

SEOUL OFFICE LEASING

February 2023 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	2023년 1월 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

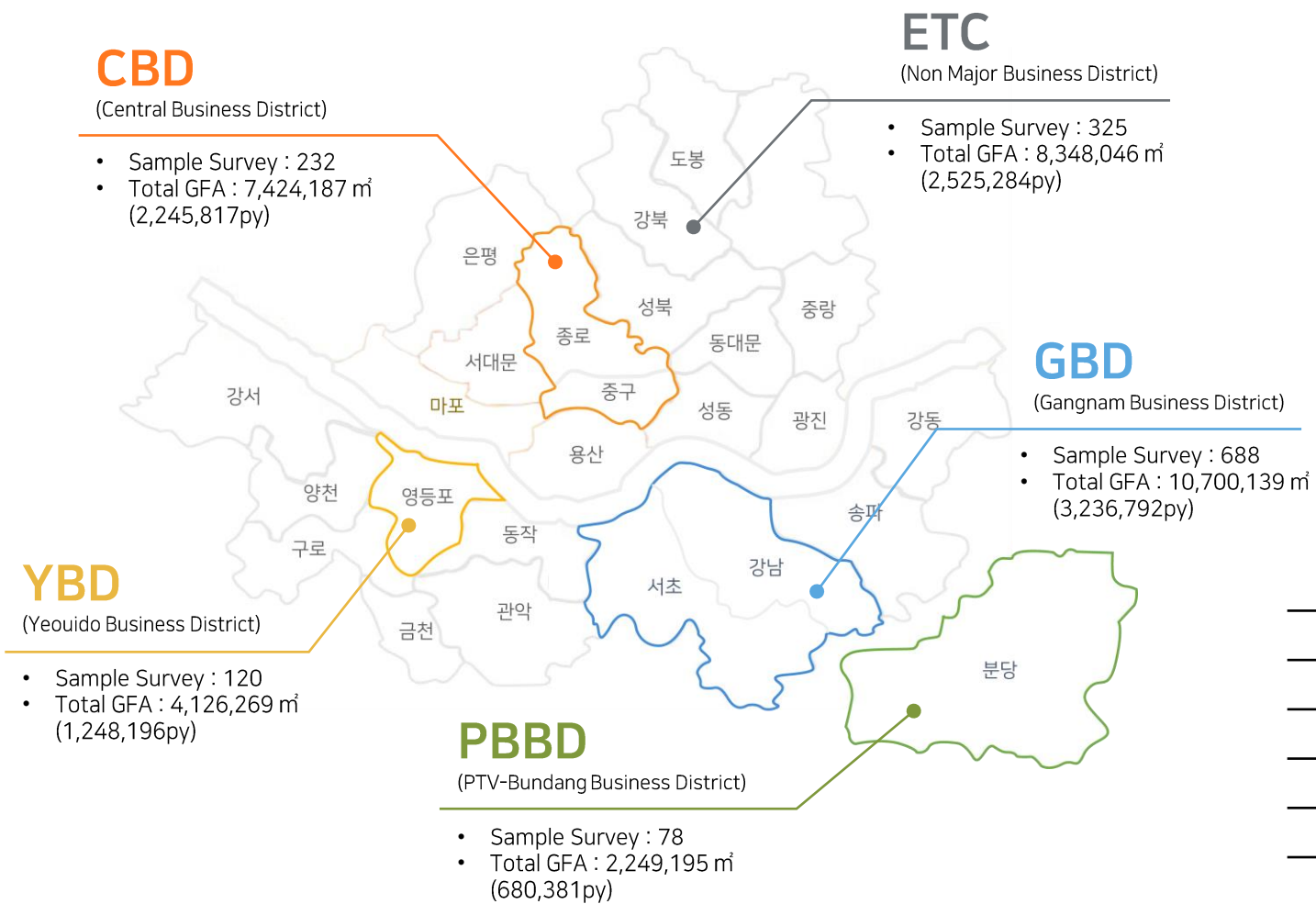
여의도권
여의도, 영등포구 일대

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 1,443

	P	S	A	B
CBD	44	67	34	87
GBD	32	86	91	479
YBD	20	25	33	42
ETC	47	60	58	160
PBBD	11	16	18	33

• 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

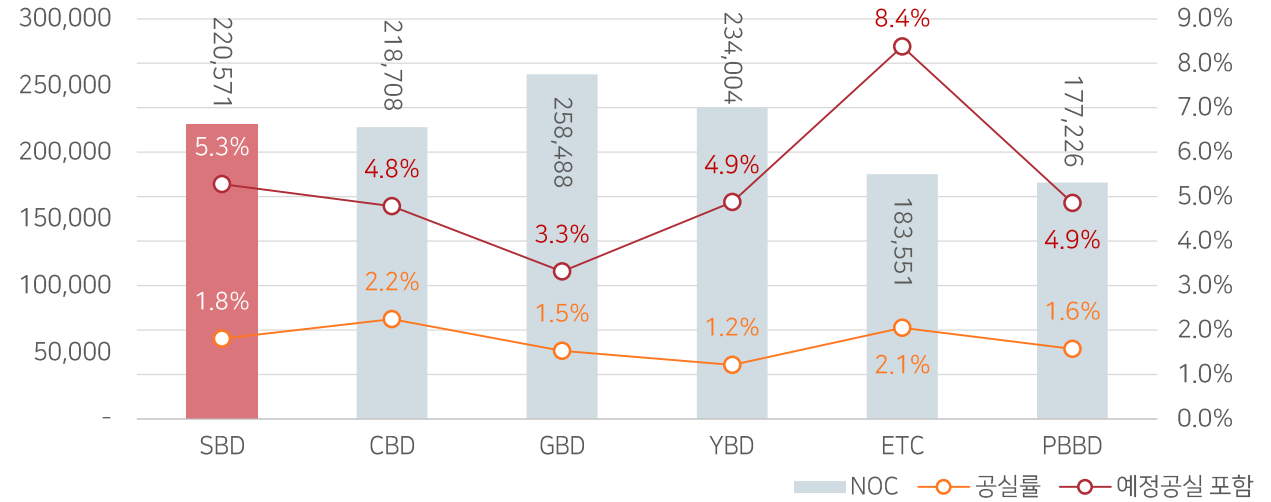
01 SBD 서울 전체

공실률
1.80% ↑

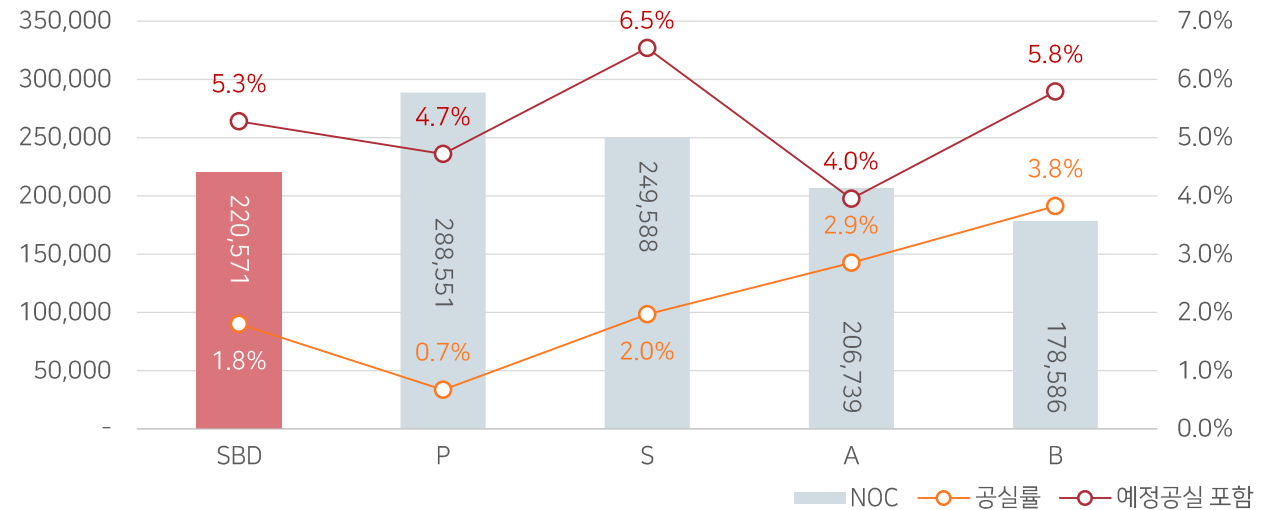
평균 NOC
₩ 220,571 ↑

평균 임대료	평균 보증금	평균 관리비
92,713	1,012,581	33,347

2023년도 1월 조사한 서울지역 오피스의
평균 공실률은 1.80%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 220,571원으로 조사되었다.



■ 서울 전체 권역 별 공실률 / NOC



■ 서울 전체 규모 별 공실률 / NOC

01 SBD 서울 전체

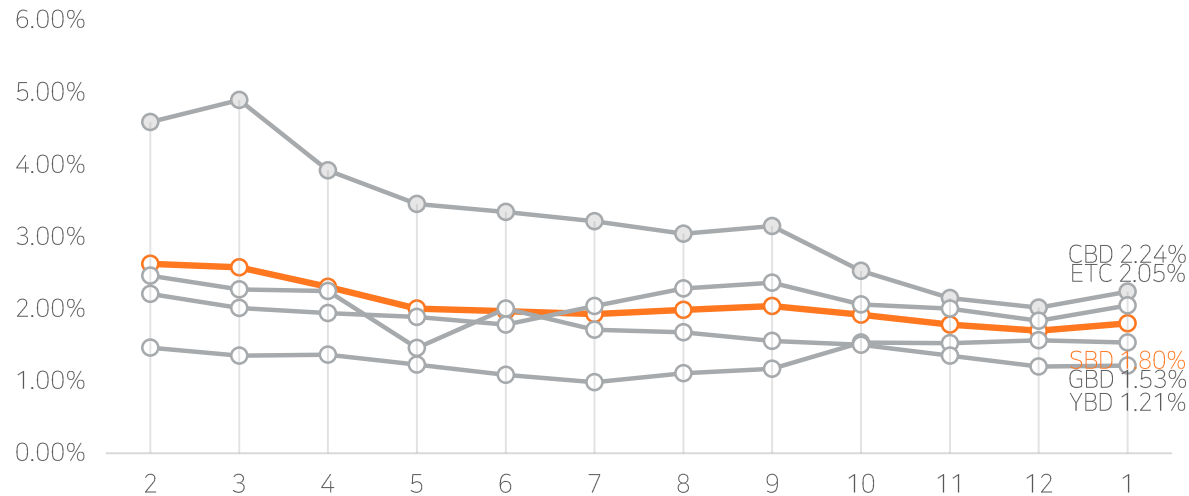
2023년 1월 서울권역의 공실률 흐름은 다음과 같이 조사되었다.

CBD의 태평로빌딩에 보람상조 본사가 사용중인 4개층 1,910평이 내년 1월 임대시장에 추가될 예정이다.

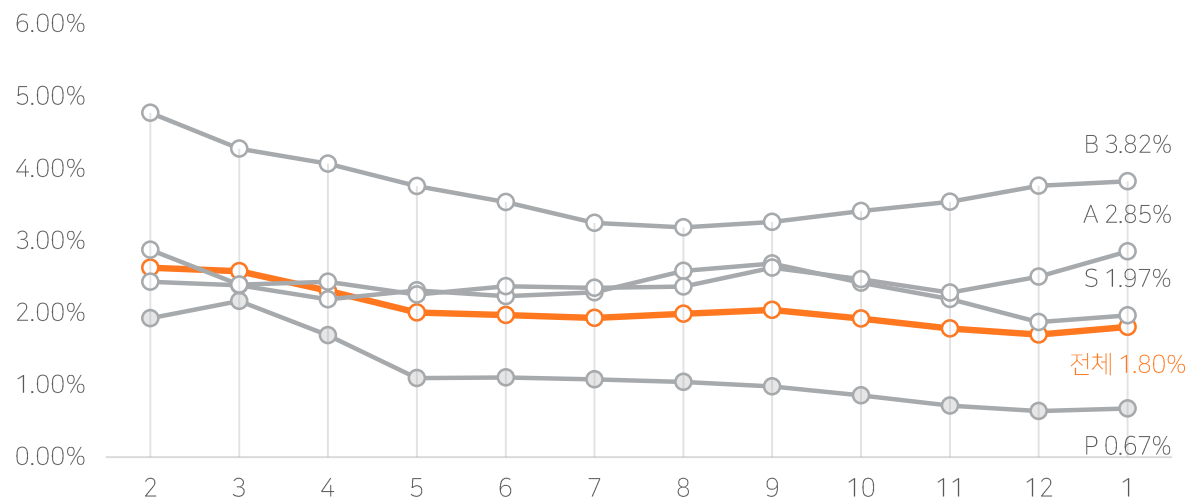
GBD의 L7강남타워에 에이슬립, 코드스테이츠, 해치랩스 등이 입주하며 총 3개층 1,580평의 공실이 해소되었고, 참존대치사옥에 폴리이에스씨가 3개층 1,040평의 공실이 해소되었다.

YBD의 현대차증권빌딩에 신한아이타스가 입주하며 3개층 1,690평의 공실이 해소되었고, 제일빌딩에서 대주중공업이 사용중인 3개층 990평의 면적이 5월에 임대시장에 나올 예정이다.

BBD의 휴맥스빌리지에는 플레이링스가 입주하며 1,130평의 면적이 해소되었다.



■ 서울 권역별 공실률 변화



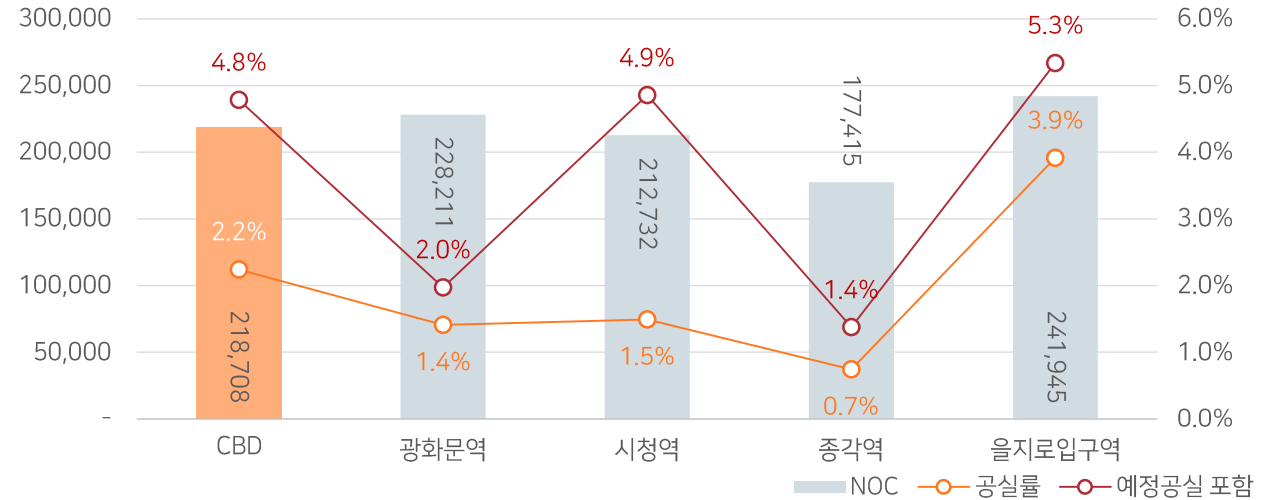
■ 서울 규모별 공실률 변화

02 CBD 도심권역

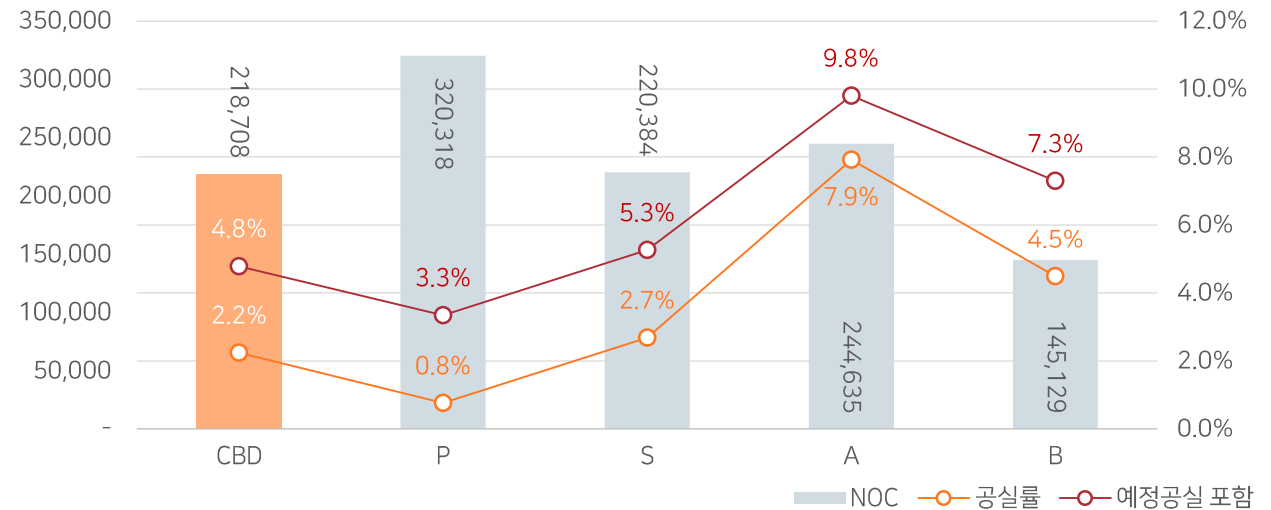
공실률 2.24% ↑ | 평균 NOC ₩ 218,708 ↑

평균 임대료	평균 보증금	평균 관리비
89,612	925,625	37,196

2023년도 1월 조사한 도심지역 오피스의 평균 공실률은 2.24%로 조사되었으며, 전용면적 1평당 사용할 때 드는 비용을 계산한 평균 NOC는 218,708원으로 조사되었다.



■ CBD 지역 세부권역별 공실률/NOC



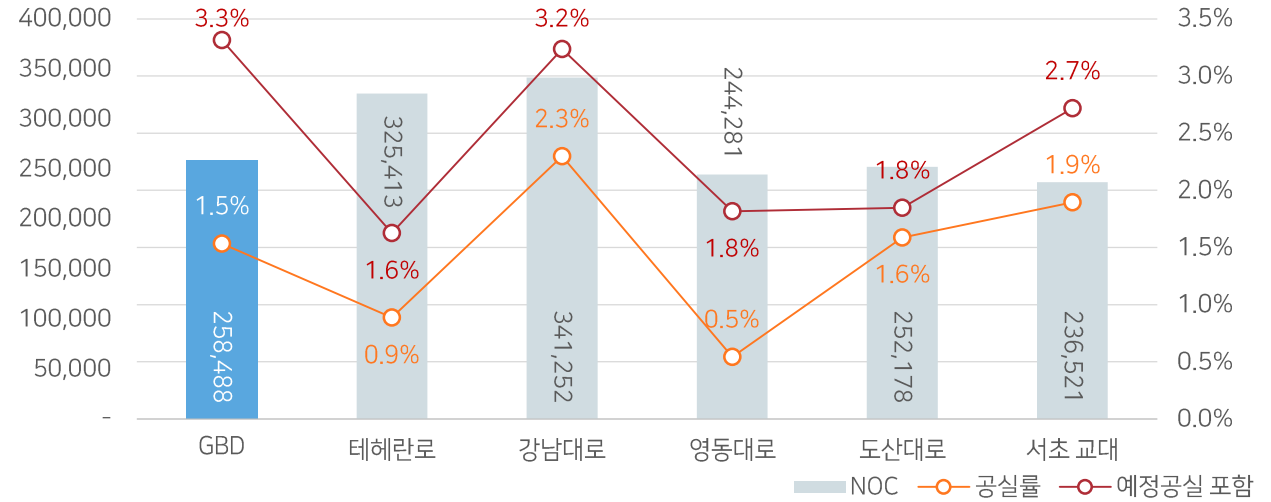
■ CBD 지역 규모별 공실률/NOC

73 GBD 강남권역

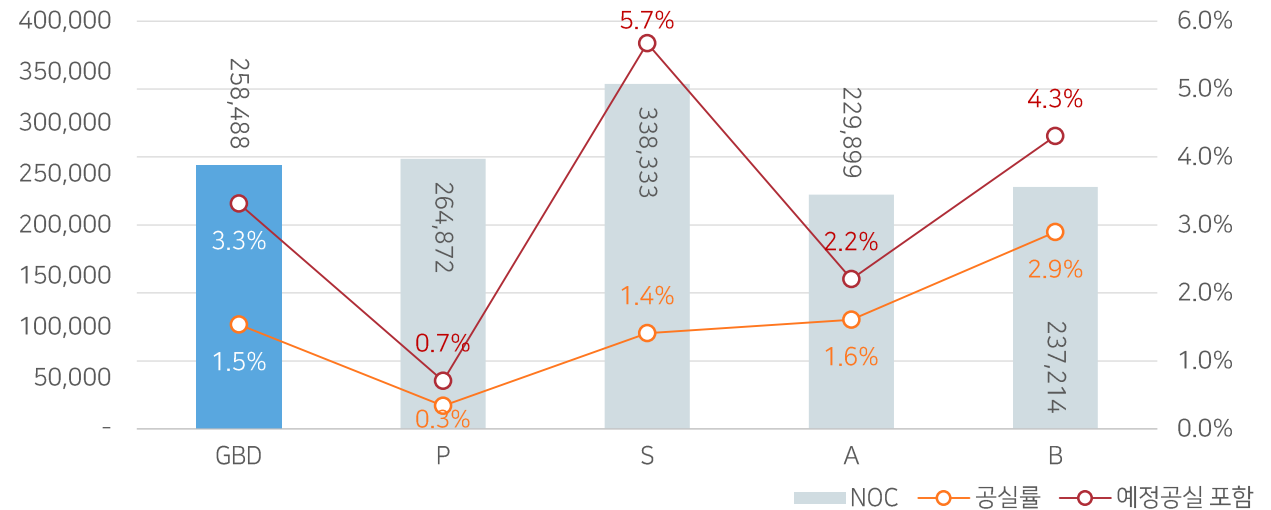
공실률 1.53% ↓ 평균 NOC ₩ 258,488 ↓

평균 임대료	평균 보증금	평균 관리비
121,068	1,404,944	32,118

2023년도 1월 조사한 강남지역 오피스의 평균 공실률은 1.53%로 조사되었으며, 전용면적 1평당 사용할 때 드는 비용을 계산한 평균 NOC는 258,488원으로 조사되었다.



GBD 지역 세부권역별 공실률/NOC



GBD 지역 규모 별 공실률/NOC

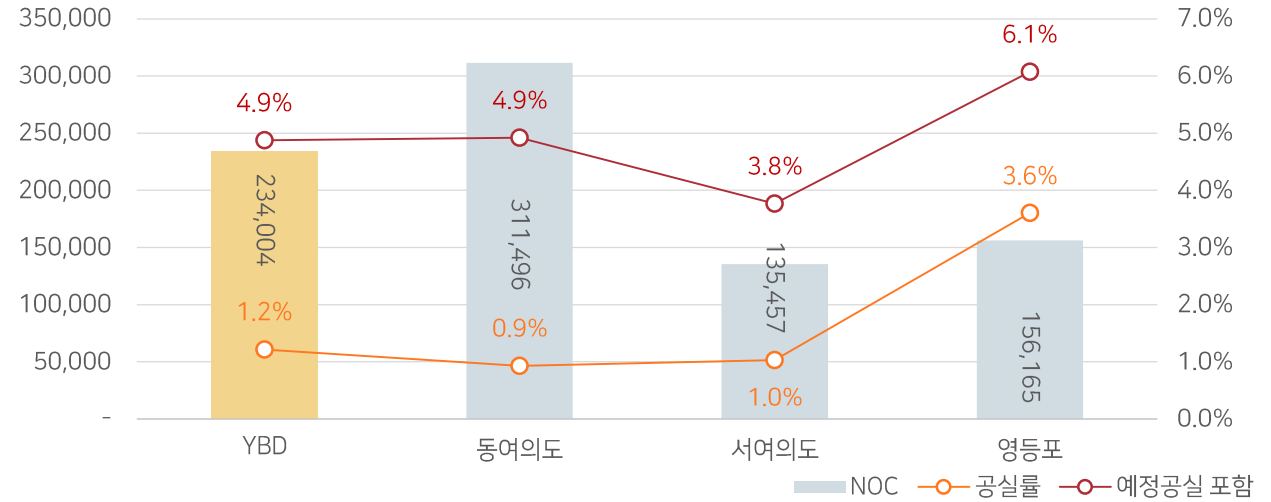
24 YBD 여의도, 영등포 권역

공실률
1.21% ↑

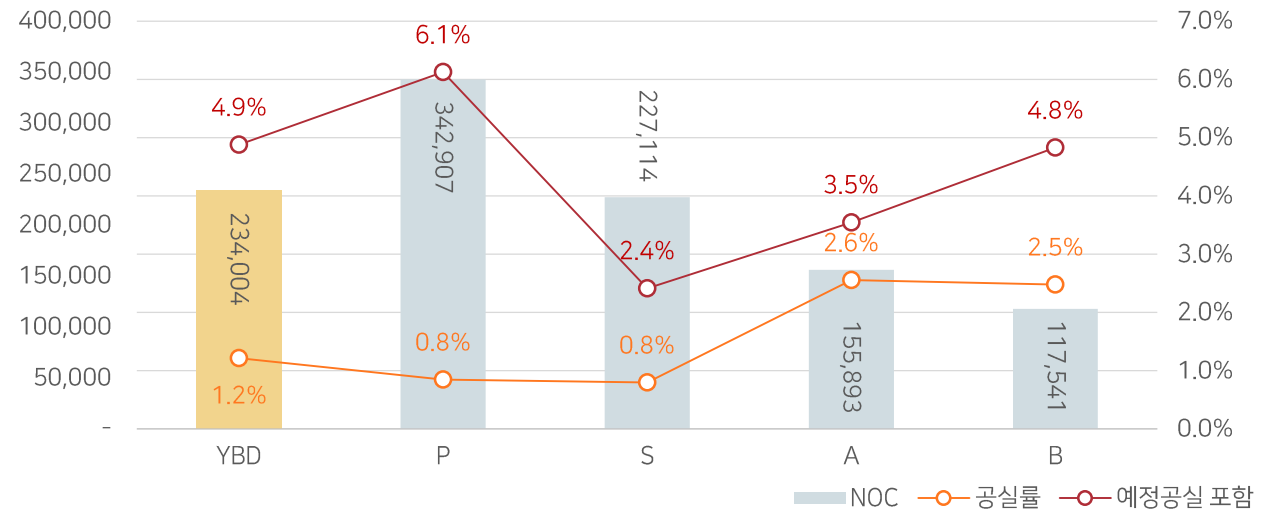
평균 NOC
₩ 234,004 ↑

평균 임대료	평균 보증금	평균 관리비
89,090	921,453	36,284

2023년도 1월 조사한 여의도, 영등포 지역
오피스의 평균 공실률은 1.21%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 234,004원으로 조사되었다.



■ YBD 지역세부권역별 공실률/NOC



■ YBD 지역규모 별 공실률/NOC

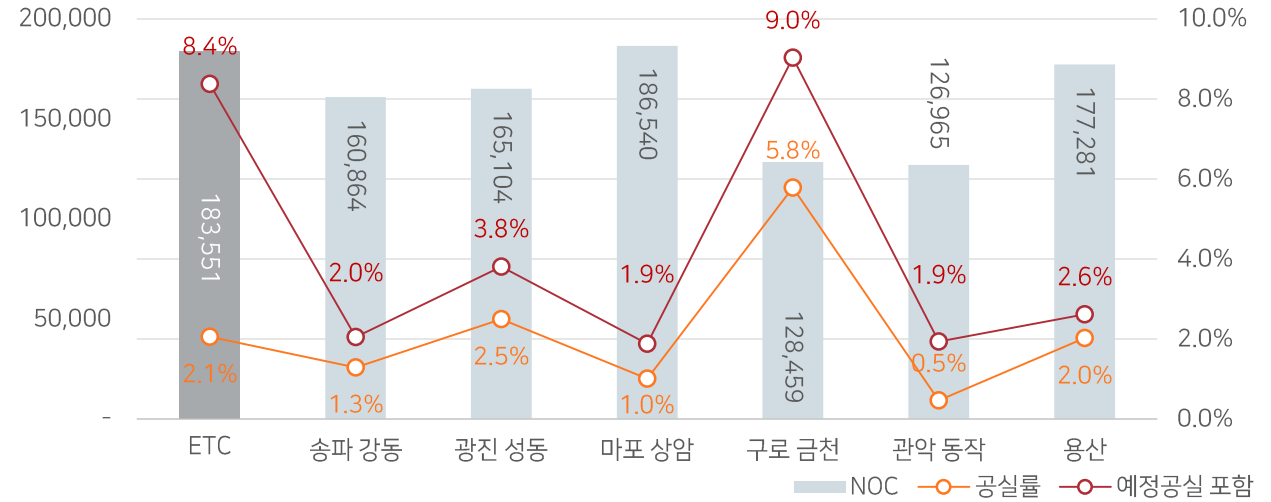
75 ETC 서울 기타권역

공실률
2.05% ↑

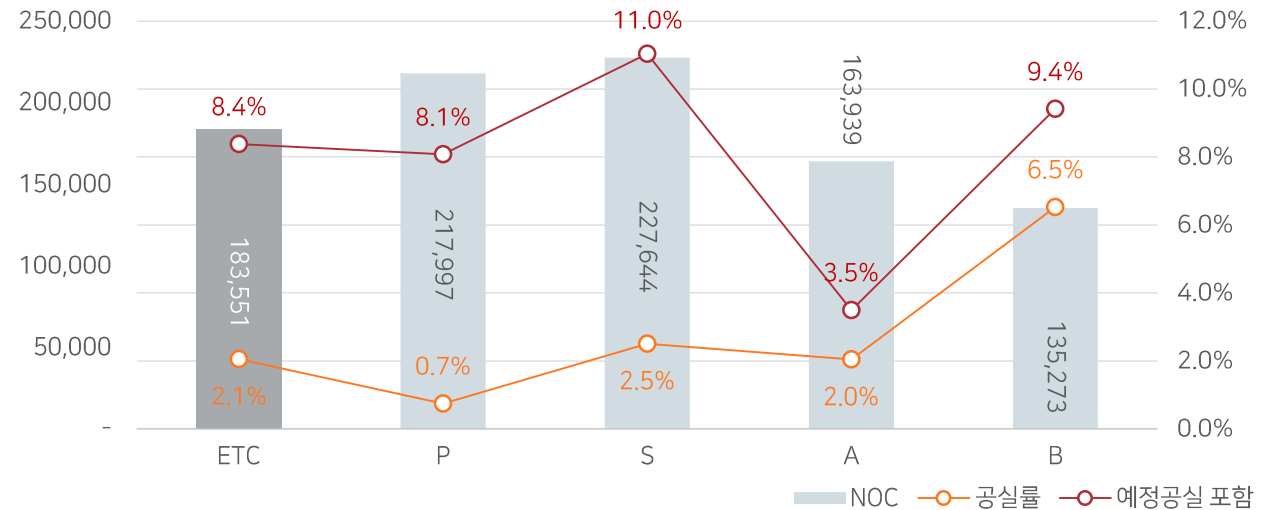
평균 NOC
₩ 183,551 ↓

평균 임대료	평균 보증금	평균 관리비
72,033	793,771	28,530

2023년도 1월 조사한 서울 기타지역 오피스의
평균 공실률은 2.05%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 183,551원으로 조사되었다.



ETC 지역 세부권역별 공실률/NOC



ETC 지역 규모별 공실률/NOC

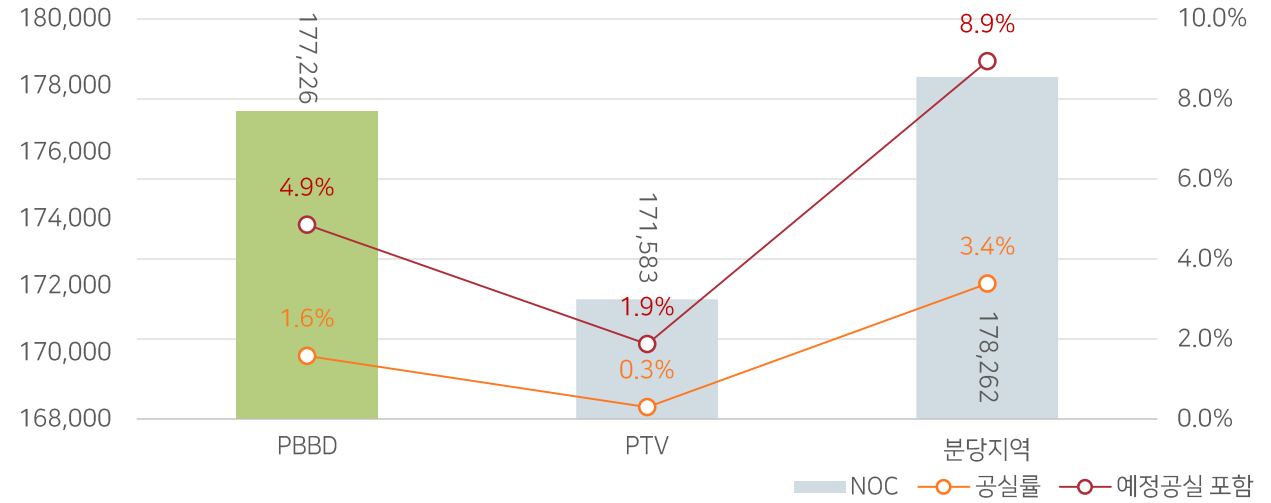
76 PBBD 판교, 분당 권역

공실률
1.58% ↑

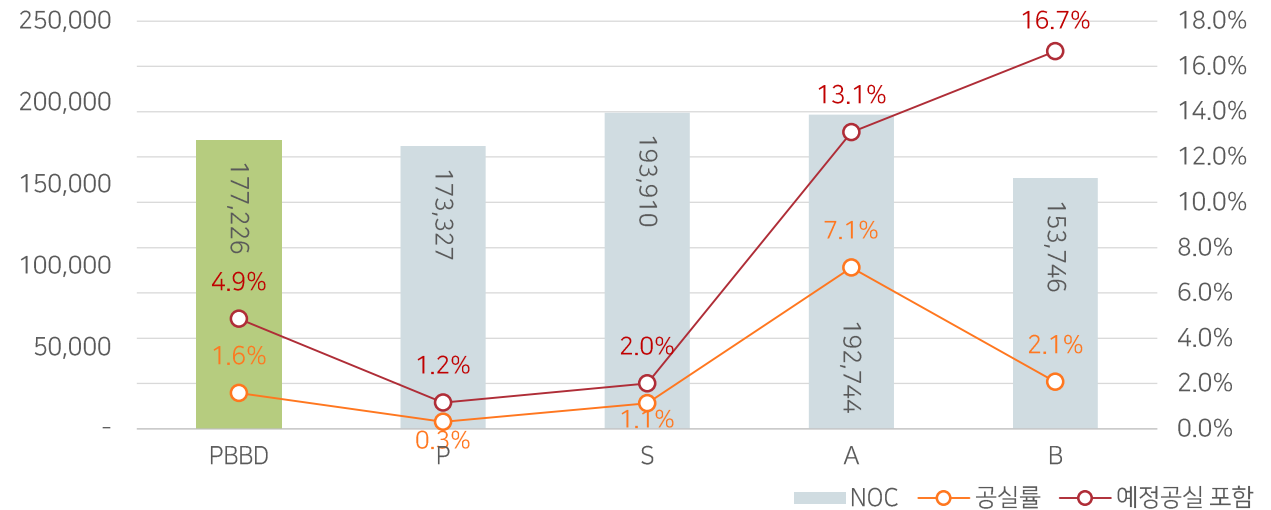
평균 NOC
₩ 177,226 ↓

평균 임대료	평균 보증금	평균 관리비
60,979	750,360	25,934

2023년도 1월 조사한 판교, 분당지역 오피스의
평균 공실률은 1.58%로 조사되었으며,
전용면적 1평당 사용할 때 드는 비용을 계산한
평균 NOC는 177,226원으로 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	269,383	972,197	101,591	36,627	228,211	1.41%
	시청역	288,406	807,632	80,152	37,599	212,732	1.49%
	종각역	286,304	745,896	74,716	33,294	177,415	0.74%
	을지로입구역	255,270	1,034,340	104,237	39,002	241,945	3.91%
GBD	테헤란로	1,098,874	1,799,778	163,559	35,621	325,413	0.89%
	강남대로	487,899	1,936,367	173,346	35,545	341,252	2.30%
	영동대로	294,903	929,166	80,491	29,561	244,281	0.54%
	도산대로	106,025	2,115,430	134,277	34,786	252,178	1.59%
	서초 교대	152,354	1,500,611	110,569	27,852	236,521	1.90%
YBD	동여의도	944,070	1,207,548	119,772	43,925	311,496	0.93%
	서여의도	177,355	515,722	47,507	26,534	135,457	1.03%
	영등포	126,771	679,090	61,023	28,352	156,165	3.60%
ETC	송파 강동	659,198	818,548	64,368	26,700	160,864	1.29%
	광진 성동	178,132	850,418	70,703	18,307	165,104	2.49%
	마포 상암	642,749	850,274	84,367	33,043	186,540	1.01%
	구로 금천	283,759	522,058	50,211	17,363	128,459	5.78%
	관악 동작	144,925	665,037	48,440	19,513	126,965	0.46%
	용산	221,651	735,130	63,120	31,376	177,281	2.02%
PBBD	PTV	397,064	609,568	61,222	25,111	171,583	0.29%
	분당지역	283,318	776,219	60,934	26,085	178,262	3.38%

지역 별
사용승인 현황

권역	빌딩명	소재지	주용도	연면적(m ²)	연면적(3.3m ²)	사용승인일
GBD	화이트518	강남구 논현동	제1종근린생활시설	8,453	2,557	13-Dec
	브릭스타워	강남구 역삼동	제1종근린생활시설	2,734	827	12-Dec
	파이라이트 빌딩	강남구 논현동	제2종근린생활시설	1,505	455	28-Dec
	정일아원	강남구 논현동	제2종근린생활시설	1,217	368	28-Dec
	아람빌딩	강남구 신사동	제2종근린생활시설	1,115	337	20-Dec
	수이빌딩	강남구 대치동	제2종근린생활시설	1,057	320	30-Dec
ETC	파크엔타워	은평구 진관동	업무시설	17,541	5,306	09-Dec
	알에프텍 서울사옥	강동구 고덕동	업무시설	15,261	4,616	08-Dec
	태양3C R&D센터	강서구 마곡동	교육연구시설	5,998	1,814	20-Dec
	에스빌딩	성북구 성북동	제2종근린생활시설	2,526	764	14-Dec
	101빌딩	중랑구 망우동	의료시설	1,880	569	08-Dec
	성수동 빌딩	성동구 성수동2가	제1종근린생활시설	1,827	553	29-Dec
	은천빌딩	관악구 봉천동	제2종근린생활시설	1,540	466	26-Dec
	운정M빌딩	강북구 미아동	제1종근린생활시설	1,498	453	12-Dec
	예성빌딩	송파구 거여동	제1종근린생활시설	1,273	385	07-Dec
	컨텐츠랩 비보 사옥	마포구 상암동	제2종근린생활시설	1,221	369	26-Dec
	구의동 빌딩	광진구 구의동	제2종근린생활시설	1,156	350	07-Dec

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, January 2023
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 = 1,251.50 KRW (0.80 USD = 1,000 KRW) as of 6th February 2023

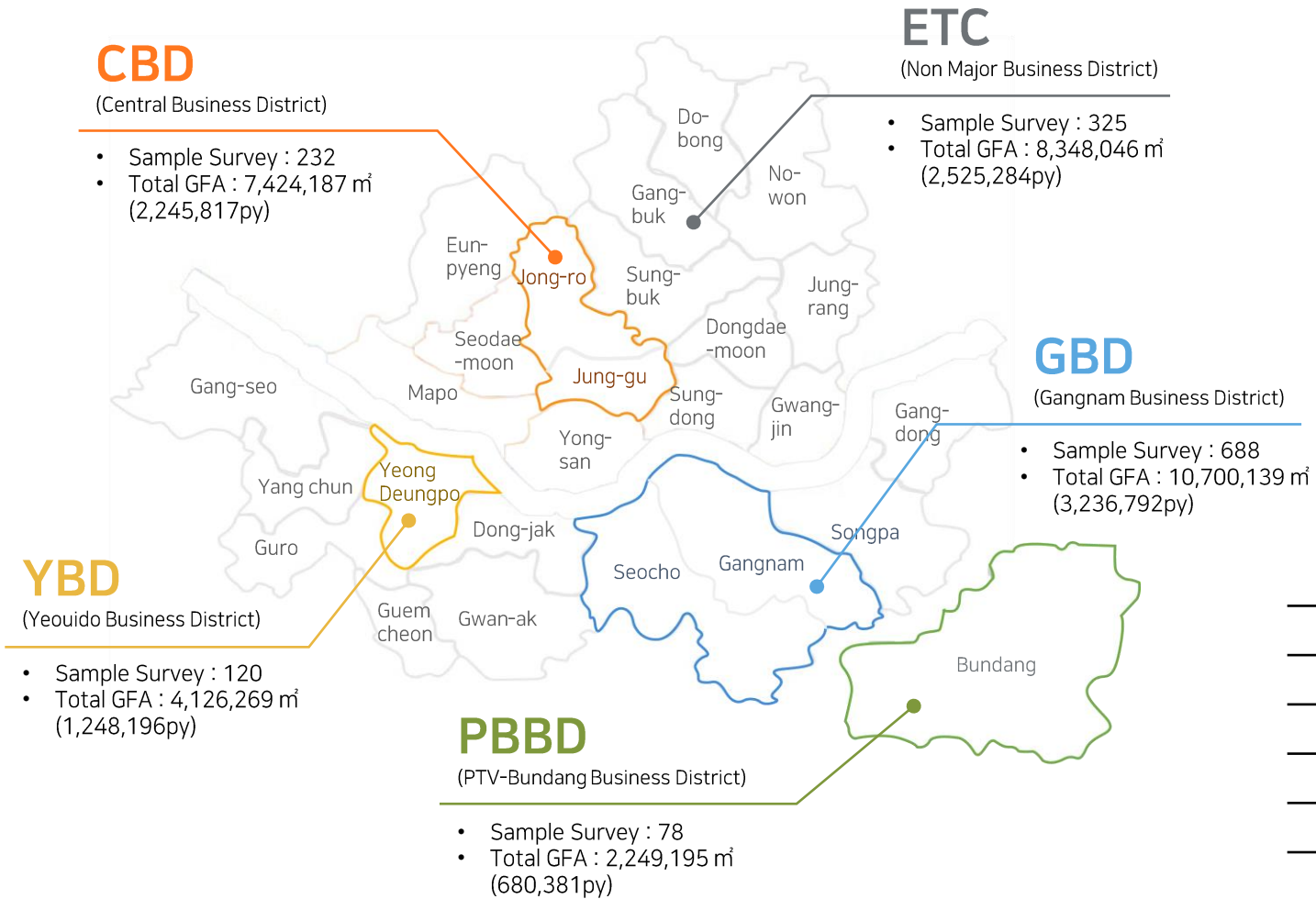
5 Regional Divisions in Seoul

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 1,443

	P	S	A	B
CBD	44	67	34	87
GBD	32	86	91	479
YBD	20	25	33	42
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PBBD	11	16	18	33

• 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

1.80% ↑

Avg, NOC

\$ 53.31 ↓

Avg.
Rent

22.41

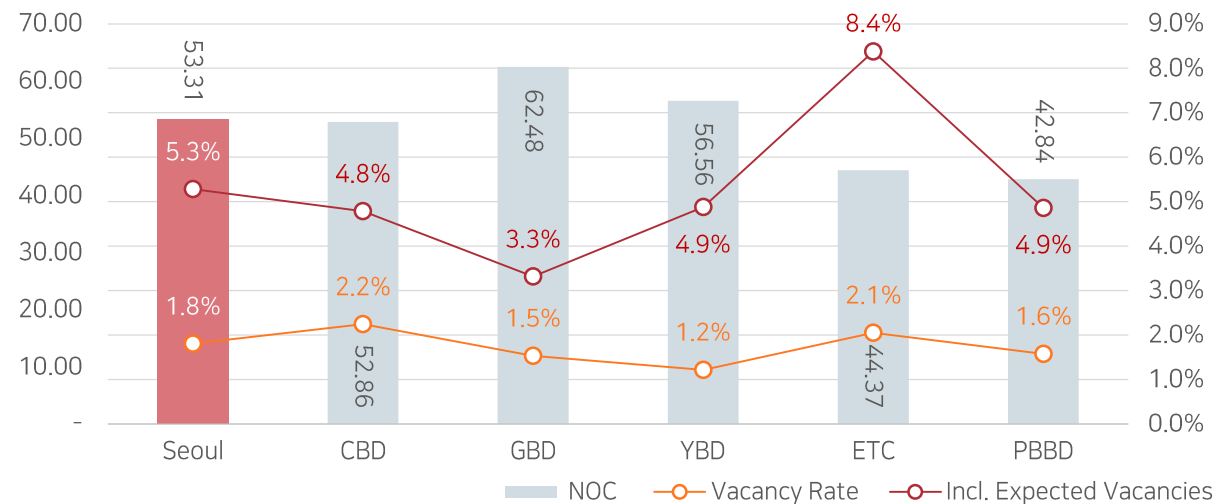
Avg.
Deposit

244.75

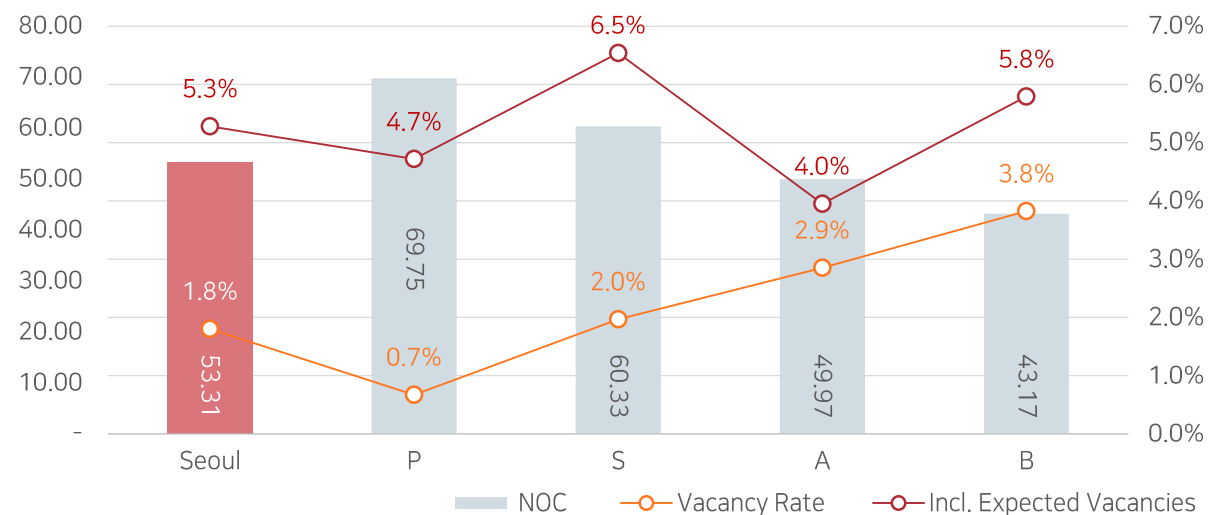
Avg.
Management.
Fee

8.06

The average vacancy rate of the office buildings in Seoul is 1.80 % as of January 2023, and the average NOC is \$ 53.31.



■ Vacancy Rate & NOC in Seoul and Each District



■ Vacancy Rate & NOC in Seoul & Each Building Category

01 SBD Seoul Capital Area

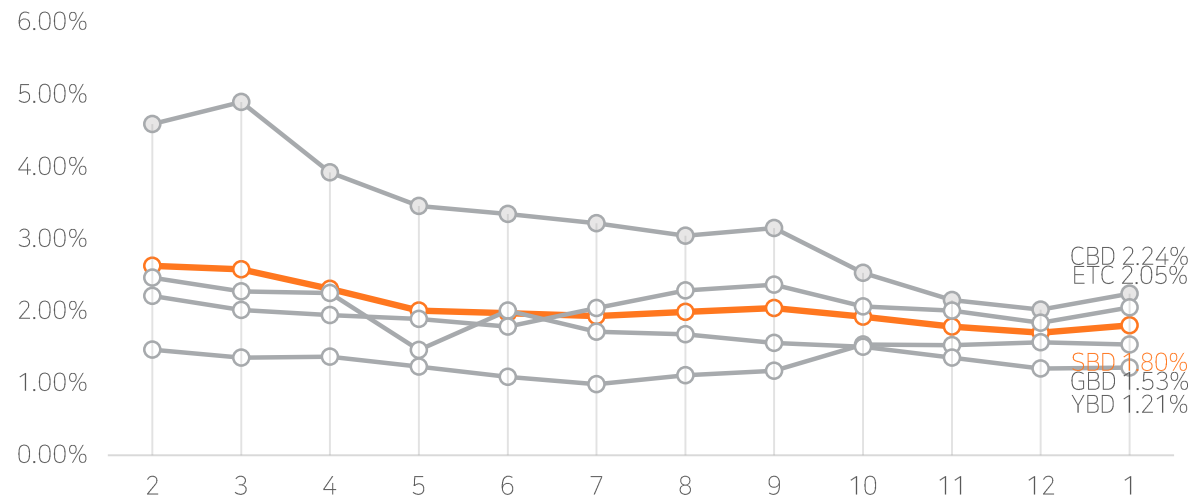
The following charts indicate the vacancy level of Seoul during January 2023.

In Taepyeongro Building (CBD), the 4 floors of 6,300m², currently occupied by Boram Sangjo Funeral Service Corp., will come on the lease market in Seoul by January 2024.

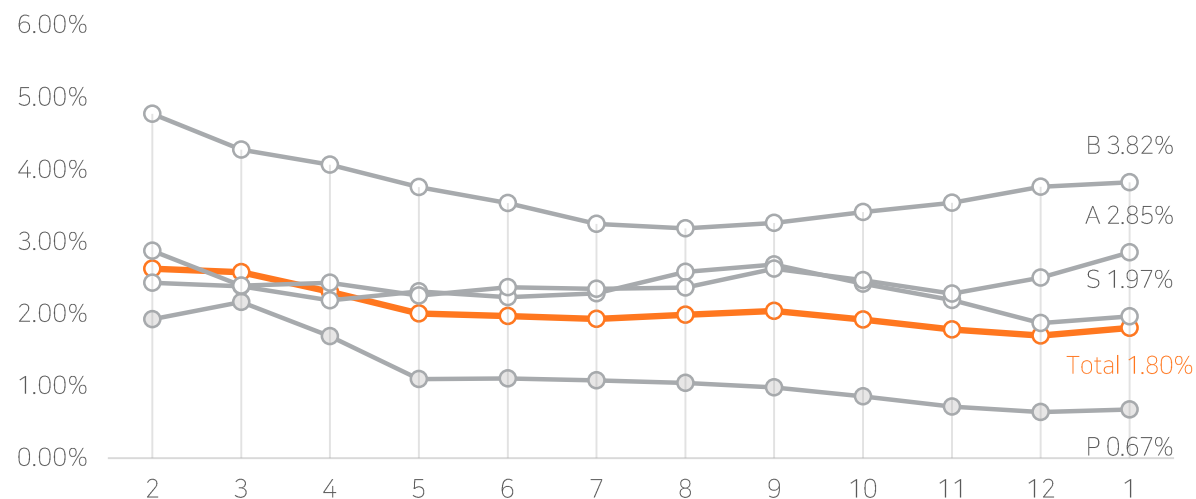
In L7 Gangnam Tower (GBD), Asleep, CodeStates, HAECHI LABS and other business units moved in as new tenants occupying the 3 vacant floors in the building equivalent to 5,220m² in total. Likewise, in Chamzon Daechi Office Building (GBD), Poly ESC moved in and began to use the 3 vacant floors in the building, equivalent to 3,440m².

In Hyundai Motor Securities Building (YBD), Shinhan Aitas moved in as a new tenant occupying the vacant units of 5,590m² in the building. And in Jaeil Building, the 3 floors of 3,260m², currently rented by Daejoo Heavy Industry, will come on the lease market by coming May 2023.

In Humax Village (BBD), Play Links moved in and began to use the vacant units of 3,730m² in total.



Monthly Vacancy Rate in 5 Main Districts



Monthly Vacancy Rate for Different Size of Buildings

02 CBD Central Seoul

Vacancy rate

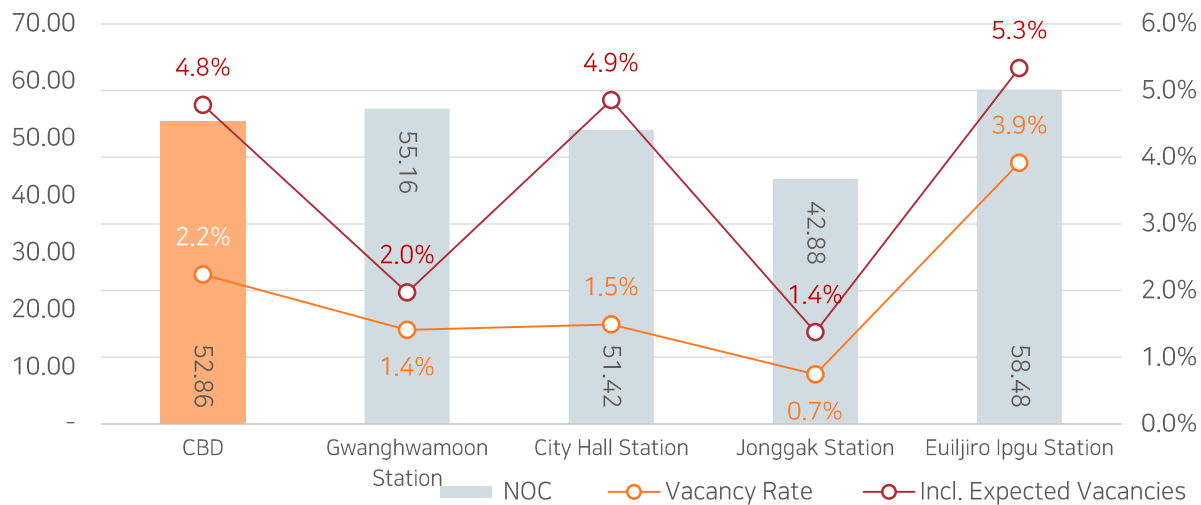
2.24% ↑

Avg, NOC

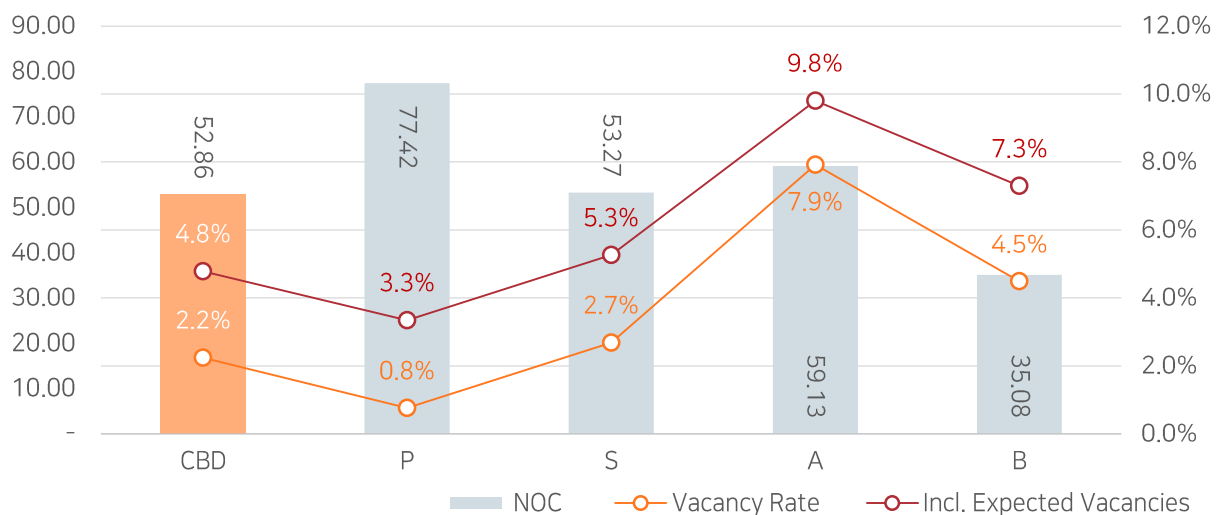
\$ 52.86 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
21.66	223.73	8.99

The average vacancy rate of the office buildings in CBD is 2.24 % as of January 2023, and the average NOC is \$ 52.86.



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



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

GBD Gangnam

Vacancy rate

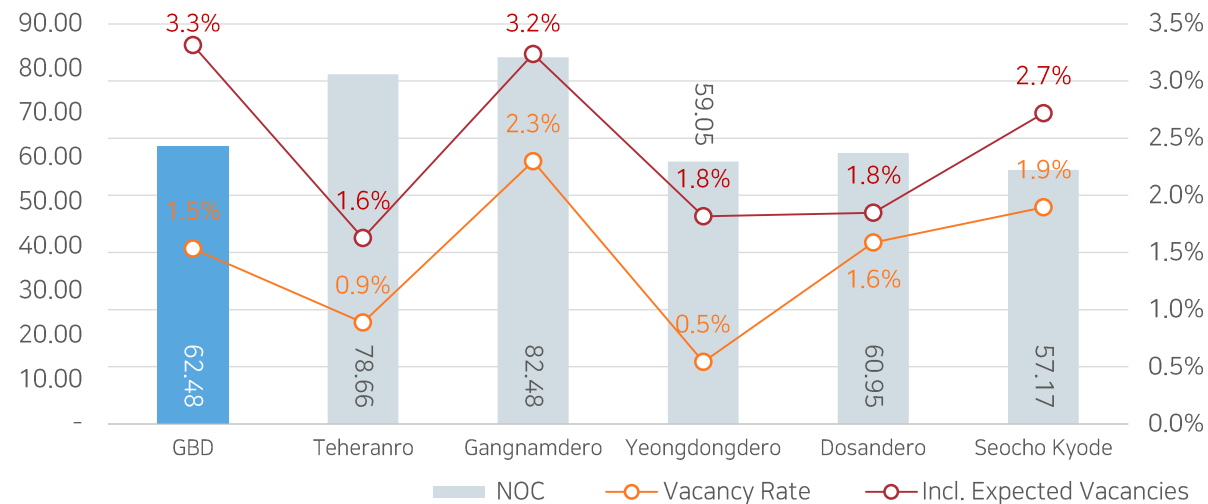
1.53 % ↓

Avg, NOC

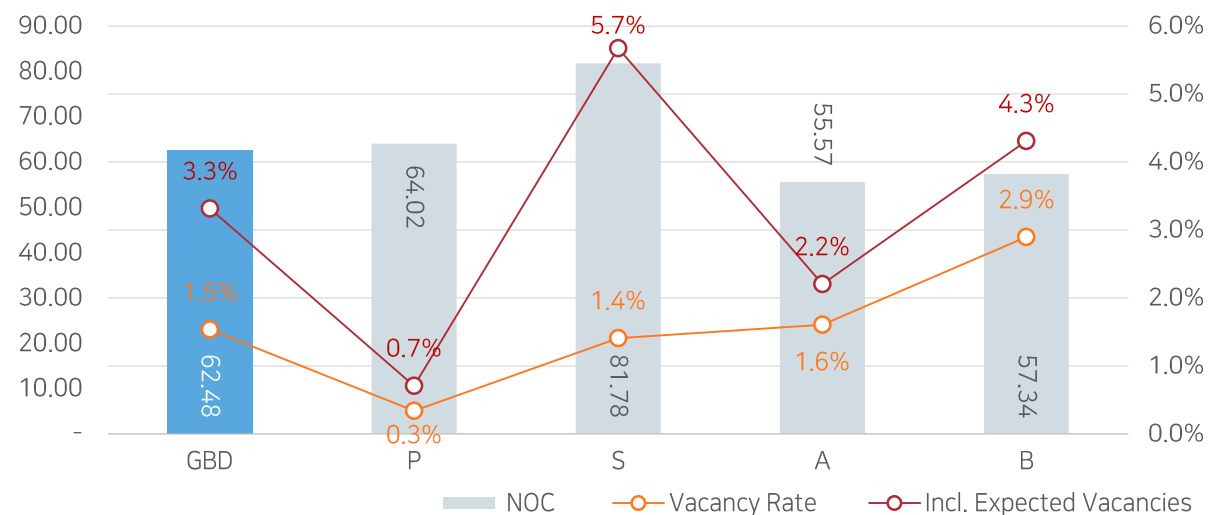
\$ 62.48 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
29.26	339.59	7.76

The average vacancy rate of the office buildings in GBD is 1.53 % as of January 2023, and the average NOC is \$ 62.48.



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



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

24 YBD Yeouido & Yeongdeungpo

Vacancy rate

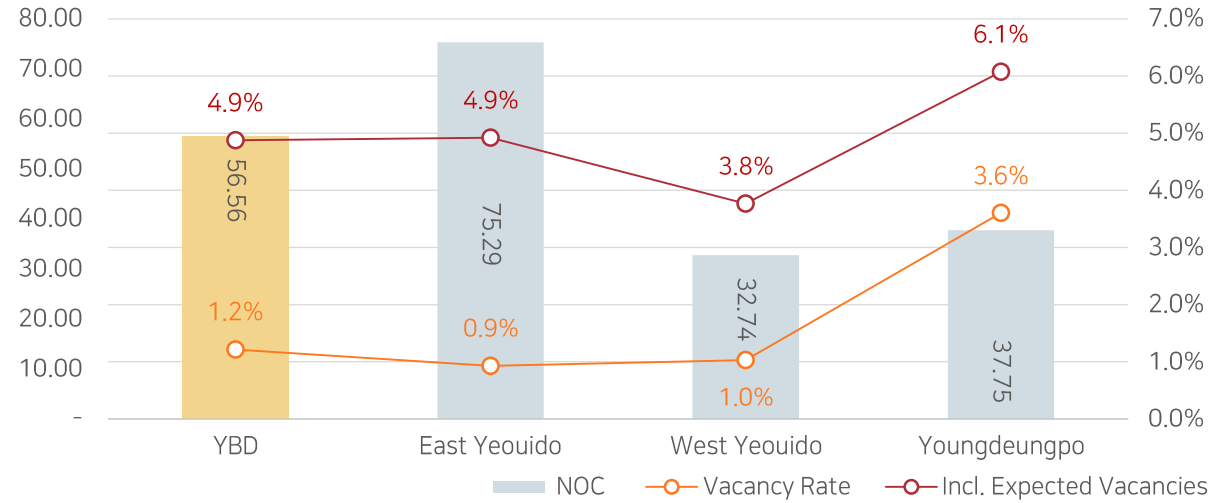
1.21% ↑

Avg, NOC

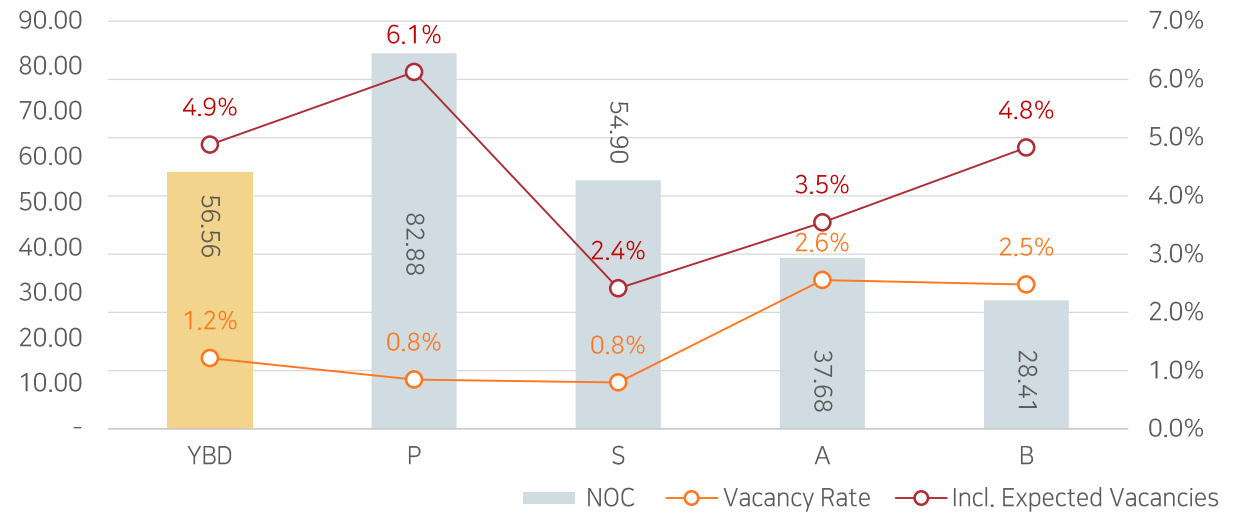
\$ 56.56 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
21.53	222.72	8.77

The average vacancy rate of the office buildings in YBD is 1.21 % as of January 2023, and the average NOC is \$ 56.56.



■ 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

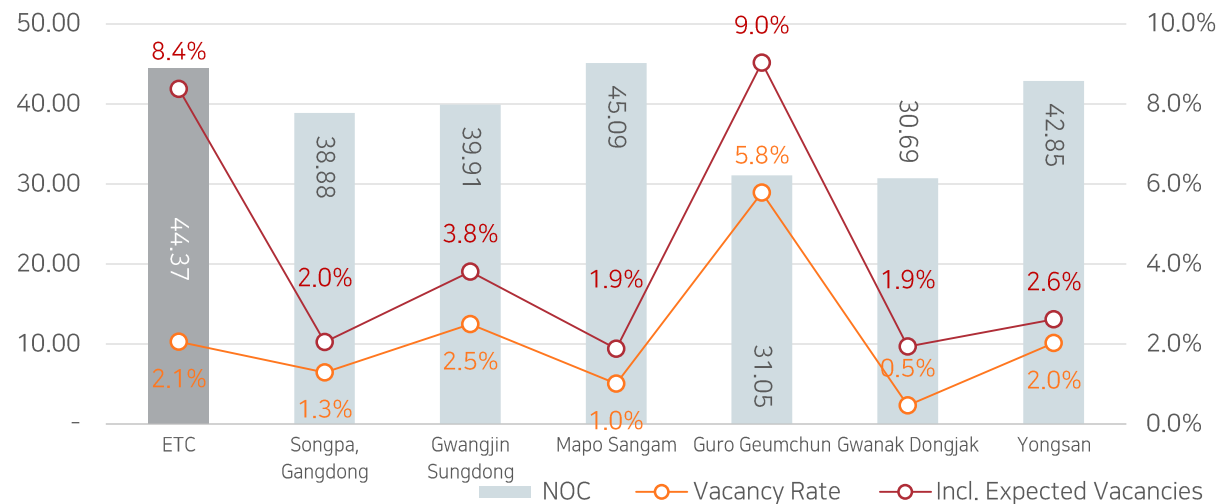
2.05 % ↑

Avg, NOC

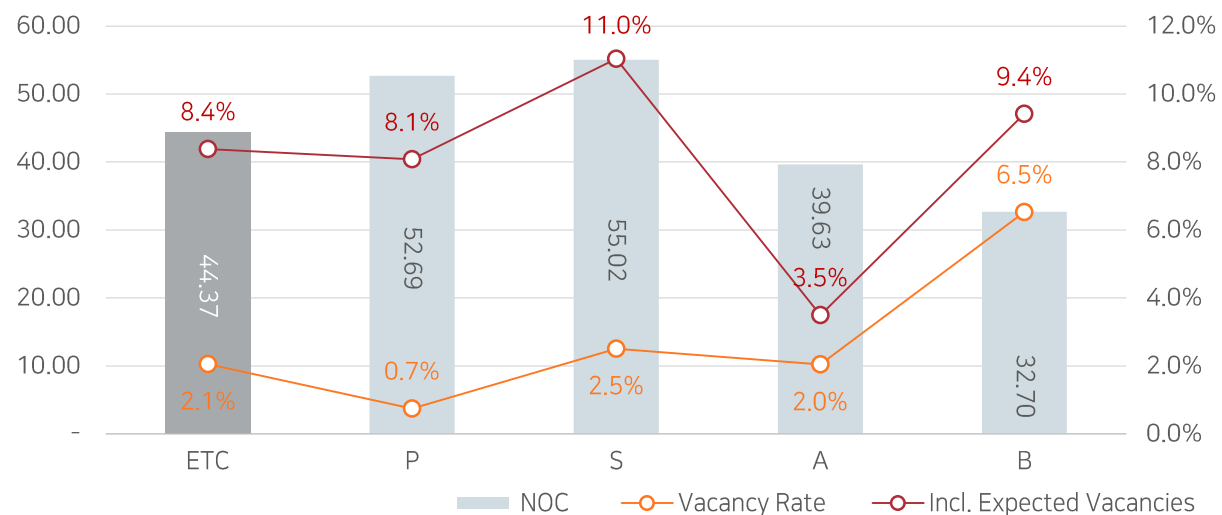
\$ 44.37 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
17.41	191.86	6.90

The average vacancy rate of the office buildings in ETC is 2.05 % as of January 2023, and the average NOC is \$ 44.37.



■ 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

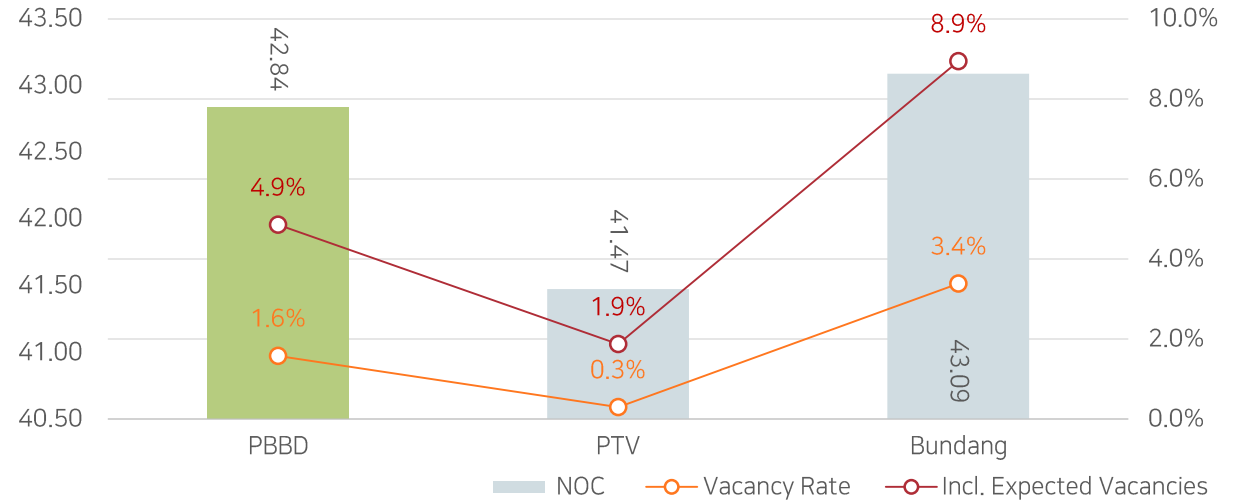
1.58 % ↑

Avg, NOC

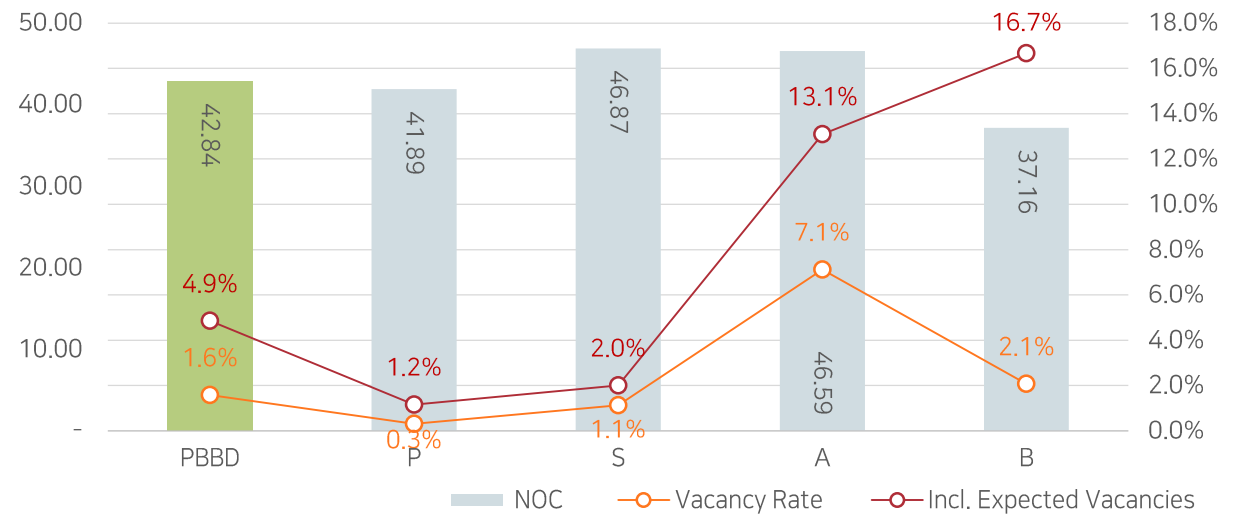
\$ 42.84 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
14.74	181.37	6.27

The average vacancy rate of the office buildings in PBBD is 1.58 % as of January 2023, and the average NOC is \$ 42.84.



■ 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	890,523	234.99	24.56	8.85	55.16	1.41%
	City Hall Station	953,407	195.21	19.37	9.09	51.42	1.49%
	Jonggak Station	946,459	180.29	18.06	8.05	42.88	0.74%
	Euljiro Ipgu Station	843,868	250.01	25.20	9.43	58.48	3.91%
GBD	Teheranro	3,632,643	435.02	39.53	8.61	78.66	0.89%
	Gangnamdero	1,612,890	468.04	41.90	8.59	82.48	2.30%
	Yeongdongdero	974,884	224.59	19.46	7.15	59.05	0.54%
	Dosandero	350,496	511.32	32.46	8.41	60.95	1.59%
	Seocho Gyodae	503,650	362.71	26.73	6.73	57.17	1.90%
YBD	East Yeouido	3,120,893	291.88	28.95	10.62	75.29	0.93%
	West Yeouido	586,298	124.66	11.48	6.41	32.74	1.03%
	Youngdeungpo	419,078	164.14	14.75	6.85	37.75	3.60%
ETC	Songpa, Gangdong	2,179,168	197.85	15.56	6.45	38.88	1.29%
	Gwangjin Sungdong	588,866	205.55	17.09	4.42	39.91	2.49%
	Mapo Sangam	2,124,791	205.52	20.39	7.99	45.09	1.01%
	Guro Geumchun	938,048	126.19	12.14	4.20	31.05	5.78%
	Gwanak Dongjak	479,091	160.75	11.71	4.72	30.69	0.46%
	Yongsan	732,731	177.69	15.26	7.58	42.85	2.02%
PBBD	PTV	1,312,607	147.34	14.80	6.07	41.47	0.29%
	Bundang	936,588	187.62	14.73	6.31	43.09	3.38%



Land Use Information by District

District	Building Name	Address	Land Use	GFA (㎡)	Completion
GBD	White 518	Nonhyeon-dong Gangnam-gu	#1 Commercial	8,453	13-Dec
	BRICS Tower	Yeoksam-dong Gangnam-gu	#1 Commercial	2,734	12-Dec
	Pyrite Building	Nonhyeon-dong Gangnam-gu	#2 Commercial	1,505	28-Dec
	Jungil Awon	Nonhyeon-dong Gangnam-gu	#2 Commercial	1,217	28-Dec
	ARAM Building	Sinsa-dong Gangnam-gu	#2 Commercial	1,115	20-Dec
	Soo Yi Building	Daechi-dong Gangnam-gu	#2 Commercial	1,057	30-Dec
ETC	Park N Tower	Jingwan-dong Eunpyeong-gu	Office	17,541	09-Dec
	RF tech	Godeok-dong Gangdong-gu	Office	15,261	08-Dec
	3CTY R&D center	Magok-dong Gangseo-gu	Educational	5,998	20-Dec
	S Building	Seongbuk-dong Seongbuk-gu	#2 Commercial	2,526	14-Dec
	101 Building	Mangu-dong Jungnang-gu	Medical	1,880	08-Dec
	Seongsu-dong Building	Seongsu-dong 2-ga Seongdong-gu	#1 Commercial	1,827	29-Dec
	Euncheon Building	Bongcheon-dong Gwanak-gu	#2 Commercial	1,540	26-Dec
	Woon Jung M Building	Mia-dong Gangbuk-gu	#1 Commercial	1,498	12-Dec
	Yesung Building	Geoyeo-dong Songpa-gu	#1 Commercial	1,273	07-Dec
	Contents Lab Vivo Office Building	Sangam-dong Mapo-gu	#2 Commercial	1,221	26-Dec
	Guui-dong Building	Guui-dong Gwangjin-gu	#2 Commercial	1,156	07-Dec



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