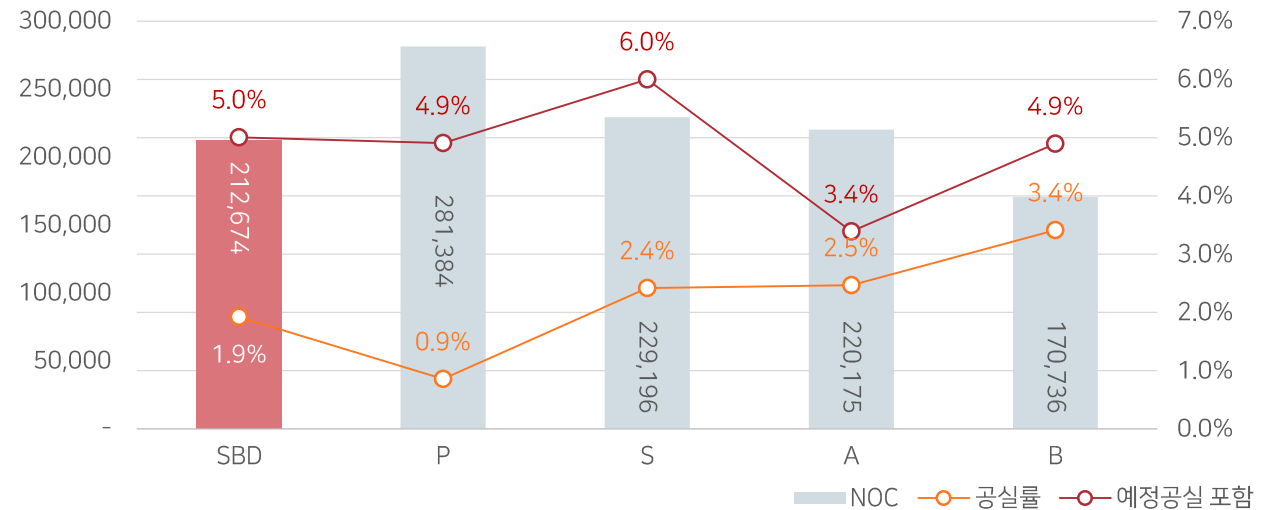
평균 NOC
₩ 212,674 ↑

평균 임대료	평균 보증금	평균 관리비
89,381	980,808	32,911

2022년도 10월 조사한 서울지역 오피스의
평균 공실률은 1.92%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 212,674원으로 조사되었다.



■ 서울 전체 권역 별 공실률 / NOC



■ 서울 전체 규모 별 공실률 / NOC

01 SBD 서울 전체

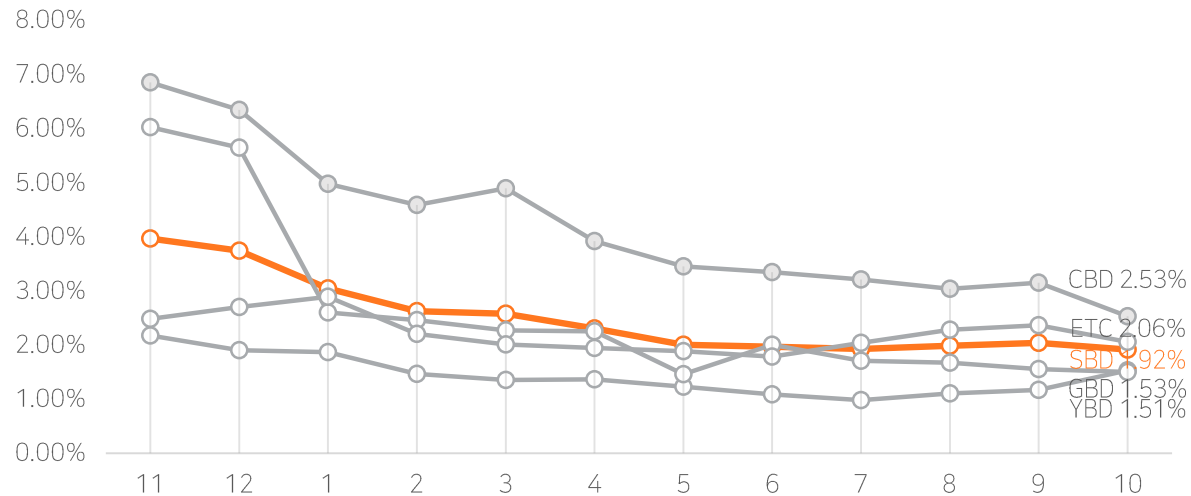
2022년 10월 서울권역의 공실률 흐름은 다음과 같이 조사되었다.

CBD의 콘코디언에 빙그레 본사가 입주하며 1,870평의 공실이 해소되었고, 서울스퀘어에 KG스틸이 사용중인 1개 층을 포함 총 1,620평의 면적이 내년8월에, 디타워에서 퍼시스 광화문센터가 사용중인 1개 층 633평의 면적이 12월에 임대시장에 추가될 예정이다.

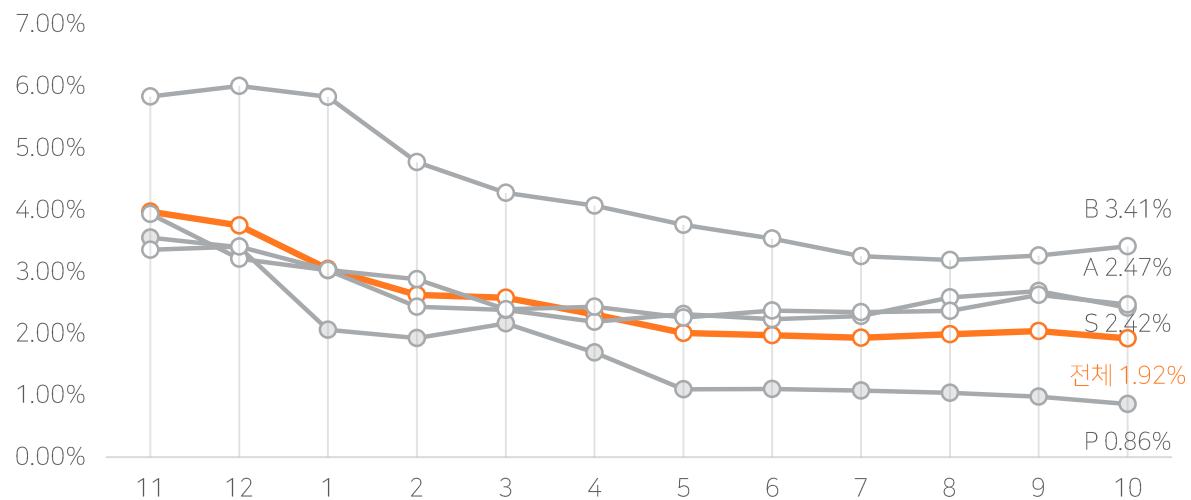
GBD의 GN빌딩은 신축 후 SM계열사에서 계약하며 750평의 공실이 모두 해소되었다.

YBD의 KC타워에서 시청자미디어재단이 사용중인 3개 층 770평의 면적이 시장에 추가되었고, 현대캐피탈과 현대카드가 사용 중인 2개 층 510평의 면적이 2월에 추가될 예정이다.

방이동의 S타워에 R서포트가 사용중인 5개 층 930평의 면적이 11월 임대시장에 추가될 예정이다.



■ 서울 권역별 공실률 변화



■ 서울 규모별 공실률 변화

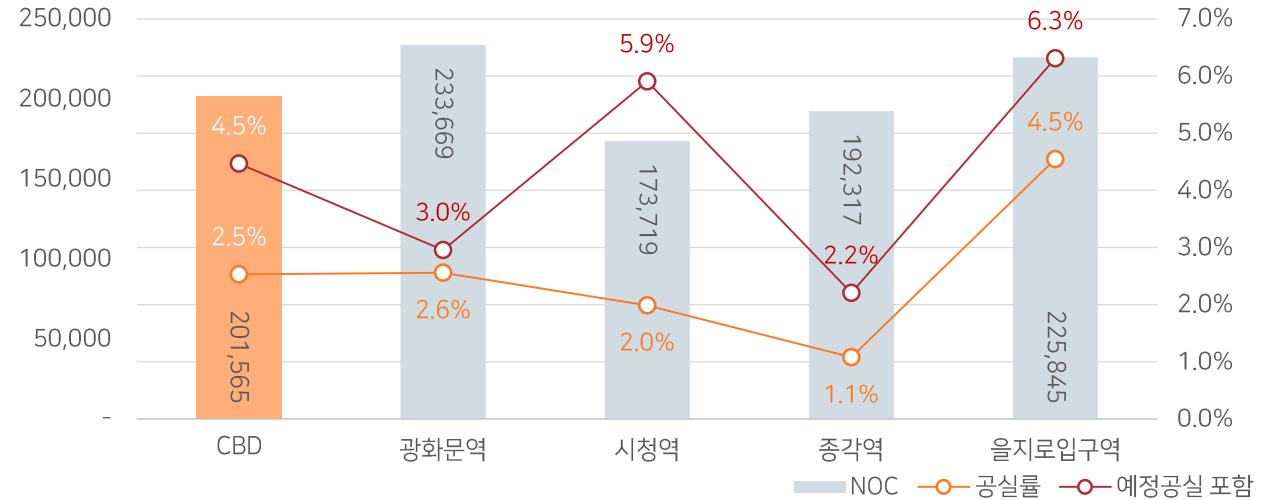
02 CBD 도심권역

공실률
2.53% ↓

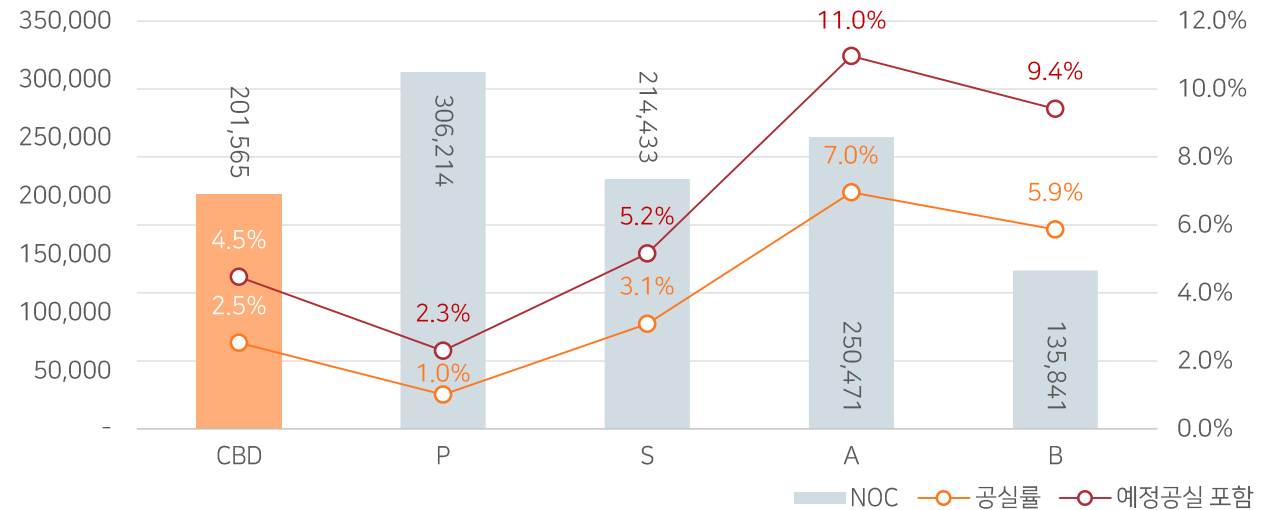
평균 NOC
₩ **201,565** ↓

평균 임대료	평균 보증금	평균 관리비
85,797	891,656	35,534

2022년도 10월 조사한 도심지역 오피스의
평균 공실률은 2.53%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 201,565원으로 조사되었다.



■ CBD 지역 세부권역별 공실률/NOC



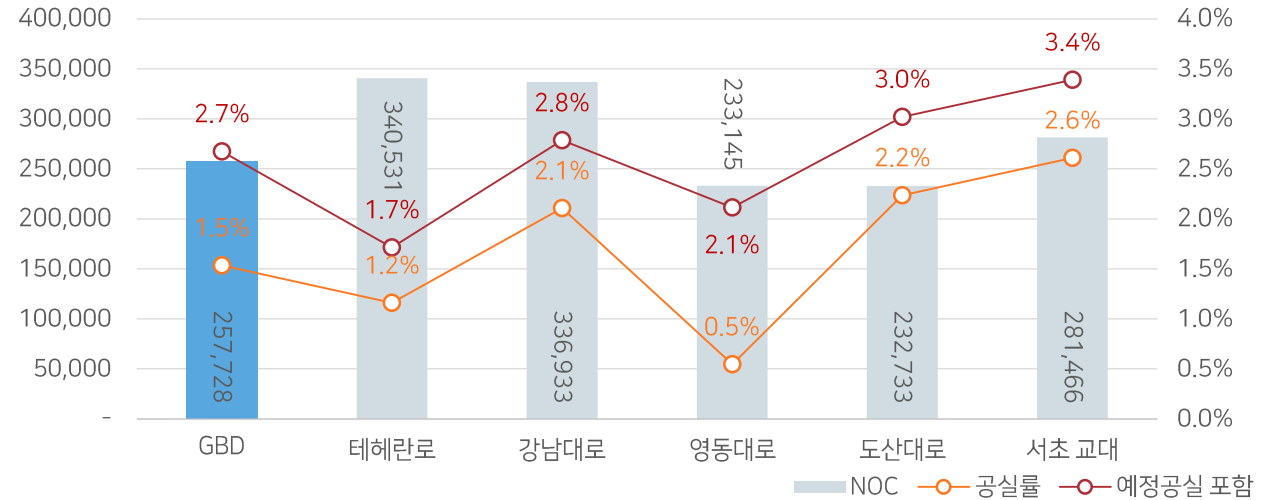
■ CBD 지역 규모 별 공실률/NOC

73 GBD 강남권역

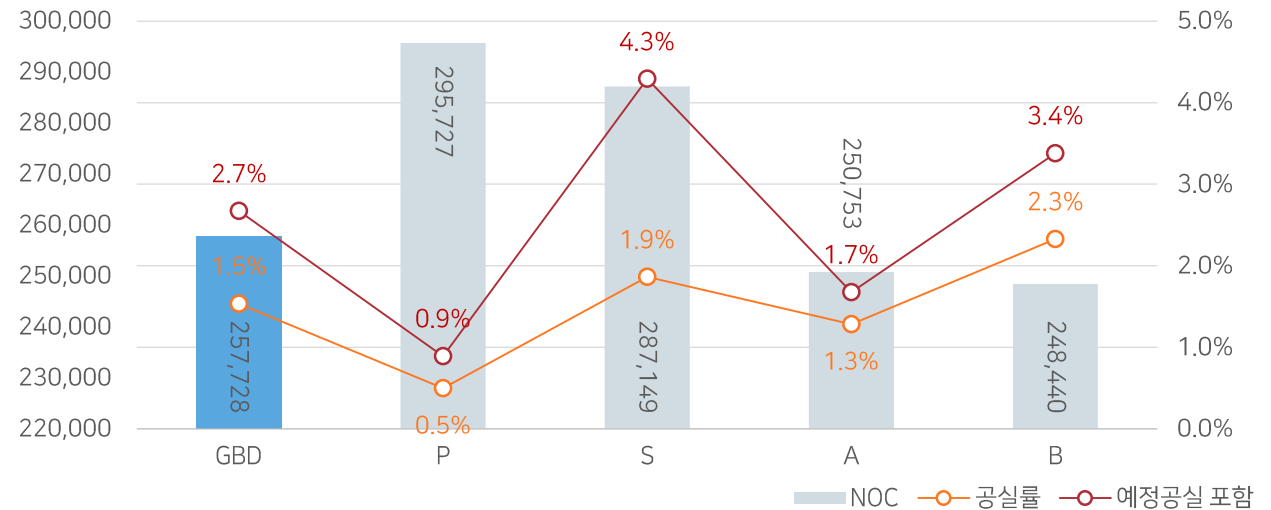
공실률 1.53% ↑ 평균 NOC ₩ 257,728 ↑

평균 임대료	평균 보증금	평균 관리비
120,432	1,445,463	31,819

2022년도 10월 조사한 강남지역 오피스의
평균 공실률은 1.53%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 257,728원으로 조사되었다.



■ GBD 지역 세부권역별 공실률/NOC



■ GBD 지역 규모 별 공실률/NOC

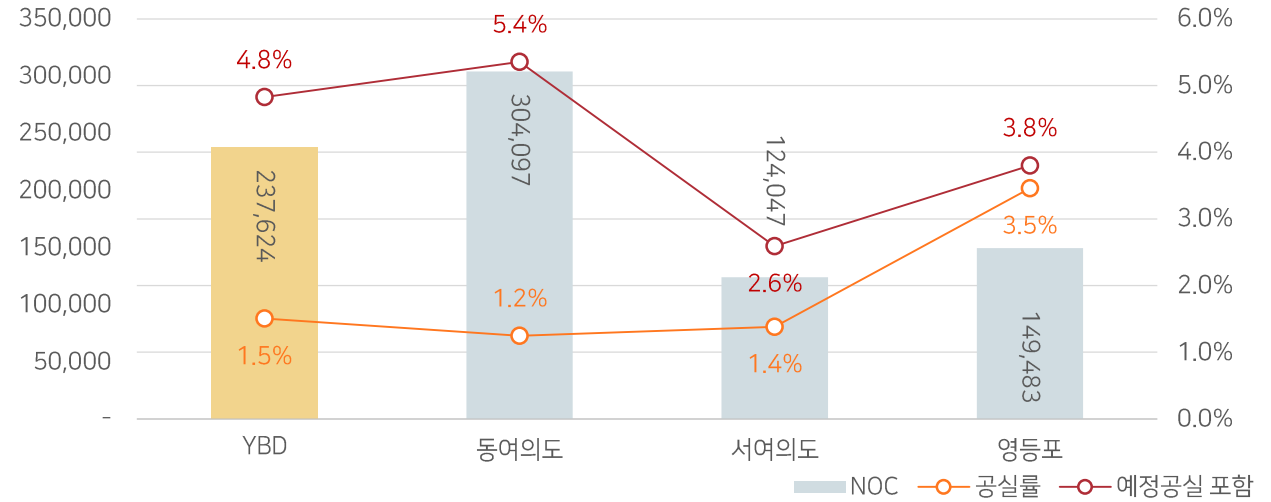
24 YBD 여의도, 영등포 권역

공실률
1.51% ↓

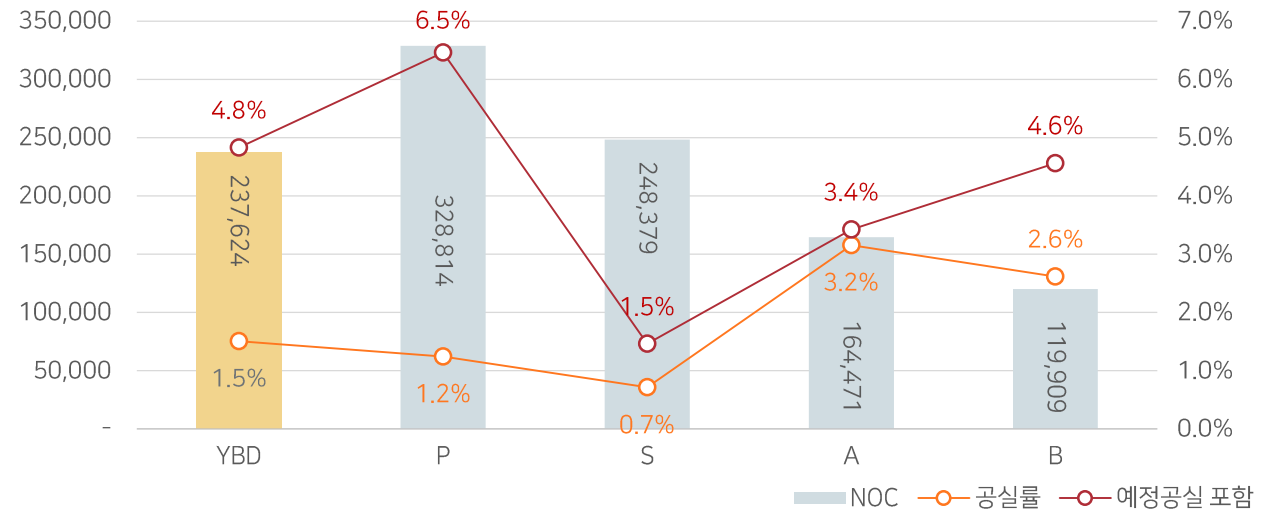
평균 NOC
₩ 237,624 ↑

평균 임대료	평균 보증금	평균 관리비
93,663	958,837	36,821

2022년도 10월 조사한 여의도, 영등포 지역
오피스의 평균 공실률은 1.51%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 237,624원으로 조사되었다.



■ YBD 지역세부권역별 공실률/NOC



■ YBD 지역규모 별 공실률/NOC

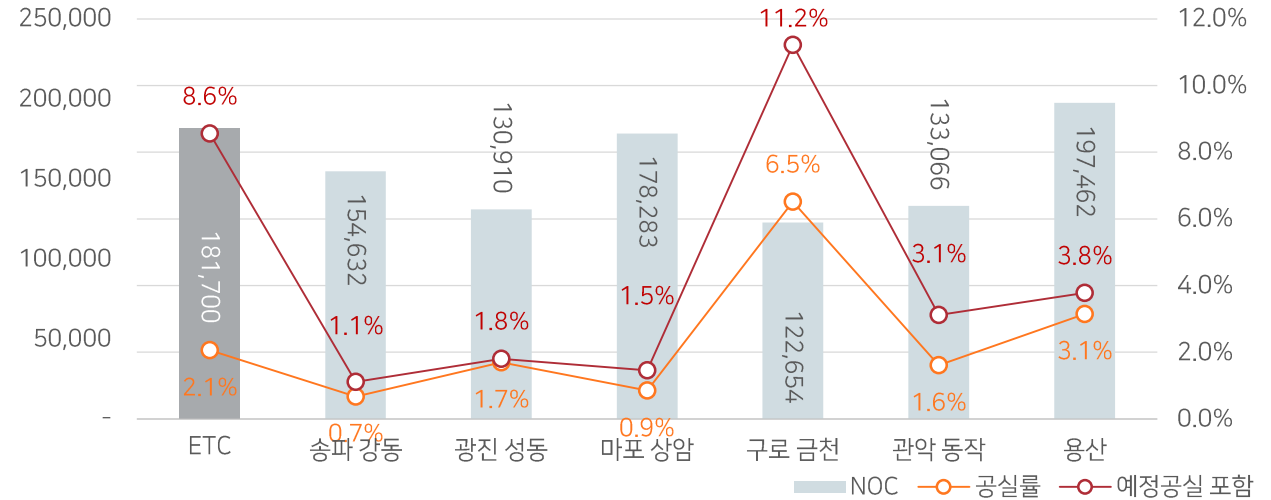
75 ETC 서울 기타권역

공실률
2.06% ↓

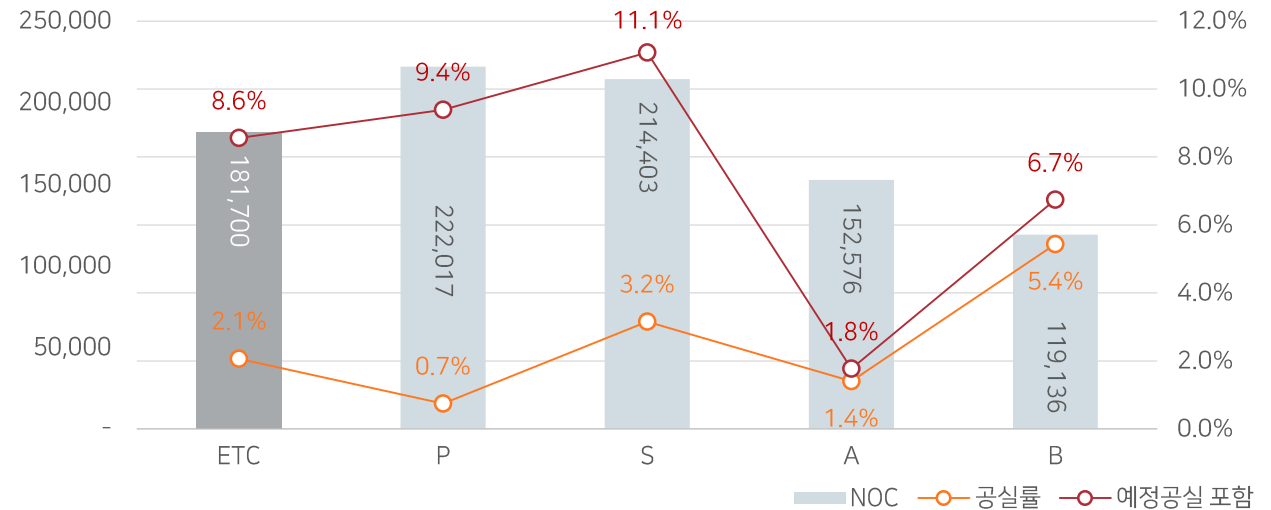
평균 NOC
₩ 181,700 ↓

평균 임대료	평균 보증금	평균 관리비
67,275	736,519	28,150

2022년도 10월 조사한 서울 기타지역 오피스의
평균 공실률은 2.06%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 181,700원으로 조사되었다.



ETC 지역 세부권역별 공실률/NOC



ETC 지역 규모별 공실률/NOC

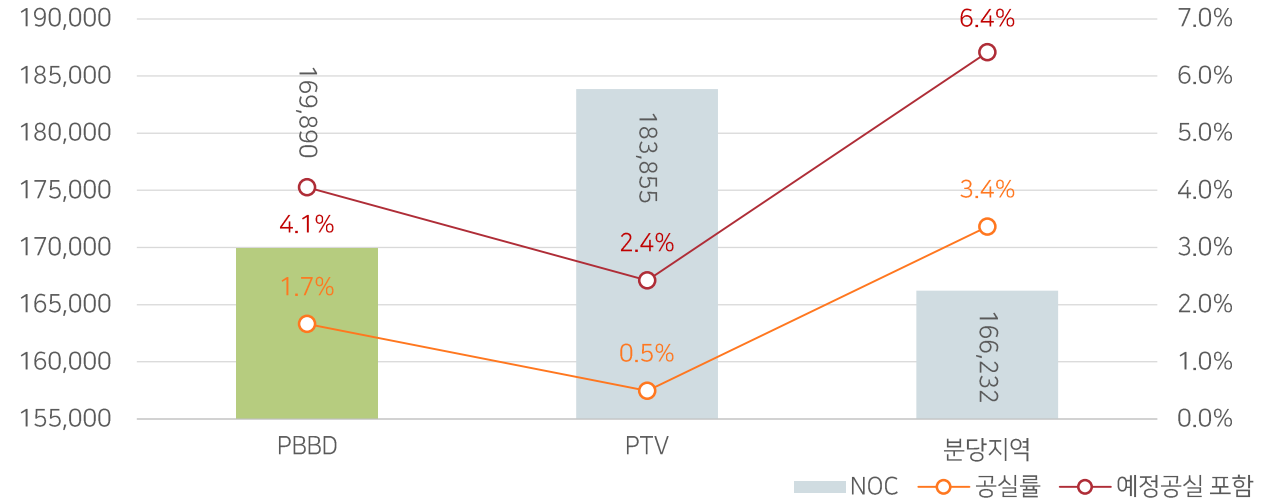
76 PBBD 판교, 분당 권역

공실률
1.66% ↑

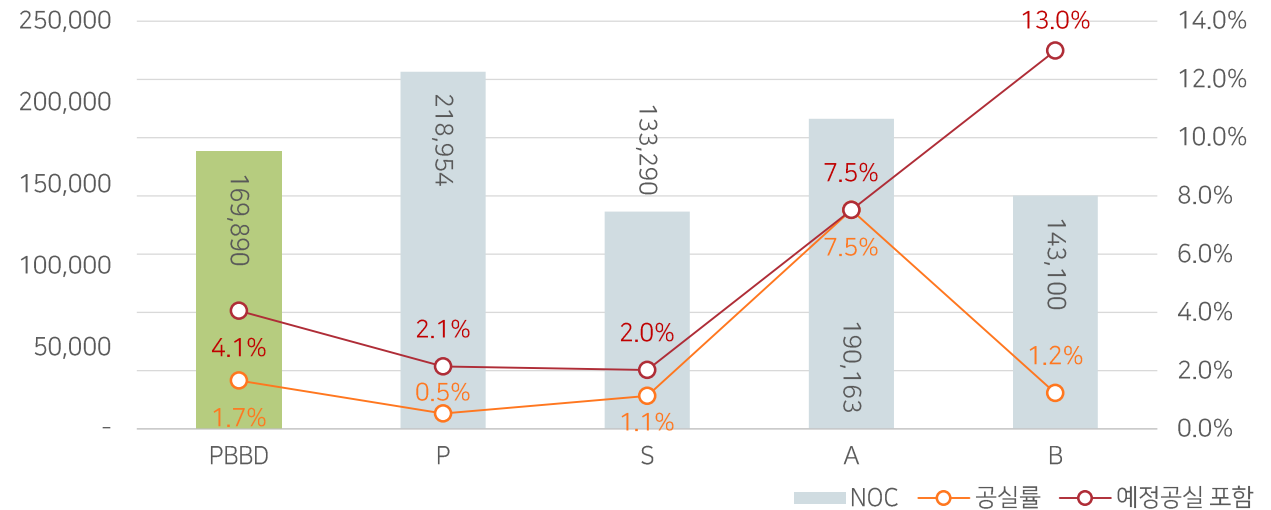
평균 NOC
₩ 169,890 ↓

평균 임대료	평균 보증금	평균 관리비
74,484	783,642	30,838

2022년도 10월 조사한 판교, 분당지역 오피스의
평균 공실률은 1.66%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 169,890원으로 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	271,312	995,891	100,458	36,251	233,669	2.56%
	시청역	292,005	742,469	75,085	33,856	173,719	1.99%
	종각역	297,489	793,794	79,992	35,298	192,317	1.08%
	을지로입구역	266,388	918,272	95,730	37,673	225,845	4.54%
GBD	테헤란로	1,001,254	1,843,050	164,692	39,688	340,531	1.16%
	강남대로	502,000	2,159,341	179,289	32,484	336,933	2.11%
	영동대로	194,020	919,149	78,964	32,450	233,145	0.55%
	도산대로	112,349	1,717,982	124,674	32,455	232,733	2.23%
	서초 교대	158,459	1,404,680	124,078	32,775	281,466	2.61%
YBD	동여의도	941,535	1,199,229	120,305	44,244	304,097	1.24%
	서여의도	169,366	489,658	47,196	24,540	124,047	1.38%
	영등포	137,111	727,743	59,756	25,035	149,483	3.46%
ETC	송파 강동	562,659	870,098	60,941	23,973	154,632	0.67%
	광진 성동	164,285	708,863	54,123	20,215	130,910	1.70%
	마포 상암	636,295	722,708	70,692	32,141	178,283	0.85%
	구로 금천	268,761	534,755	50,226	17,720	122,654	6.52%
	관악 동작	160,758	729,634	50,284	19,489	133,066	1.61%
	용산	226,682	780,545	75,100	34,268	197,462	3.15%
PBBD	PTV	406,554	728,650	74,361	27,900	183,855	0.49%
	분당지역	279,618	798,045	74,517	31,538	166,232	3.36%

지역 별 사용승인 현황

권역	빌딩명	소재지	주용도	연면적(㎡)	연면적(3.3㎡)	사용승인일
CBD	LeMERIDIEN moxy	중구 충무로1가	숙박시설	40,976	12,395	26-Sep
	지성빌딩	중구 명동2가	제1종근린생활시설	1,849	559	27-Sep
	명동행정문화복합센터	중구 충무로1가	문화및집회시설	1,630	493	26-Sep
GBD	AMC 타워	강남구 역삼동	업무시설	8,916	2,697	08-Sep
	크레타나인	강남구 논현동	업무시설	3,609	1,092	15-Sep
	프로빌딩	서초구 잠원동	제2종근린생활시설	1,684	509	28-Sep
	SOL 빌딩	강남구 대치동	제2종근린생활시설	1,338	405	07-Sep
YBD	인투타워	영등포구 양평동4가	제2종근린생활시설	1,555	470	13-Sep
	M타워	영등포구 양평동5가	제1종근린생활시설	1,451	439	07-Sep
ETC	위더스빌딩	송파구 석촌동	제2종근린생활시설	2,218	671	29-Sep
	LG베스트샵	구로구 고척동	판매시설	2,143	648	16-Sep
	삼미빌딩	강북구 번동	제1종근린생활시설	2,028	613	05-Sep
	센트럴 메디	관악구 신림동	제1종근린생활시설	1,752	530	21-Sep
	장안동 상영빌딩	동대문구 장안동	제2종근린생활시설	1,627	492	19-Sep
	스튜디오삼익	마포구 상수동	업무시설	1,246	377	06-Sep

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, October 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 = 1,421.00 KRW (0.70 USD = 1,000 KRW) as of 4th November 2022

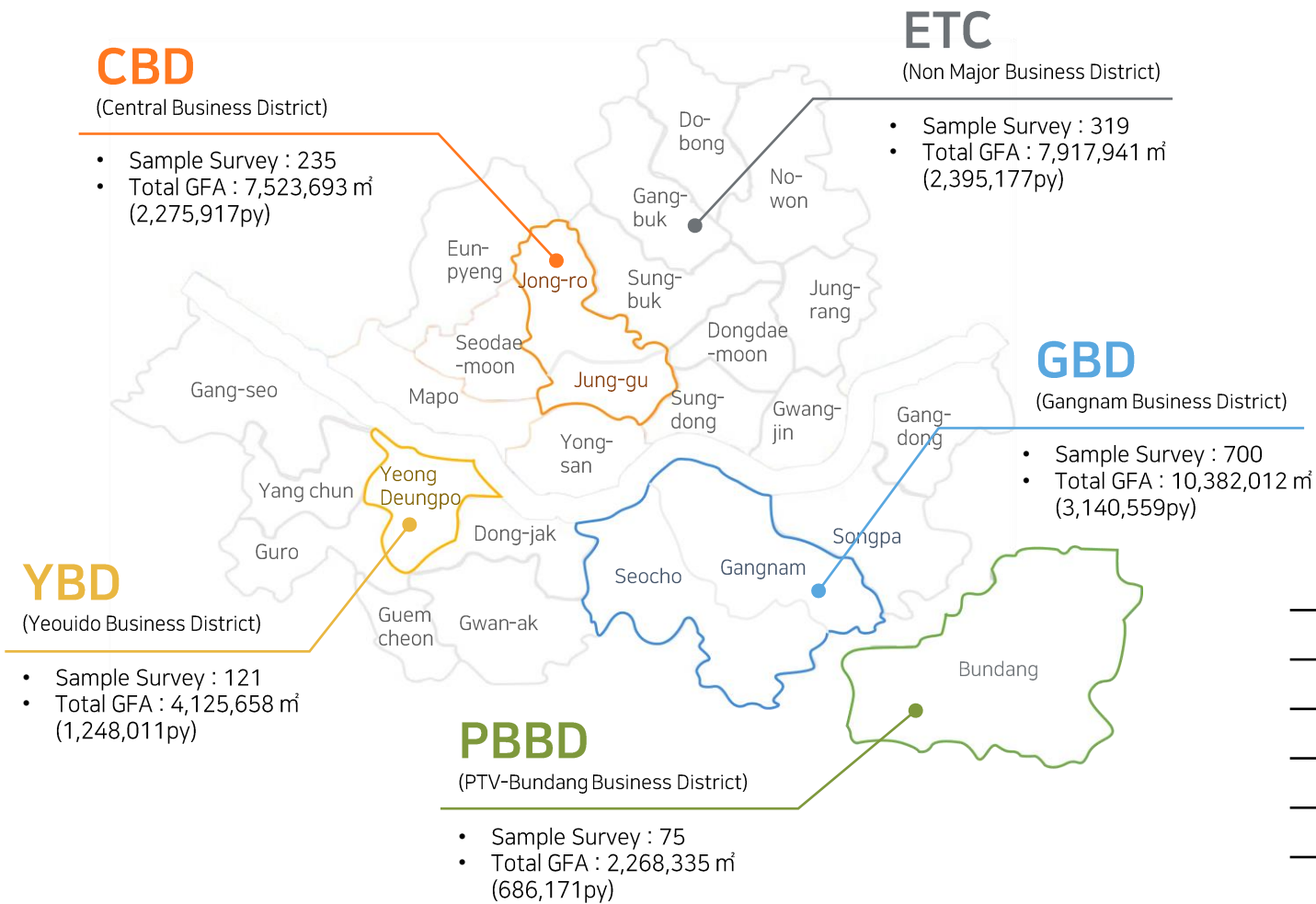
5 Regional Divisions in Seoul

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 1,450

	P	S	A	B
CBD	45	68	34	88
GBD	30	81	98	491
YBD	20	25	32	44
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• 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

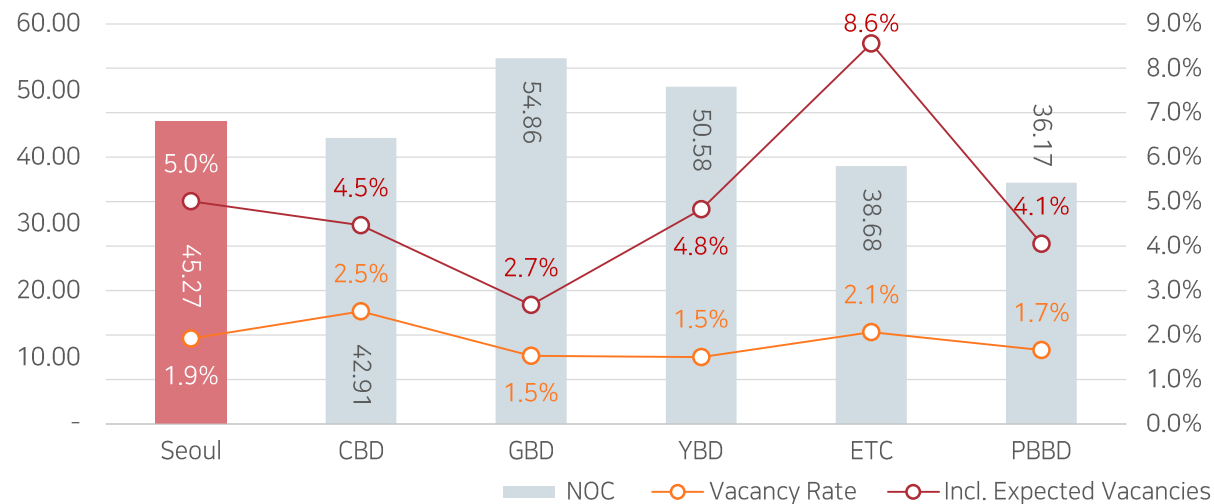
1.92% ↓

Avg, NOC

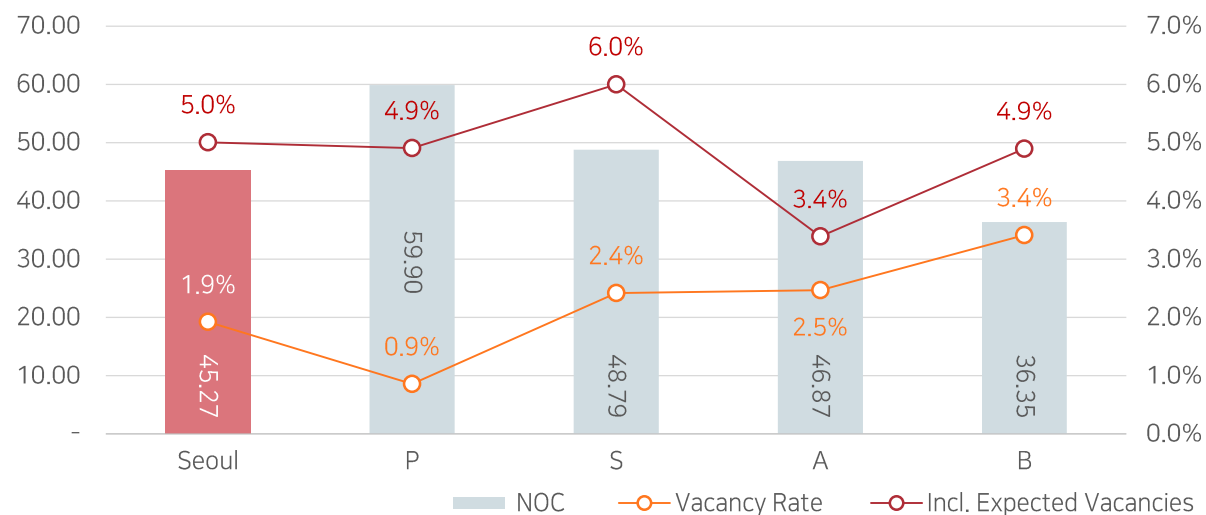
\$45.27 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
19.03	208.79	7.01

The average vacancy rate of the office buildings in Seoul is 1.92 % as of October 2022, and the average NOC is \$ 45.27.



■ Vacancy Rate & NOC in Seoul and Each District



■ Vacancy Rate & NOC in Seoul & Each Building Category

01 SBD Seoul Capital Area

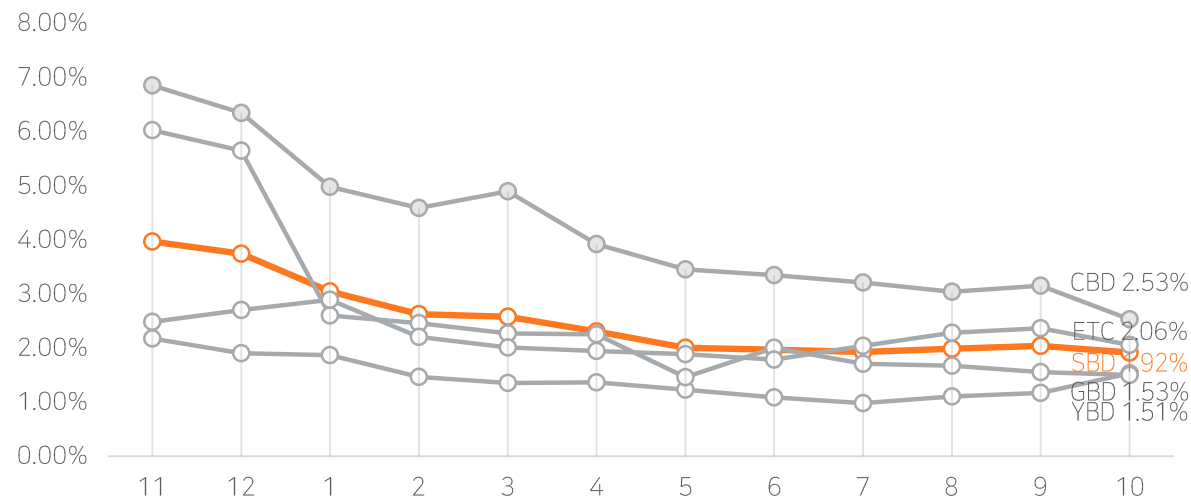
The following charts indicate the vacancy level of Seoul during October 2022.

Concordian Tower in CBD filled the vacant units of 6,170m² by the new tenant, Binggrae. In addition, the office space of 2,090m² in D-Tower and of 5,370m² in Seoul Square Building will come on the lease market in CBD by December 2022 and August 2023, respectively. Out of this office space, Fursys Gwanghwamun Center is renting the 1 floor in D-Tower and KG Steel Corporation is renting the 1 floor in Seoul Square Building, at the moment.

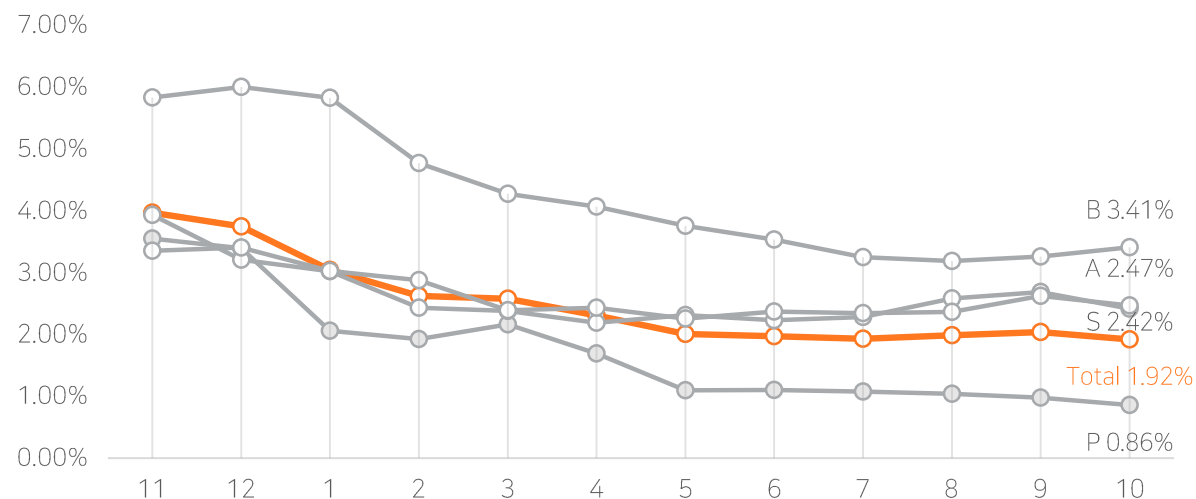
GN Building, the new-built in GBD achieved the occupancy rate of 100% to the available leasing area of 2,480m², thanks to the quality tenant, the affiliate of SM Entertainment Ltd.

In YBD, the office space of 2,530m² in KC Tower, currently rented by Community Media Foundation, came on the lease market and another 1,690m² of the 2 floors in KC Tower, currently rented by Hyundai Capital and Hyundai Card, will come on the market by February 2023.

Additionally, the 5 floors equivalent with 3,090m² in S Tower, currently occupied by R Support Co., Ltd., will come on the lease market in January 2023.



Monthly Vacancy Rate in 5 Main Districts



Monthly Vacancy Rate for Different Size of Buildings

02 CBD Central Seoul

Vacancy rate

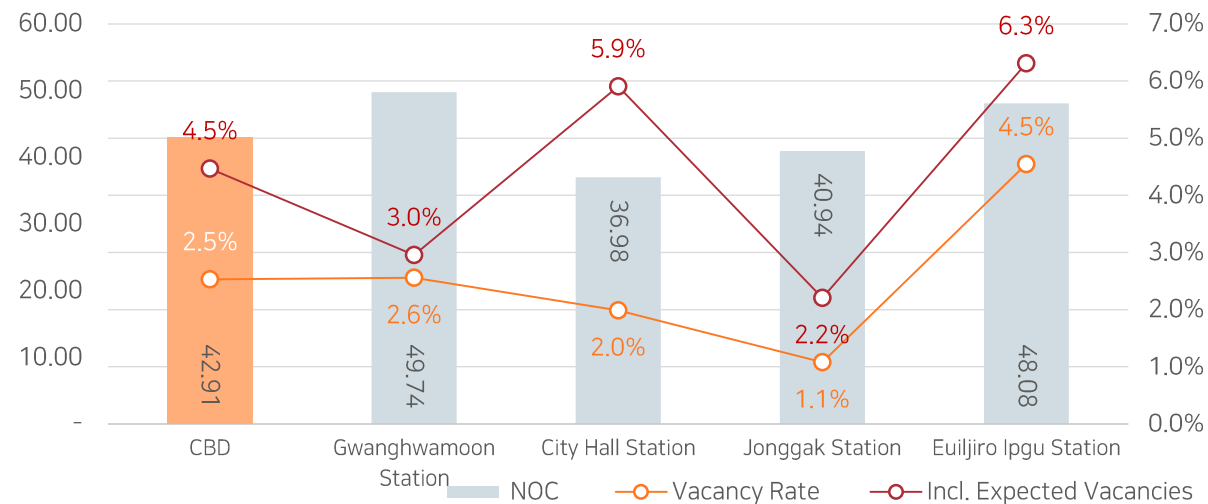
2.53% ↓

Avg, NOC

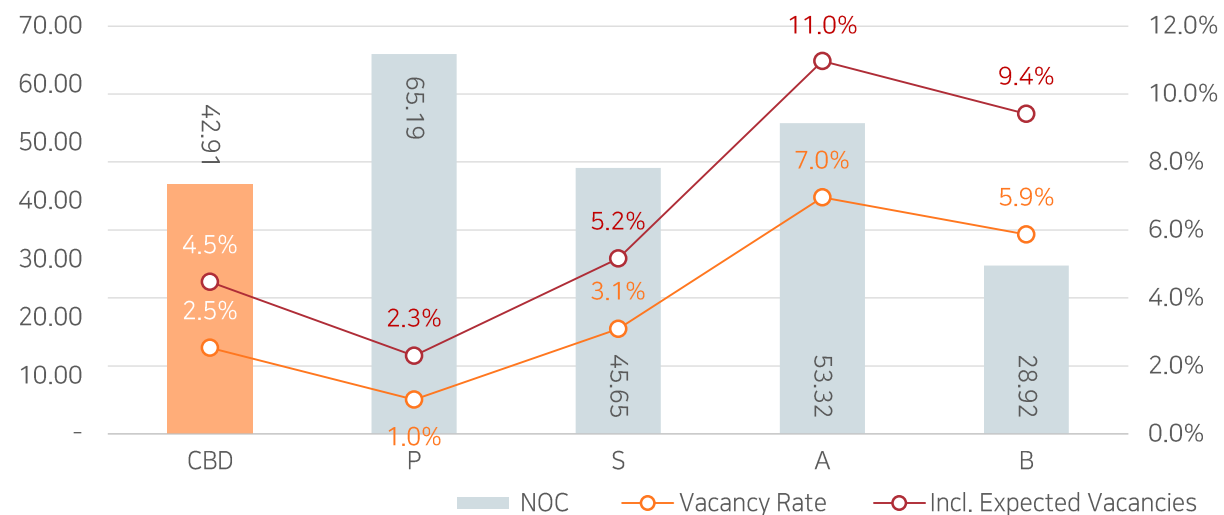
\$42.91 ↓

Avg. Rent	Avg. Deposit	Avg. Management Fee
18.26	189.81	7.56

The average vacancy rate of the office buildings in CBD is 2.53 % as of October 2022, and the average NOC is \$ 42.91.



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



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

GBD Gangnam

Vacancy rate

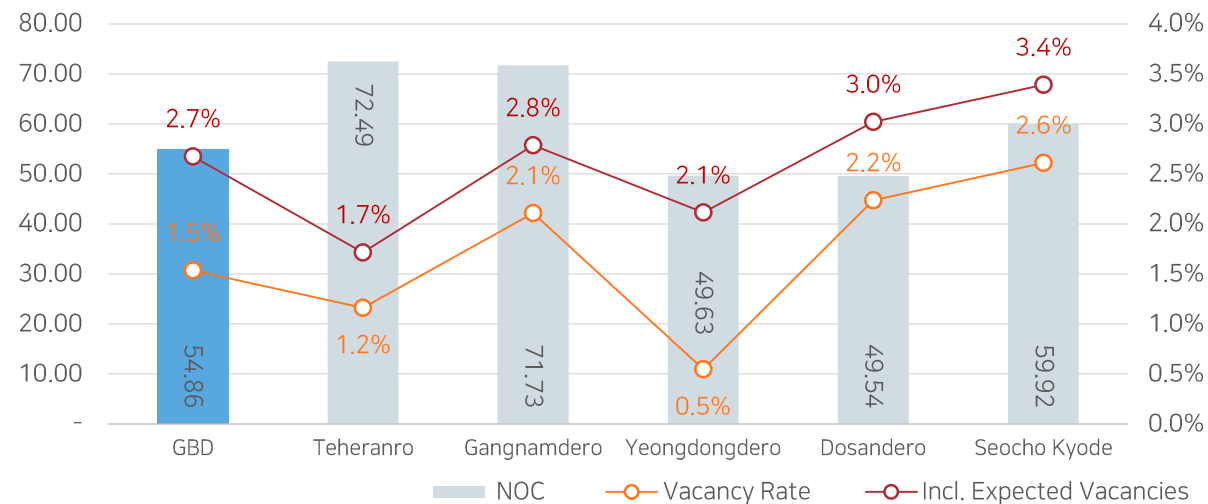
1.53% ↑

Avg, NOC

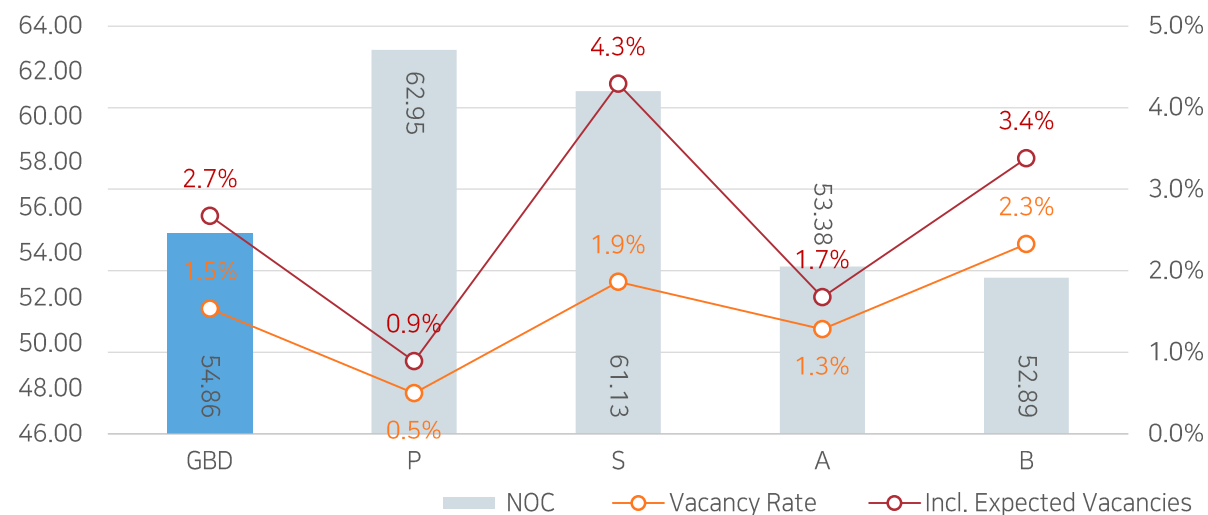
\$ 54.86 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
25.64	307.71	6.77

The average vacancy rate of the office buildings in GBD is 1.53 % as of October 2022, and the average NOC is \$ 54.86.



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



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

24 YBD Yeouido & Yeongdeungpo

Vacancy rate

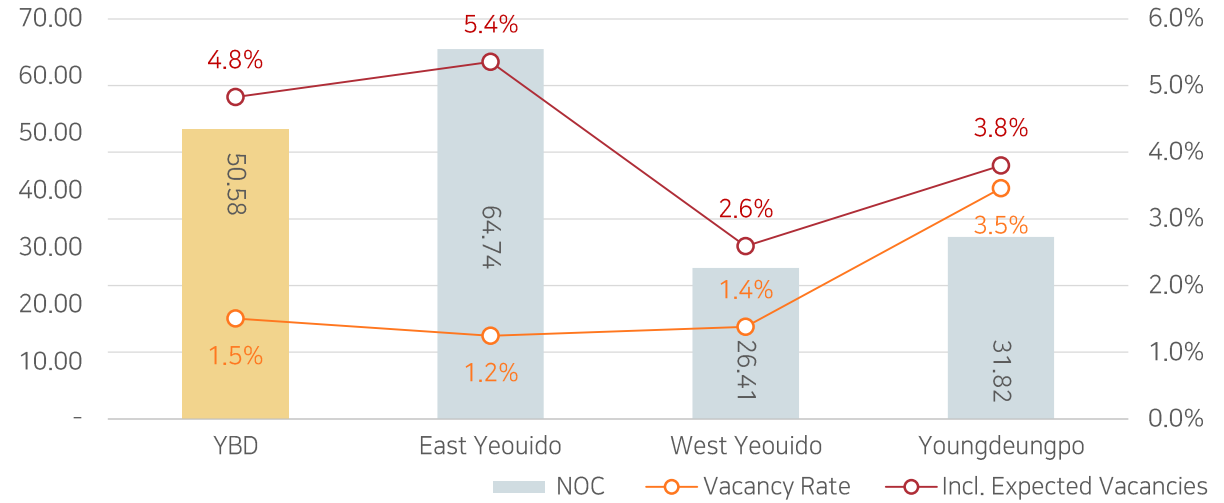
1.51 % ↓

Avg, NOC

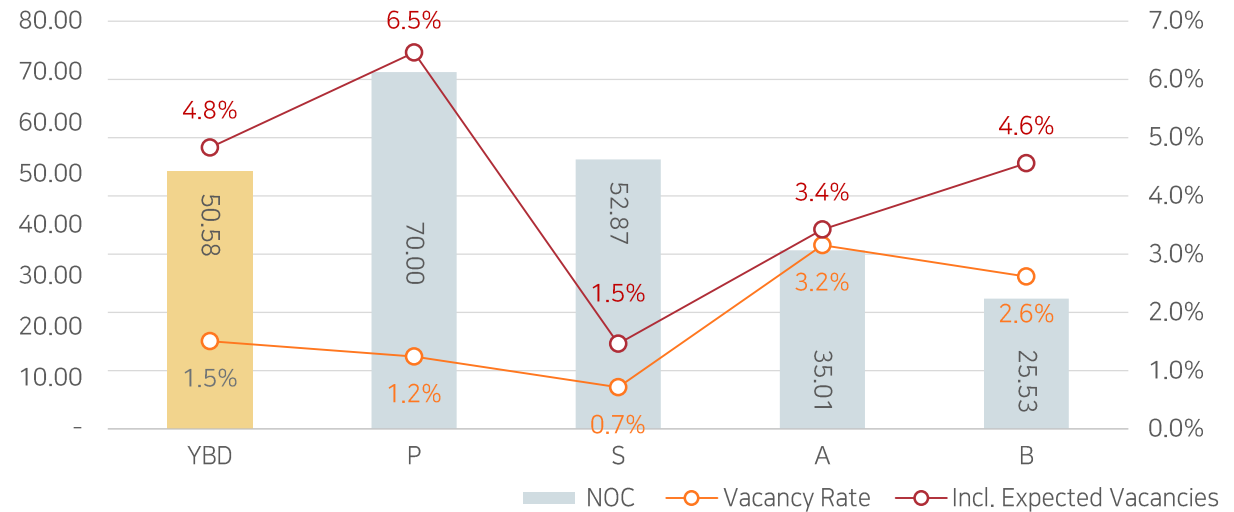
\$ 50.58 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
19.94	204.12	7.84

The average vacancy rate of the office buildings in YBD is 1.51 % as of October 2022, and the average NOC is \$ 50.58.



■ 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

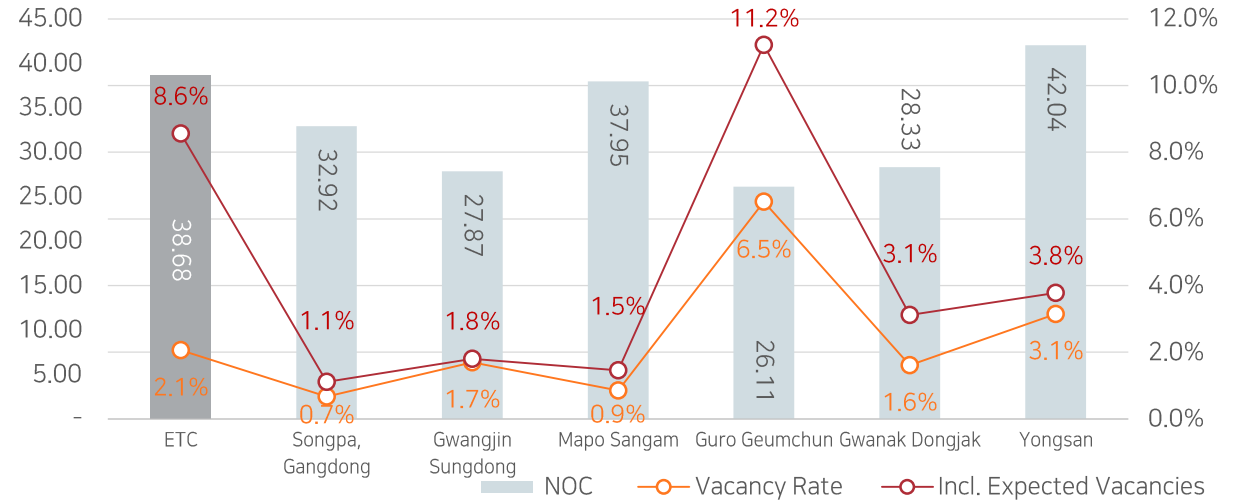
2.06 % ↓

Avg, NOC

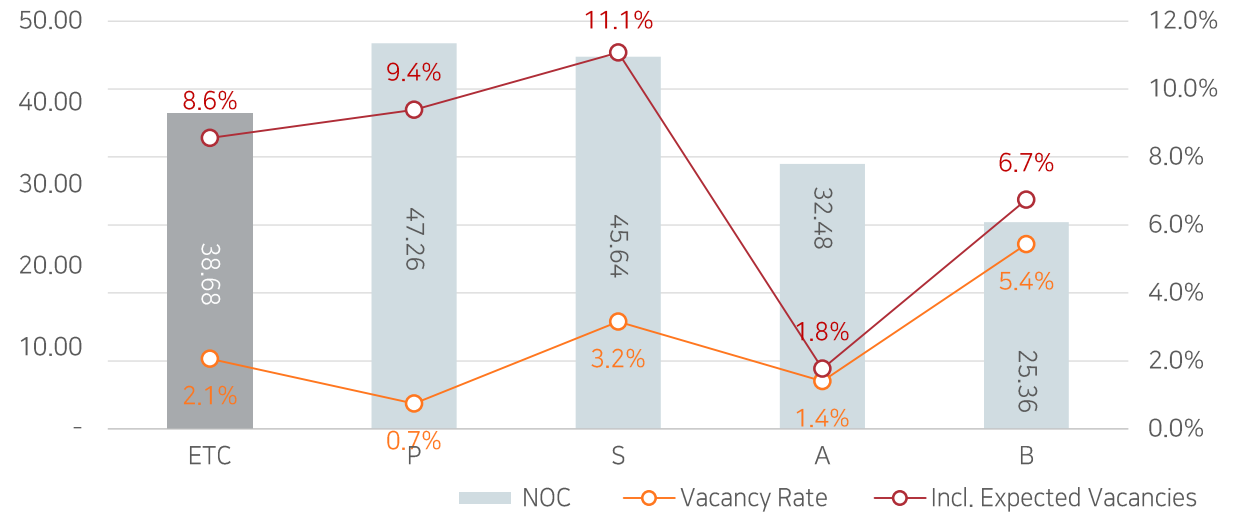
\$ 38.68 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
14.32	156.79	5.99

The average vacancy rate of the office buildings in ETC is 2.06 % as of October 2022, and the average NOC is \$ 38.68.



■ 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

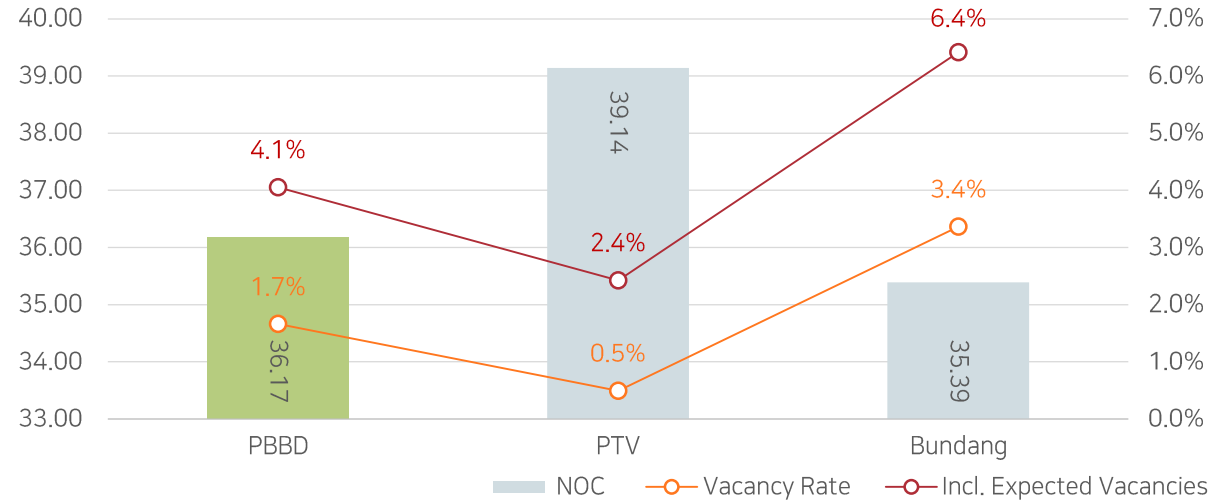
1.66 % ↑

Avg, NOC

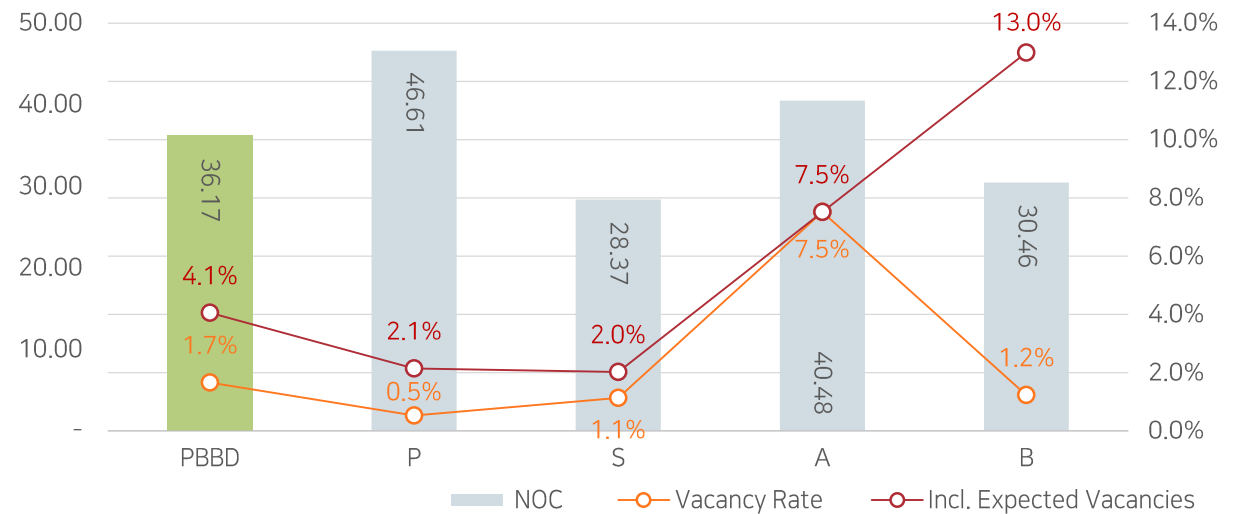
\$ 36.17 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
15.86	166.82	6.56

The average vacancy rate of the office buildings in PBBD is 1.66 % as of October 2022, and the average NOC is \$ 36.17.



■ 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	896,899	212.00	21.39	7.72	49.74	2.56%
	City Hall Station	965,306	158.06	15.98	7.21	36.98	1.99%
	Jonggak Station	983,434	168.98	17.03	7.51	40.94	1.08%
	Euiljiro Ipgu Station	880,622	195.48	20.38	8.02	48.08	4.54%
GBD	Teheranro	3,309,930	392.35	35.06	8.45	72.49	1.16%
	Gangnamdero	1,659,505	459.68	38.17	6.92	71.73	2.11%
	Yeongdongdero	641,390	195.67	16.81	6.91	49.63	0.55%
	Dosandero	371,401	365.72	26.54	6.91	49.54	2.23%
	Seocho Gyodae	523,831	299.03	26.41	6.98	59.92	2.61%
YBD	East Yeouido	3,112,511	255.29	25.61	9.42	64.74	1.24%
	West Yeouido	559,888	104.24	10.05	5.22	26.41	1.38%
	Youngdeungpo	453,258	154.92	12.72	5.33	31.82	3.46%
ETC	Songpa, Gangdong	1,860,028	185.22	12.97	5.10	32.92	0.67%
	Gwangjin Sungdong	543,091	150.90	11.52	4.30	27.87	1.70%
	Mapo Sangam	2,103,453	153.85	15.05	6.84	37.95	0.85%
	Guro Geumchun	888,467	113.84	10.69	3.77	26.11	6.52%
	Gwanak Dongjak	531,431	155.32	10.70	4.15	28.33	1.61%
	Yongsan	749,362	166.16	15.99	7.29	42.04	3.15%
PBBD	PTV	1,343,979	155.11	15.83	5.94	39.14	0.49%
	Bundang	924,356	169.89	15.86	6.71	35.39	3.36%



Land Use Information by District

District	Building Name	Address	Land Use	GFA (㎡)	Completion
CBD	LeMERIDIEN moxy	Chungmuro 1-ga Jung-gu	Hospitality	40,976	26-Sep
	Jisung Building	Myeong-dong 2-ga Jung-gu	#1 Commercial	1,849	27-Sep
	Myeong-dong Admin Cultural Center	Chungmuro 1-ga Jung-gu	Cultural & Social	1,630	26-Sep
GBD	AMC Tower	Yeoksam-dong Gangnam-gu	Office	8,916	08-Sep
	Cretanine	Nonhyeon-dong Gangnam-gu	Office	3,609	15-Sep
	Pro Building	Jamwon-dong Seocho-gu	#2 Commercial	1,684	28-Sep
	SOL Building	Daechi-dong Gangnam-gu	#2 Commercial	1,338	07-Sep
YBD	Into Tower	Yangpyeong-dong 4-ga Yeongdeungpo-gu	#2 Commercial	1,555	13-Sep
	M Tower	Yangpyeong-dong 5-ga Yeongdeungpo-gu	#1 Commercial	1,451	07-Sep
ETC	Withus Building	Seokchon-dong Songpa-gu	#2 Commercial	2,218	29-Sep
	LG Best Shop	Gocheok-dong Guro-gu	Sales	2,143	16-Sep
	Sammi Building	Beon-dong Gangbuk-gu	#1 Commercial	2,028	05-Sep
	Central Medi	Sillim-dong Gwanak-gu	#1 Commercial	1,752	21-Sep
	Sangyoung Building	Jangan-dong Dongdaemun-gu	#2 Commercial	1,627	19-Sep
	Studio Samik	Sangsu-dong Mapo-gu	Office	1,246	06-Sep



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