



Q1 2020

SEOUL OFFICE

LEASING MARKET REVIEW

Quarterly Market Review

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임대마켓 Highlights



공실률

5.27%

0.14% ↓



NOC

₩153,780

₩2,207 ↑



상업용 공급량

38,753.719평

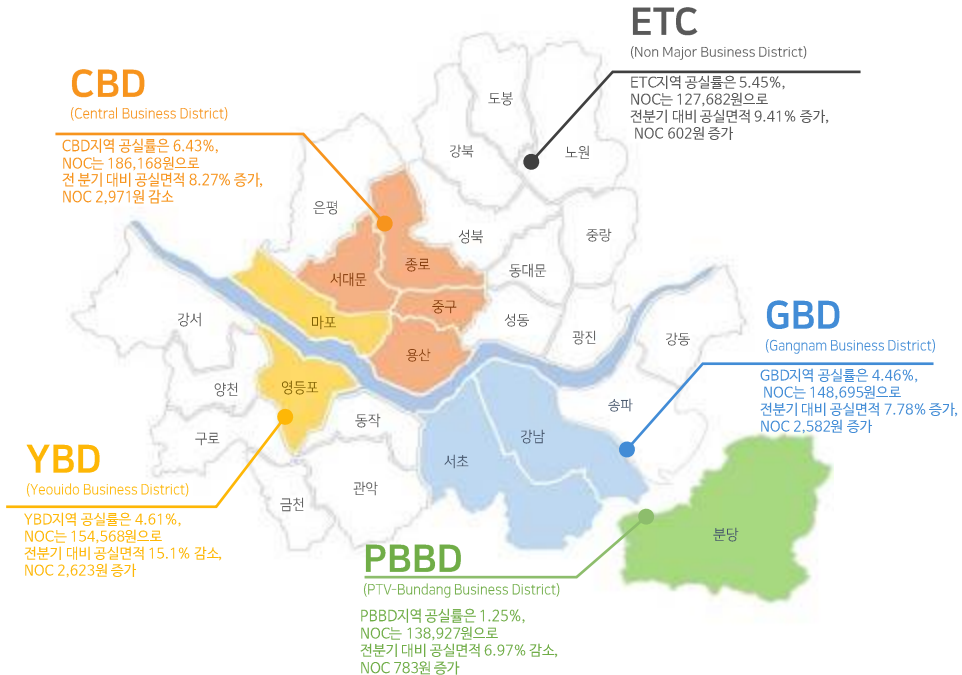
271,739 ↓



상업용신축

115,455평

58,825 ↓



임대시장 요약

구역	NOC	공실률	평당임대료	평당보증금	평당관리비
서울전체	153,780원	5.27%	63,225원	817,219원	24,501원
CBD	186,168원	6.43%	73,438원	754,760원	32,219원
GBD	148,695원	4.46%	65,277원	934,512원	22,803원
YBD	154,568원	4.61%	52,720원	563,709원	27,717원
ETC	127,682원	5.45%	49,491원	607,611원	18,909원
PBBD	138,927원	1.25%	46,330원	520,292원	22,207원

주요 신축 빌딩


구역	빌딩명	소재지	주용도	연면적(m)	연면적(py)	사용승인월
ETC	가산 테라타워	금천구 가산동	공장	86,239	26,087	2020-02
GBD	현대백화점 본사	강남구 대치동	업무시설	28,715	8,686	2020-03
GBD	신라스테이 삼성	강남구 삼성동	숙박시설	18,526	5,604	2020-01
ETC	용답동 한성자동차 정비공장	성동구 용답동	자동차관련시설	17,713	5,358	2020-03
ETC	WW 홍대	마포구 동교동	숙박시설	17,059	5,160	2020-01

주요 법인 이전

구역	법인명	업종	빌딩명	소재지	임대면적(3.3m)
YBD	에이앤디신용정보	신용 조사 중심 대행업	영시티	영등포구 문래로28길 25	23,310
CBD	김앤장	변호사업	크레센도빌딩	종로구 새문안로 75	16,517
CBD	법무법인 태평양	변호사업	센트럴폴리스	종로구 우정국로 26	11,046
CBD	서울시 제3청사	공공기관	씨티스퀘어	중구 서소문로 124	9,248
YBD	SK텔레콤 자회사	콜센터	영시티	영등포구 문래로28길 25	7,865

부동산 이슈

 시장동향

 정책/제도

 개발동향

 업계동향

JAN

시장동향

6

올해 신규 오피스
사상 최대 공급
폭탄 전망 공실률
급등 우려

시장동향

7

홍콩계 PAG,
남산 그랜드
하얏트 5800억
인수 완료

시장동향

7

NH투자증권,
여의도 53층
'파크원타워'
9,000억대 인수

시장동향

8

주택시장 누르니
강남 꼬마 빌딩
뜨고 '풍선 효과'

정책/제도

17

서울시, 역세권
활성화 위해
'콤팩트 시티'
만든다

개발동향

22

부천시, 4조원
사업 '부천 영상
문화단지 조성'
다시 제동걸려

개발동향

31

SK디앤디, 용산과
역삼에서 2500억
규모 임대주택
개발사업 본격화

FEB

시장동향

3

서울시, 낙후
불편 영등포역
일대 '특화가로'
조성한다

시장동향

4

옛 성동구치소
부지에 1300가구
단지 조성

시장동향

7

8월부터
중개보조원이
부동산 매물
못올린다

시장동향

13

현대차 GEC
부지 땅값 올해
15% 올라,
보유세만 360억

정책/제도

24

부동산 신탁
시장 파이
'1.3조' 역대급
성장

개발동향

25

서울 빅3 개발사업
'서울역 복구 역세
권 개발&세운재정
비지구개발&강남
삼성역개발'

개발동향

27

가양동 CJ부지,
규모 10만3049㎡로
인창 개발과 현대건설
컨소시엄 1조 500억원
인수완료

MAR

시장동향

10

위기가 불러온
'스마트 오피스'
실험

시장동향

13

코로나 19
부동산 시장,
당장은 몰라도
'충격' 불가피

시장동향

14

하이트 진로
서초 사옥
최종 인수자에
'KB자산운용'
매각가 3.3㎡당
2800만원

시장동향

24

코로나 사태에
부동산 중개업소
폐업 늘어

정책/제도

25

이마트, 마곡부지
태영건설-메리트
중급중권 컨소시엄
8158억원에
매각 공시

개발동향

25

부동산 서비스앱
디스코 '등기부
등본 무료열람
기능' 전국 확대

개발동향

26

도시개발구역
여의도의 3.2배
새로 지정,
전국 524개,
167.5km

리서치 개요

지역	서울 전 지역 및 판교, 분당지역
대상	임대가 조사 : 연면적 1,000㎡(330py)이상, 지상4층 이상의 업무시설 및 업무복합시설 공급량 조사 : 주거용, 공공시설, 병원, 종교시설 등 제외한 상업용 부동산
조사방법	전화조사 및 자산관리업체의 발표자료, 국토교통부 공공데이터, 공시자료 등 참고
조사내용	오피스 임대 및 공실 변화, 임차인 이동현황, 거래 사례 등
조사기간	2020년 1월 ~ 3월, 3개월간 조사
DB관리	OKEY 리서치센터는 업무용 빌딩의 공실정보 및 임대료를 조사하고 있으며, 사무실 임대플랫폼 OKEY - Office Key를 통하여 관리 활용되고 있습니다. 분기 레포트 작성을 위하여 국토교통부에서 제공하는 공공데이터를 참조하여 조사하였습니다.

NOC (Net Occupancy Cost)

오피스시장의 특성상 임대형태(전세, 월세) 및 빌딩특성이 각각 다른 오피스 빌딩의 비교를
위해 전용면적 1평당 임대할 때 필요한 비용을 월 단위로 환산한 수치

QOQ (Quarter on Quarter) 전분기 대비 증감률

YOY (Year on Year) 전년도 동분기 대비 증감률

조사 표본수

	CBD	GBD	YBD	ETC	PBBD
Sample	249	835	129	226	66
GFA(㎡)	7,577,922	9,380,056	3,708,837	6,232,523	1,859,787
GFA(py)	2,292,322	2,837,467	1,121,923	1,885,338	562,586

권역별 분류

CBD Central Business District	GBD Gangnam Business District	YBD Yeido Business District	ETC Non Major Business District	PBBD PTV-Bundang Business District
도심권 광화문, 중구, 서대문, 종로구 일대	강남권 강남구, 서초구, 송파구 일대	여의도권 여의도, 마포구 일대	서울기타권 상암, 강동, 신촌 일대	판교, 분당권 판교테크노밸리, 서현, 수내동 일대

오피스 규모별 분류기준

OKEY	P Grade Prime 빌딩	S Grade 대형빌딩	A Grade 중대형빌딩	B Grade 중소형빌딩	C Grade 소형빌딩
연면적	15,000py 이상	7,000py 이상	4,000py 이상	1,000py 이상	1,000py 이하
기준층 임대면적	500py 이상	300py 이상	200py 이상	150py 이상	150py 이하

01 서울 분당 마켓

LEASING MARKET REVIEW

상업용 부동산 빌딩수

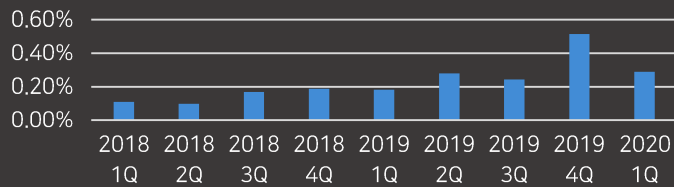
서울 및 분당의 상업용 부동산 총 빌딩수는 다음과 같이 변동된 것으로 조사되었다.
2020년 Q1 서울의 상업용 부동산은 26,060여 채가 공급된 상태인 것으로 조사되었다.

전분기 대비 0.3% 상승, 전년도 동분기대비 1.3% 상승

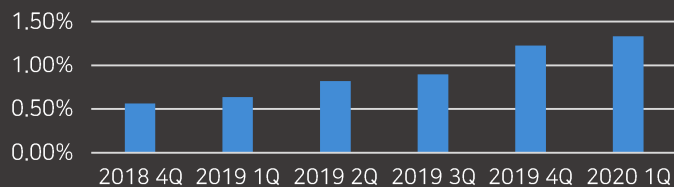
분당 지역의 1,000㎡ 이상인 상업용 부동산의 빌딩수는 919채로 조사되었다.

상업용 부동산 빌딩수 증감률

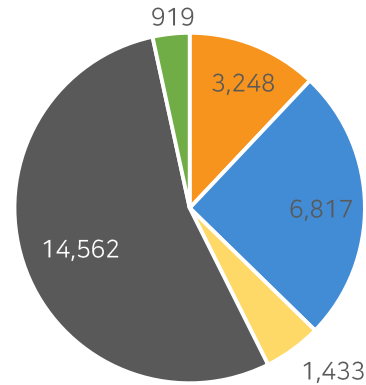
QOQ



YOY

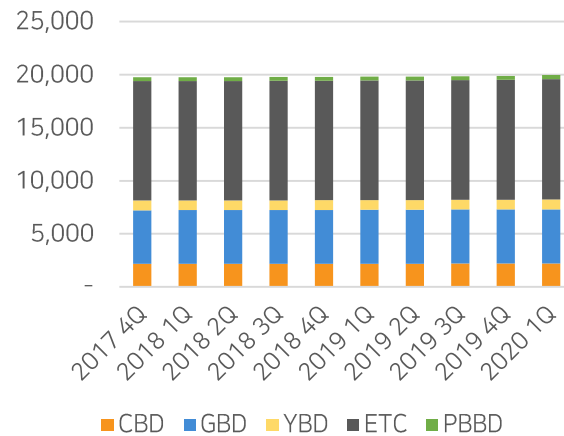


서울 분당 권역별 빌딩수



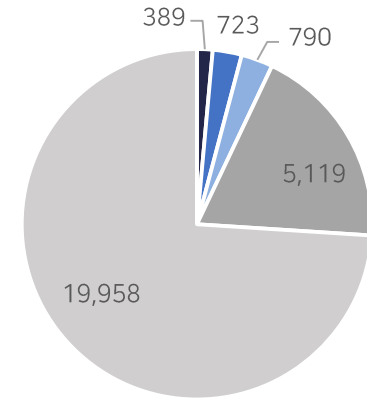
■ CBD ■ GBD ■ YBD ■ ETC ■ PBBD

서울 분당 권역별 빌딩수



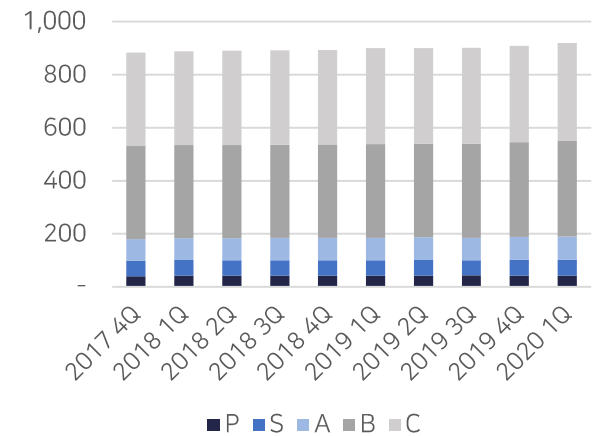
■ CBD ■ GBD ■ YBD ■ ETC ■ PBBD

서울 규모별 빌딩수



■ P ■ S ■ A ■ B ■ C

서울 규모별 빌딩수



■ P ■ S ■ A ■ B ■ C

01 서울 분당 마켓

LEASING MARKET REVIEW

상업용 부동산 공급량

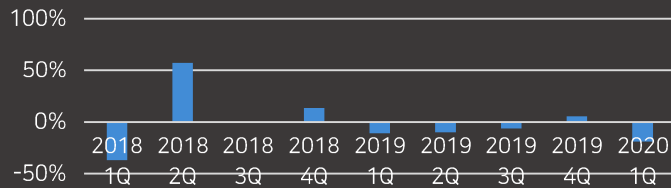
서울의 상업용 부동산의 총 공급량은 다음과 같이 변동된 것으로 조사되었다.
2020년 Q1 서울의 상업용 부동산은 연면적 기준 128,111,468㎡
(38,753,719py)가 공급된 상태인 것으로 조사되었다.

전분기 대비 0.7% 감소, 전년도 동분기 대비 2.8% 상승

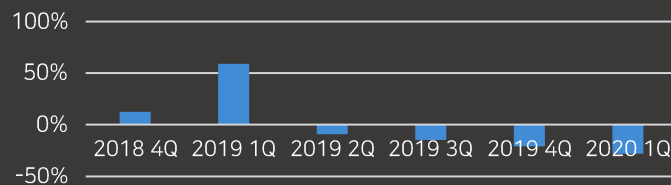
분당 지역의 상업용 부동산은 연면적 기준 10,252,142㎡ (3,101,273py)가
공급된 상태인 것으로 조사되었다.

상업용 부동산 공급량 증감률

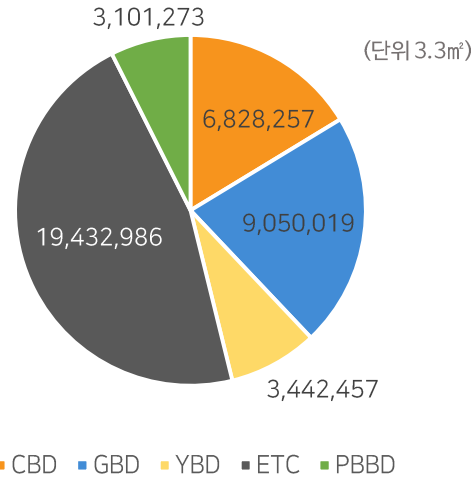
QOQ



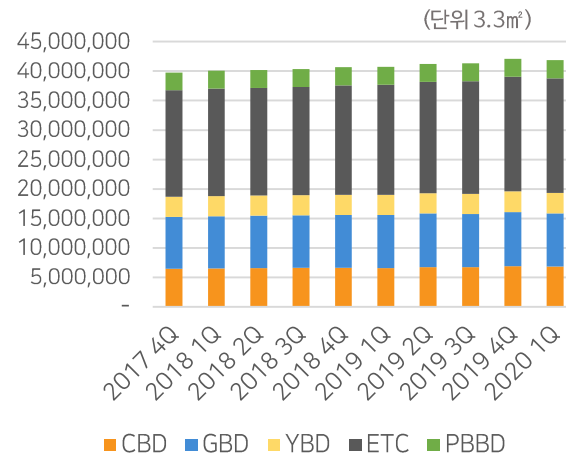
YOY



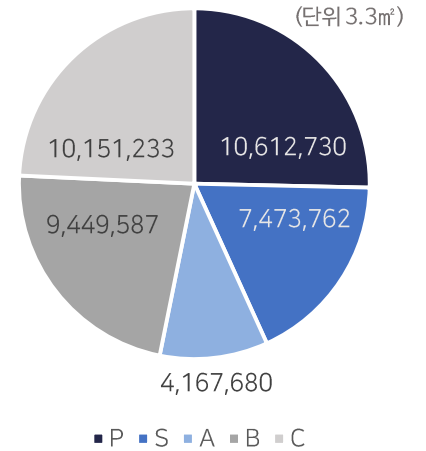
서울 분당 권역별 공급량



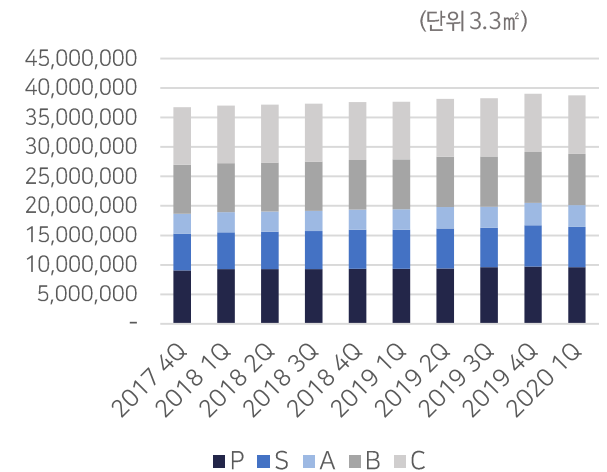
서울 분당 권역별 공급량



서울 규모별 공급량



서울 규모별 공급량



01 서울 분당 마켓

LEASING MARKET REVIEW

상업용 부동산 신축 빌딩수

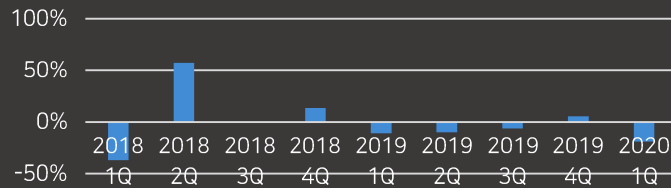
서울의 상업용 부동산 (주거용, 공공시설, 병원, 종교시설 등 제외)의 신규 공급량은 다음과 같이 변동된 것으로 조사되었다.
2020년 Q1 서울의 상업용 부동산 신축은 64건으로 조사되었다.

전분기 대비 19% 감소, 전년도 동분기 대비 28% 감소

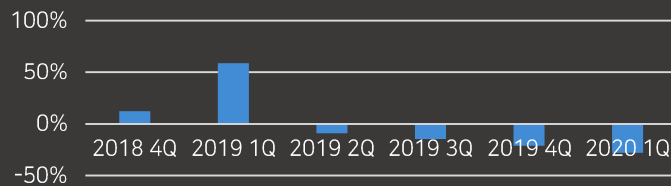
분당 지역의 상업용 부동산 신축빌딩수는 2건으로 조사되었다.

상업용 부동산 빌딩수 증감률

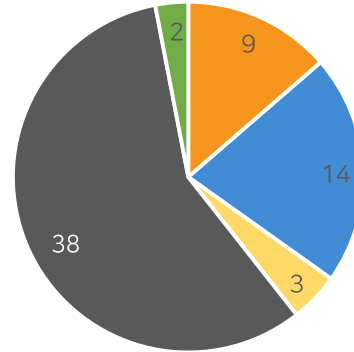
QOQ



YOY

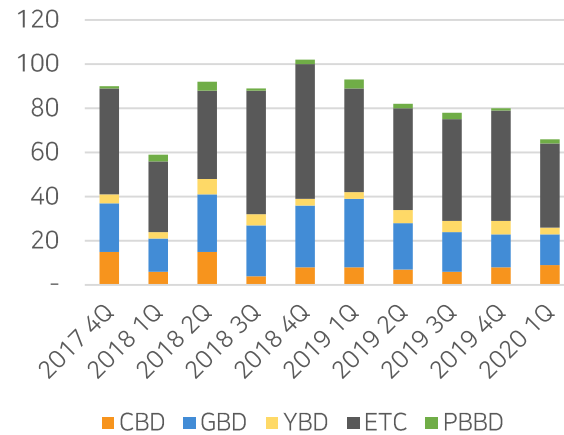


서울 분당 권역별 신축 빌딩수



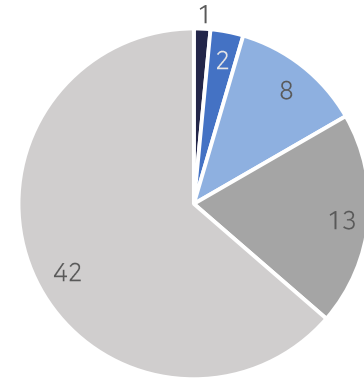
■ CBD ■ GBD ■ YBD ■ ETC ■ PBBD

서울 분당 권역별 신축 빌딩수



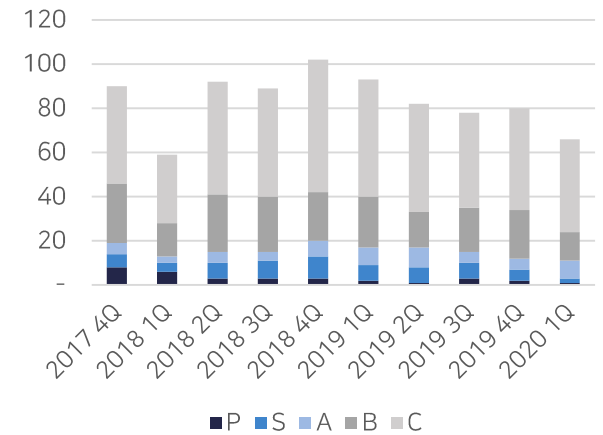
■ CBD ■ GBD ■ YBD ■ ETC ■ PBBD

서울 규모별 신축 빌딩수



■ P ■ S ■ A ■ B ■ C

서울 규모별 신축 빌딩수



■ P ■ S ■ A ■ B ■ C

01 서울 분당 마켓

LEASING MARKET REVIEW

상업용 부동산 신축 공급량

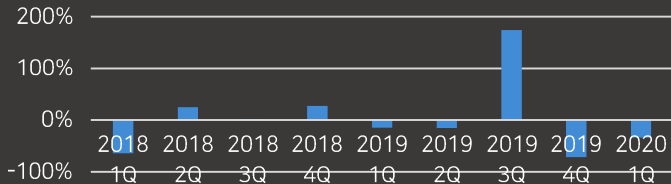
서울의 상업용 부동산 (주거용, 공공시설, 병원, 종교시설 등 제외)의
신규 공급량은 다음과 같이 변동된 것으로 조사되었다.
2020년 Q1 서울의 상업용 부동산 신축은 64건으로 연면적 기준 381,668㎡
(115,455py)가 신규 공급된 것으로 조사되었다.

전분기 대비 72% 감소, 전년도 동분기 대비 57% 감소

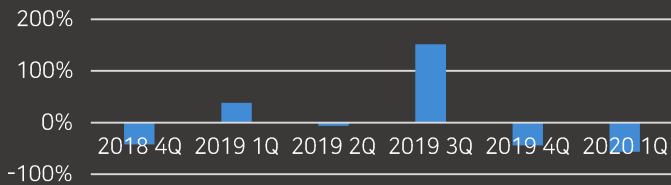
분당 지역의 상업용 부동산 신축 공급량은 62,344㎡ (18,853py)로 조사되었다.

상업용 부동산 신축 공급량 증감률

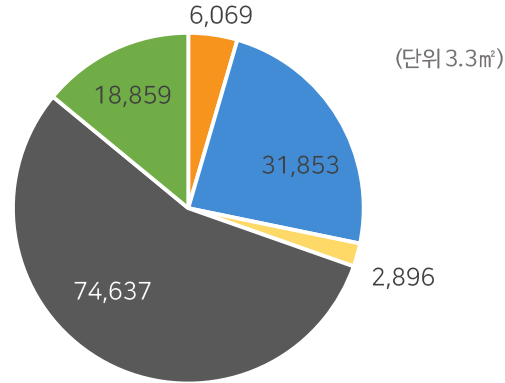
QOQ



YOY

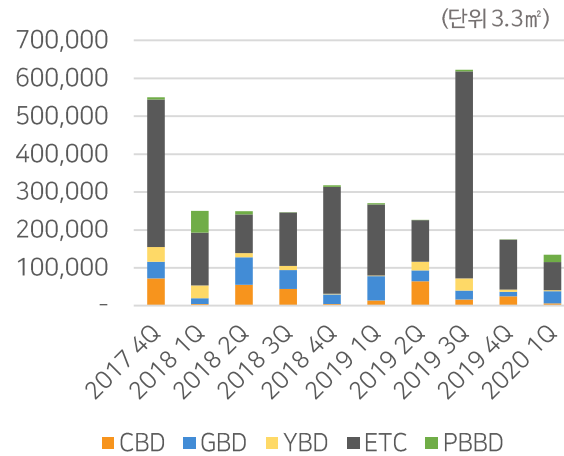


서울 분당 권역별 신축 공급량



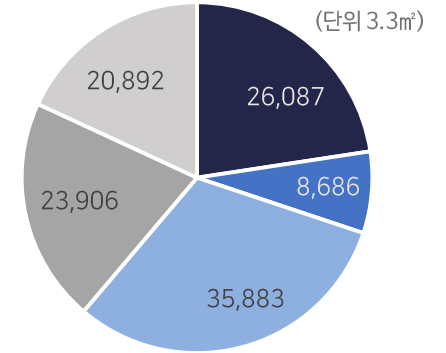
■ CBD ■ GBD ■ YBD ■ ETC ■ PBBD

서울 분당 권역별 신축 공급량



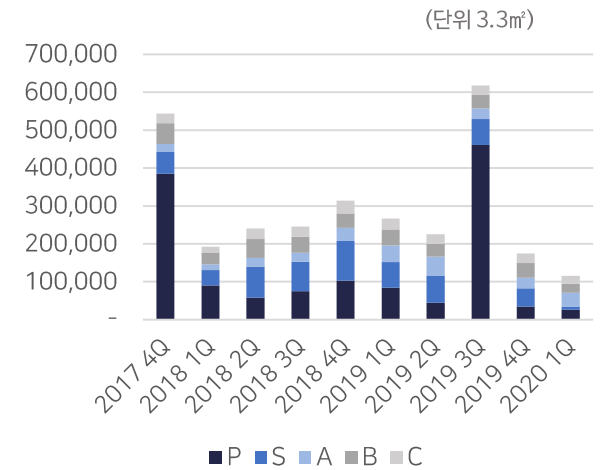
■ CBD ■ GBD ■ YBD ■ ETC ■ PBBD

서울 규모별 신축 공급량



■ P ■ S ■ A ■ B ■ C

서울 규모별 신축 공급량



■ P ■ S ■ A ■ B ■ C

01 서울 분당 마켓

LEASING MARKET REVIEW

오피스 공실 해소율

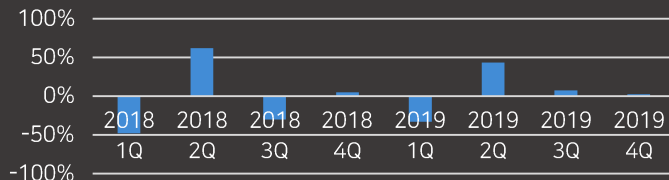
서울 오피스 공실 해소율을 44%로 조사되었다.
전분기 대비 8.40%p증가, 전년도 동분기 대비 10.32%p증가

분당 오피스 공실 해소율은 77%로 조사되었다.

※ 공실면적 중 다음 분기에 공실이 해소된 면적으로 조사하였으며,
이때 신규 발생한 공실면적은 배제하였다.

오피스 공실 해소 면적 증감률

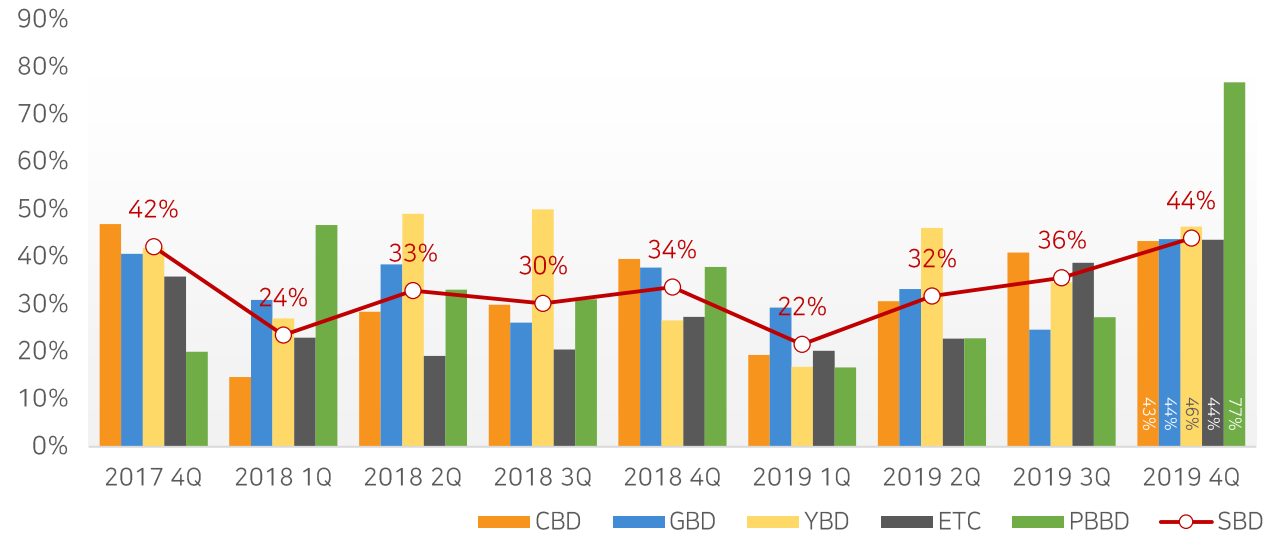
QOQ



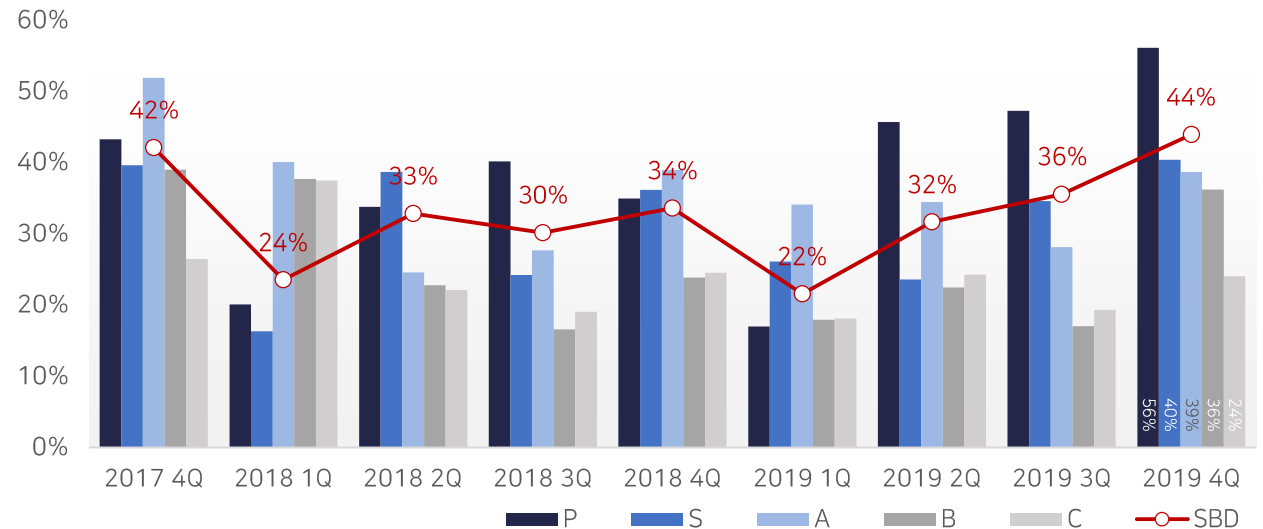
YOY



서울분당 권역별 공실해소율



서울 규모별 공실 해소율



01 서울 분당 마켓

LEASING MARKET REVIEW

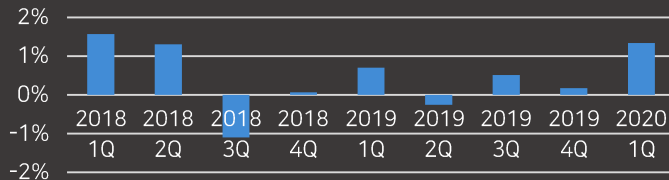
오피스 NOC

서울 오피스 NOC는 3.3㎡당 153,780원으로 조사되었다.
전분기 대비 1.34% 증가, 전년도 동분기 대비 1.76% 증가

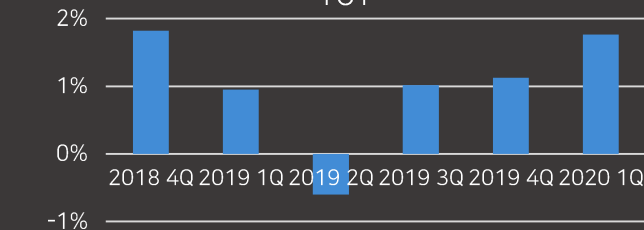
분당 오피스 NOC는 3.3㎡당 138,927원으로 조사되었다.

오피스 NOC 증감률

QOQ

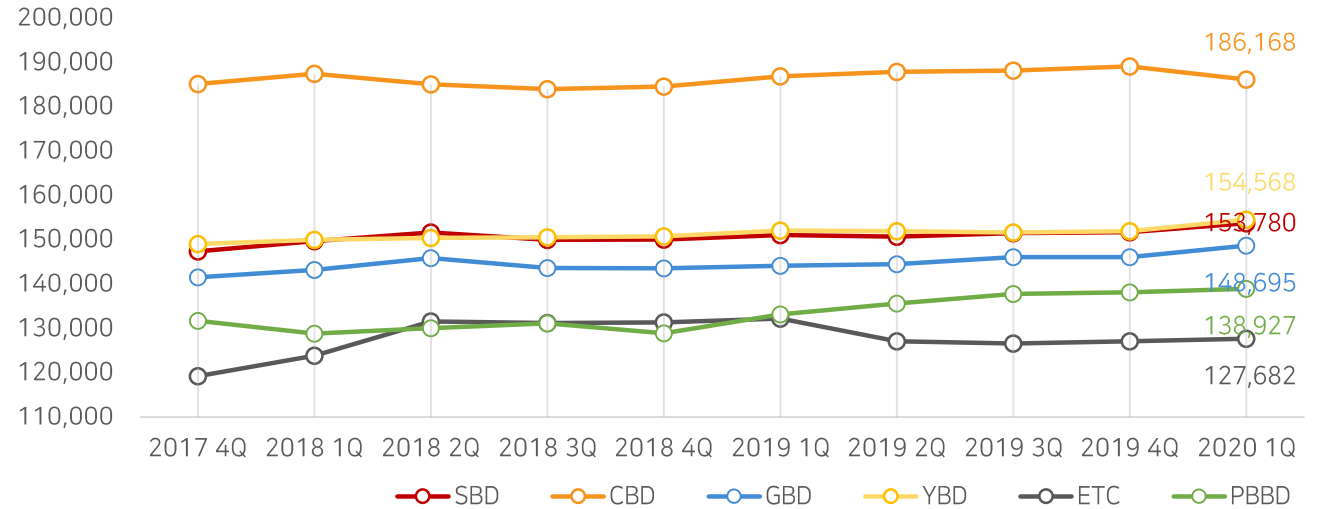


YOY



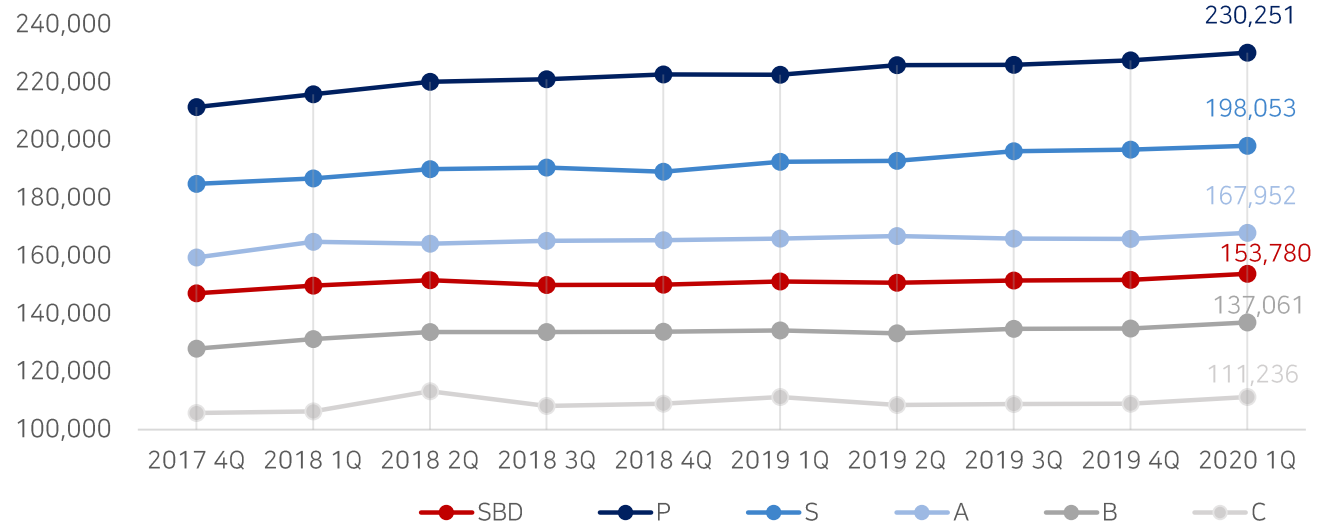
서울 분당 권역별 NOC

(단위 원/3.3㎡)



서울 규모별 NOC

(단위 원/3.3㎡)



01 서울 분당 마켓

LEASING MARKET REVIEW

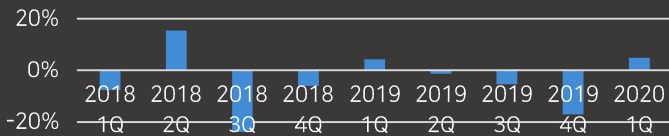
오피스 공실률

서울 오피스 공실률은 5.27%로 조사되었다
전분기 대비 0.15%p 감소, 전년도 동분기 대비 1.92%p 감소

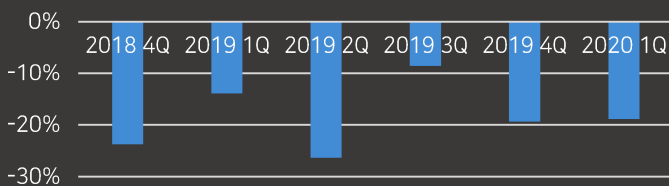
분당 오피스 공실률은 1.25%로 조사되었다.

오피스 공실 면적 증감률

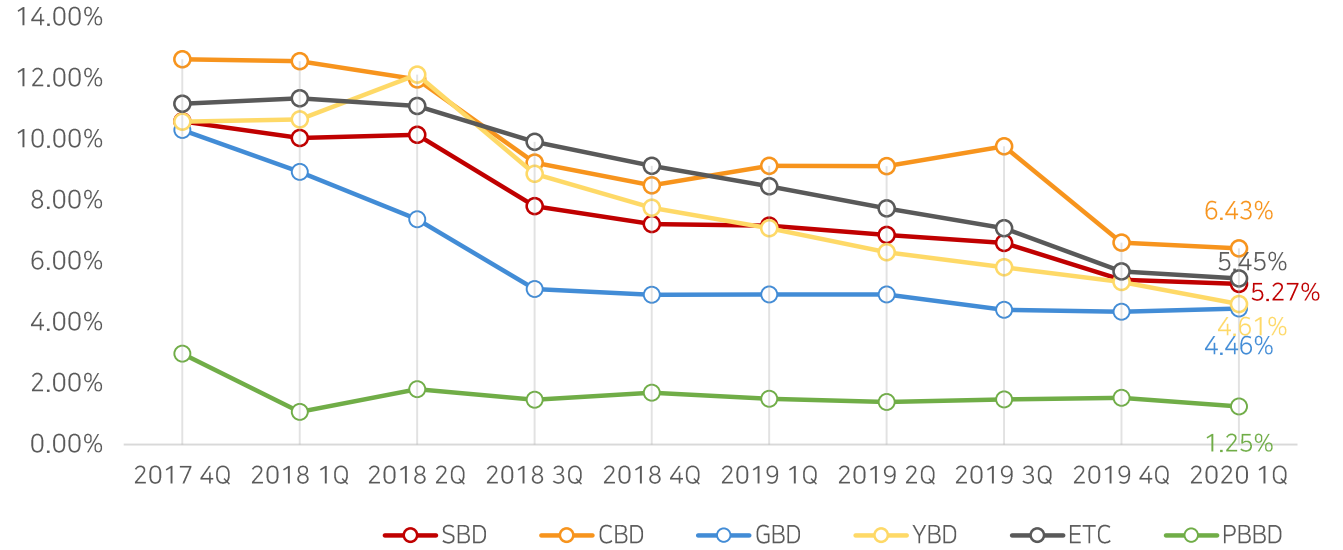
QOQ



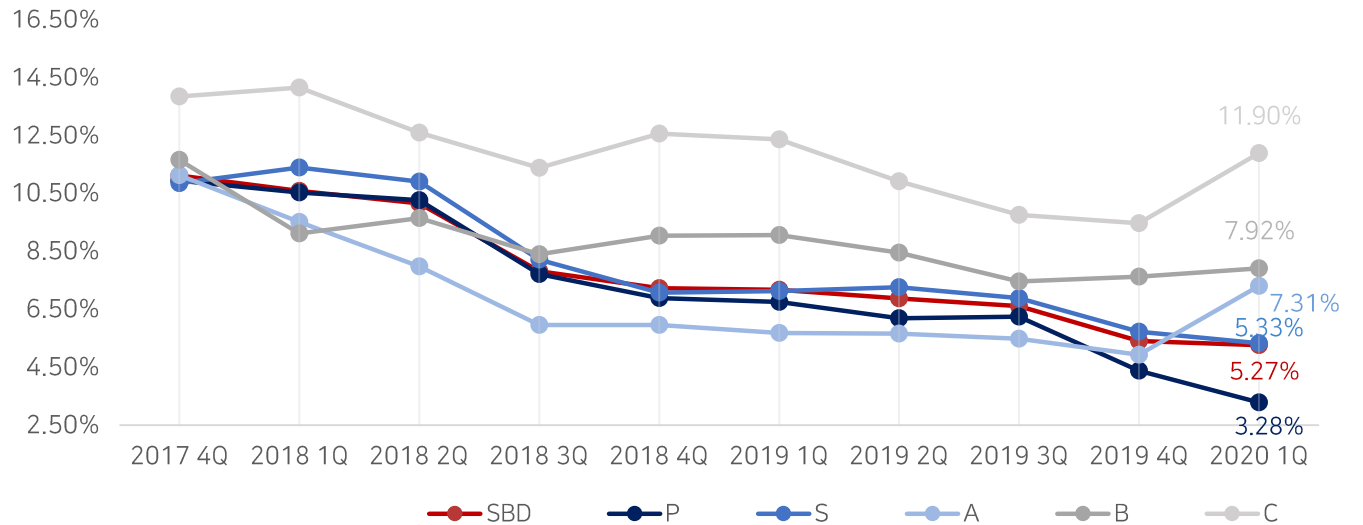
YOY



서울 분당 권역별 공실률



서울 규모별 공실률



01 서울 분당 마켓

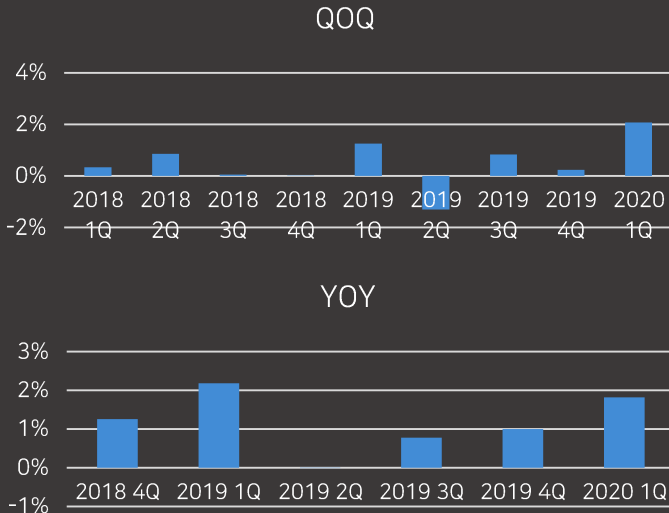
LEASING MARKET REVIEW

오피스 임대료

서울 오피스 임대료는 3.3㎡당 63,225원으로 조사되었다.
전분기 대비 2.08% 증가, 전년도 동분기 대비 1.81% 증가

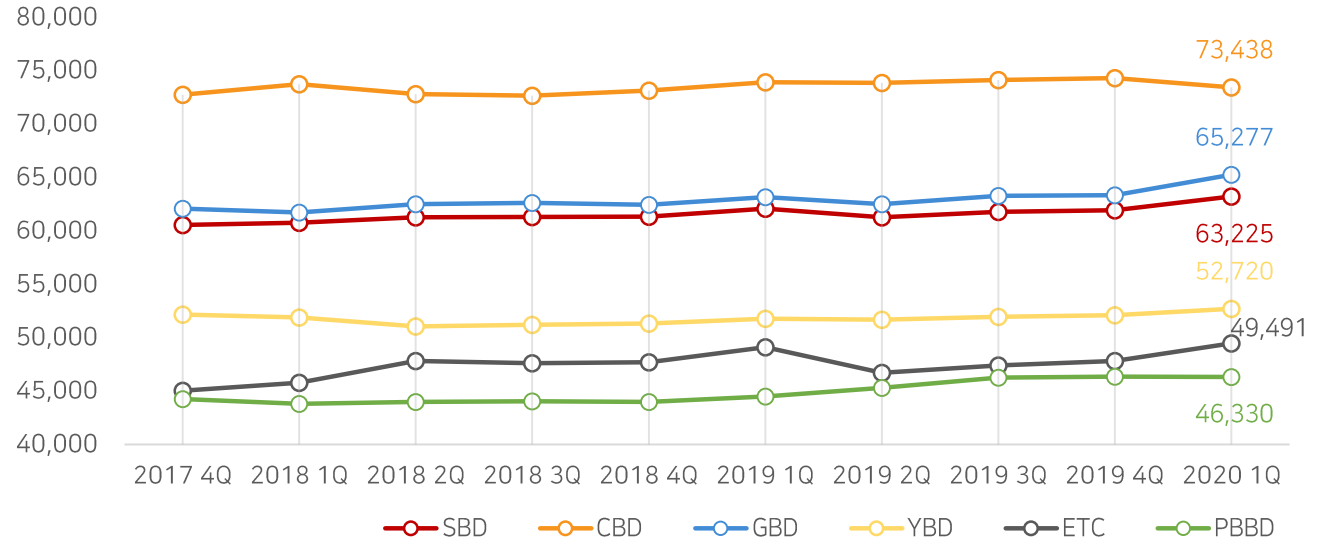
분당 오피스 임대료는 3.3㎡당 46,330원으로 조사되었다.

오피스 임대료 증감률



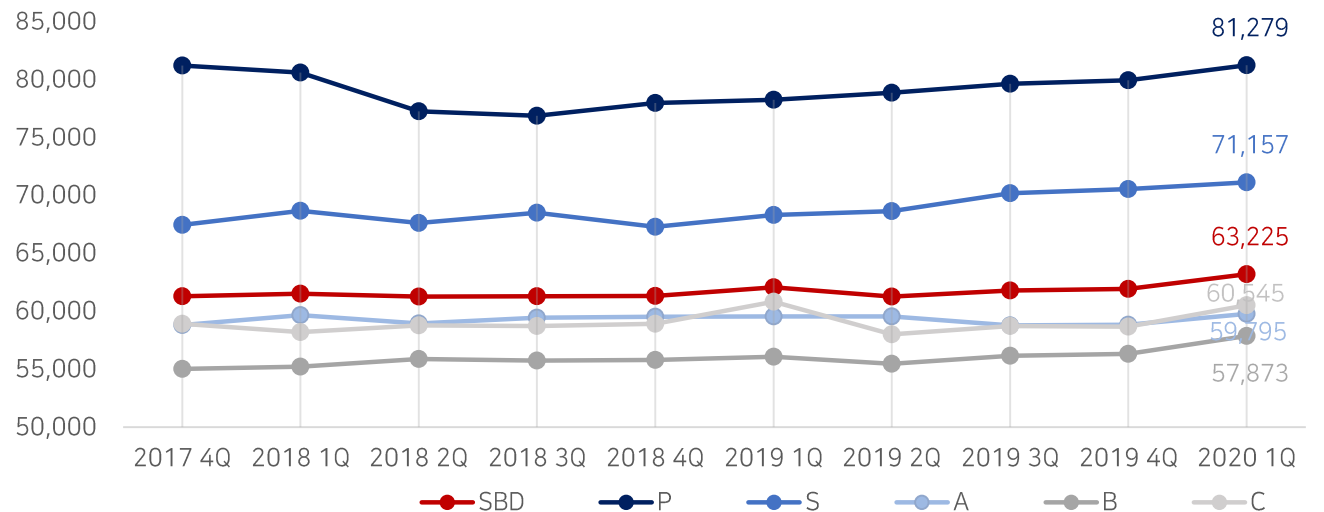
서울 분당 권역별 오피스 임대료

(단위 원/3.3㎡)



서울 규모별 오피스 임대료

(단위 원/3.3㎡)



01 서울 분당 마켓

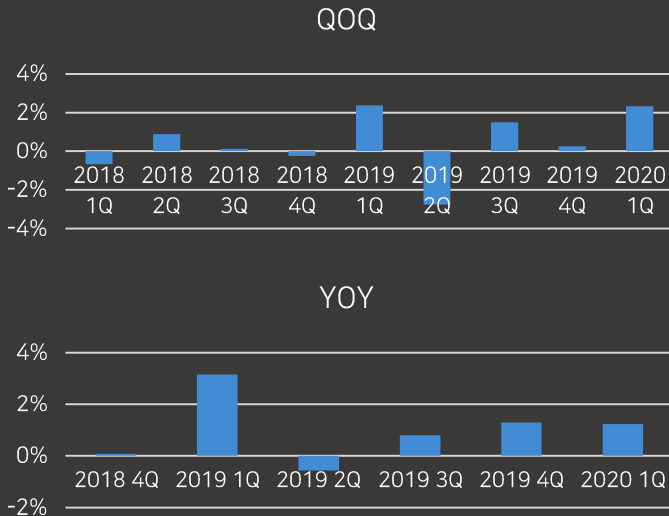
LEASING MARKET REVIEW

오피스 보증금

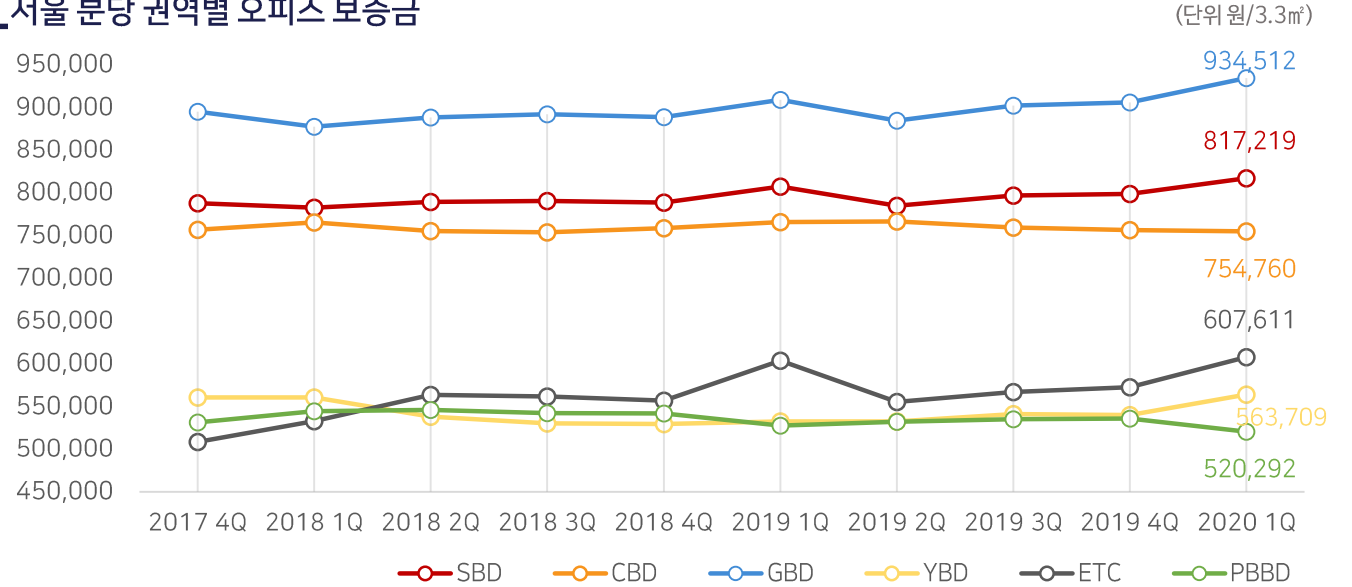
서울 오피스 보증금은 3.3㎡당 817,219원으로 조사되었다.
전분기 대비 2.32% 증가, 전년도 동분기 대비 1.24% 증가

분당 오피스 보증금은 3.3㎡당 520,292원으로 조사되었다.

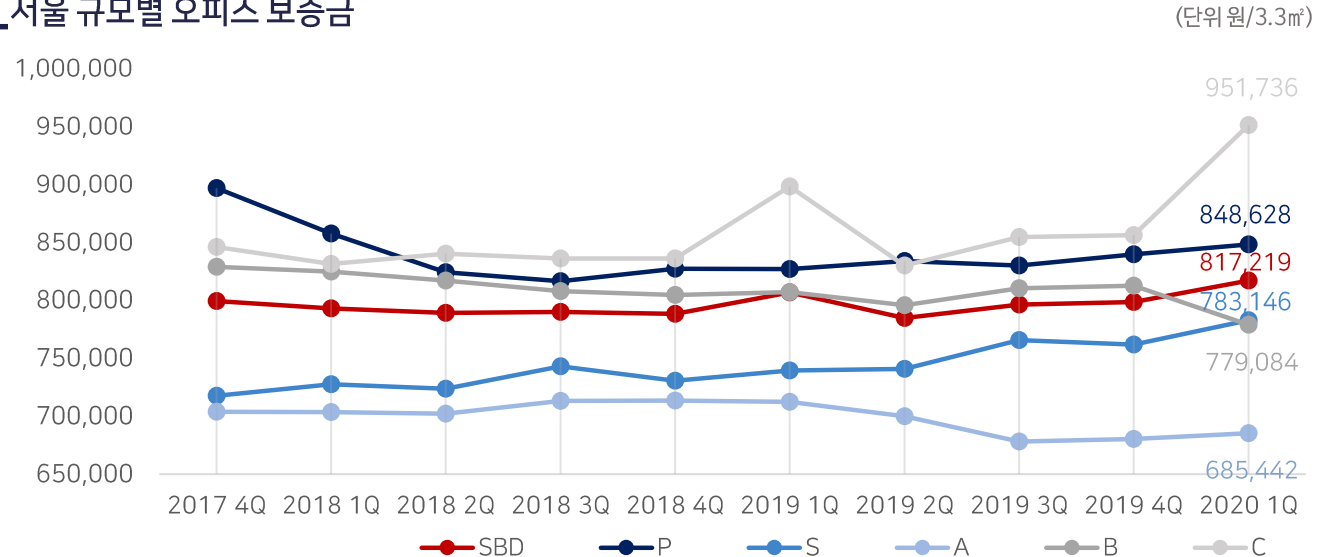
오피스 보증금 증감률



서울 분당 권역별 오피스 보증금

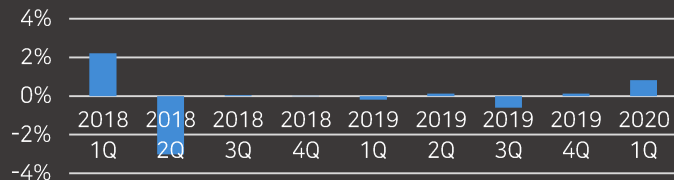


서울 규모별 오피스 보증금

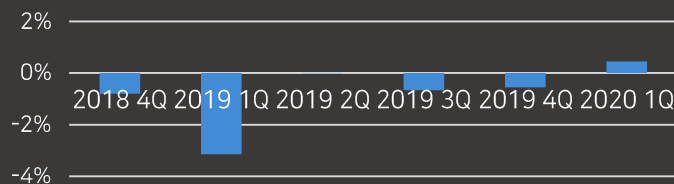


분당 오피스 관리비는 3.3㎡당 22,207원으로 조사되었다.

QQQ



YOY



Company	2017 4Q	2018 1Q	2018 2Q	2018 3Q	2018 4Q	2019 1Q	2019 2Q	2019 3Q	2019 4Q	2020 1Q
SBD	24,500	25,000	24,300	24,300	24,300	24,300	24,300	24,200	24,200	24,501
CBD	32,700	33,200	32,700	32,600	32,800	32,900	32,800	32,800	32,800	32,219
GBD	22,800	23,000	22,400	22,400	22,400	22,300	22,600	22,500	22,500	22,803
YBD	26,400	26,700	26,800	26,900	26,900	27,000	27,000	27,000	27,100	27,717
ETC	19,900	22,300	19,900	19,900	19,900	19,800	19,300	18,800	18,900	18,909
PBBD	21,400	20,800	20,800	20,800	20,800	21,200	21,500	21,600	21,700	22,207

Period	SBD	P	S	A	B	C
2017 4Q	24,800	35,200	31,000	28,500	23,500	14,800
2018 1Q	25,500	35,800	32,000	29,500	24,500	14,500
2018 2Q	24,500	32,500	30,800	28,800	23,800	14,500
2018 3Q	24,500	32,200	31,000	28,800	23,800	14,500
2018 4Q	24,500	32,800	30,800	28,800	23,800	14,500
2019 1Q	24,500	32,800	31,000	28,800	23,800	14,800
2019 2Q	24,500	33,000	31,200	28,800	23,800	14,800
2019 3Q	24,500	32,800	31,800	28,800	23,800	14,500
2019 4Q	24,500	33,000	31,800	28,800	23,800	14,500
2020 1Q	24,501	33,513	32,041	28,685	23,751	14,801

02

SBBB 서울전체

SBBB OFFICE LEASING MARKET

공실률

5.27% ↑

평균 NOC

₩153,780 ↑

평균 임대료

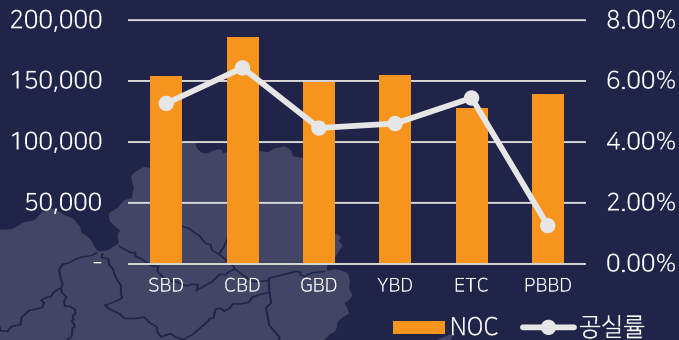
63,225

평균 보증금

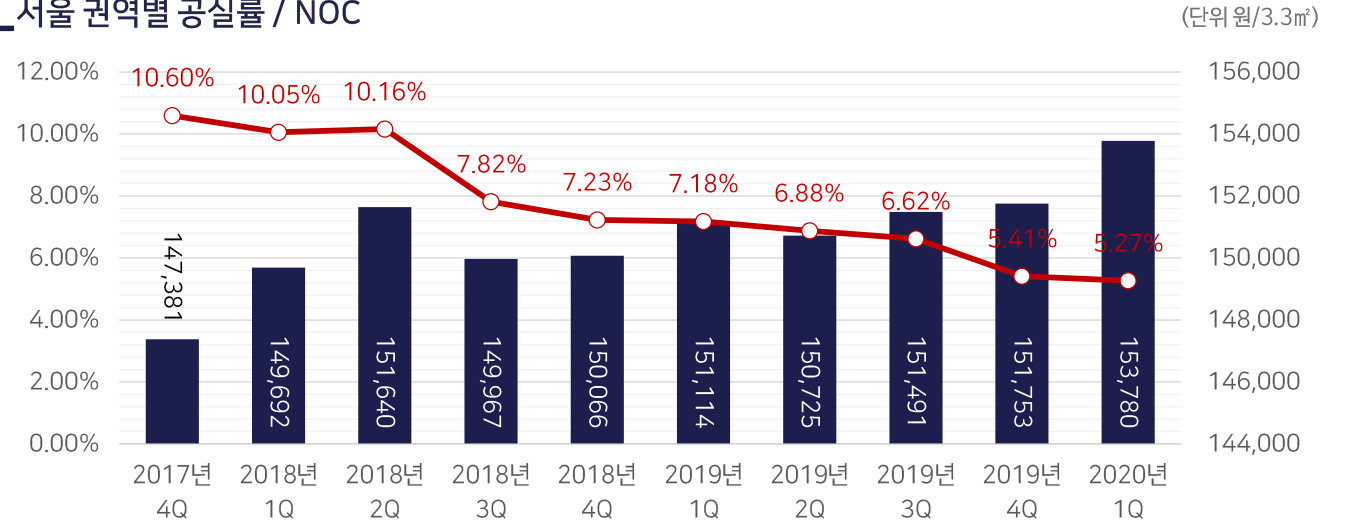
817,219

평균 관리비

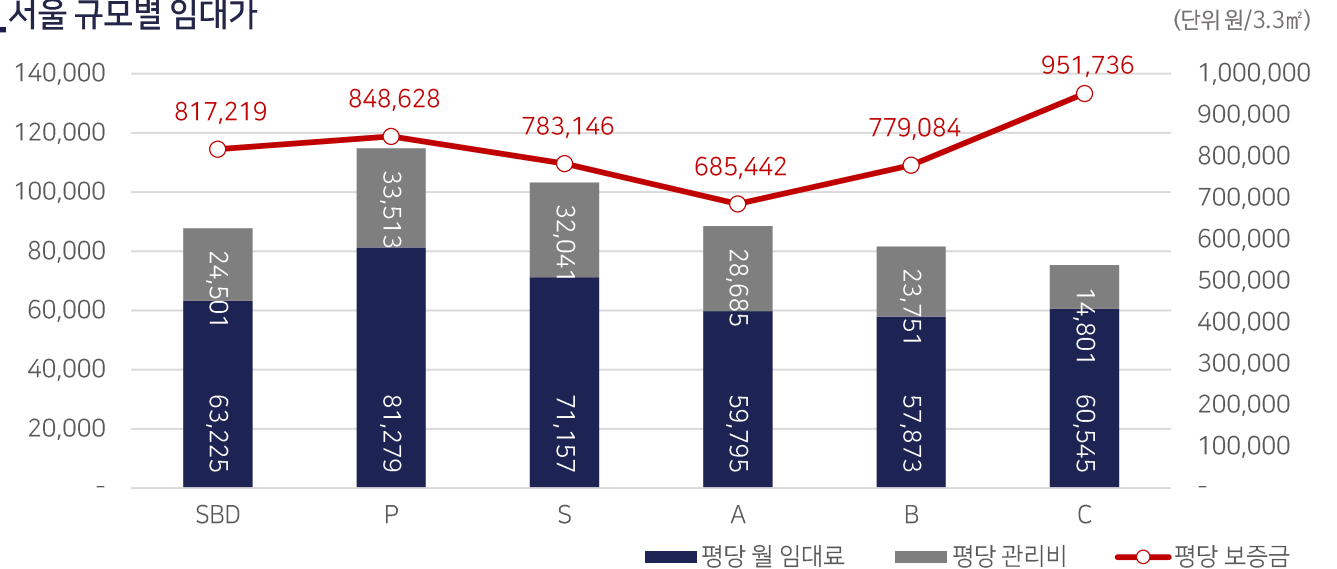
24,501



서울 권역별 공실률 / NOC



서울 규모별 임대가



03

CBD 도심지역

CBD OFFICE LEASING MARKET



6.43% ↑



₩186,168 ↓

평균 임대료

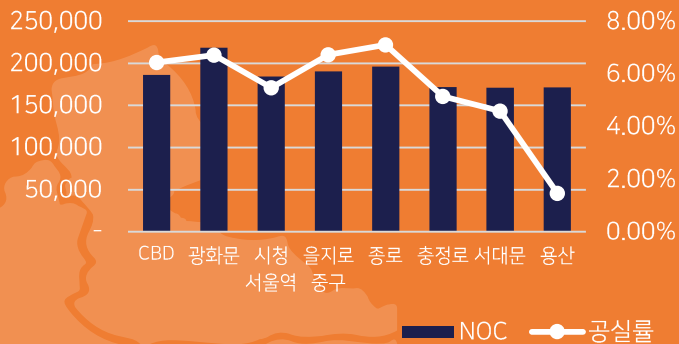
73,438

평균 보증금

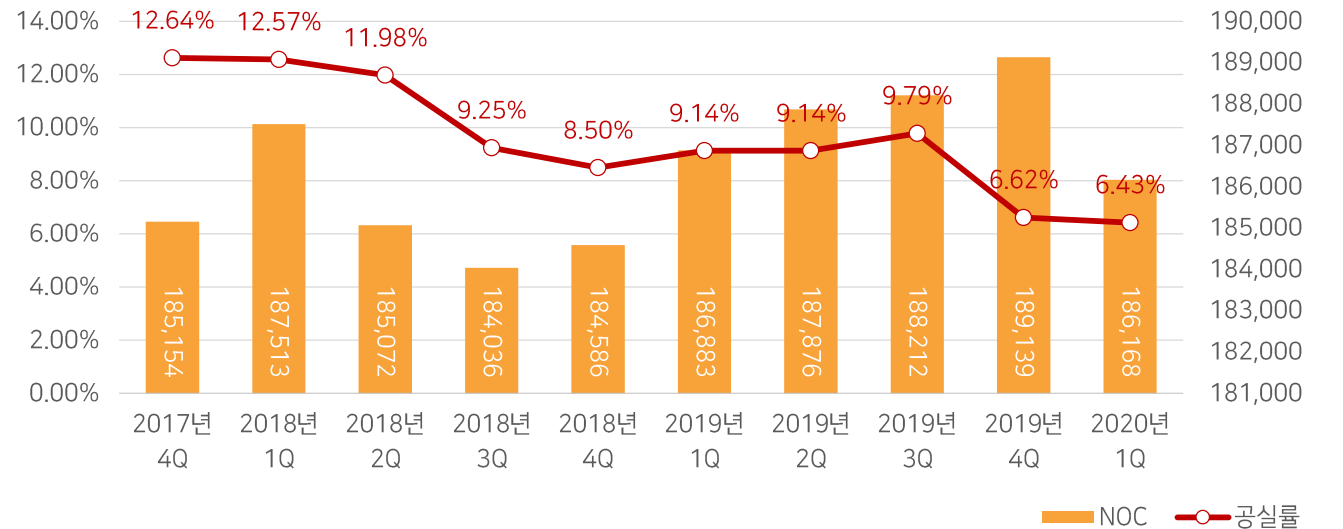
754,760

평균 관리비

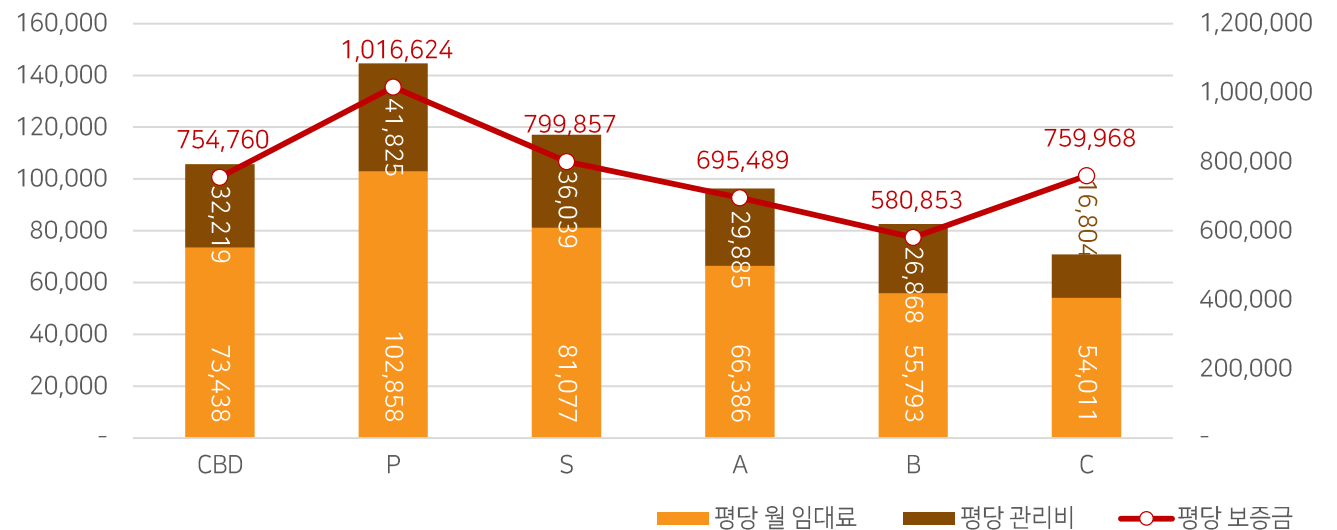
32,219



CBD 지역 공실률 / NOC



CBD 지역 규모별 임대가 현황



04

GBD 강남지역

GBD OFFICE LEASING MARKET



공실률

4.46%



평균 NOC

₩148,695



평균 임대료

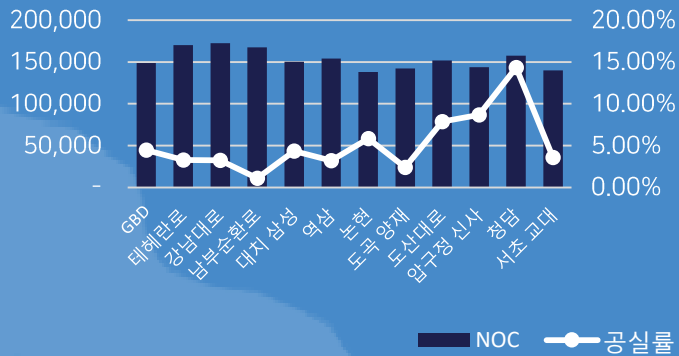
65,277

평균 보증금

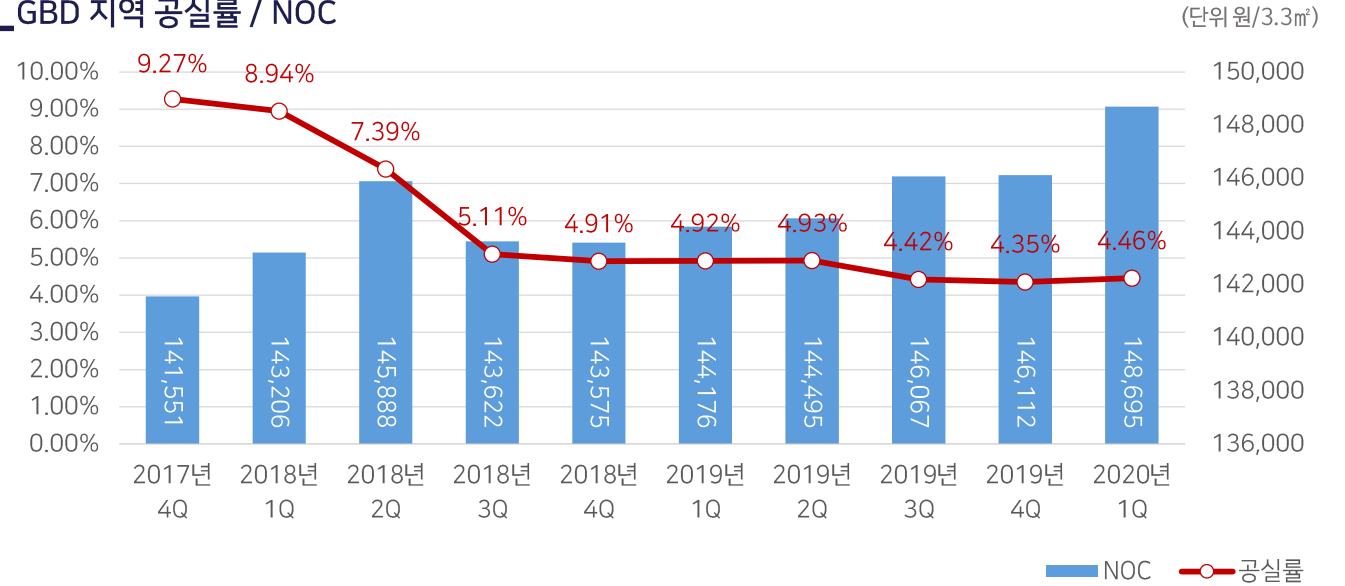
934,512

평균 관리비

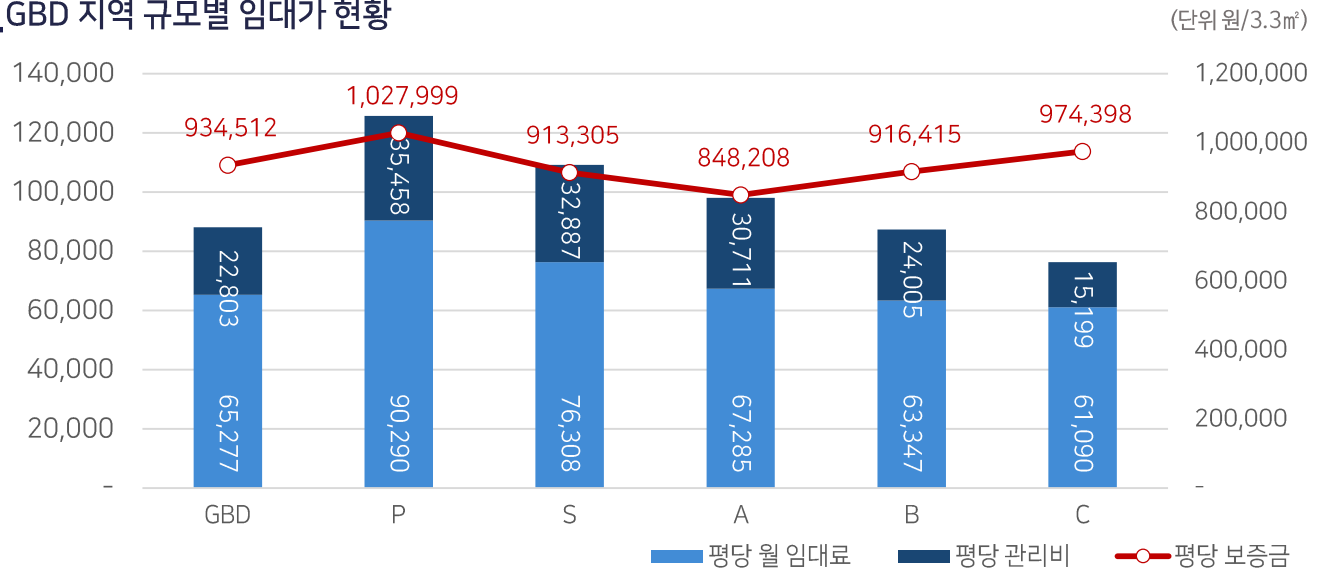
22,803



GBD 지역 공실률 / NOC



GBD 지역 규모별 임대가 현황



05

YBD 여의도 영등포

YBD OFFICE LEASING MARKET



공실률

4.61%



평균 NOC

₩154,568



평균 임대료

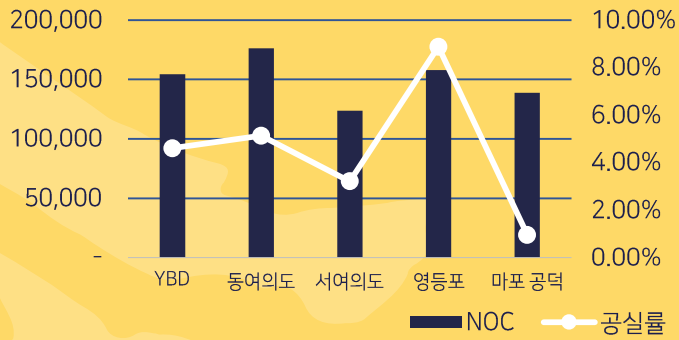
52,720

평균 보증금

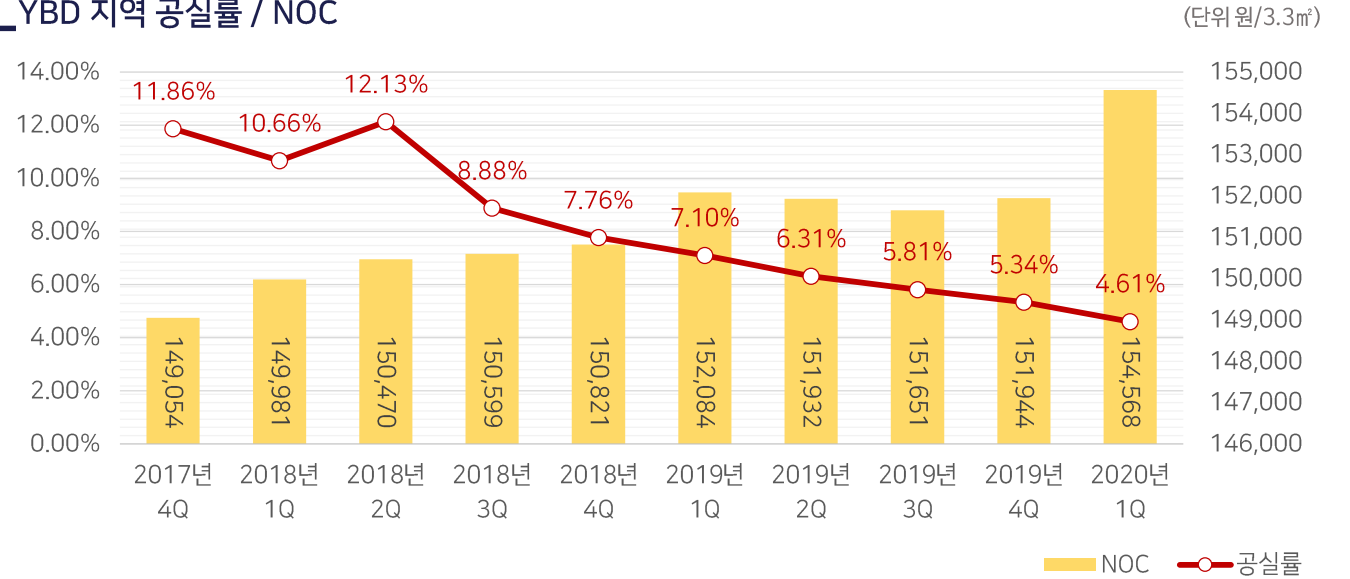
563,709

평균 관리비

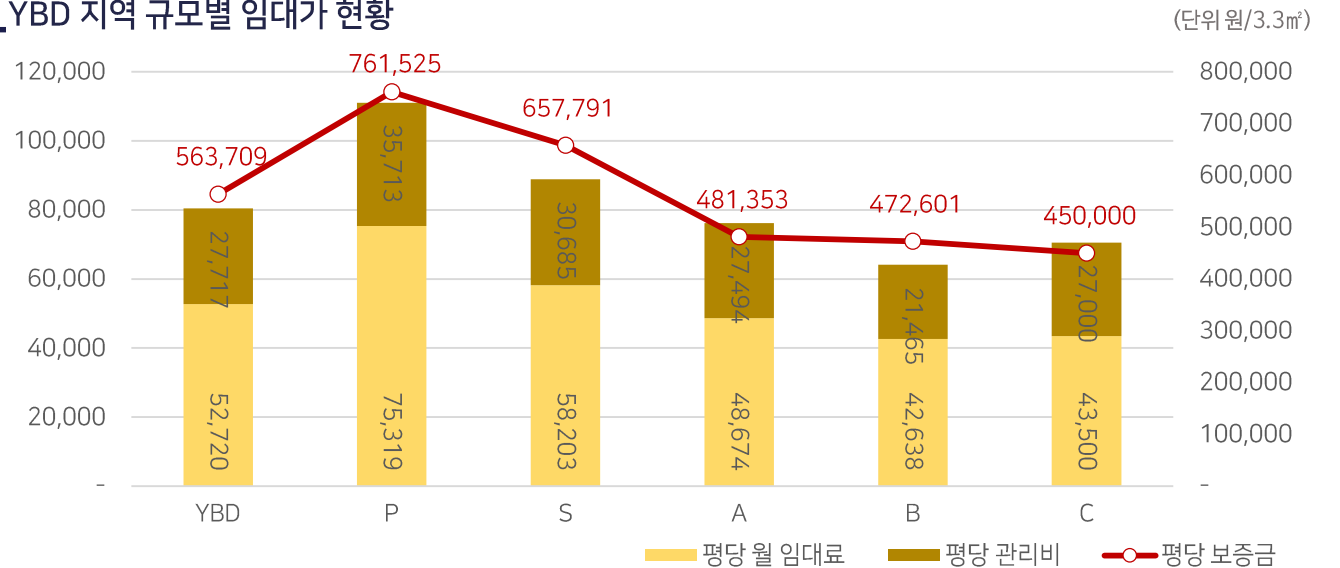
27,717



YBD 지역 공실률 / NOC



YBD 지역 규모별 임대가 현황



06 ETC 서울기타

ETC OFFICE LEASING MARKET



공실률

5.45%



평균 NOC

₩123,682



평균 임대료

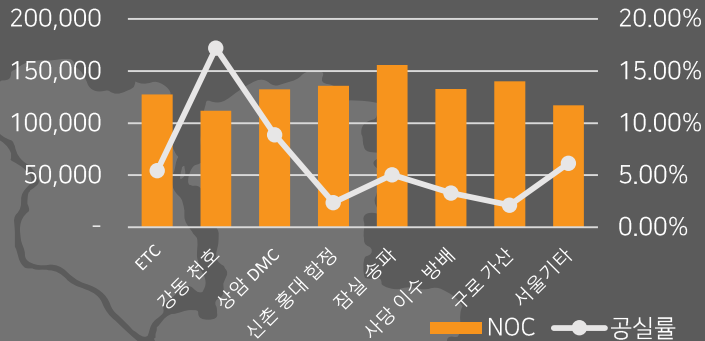
49,491

평균 보증금

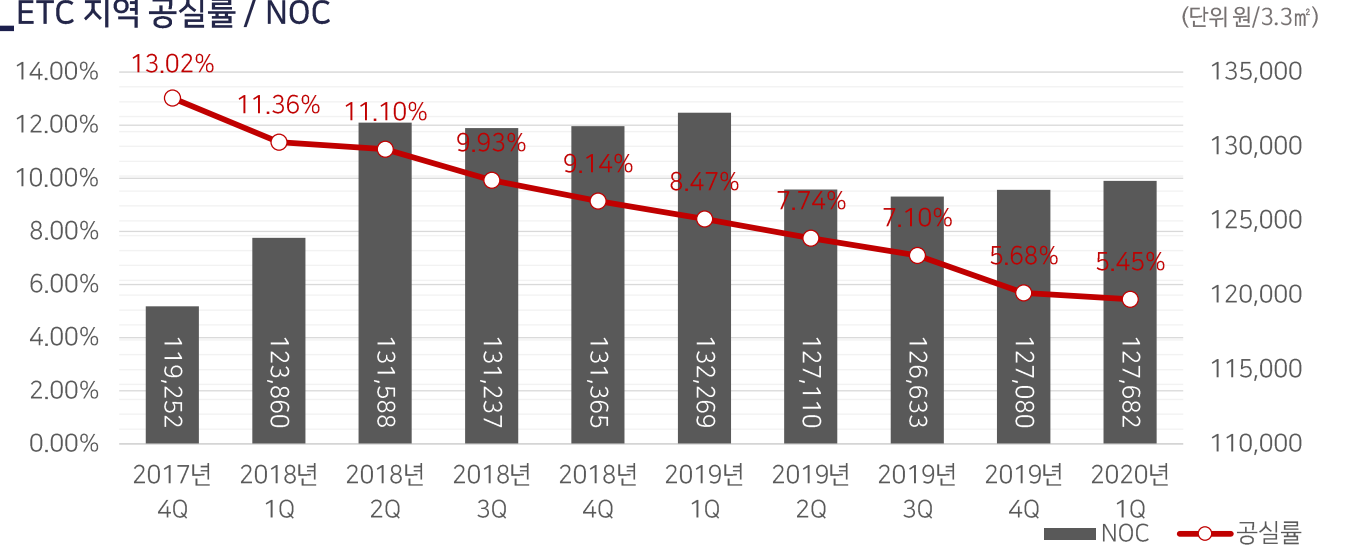
607,611

평균 관리비

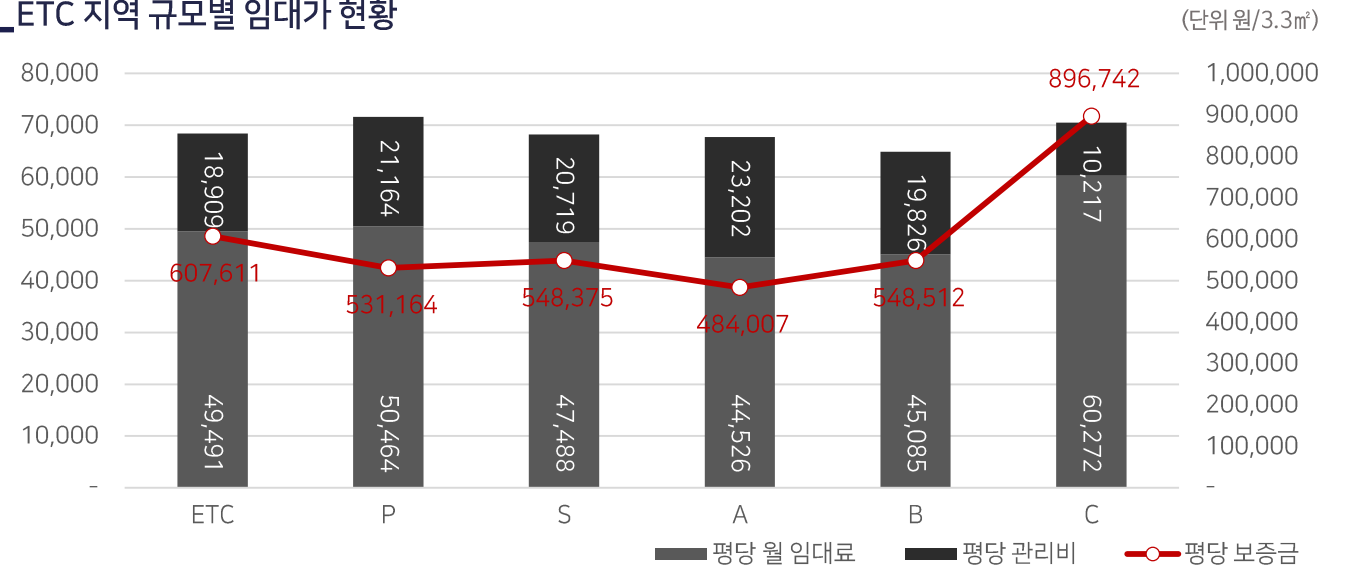
18,909



ETC 지역 공실률 / NOC



ETC 지역 규모별 임대가 현황



07

PBBD 판교 분당

PBBD OFFICE LEASING MARKET



공실률

1.25%



평균 NOC

₩138,927



평균 임대료

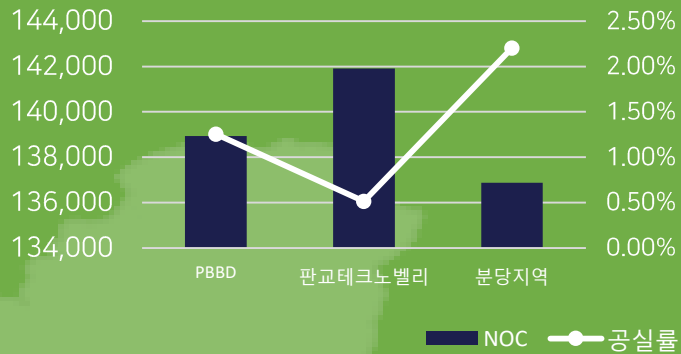
46,330

평균 보증금

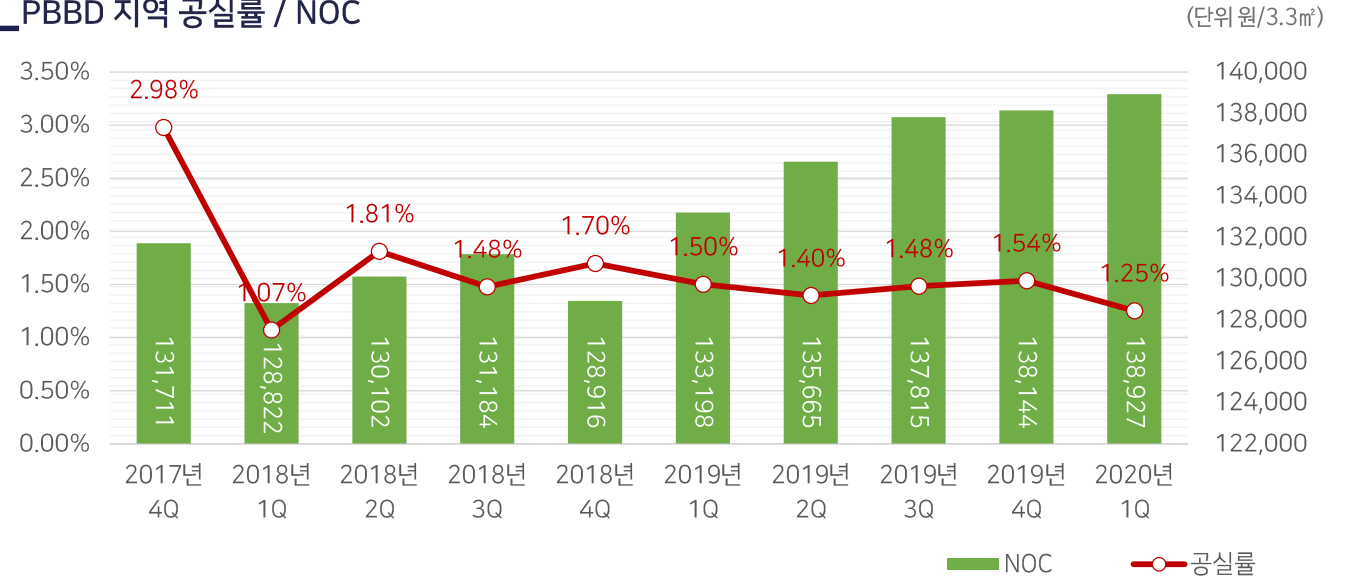
520,292

평균 관리비

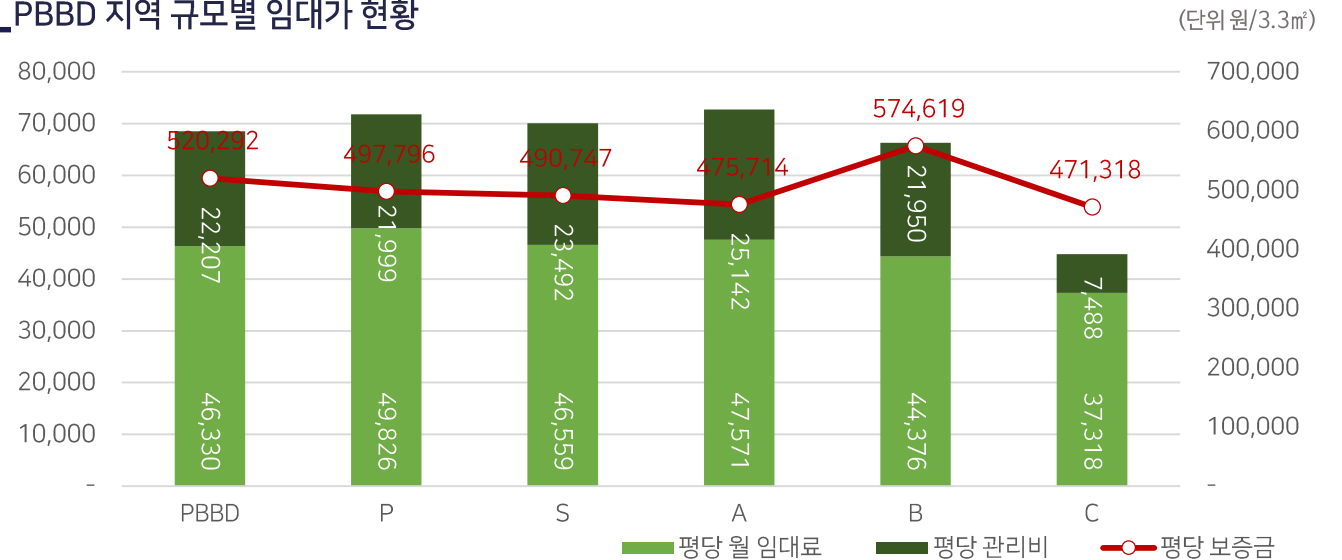
22,207



PBBD 지역 공실률 / NOC



PBBD 지역 규모별 임대료 현황



08

세부지역별 임대 현황

Market	Submarket	총임대면적	평균보증금	평균임대료	평균관리비	평균NOC	공실률
CBD	광화문	558,743	871,783	87,350	34,939	218,354	6.71%
	종로	723,484	813,166	77,006	31,407	195,902	7.10%
	을지로 중구	1,243,123	752,957	75,653	33,789	190,530	6.72%
	시청 서울역	810,659	735,659	73,853	33,755	184,174	5.47%
	충정로	163,867	611,802	60,486	30,971	171,635	5.14%
	용산	172,545	679,357	62,600	29,833	171,242	1.47%
GBD	서대문	94,378	634,603	62,388	31,318	170,846	4.58%
	강남대로	525,974	968,033	72,048	26,893	172,325	3.24%
	테헤란로	1,376,787	880,689	72,802	26,276	170,152	3.28%
	남부순환로	67,322	815,906	60,730	26,079	167,421	1.10%
	청담	94,512	1,113,036	75,106	21,137	157,533	14.35%
	역삼	1,173,976	862,356	65,396	24,119	154,183	3.23%
	도산대로	68,358	1,103,103	66,765	24,119	151,696	7.88%
	대치 삼성	795,463	860,640	67,443	22,880	150,301	4.38%
	압구정 신사	44,677	1,489,303	67,597	22,001	143,592	8.69%
	도곡 양재	124,108	770,001	54,248	22,037	142,180	2.40%
YBD	서초 교대	162,711	875,519	59,338	19,491	139,743	3.61%
	논현	254,988	1,136,411	63,236	21,857	138,077	5.86%
	동여의도	651,705	607,570	58,074	29,920	176,290	5.13%
	영등포	134,408	552,147	52,680	29,757	157,924	8.88%
ETC	마포 공덕	196,168	557,350	49,710	26,175	138,907	0.96%
	서여의도	137,582	467,303	43,730	23,325	123,631	3.21%
	잠실 송파	449,640	728,611	57,033	23,305	155,779	5.04%
	신촌 홍대 합정	59,099	878,330	63,444	20,247	135,972	2.37%
	사당 이수 방배	31,797	1,090,072	56,888	19,110	132,883	3.30%
PBBD	상암 DMC	306,878	414,986	40,276	25,808	132,625	8.87%
	서울기타	711,027	594,149	47,704	18,901	117,005	6.13%
	강동 천호	74,167	588,870	47,275	16,639	111,759	17.22%
	판교테크노밸리	315,943	505,716	47,869	20,178	141,904	0.51%
	분당지역	246,643	530,769	45,224	23,665	136,880	2.20%

09

주요 상업용
빌딩 신축

권역	빌딩명	소재지	주용도	연면적(m)	연면적(py)	사용승인월
CBD	도화서길 디원	종로구 수송동	제2종근린생활시설	6,716	2,032	2020-03
	도화서길 디투	종로구 수송동	제2종근린생활시설	2,481	750	2020-03
	코너스톤	종로구 관철동	제2종근린생활시설	2,155	652	2020-01
	에이트 타워	종로구 교북동	제2종근린생활시설	2,138	647	2020-03
GBD	현대백화점 본사	강남구 대치동	업무시설	28,715	8,686	2020-03
	신라스테이 삼성	강남구 삼성동	숙박시설	18,526	5,604	2020-01
	EG빌딩	강남구 대치동	업무시설	13,622	4,121	2020-01
	다이레나 서초	서초구 서초동	업무시설	5,102	1,543	2020-02
	First Light 타워	강남구 청담동	업무시설	4,757	1,439	2020-01
YBD	파인그라드빌딩	영등포구 문래동	제2종근린생활시설	6,790	2,054	2020-03
	대림메디컬	영등포구 대림동	제1종근린생활시설	1,688	510	2020-03
ETC	가산 테라타워	금천구 가산동	공장	86,239	26,087	2020-02
	용답동 한성자동차 정비공장	성동구 용답동	자동차관련시설	17,713	5,358	2020-03
	WW 홍대	마포구 동교동	숙박시설	17,059	5,160	2020-01
	범한기술원	강서구 마곡동	교육연구시설	16,625	5,029	2020-03
	마곡지구 C4-6블럭 업무,근린생활시설	강서구 마곡동	업무시설	15,411	4,662	2020-01
PBBD	Technoplex 한국타이어앤테크놀로지	성남시 분당구 삼평동	업무시설	47,919	14,496	2020-01

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주요 법인
이전

CBD 권역

임차인	업종	빌딩명	소재지	면적(㎡)	면적(3.3㎡)
김앤장	변호사업	크레센도빌딩	구 KC타워	54,600	16,517
법무법인 태평양	변호사업	센트로폴리스	종로구 우정국로 26	36,515	11,046
서울시 제3청사	공공기관	씨티스퀘어	중구 서소문로 124	30,572	9,248
한화건설	건설업	장교동 한화빌딩	중구 청계천로 86	19,000	5,748
LG하우시스	플라스틱 창호 제조업	LG서울역빌딩	중구 후암로 98	10,883	3,292
SK C&C	시스템 통합 SI	센트로폴리스	종로구 우정국로 26	8,723	2,639
저스트코	공유 오피스	콘코디언	종로구 세문안로 76	8,303	2,512
서브원	상품 종합 도매업	콘코디언	종로구 새문안로 76	6,227	1,884
플래그원	공유 오피스	연세빌딩	중구 통일로 10	6,136	1,856
지멘스(주)	전기용 기계 장비	풍산빌딩	서대문구 충정로 23	4,721	1,428
캐롯손해보험	보험업	파인에비뉴	중구 을지로 100	2,828	856

YBD 권역

임차인	업종	빌딩명	소재지	면적(㎡)	면적(3.3㎡)
에이앤디신용정보	신용 조사 추심 대행업	영시티	영등포구 문래로28길 25	77,059	23,310
SK텔레콤 자회사	콜센터	영시티	영등포구 문래로28길 25	26,000	7,865
한국투자신탁운용	신탁업 집합투자업	FKI타워	영등포구 여의대로 24	6,866	2,077
현대캐피탈	신용카드 할부금융업	KCT타워	영등포구 국회대로 74길 4	3,394	1,027

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주요 법인
이전

GBD 권역

임차인	업종	빌딩명	소재지	면적(㎡)	면적(3.3㎡)
비바리퍼블리카	소프트웨어 개발 및 공급업	한국지식재산센터	강남구 테헤란로 131	13,187	3,989
카카오	포털	EG빌딩	강남구 테헤란로98길 11	6,700	2,027
마크로젠	의학 연구개발업	대봉빌딩	강남구 테헤란로 238	6,211	1,879
리저스코리아	비주거용 건물 임대업	오토웨이타워	강남구 영동대로 417	5,300	1,603
직방	시스템 소프트웨어 개발	GT타워	서초구 서초대로 411	2,840	1,442
패스트파이브	비주거용 건물 임대업	인우빌딩	강남구 도산대로 145	4,489	1,358
교보증권	증권 중개업	GT타워	서초구 서초대로 411	2,225	673
원익투자파트너스	금융 투자업	해성1빌딩	강남구 테헤란로 504	1,732	524
현대글로벌비스	화물운송	한국기술센터	강남구 테헤란로 305	1,215	368

ETC 권역

임차인	업종	빌딩명	소재지	면적(㎡)	면적(3.3㎡)
쿠팡	전자상거래 소매업	월드타워	송파구 송파대로 558	13,200	3,993
현대엘앤씨	플라스틱 창호 제조업	이스트센트럴	강동구 천호대로 1077	8,636	2,612
팜스빌	건강기능식품 제조업	팜스빌 마곡허브	강서구 마곡중앙8로3길 37	6,139	1,857
삼성물산	제조업 건설업	이스트센트럴	강동구 천호대로 1077	5,289	1,600
한국다케다제약	의약품 도매업	롯데월드타워	송파구 신천동 29	3,531	1,068
스파크플러스	소프트웨어 개발 및 공급업	에스팩토리	성동구 연무장15길 11	2,314	700

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03 . CBD – Central Business District

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05 . YBD – Yeouido Youngdeungpo

06 . ETC – The rest of Seoul

07 . PBBD – Pangyo & Bundang Business District

08 . Leasing Data in Sub-districts


09 . New Buildings

10. Corporations Recently Moved



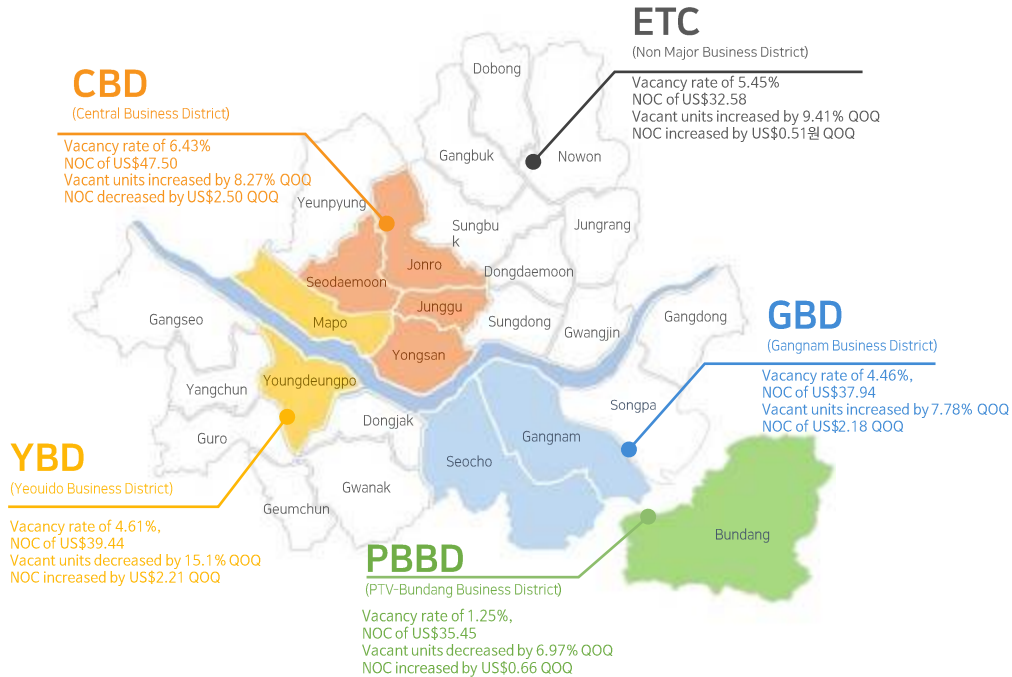
Leasing Market Highlights

 Vacancy Rate
5.27%
0.14% ↓

 NOC
\$39.24
\$0.56 ↑

 Supply of CRE
11,723,000m²
82,201 ↓

 Newly-built CRE
34,925m²
17,795 ↓



Leasing Market Summary

Business District	NOC	Vacancy Rate	Rent / Py	Deposit / Py	Management Fee / Py
Capital Seoul	39.24	5.27%	16.13	208.51	6.25
CBD	47.50	6.43%	18.74	192.57	8.22
GBD	37.94	4.46%	16.66	238.44	5.82
YBD	39.44	4.61%	13.45	143.83	7.07
ETC	32.58	5.45%	12.63	155.03	4.82
PBBD	35.45	1.25%	11.82	132.75	5.67

New Buildings

Business District	Building Name	Address	Purpose of Use	GFA (m)	GFA (py)	Building Completion
ETC	Gasan Tera Tower	Gasan-dong Geumcheon	Factory	86,239	26,087	2020-02
GBD	Hyundai Department Store	Daechi-dong Gangnam-gu	Accommodation	28,715	8,686	2020-03
GBD	Shilla Stay	Samsung-dong Gangnam-gu	Addommodation	18,526	5,604	2020-01
ETC	Hansung Motors	Yongnap-dong Sungdong-gu	Car Manufacturing	17,713	5,358	2020-03
ETC	WW Hongdae	Donggyo-dong Mapo-gu	Accommodation	17,059	5,160	2020-01

Corporations Recently Moved

Business District	Corporation Name	Type of Business	Building Name	Leasing Area (3.3m)	Address
YBD	A&D Credit Information	Credit Research & Collection	Young City	23,310	25 28-gil Moonrae-dong Youngdeungpo-gu
CBD	Kim & Chang	Legal Service	Crescendo	16,517	75 Semoonan-ro Jongro
CBD	Bae, Kim & Lee	Legal Service	Centropolis	11,046	26 Woojungguk-ro Jongro-gu
CBD	Seoul Government Office	Public Office	City Square	9,248	124 Seosomoon-ro Jung-gu
YBD	SK Telecom	Call Center	Young City	7,865	25 28-gil Moonrae-ro Youngdeungpo-gu

CRE Issues



Market Trends



Policies/Legislations



Development Trends



Industry Trends

JAN

Market Trends

6

Marked the highest supply level in 2020, with an alarm for a possible surge of vacancy level

Market Trends

7

HK-based PAG, completed the acquisition of Grand Hyatt Seoul Hotel with US\$489.2 million

Market Trends

7

NH Investment & Securities, acquired 53-story 'Park One Tower' with US\$759.1 million

Market Trends

8

Sanctions on residential market and its 'balloon effect'; investors led to the small-to-medium commercial buildings in Gangnam '

Legislation & Policies

17

Seoul City Hall, to build a 'Compact City' to boost the business districts around 5 major subway stations

CRE Development

22

US\$3.4 billion project to build a cultural town by Buchun City Hall, halted by City Council

CRE Development

31

US\$210.8 million project of house-to-let development, embarked in Yongsan & Yeoksam

FEB

Market Trends

3

Seoul City Hall, announced a development plan for Youngdeungpo station areas

Market Trends

4

1,300-household residential development plan set on the site of ex-'Sungdong Prison'

Market Trends

7

Non-qualified property agents, banned to advertise any property from Aug 2020

Market Trends

13

Increased land value of Hyundai Motor's GEC site, caused 15% increase of Property Tax, US\$ 30.4 million in total

Legislation & Policies

24

Real estate trust market, grown up to US\$1.1 billion

CRE Development

25

3 major development plans in Seoul, announced

CRE Development

27

CJ's site in Gayang-dong, bought by Inchang & Hyundai consortium, with US\$885.6 million

MAR

Market Trends

10

Crisis led to 'Smart Office' Development

Market Trends

13

Impact of COVID-19, maybe not now but expected to be visible soon

Market Trends

14

Hite Jonro Head Office Building in Seocho, bought by KB Asset Management, with US\$7,144 /m²

Market Trends

24

Numbers of real estate agencies, gone out of business due to COVID-19

Legislation & Policies

25

E-mart building & its site in Magok, bought by Tae-young & Meritz consortium with US\$687.2 million

CRE Development

25

Disco Corp., launched a free service to access property registrations and their transaction information

CRE Development

26

City Development Plan, expanded the target areas up to 524 zones with 167.5km²

Research Outline

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	3 months period; Jan-March 2020
DB Management	Okey Research Center has carried out our research with a large numbers 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 = 1,185.60 KRW (0.84 USD = 1,000 KRW) as at 11 Aug 2020

NOC (Net Occupancy Cost)

*NOC: The cost that 1m² of GFA incurs to a tenant who rents the property. NOC can be useful to compare between different types of office buildings.

*py: Pyung (1 m² = 0.3025py)

QOQ (Quarter on Quarter): the rate increase/decrease to the previous quarter

YOY (Year on Year): the rate increase/decrease to the same quarter of the previous year

Sample Size of Each Building Grade

	CBD	GBD	YBD	ETC	PBBD
Sample	249	835	129	226	66
GFA(m ²)	7,577,922	9,380,056	3,708,837	6,232,523	1,859,787
GFA(py)	2,292,322	2,837,467	1,121,923	1,885,338	562,586

5 Regional Divisions in Seoul

CBD Central Business District	GBD Gangnam Business District	YBD Yeido Business District	ETC Non Major Business District	PBBD PTV-Bundang Business District
Gwanghwamoon, Joong-gu, Seodaemoon, Jong-ro, Etc	Gangnam-gu, Seocho-gu, Etc.	Yeido, Mapo-ku, Etc.	Sangam, Gangdong, Songpa-gu, Etc.	Pangyo Techno Valley, Seohyundong, Sunedong, Etc.

Categories of Office Buildings by Their Sizes

	Grade P Prime Bldg.	Grade S Large Bldg.	Grade A Large-medium	Grade B Medium-small	Grade C Small Bldg.
Gross Floor Area	≥49,587m ² (≥15,000py)	≥23,140m ² (≥7,000py)	≥13,223m ² (≥4,000py)	≥3,306m ² (≥1,000py)	<3,306m ² (<1,000py)
Lease Area of Sample Floor	≥1,653m ² (≥500py)	≥992m ² (≥300py)	≥661m ² (≥200py)	≥96m ² (≥150py)	<496m ² (<150py)

01

Seoul & Bundang Market

LEASING MARKET REVIEW

Number of CRE Buildings

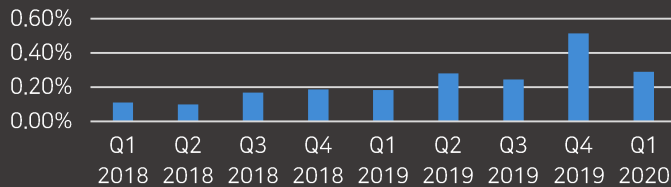
The total number of CRE in Seoul & Bundang was updated as follows:

-In Seoul, there was new supply of 26,060 properties into CRE Market:
0.3% increase QOQ & 1.3% increase YOY

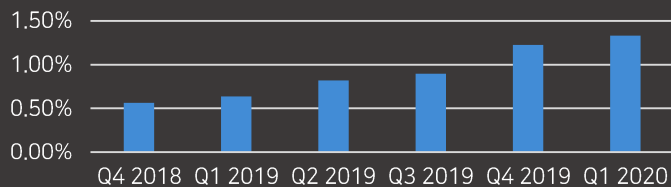
In Bundang, the number of the properties over 1,000 m² GFA was 919

Growth Rate of Number of CRE Buildings

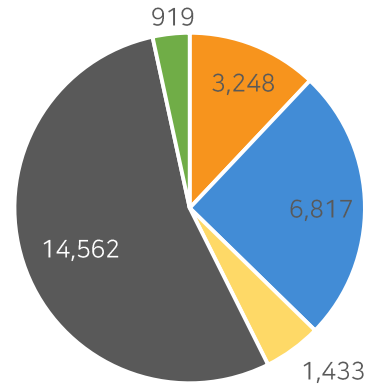
QOQ



YOY

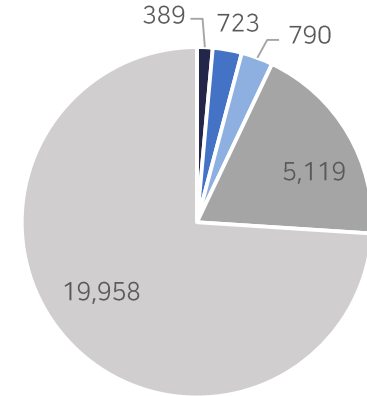


No. of Buildings in Seoul & Bundang, by District



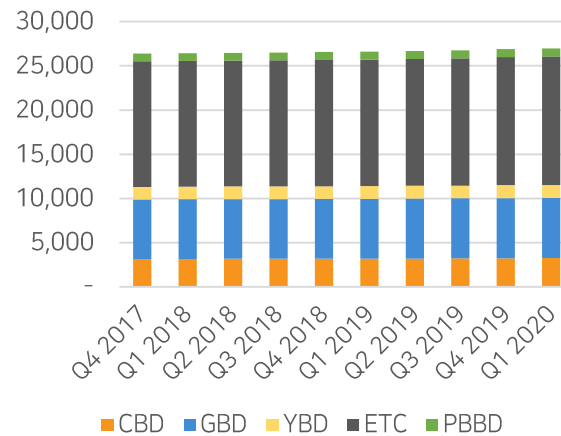
■ CBD ■ GBD ■ YBD ■ ETC ■ PBBD

No. of Building in Seoul, by Size



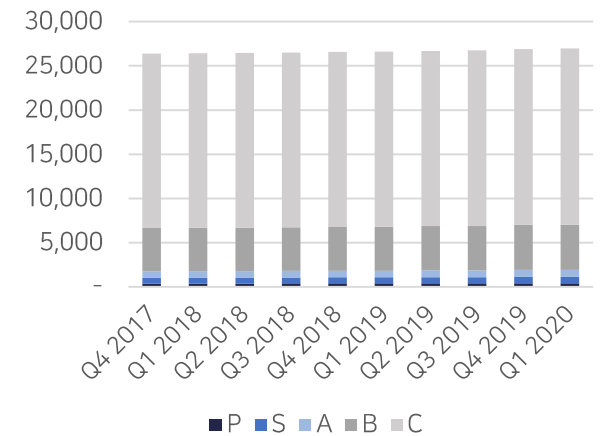
■ P ■ S ■ A ■ B ■ C

No. of Building in Seoul & Bundang, by District



■ CBD ■ GBD ■ YBD ■ ETC ■ PBBD

No. of Building in Seoul, by Size



■ P ■ S ■ A ■ B ■ C

01

Seoul & Bundang Market

LEASING MARKET REVIEW

CRE Supply

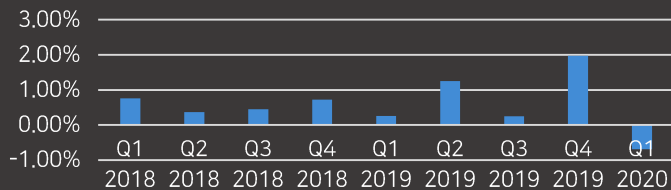
In Seoul, the number of commercial properties was updated as follows:

- There was new supply of 128,111,468 m² GFA into Seoul;
0.7% increase QOQ & 2.8% increase YOY

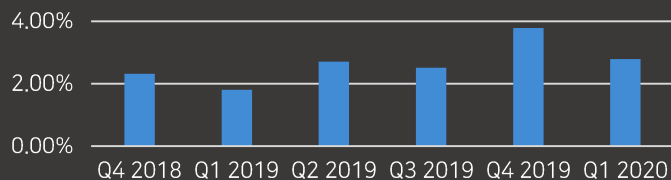
In Bundang, there was new supply of 10,252,142 m² into the CRE market

Growth of CRE Supply

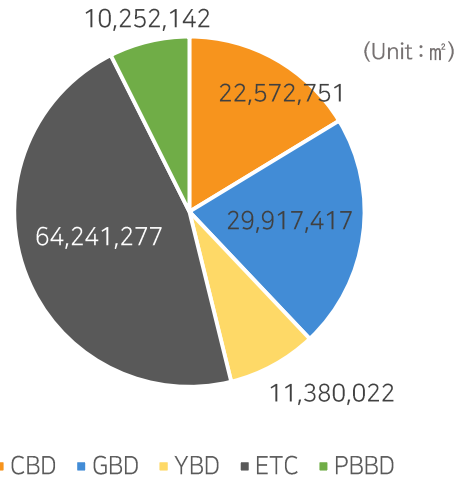
QOQ



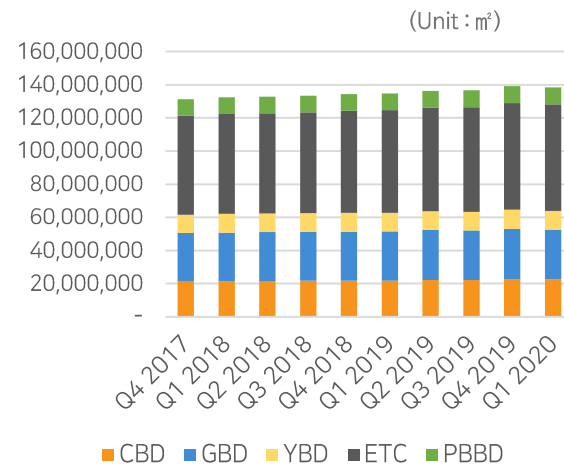
YOY



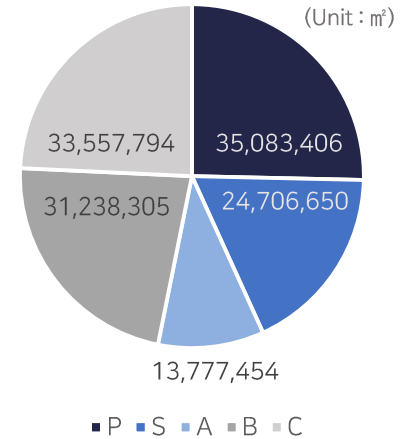
CRE Supply in Seoul & Bundang, by District



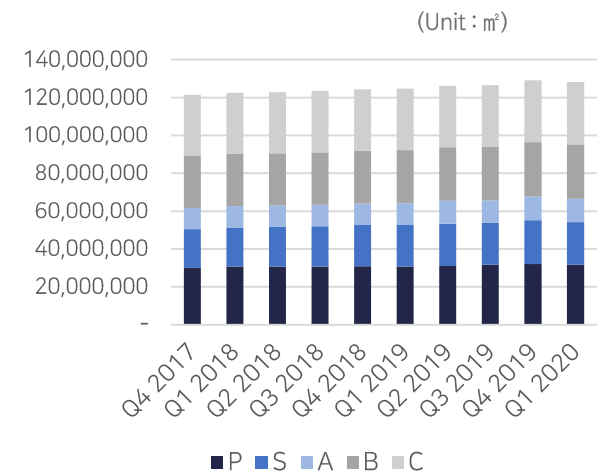
CRE Supply in Seoul & Bundang, by District



CRE Supply in Seoul, by Size



CRE Supply in Seoul, by Size



01

Seoul & Bundang Market

LEASING MARKET REVIEW

No. of New Commercial Buildings

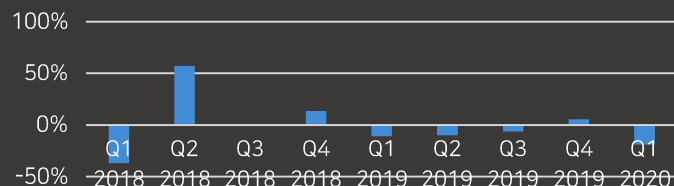
In Seoul, the new supply has been updated as follows;
(except for residential, public, religious & hospital properties)

-There were 64 new buildings, 19% decrease QOQ & 28% decrease YOY

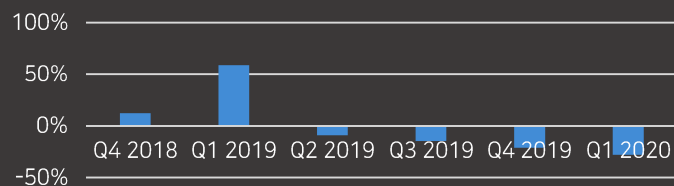
In Bundang, there were 2 new buildings

No. of New Commercial Buildings

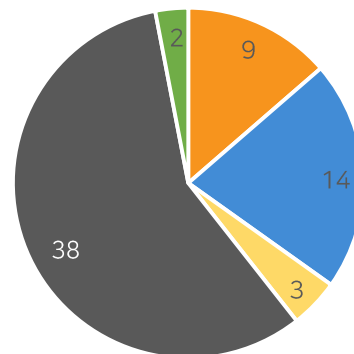
QOQ



YOY

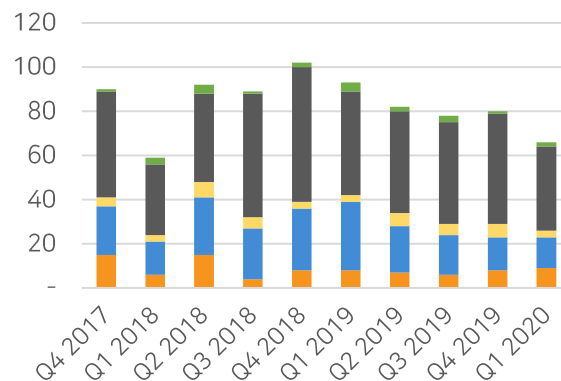


No. of New Buildings in Seoul & Bundang, by District



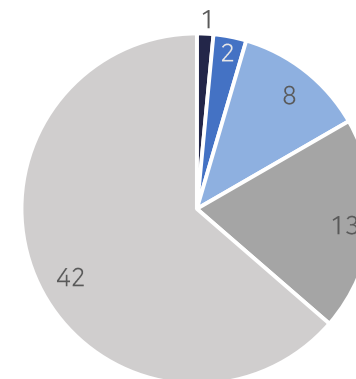
■ CBD ■ GBD ■ YBD ■ ETC ■ PBBD

No. of New Buildings in Seoul & Bundang, by District



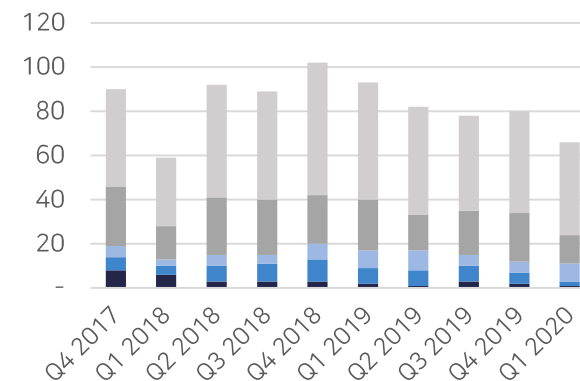
■ CBD ■ GBD ■ YBD ■ ETC ■ PBBD

No. of New Buildings in Seoul, by Size



■ P ■ S ■ A ■ B ■ C

No. of New Buildings in Seoul, by Size



■ P ■ S ■ A ■ B ■ C

01

Seoul & Bundang Market

LEASING MARKET REVIEW

Supply of New CRE in the Market

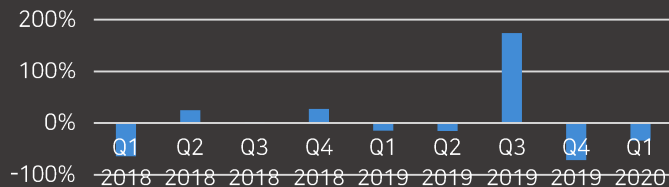
In Seoul, the new supply has been updated as follows:
(except for residential, public, religious & hospital properties)

-There were 64 new buildings that were 381,668m² GFA in total,
72% decrease QOQ & 57% decrease YOY

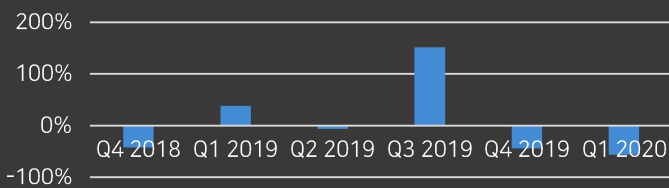
In Bundang, there was the new supply of 62,344 m² GFA

New Supply Growth in CRE Market

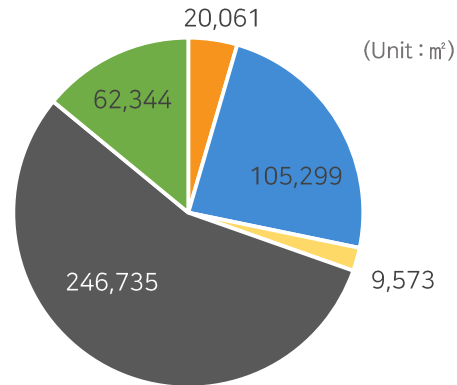
QOQ



YOY

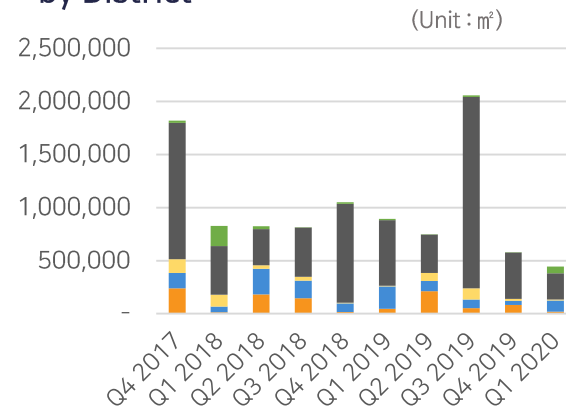


Supply of New CRE in Seoul & Bundang, by District



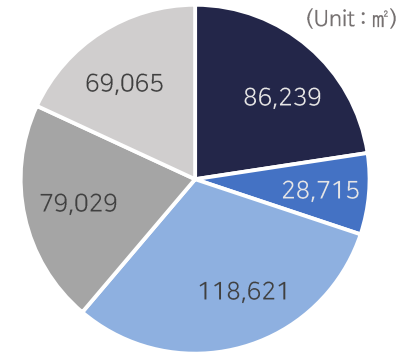
■ CBD ■ GBD ■ YBD ■ ETC ■ PBBD

Supply of New CRE in Seoul & Bundang, by District



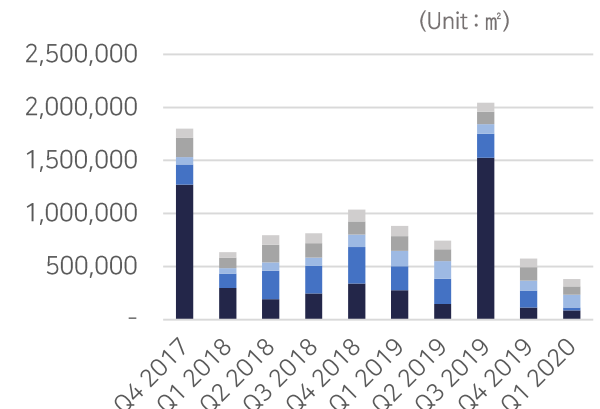
■ CBD ■ GBD ■ YBD ■ ETC ■ PBBD

Supply of New CRE, by Size



■ P ■ S ■ A ■ B ■ C

Supply of New CRE, by Size



■ P ■ S ■ A ■ B ■ C

01

Seoul & Bundang Market

LEASING MARKET REVIEW

Elimination Rate of Vacancy in Office Sector

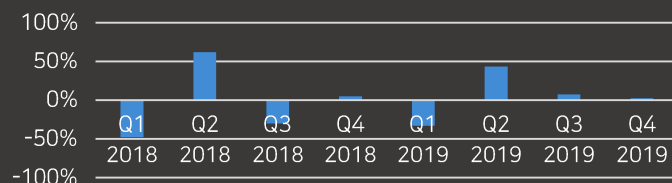
In Seoul, the elimination rate of vacancy was 44%,
8.49% increase QOQ & 10.32% increase YOY

In Bundang, the rate was 77%

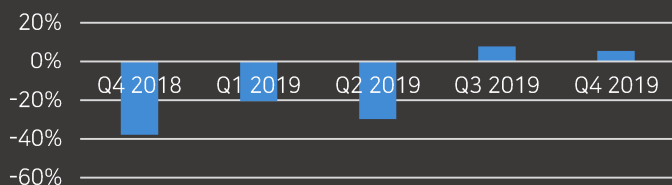
※ The elimination rate was obtained by calculating the resolved units
that used to be vacant in the previous quarter.

Rate Increase/Decrease of Occupied Units from Vacancy

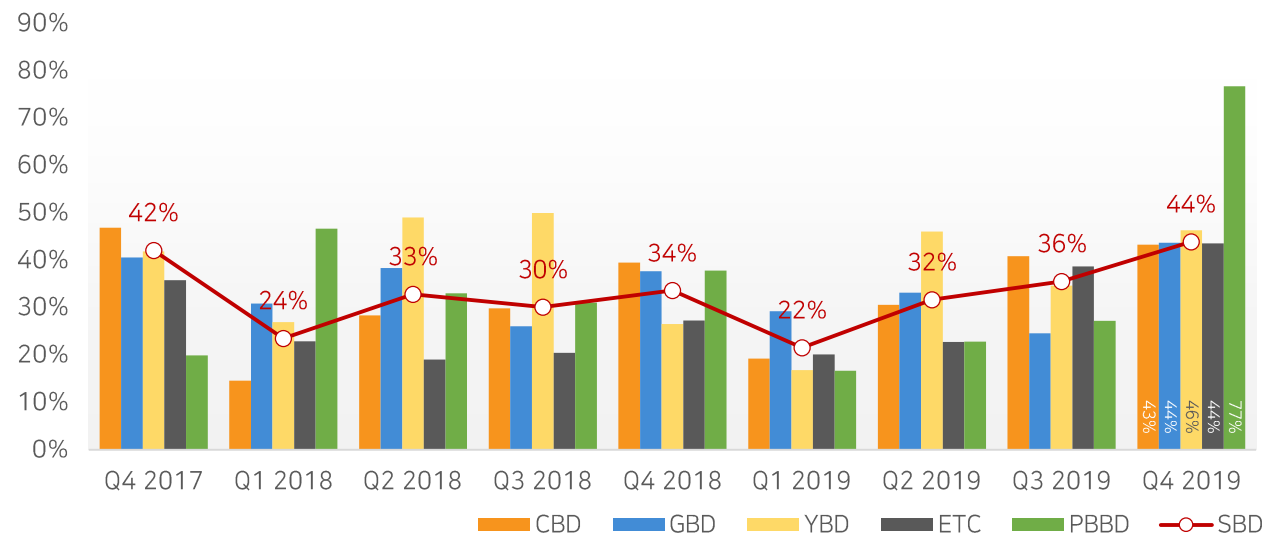
QOQ



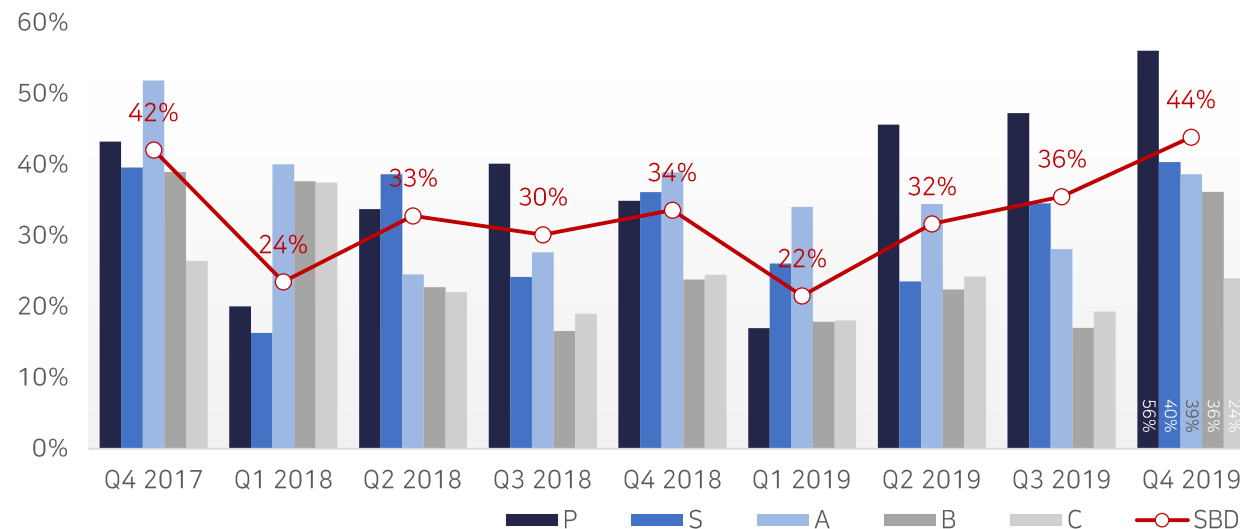
YOY



Elimination of Vacancy in Seoul & Bundang, by District



Elimination of Vacancy in Seoul & Bundang, by Size



01

Seoul & Bundang Market

LEASING MARKET REVIEW

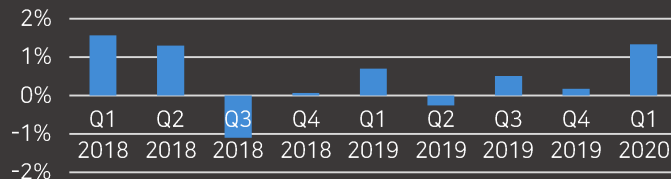
NOC of Office CRE

In Seoul, the average NOC in the office sector was US\$39.24 /m², 1.34% increase QOQ & 1.76% increase YOY

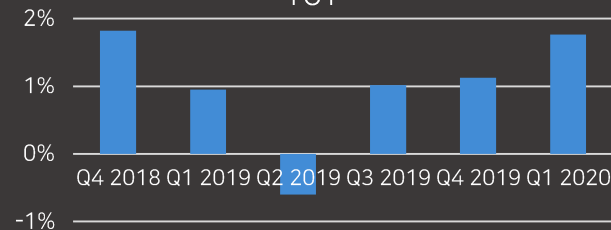
In Seoul, the average NOC in the office sector was US\$35.45 /m²

NOC Growth Rate of Office CRE

QOQ



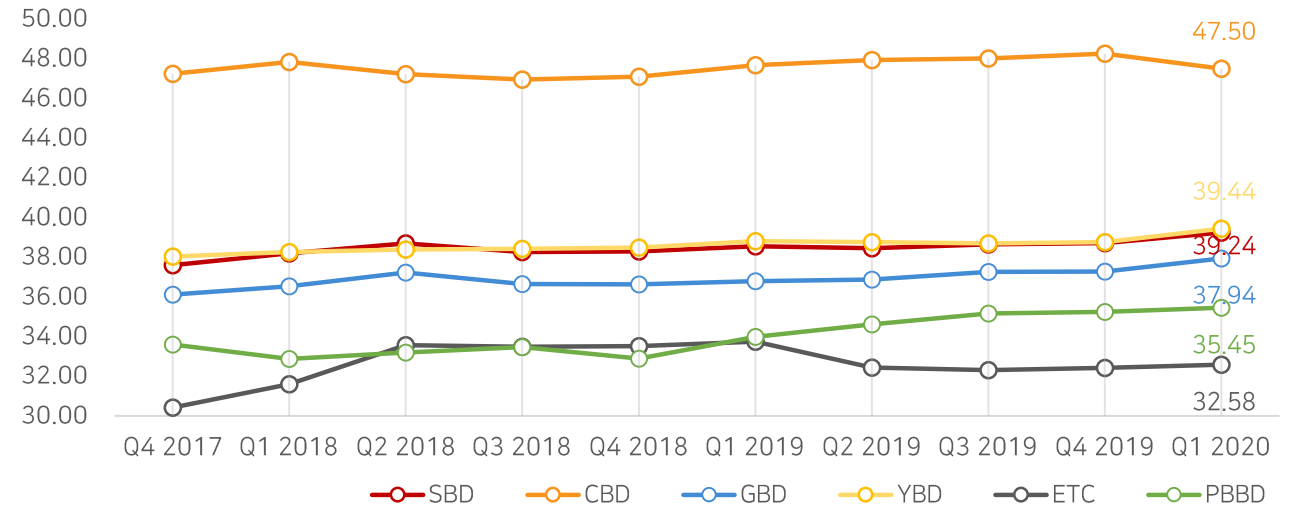
YOY



Q1 2020

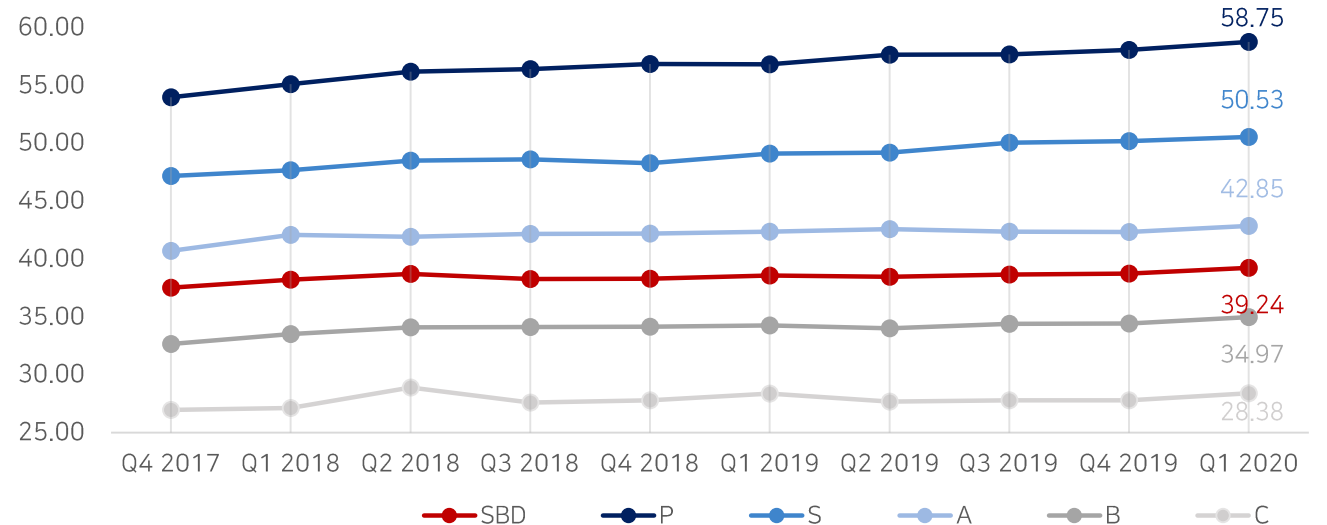
Net Occupancy Cost (NOC) in Seoul & Bundang, by District

(Unit : USD/m²)



Net Occupancy Cost (NOC) in Seoul, by Size

(Unit : USD/m²)



01

Seoul & Bundang Market

LEASING MARKET REVIEW

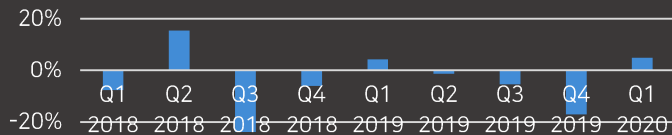
Vacancy Level of Office CRE

In Seoul, the average vacancy rate was 5.27%,
0.15% decrease & 1.92% decrease

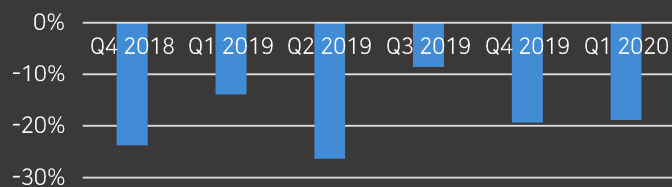
In Bundang, the average vacancy rate was 1.25%

Vacancy Growth Rate of Office CRE

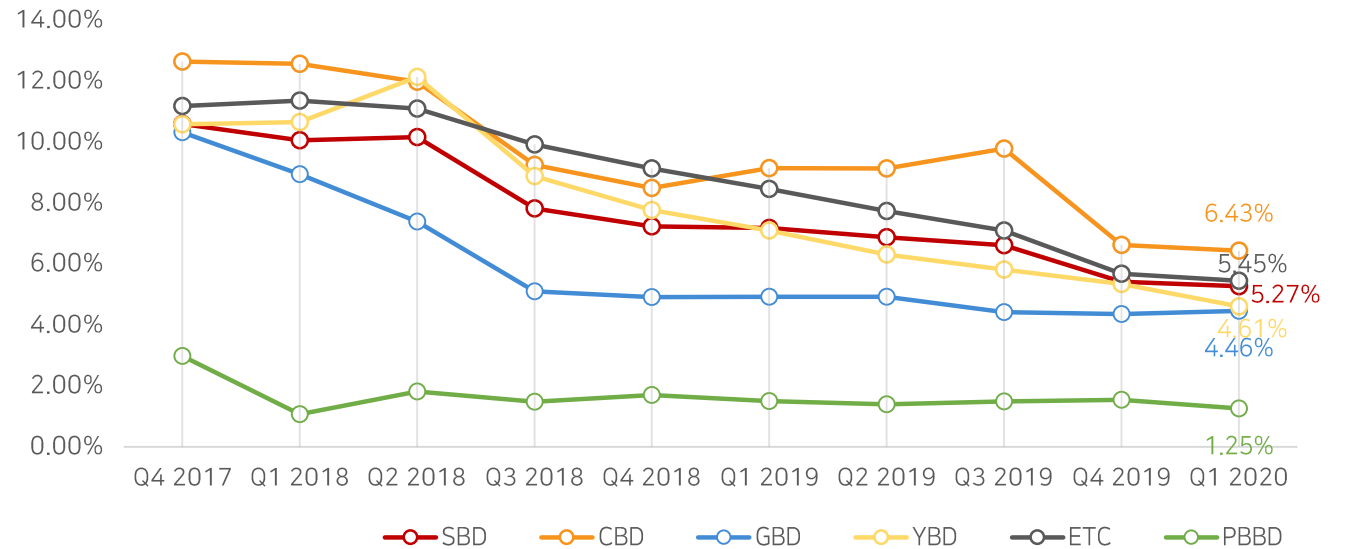
QOQ



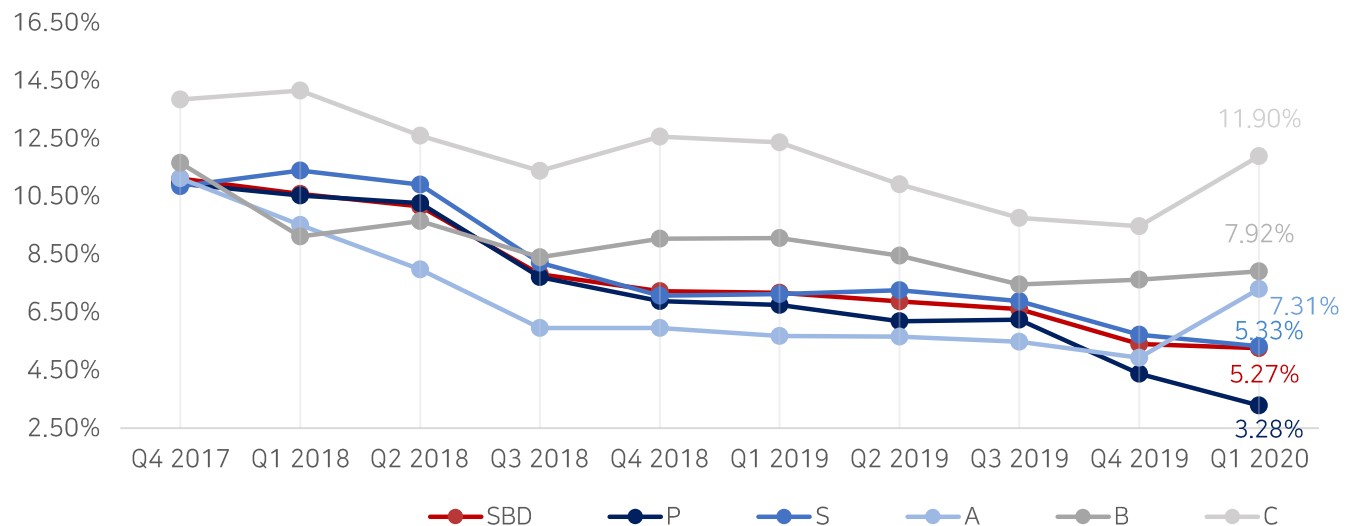
YOY



Vacancy Rate in Seoul & Bundang, by District



Vacancy Rate in Seoul, by Size



01

Seoul & Bundang Market

LEASING MARKET REVIEW

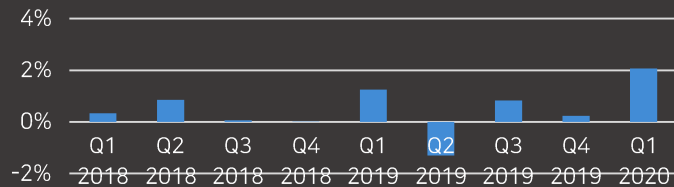
Rent Price of Office CRE

In Seoul, the average rents was US\$16.13 /m²,
2.08% increase QOQ & 1.81% increase YOY

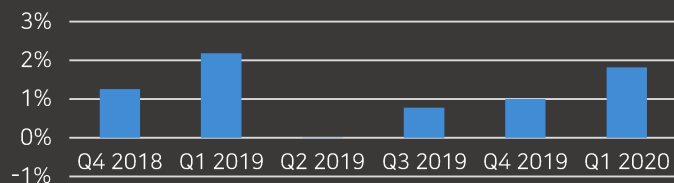
In Bundang, the average rents was US\$11.82 /m²

Rents Growth in Office Sector

QOQ



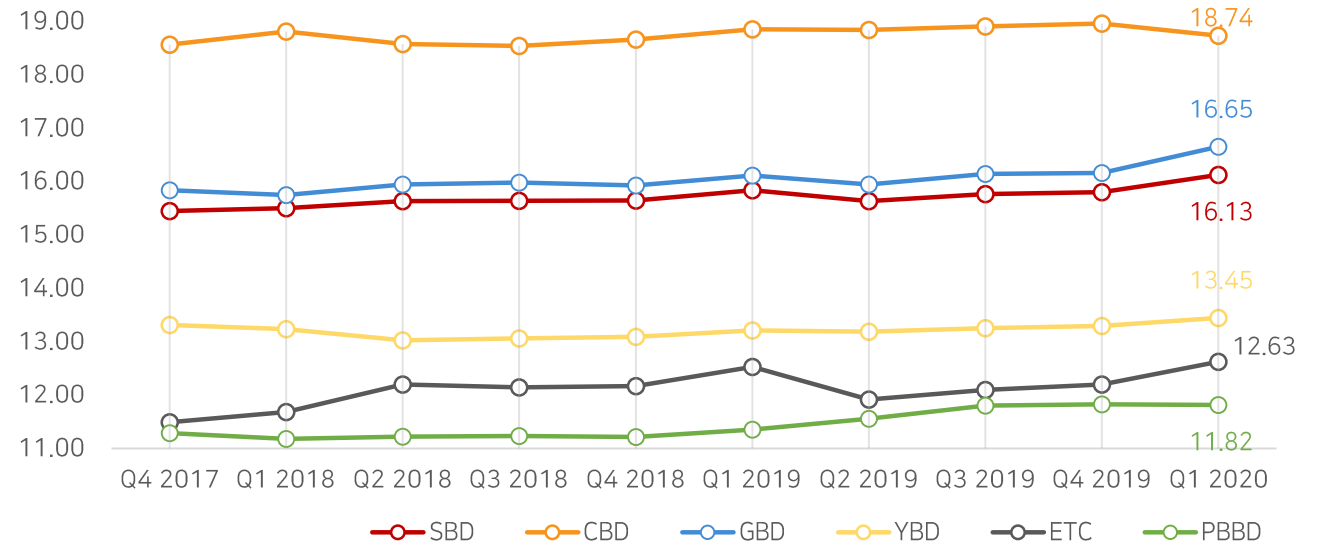
YOY



Q1 2020

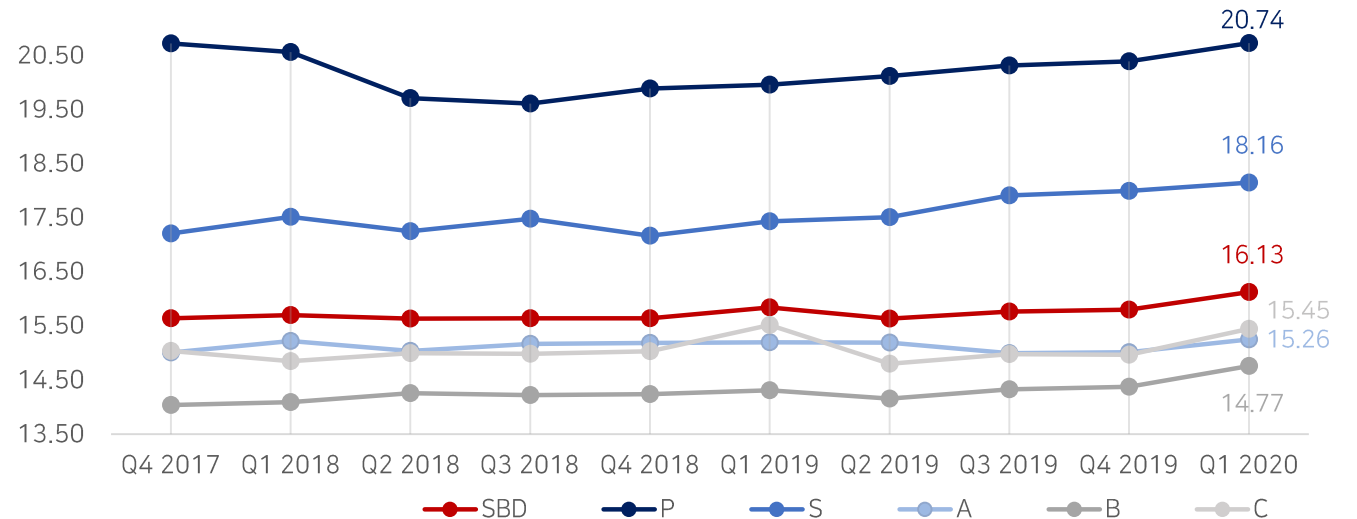
Office Rents in Seoul & Bundang, by District

(Unit : USD/m²)



Office Rents in Seoul, by Size

(Unit : USD/m²)



01

Seoul & Bundang Market

LEASING MARKET REVIEW

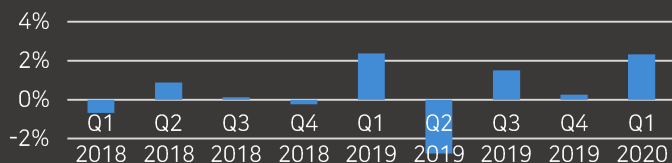
Deposit Level in Office Sector

In Seoul, the average deposit was US\$208.51 /m²,
2.32% increase QOQ & 1.24% increase YOY

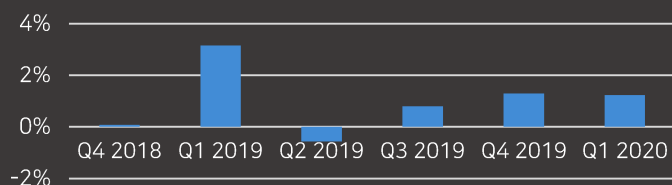
In Bundang, the average deposit was US\$132.75 /m²

Growth of Deposit Level in Office Sector

QOQ

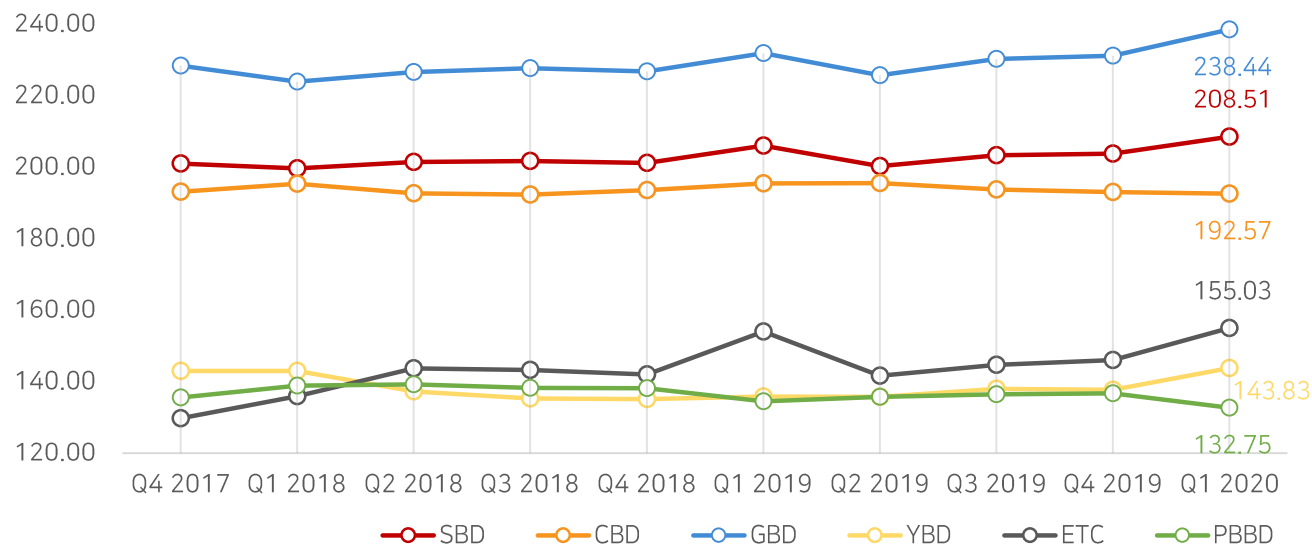


YOY

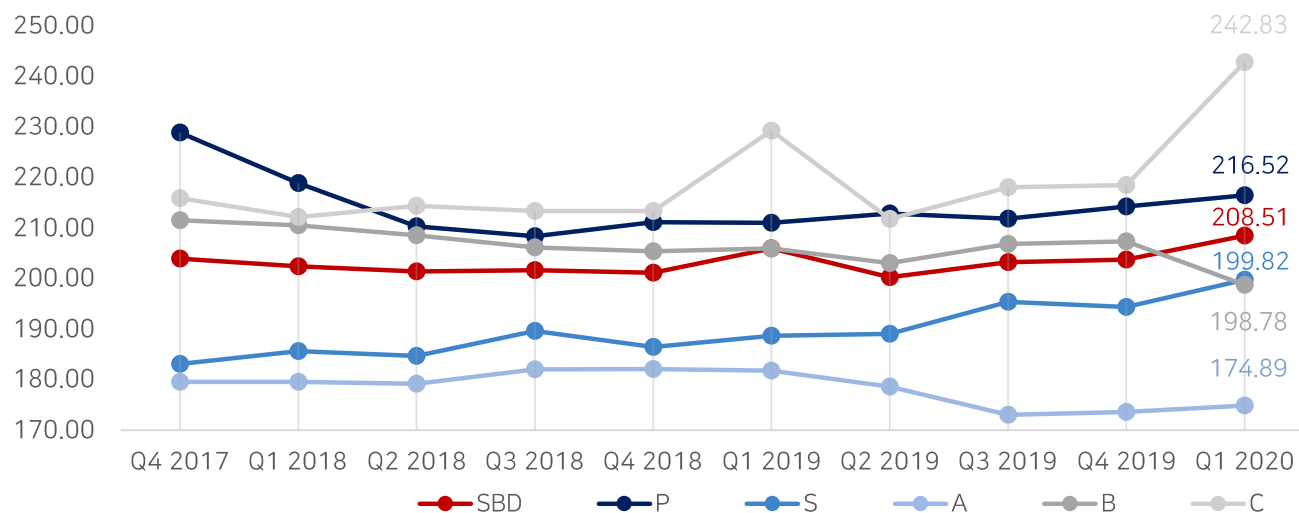


Q1 2020

Office Deposit Level in Seoul & Bundang, by District

(Unit : USD/m²)


Office Deposit Level in Seoul, by Size

(Unit : USD/m²)


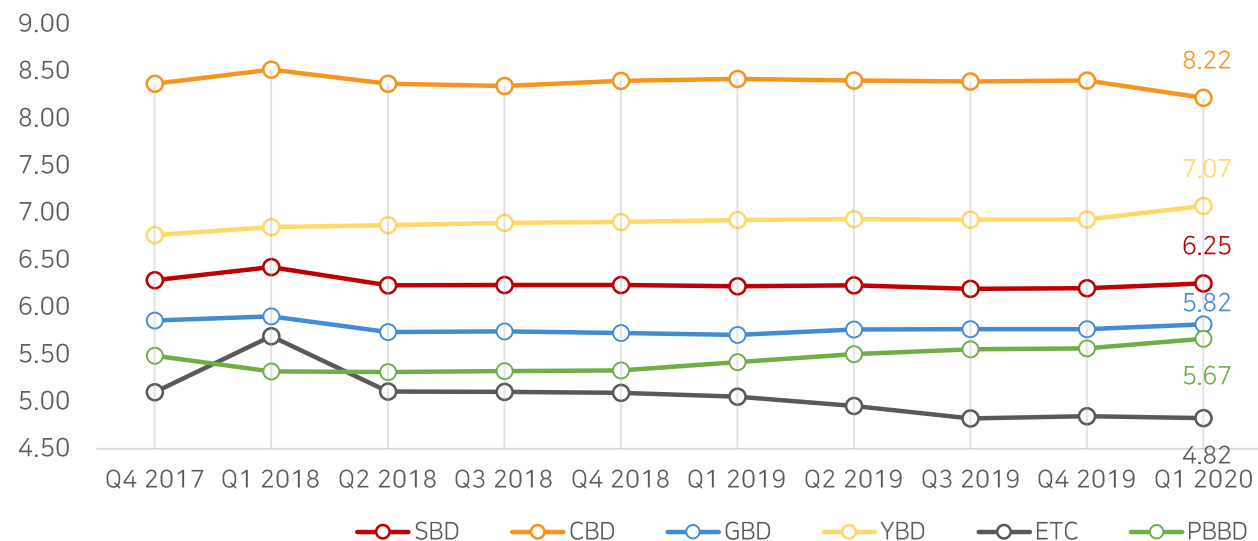
Management Cost in Office Sector

In Bundang, the average management was US\$5.67 /m²

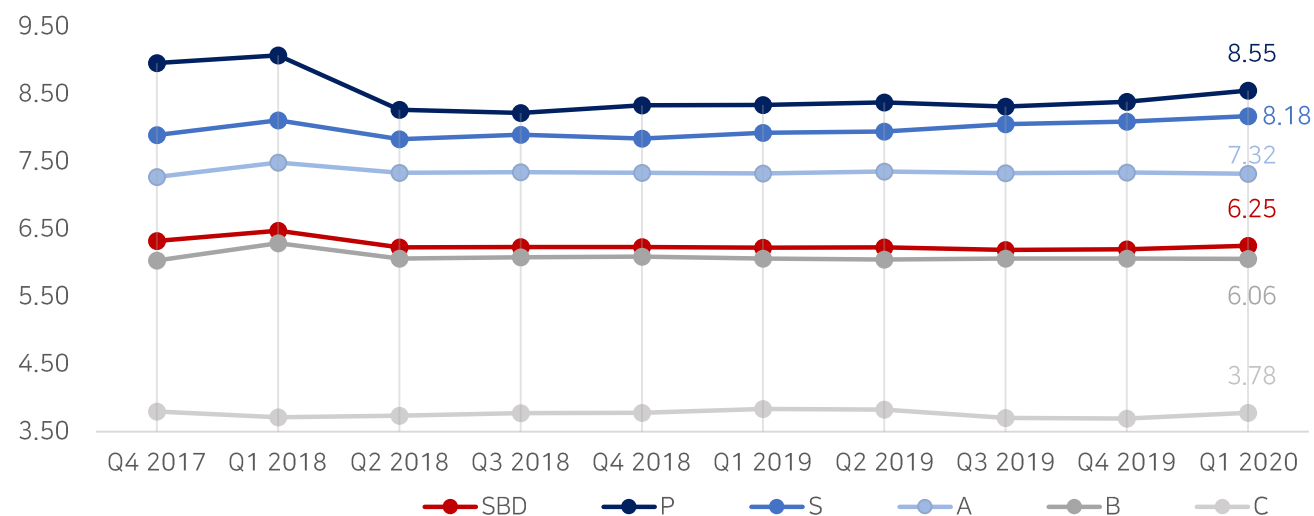
Quarter	Change (%)
Q1 2018	2.1
Q2 2018	-1.8
Q3 2018	-0.1
Q4 2018	-0.1
Q1 2019	-0.3
Q2 2019	0.1
Q3 2019	-0.5
Q4 2019	0.1
Q1 2020	0.8

Quarter	Change in Number of Employees (%)
Q4 2018	-0.5%
Q1 2019	-3.5%
Q4 2019	-0.5%
Q1 2020	0%

(Unit : USD/m²)



(Unit : USD/m²)

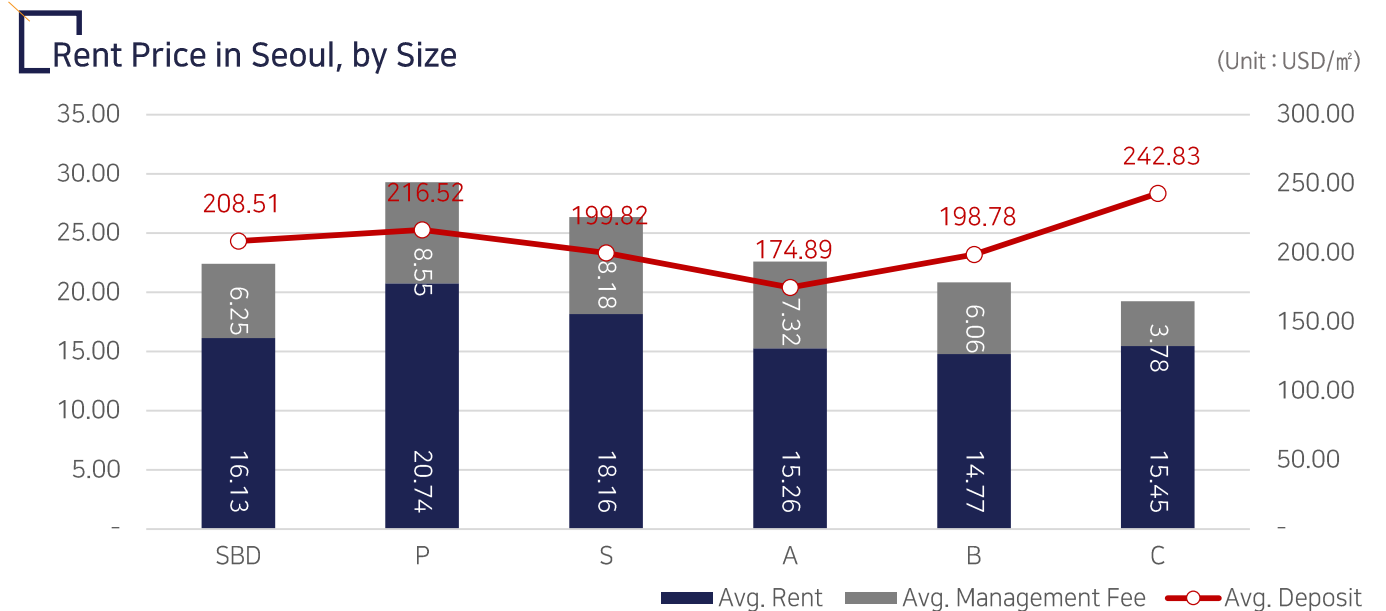
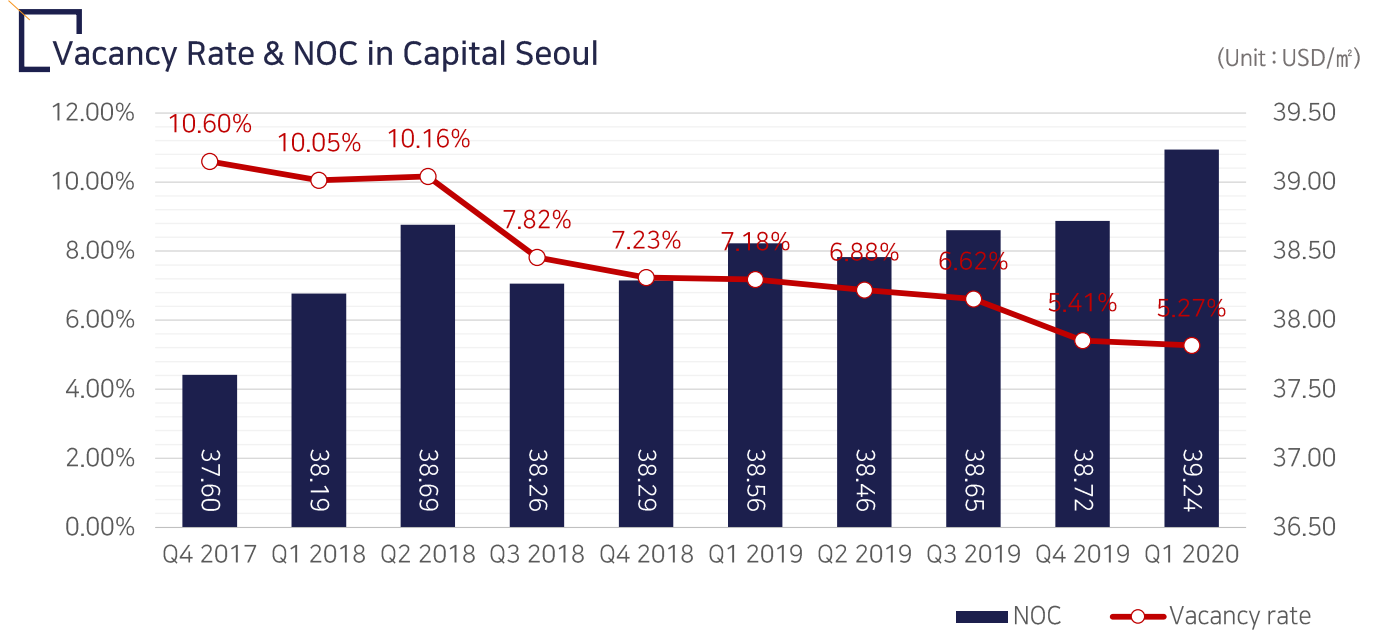
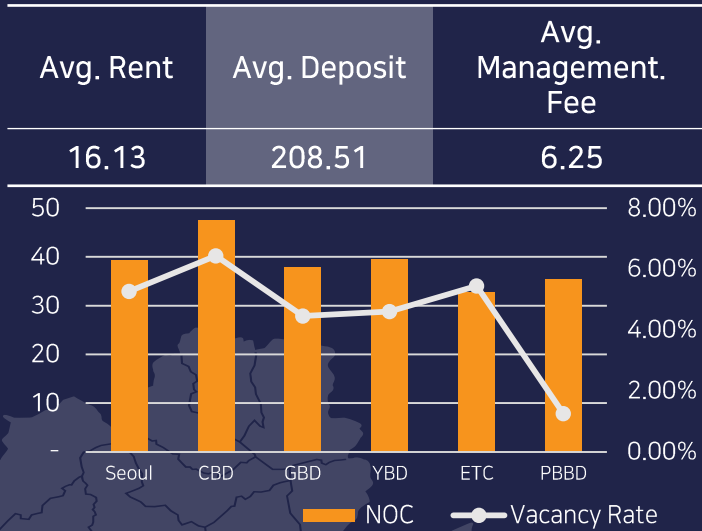


02 SBD Capital Seoul

SBD OFFICE LEASING MARKET

Vacancy rate
5.27% ↑

Avg. NOC
\$ 39.24 ↑



03

CBD Capital Business District

CBD OFFICE LEASING MARKET



Vacancy rate

6.43%



Avg. NOC

\$47.50



Avg. Rent

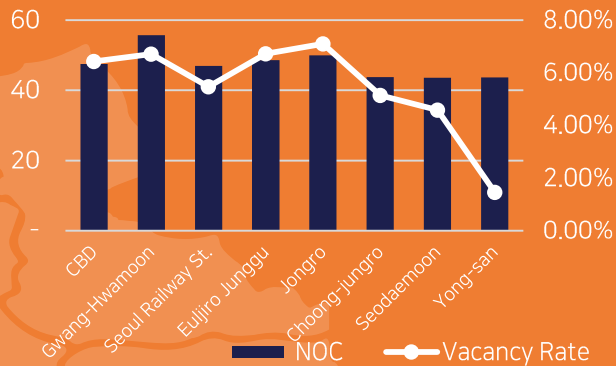
18.74

Avg. Deposit

192.57

Avg.
Management.
Fee

8.22

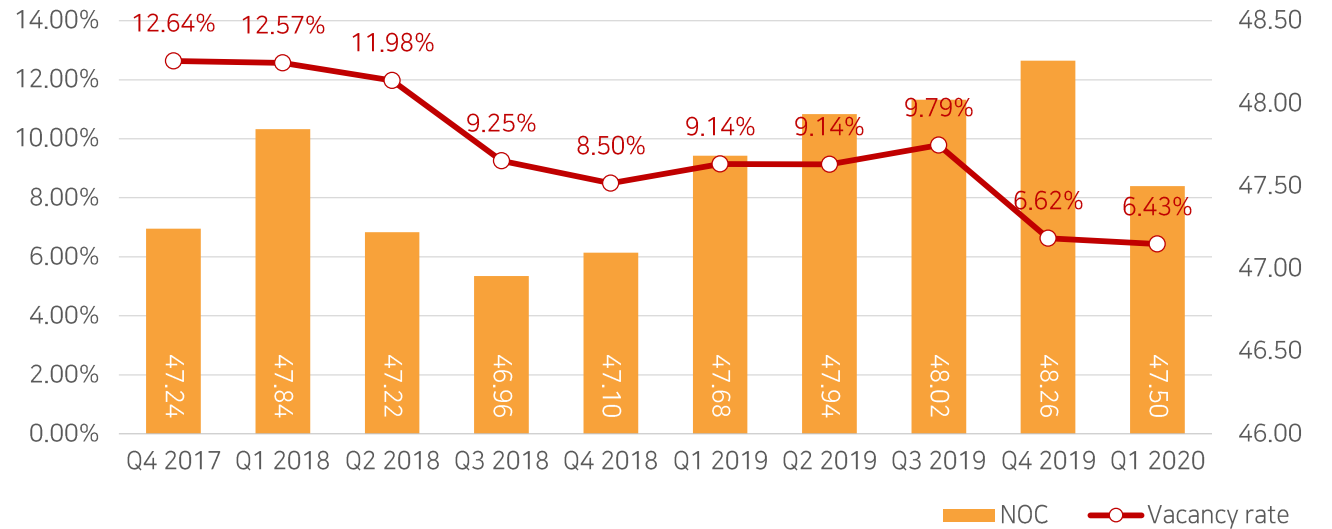


Q1 2020



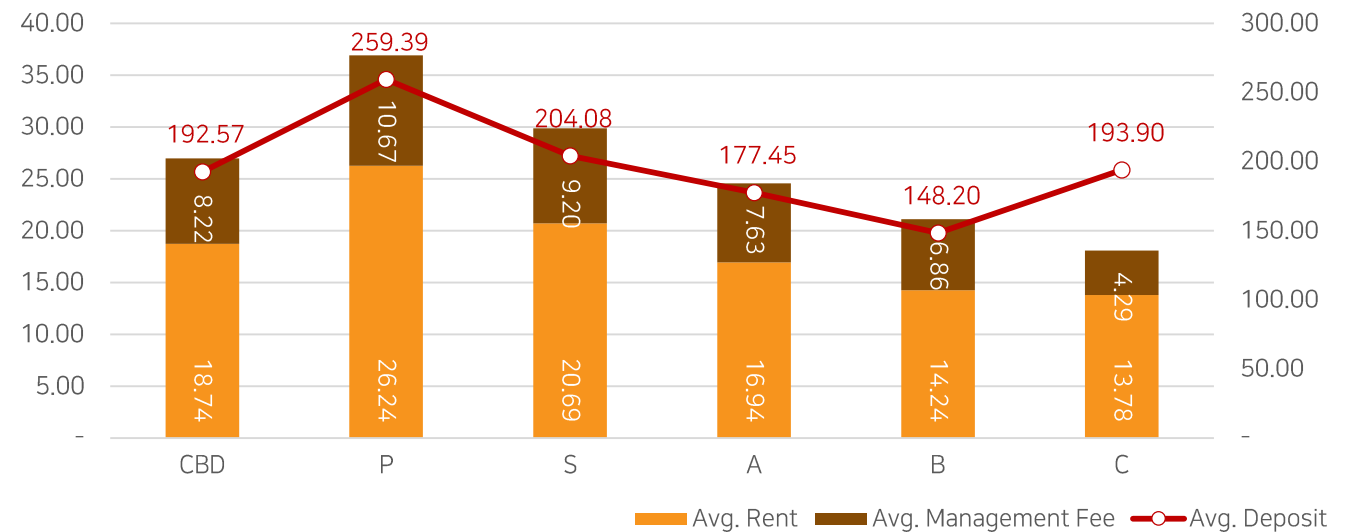
Vacancy Rate & NOC in CBD

(Unit : USD/m²)



Rent Price in CBD

(Unit : USD/m²)



04

GBD Gangnam Business District

GBD OFFICE LEASING MARKET



Vacancy rate

4.46%



Avg. NOC

\$ 37.94



Avg. Rent

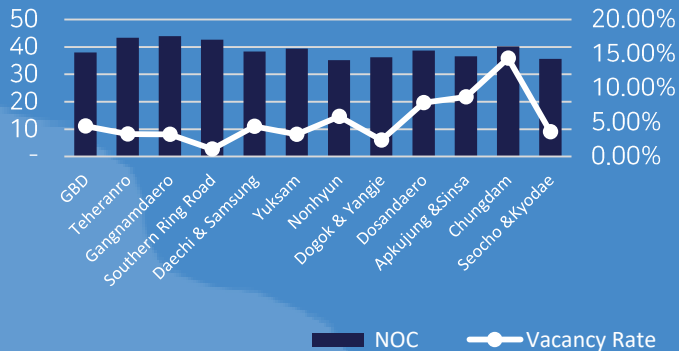
16.66

Avg. Deposit

238.44

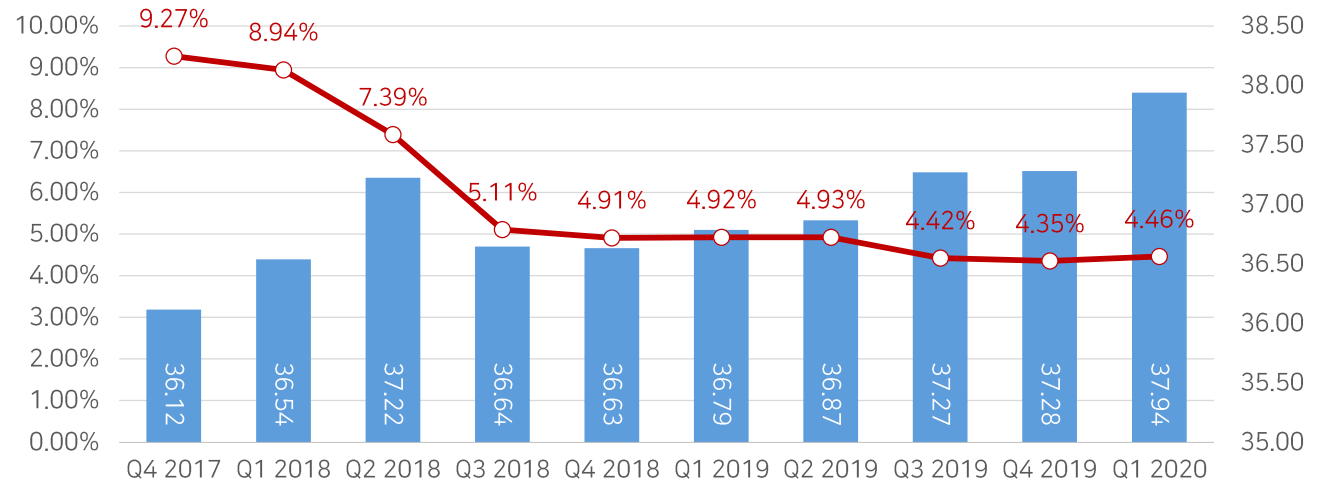
Avg.
Management.
Fee

5.82



Vacancy Rate & NOC in GBD

(Unit : USD/m²)

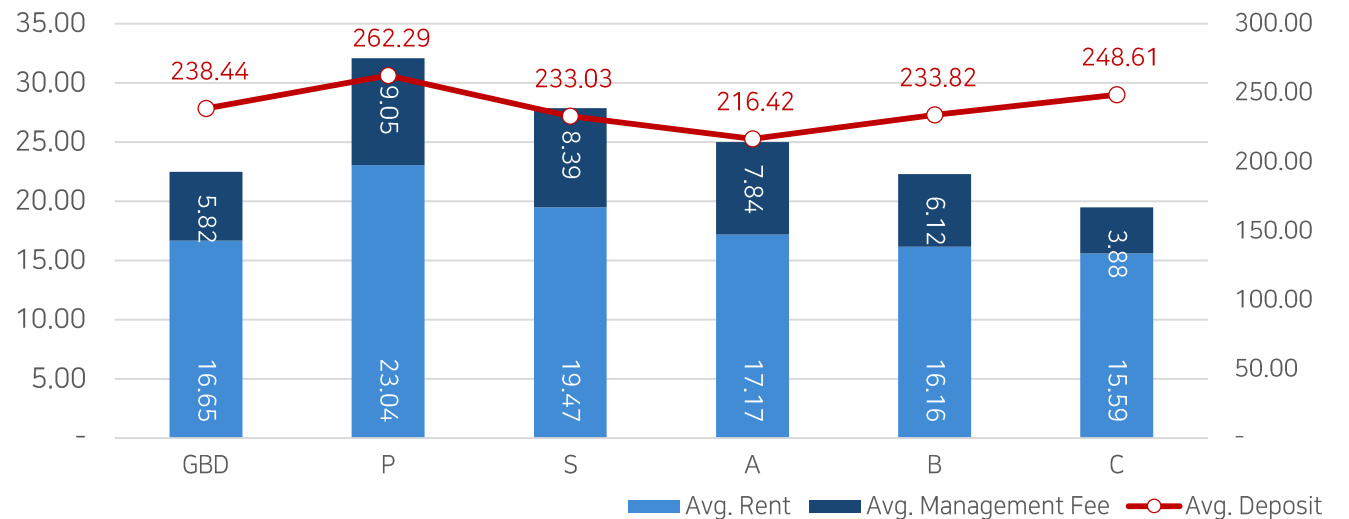


■ NOC ○ Vacancy rate



Rent Price in GBD

(Unit : USD/m²)



■ Avg. Rent ■ Avg. Management Fee ○ Avg. Deposit

05

YBD Yeouido Yeong-deungpo

YBD OFFICE LEASING MARKET



Vacancy rate

4.61%



Avg. NOC

\$ 39.44



Avg. Rent

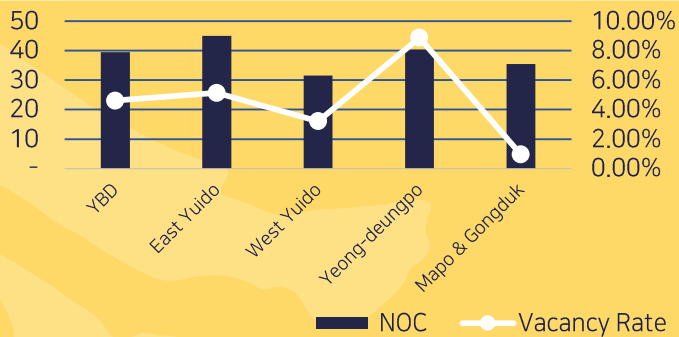
13.45

Avg. Deposit

143.83

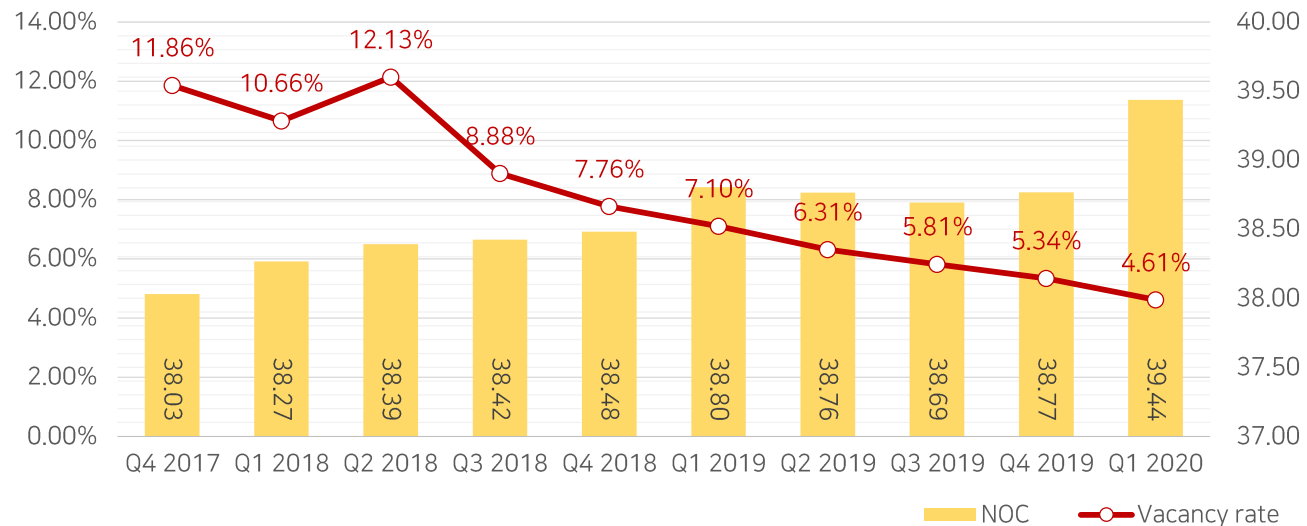
Avg.
Management.
Fee

7.07



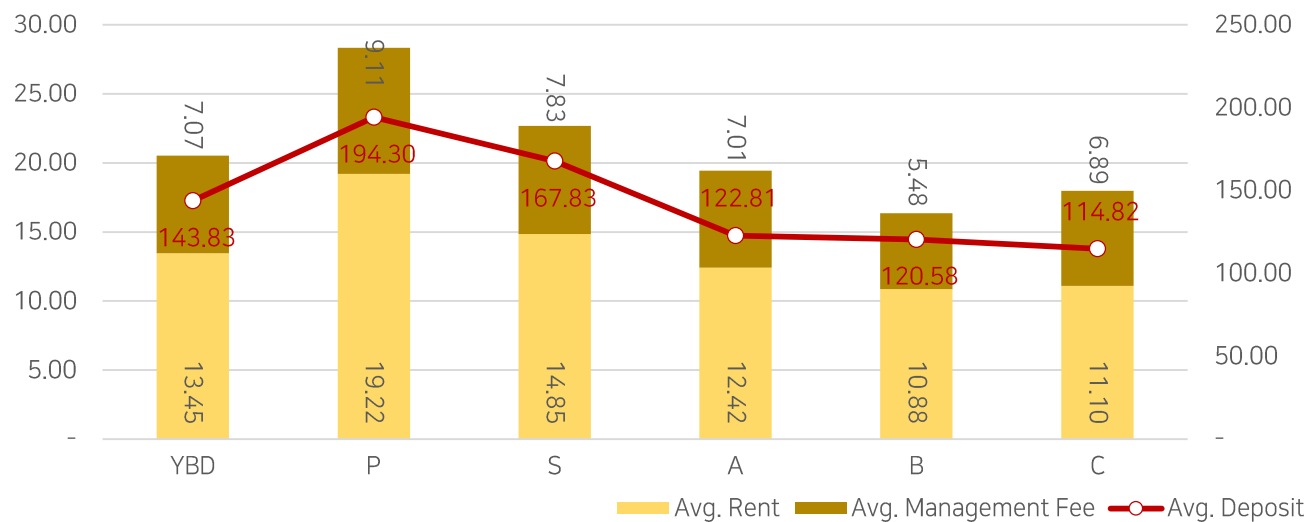
Vacancy Rate & NOC in YBD

(Unit : USD/m²)



Rent Price in YBD

(Unit : USD/m²)



06

ETC Rest Parts of Seoul

ETC OFFICE LEASING MARKET



Vacancy rate

5.45%



Avg. NOC

\$ 32.58



Avg. Rent

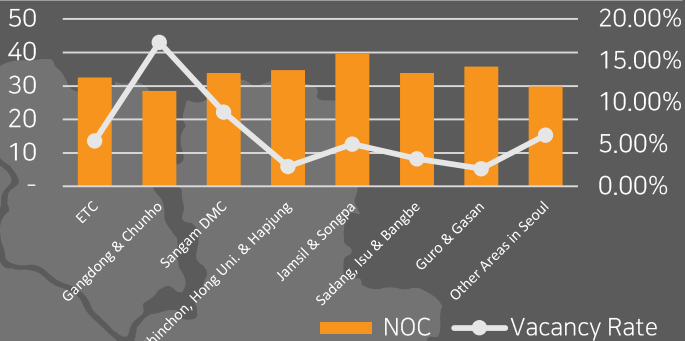
12.63

Avg. Deposit

155.03

Avg.
Management.
Fee

4.82



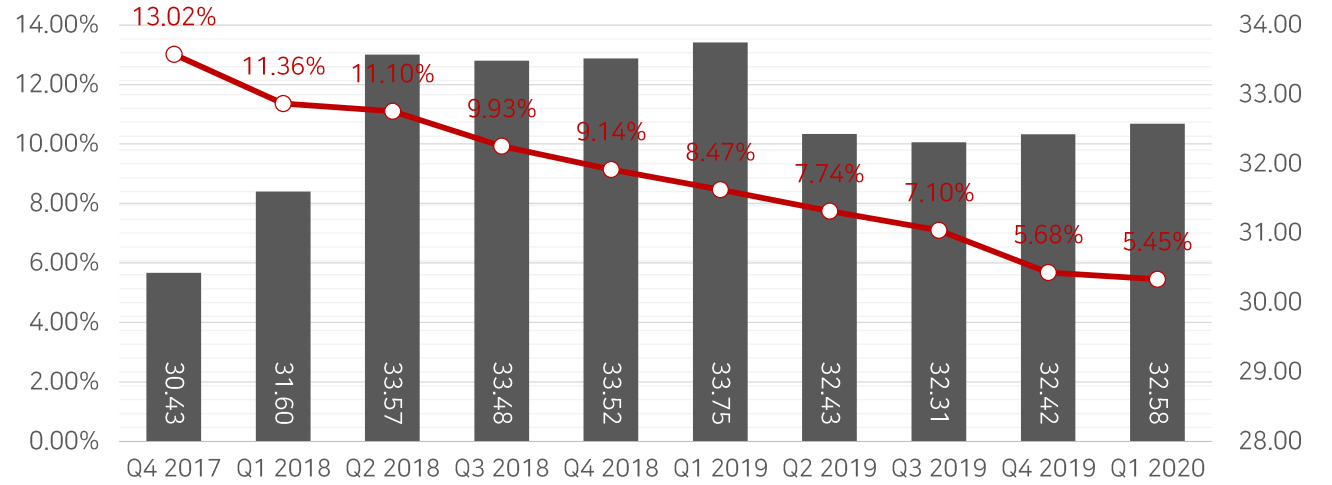
■ NOC ● Vacancy Rate

Q1 2020



Vacancy Rate & NOC in ETC

(Unit : USD/m²)

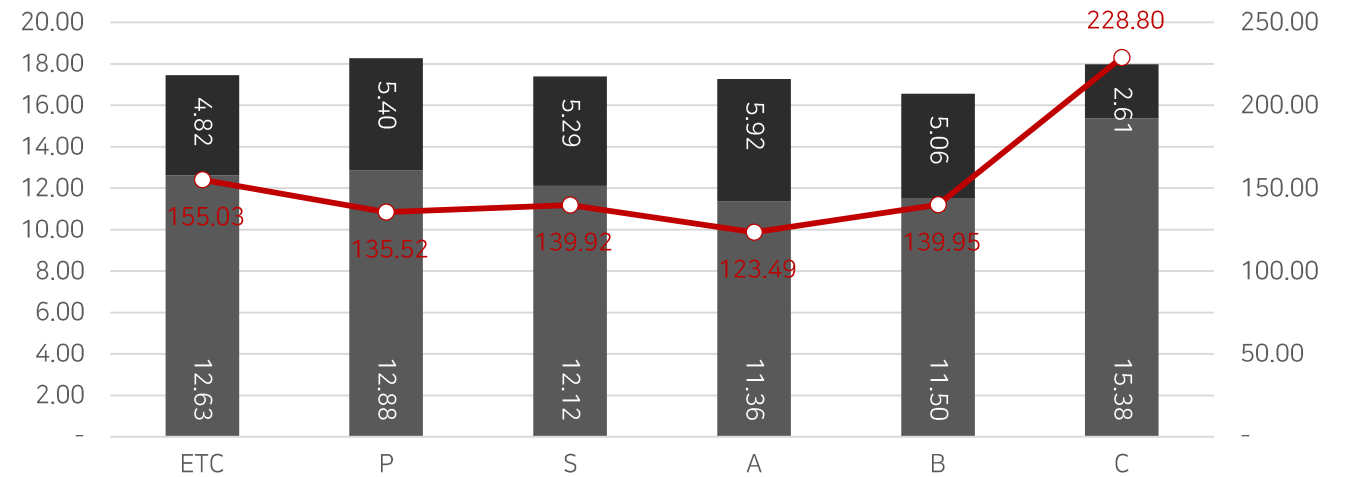


■ NOC ● Vacancy rate



Vacancy Rate & NOC in ETC

(Unit : USD/m²)



■ Avg. Rent ■ Avg. Management Fee ● Avg. Deposit

07

PBBD Pangyo Bundang

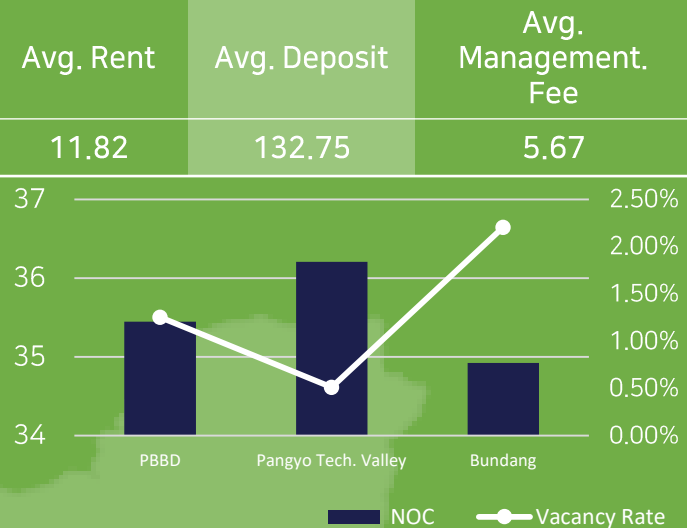
PBBD OFFICE LEASING MARKET

Vacancy rate

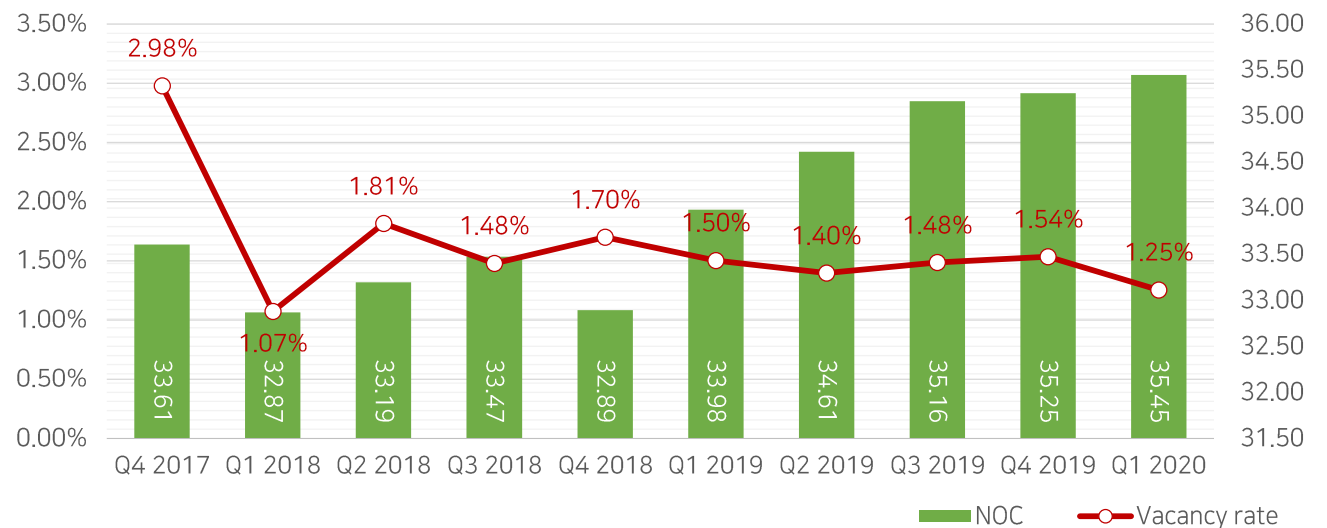
1.25% ↓

Avg. NOC

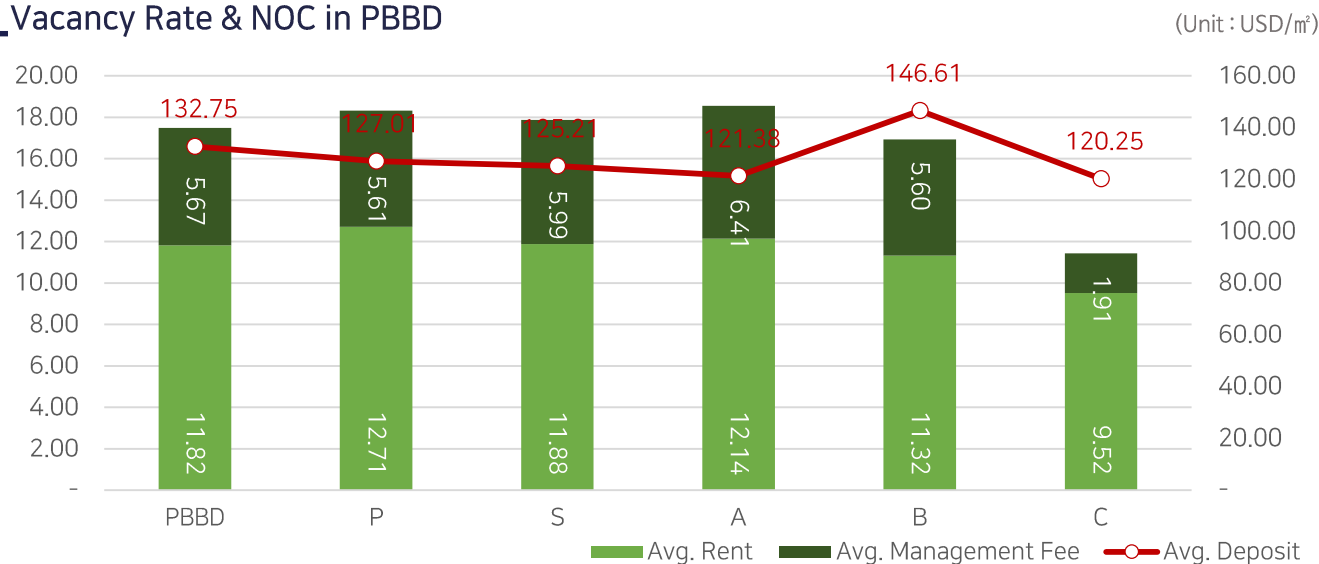
\$ 35.45 ↑



Vacancy Rate & NOC in NOC



Vacancy Rate & NOC in PBBD



08

Lease Data in Each Sub-district

(Unit : USD/㎡)

Market	Submarket	Leasing (㎡)	Deposit(\$)	Rents(\$)	Management Cost (\$)	NOC	Vacancy Rate
CBD	Gwang-Hwamoon	1,847,085	222.43	22.29	8.91	55.71	6.71%
	Jongro	2,391,681	207.48	19.65	8.01	49.98	7.10%
	Euljiro Junggu	4,109,499	192.11	19.30	8.62	48.61	6.72%
	Seoul Railway St.	2,679,863	187.70	18.84	8.61	46.99	5.47%
	Choong-jungro	541,709	156.10	15.43	7.90	43.79	5.14%
	Yong-san	570,397	173.33	15.97	7.61	43.69	1.47%
GBD	Seodaemooon	311,995	161.92	15.92	7.99	43.59	4.58%
	Gangnamdaero	1,738,757	246.99	18.38	6.86	43.97	3.24%
	Teheranro	4,551,362	224.70	18.57	6.70	43.41	3.28%
	Southern Ring Road	222,551	208.17	15.50	6.65	42.72	1.10%
	Chungdam	312,436	283.99	19.16	5.39	40.19	14.35%
	Yuksam	3,880,911	220.03	16.69	6.15	39.34	3.23%
	Dosandaero	225,976	281.45	17.03	6.15	38.70	7.88%
	Daechi & Samsung	2,629,629	219.59	17.21	5.84	38.35	4.38%
	Apkujung & Sinsa	147,691	379.99	17.25	5.61	36.64	8.69%
	Dogok & Yangje	410,275	196.46	13.84	5.62	36.28	2.40%
	Seocho & Kyodae	537,887	223.38	15.14	4.97	35.65	3.61%
	Nonhyun	842,934	289.95	16.13	5.58	35.23	5.86%
YBD	East Yuido	2,154,395	155.02	14.82	7.63	44.98	5.13%
	Yeong-deungpo	444,325	140.88	13.44	7.59	40.29	8.88%
	Mapo & Gongduk	648,490	142.21	12.68	6.68	35.44	0.96%
	West Yuido	454,816	119.23	11.16	5.95	31.54	3.21%
ETC	Jamsil & Songpa	1,486,412	185.90	14.55	5.95	39.75	5.04%
	Shinchon, Hong Uni. & Hapjung	195,368	224.10	16.19	5.17	34.69	2.37%
	Sadang, Isu & Bangbe	105,113	278.13	14.51	4.88	33.90	3.30%
	Sangam DMC	1,014,472	105.88	10.28	6.58	33.84	8.87%
	Other Areas in Seoul	2,350,504	151.59	12.17	4.82	29.85	6.13%
	Gangdong & Chunho	245,180	150.25	12.06	4.25	28.51	17.22%
PBBD	Pangyo Techno. Vally	1,044,439	129.03	12.21	5.15	36.21	0.51%
	Bundang	815,349	135.42	11.54	6.04	34.92	2.20%

09

New Buildings

District	Building Name	Address	Zoning	GFA(㎡)	Building Completion
CBD	Dohwaseogil D1	Soosong-dong Jongro-gu	#2 Commercial Area	6,716	2020-03
	Dohwaseogil D2	Soosong-dong Jongro-gu	#2 Commercial Area	2,481	2020-03
	Corner Stone	Gwanchul-dong Jongro-gu	#2 Commercial Area	2,155	2020-01
	Eight Tower	Gyobuk-dong Jongro-gu	#2 Commercial Area	2,138	2020-03
GBD	Hyundai Department	Daechi-dong Gangnam-gu	Office Facility	28,715	2020-03
	Shilla Stay Samsung	Samsung-dong Gangnam-gu	Accommodation Facility	18,526	2020-01
	EG Building	Daechi-dong Gangnam-gu	Office Facility	13,622	2020-01
	Dairena Seocho	Seocho-dong Seocho-gu	Office Facility	5,102	2020-02
	First Light Tower	Chungdam-dong Gangnam-gu	Office Facility	4,757	2020-01
YBD	Pine Grid Building	Moonrae-dong Yeong-deungpo-gu	#2 Commercial Area	6,790	2020-03
	Dream Medical	Daelim-dong Yeong-deungpo-gu	#1 Commercial Area	1,688	2020-03
ETC	Gasam Tera Tower	Gasam-dong Geumcheon-gu	Factory Facility	86,239	2020-02
	Yongdap-dong Hansung Motor Service Center	Yongdap-dong Seongdong-gu	Motor-related Facility	17,713	2020-03
	WW Hongdae	Donggyo-dong Mapo-gu	Accommodation Facility	17,059	2020-01
	Bumhan Technical Center	Magok-dong Gangseo-gu	Educational Facility	16,625	2020-03
	Magok C4-6 Block	Magok-dong Gangseo-gu	Office Facility	15,411	2020-01
PBBD	Technoplex Hankook Tire Tech.	Sampyung-dong Bundang-gu Seongnam-si	Office Facility	47,919	2020-01

10

Companies Recently Moved

CBD

Tenant	Business Type	Building Name	Address	Leasing Area (㎡)
Kim & Jang	Legal Service	KC Tower (Crescendo)	Semoonan-ro Jongro-gu	54,600
Bae, Kim & Lee	Legal Service	Centropolis	26 Woojungguk-ro Jongro-gu	36,515
Seoul Metropolitan Government Office #3	Public Service	City Square	124 Seosomoonro Jung-gu	30,572
Hanhwa Construction	Construction Service	Hanhwa Building	86 Chunggyechun-ro Jung-gu	19,000
LG Hausys	Plastic Manufacturing	LG Seoul Station Building	98 Hooam-ro Joong-gu	10,883
SK C&C	System Integration (SI)	Centropolis	26 Woojungguk-ro Jongro-gu	8,723
Justco	Shared Office	Concordian	76 Saemoonan-ro Jongro-gu	8,303
Serveone	Wholesale	Concordian	76 Saemoonan-ro Jongro-gu	6,227
Flag One	Shared Office	Yonsei Building	10 Tongil-ro Jung-gu	6,136
Siemens	Electric Manufacturing Electric Equipment	Poongsan Building	23 Choongjung-ro Seodaemoon-gu	4,721
Carrot Insurance	Insurance	Pine Evinue	100 Eulji-ro Jung-gu	2,828

YBD

Tenant	Business Type	Building Name	Address	Leasing Area (㎡)
A&D Credit Information	Credit Research & Collection Agency	Young City	25 28-gil Moonrae-ro Yeongdeungpo-gu	77,059
SK Telecom's Affiliate	Call Center	Young City	25 28-gil Moonrae-ro Yeongdeungpo-gu	26,000
Korean Investment Trust	Trust & Collective Investment	FKI Tower	24 Yeoeuidae-ro Yeongdeungpo-gu	6,866
Hyundai Capital	Credit Card Finance	KC Tower	4 74-gil Gukhuidae-ro Yeongdeungpo-gu	3,394

10

Companies Recently Moved

GBD

Tenant	Business Type	Building Name	Address	Leasing Area (㎡)
Viva Republica	Software Development & Sales	Korean Knowledge Center	131 Taeheranro Gangnamgu	13,187
Kakao	Portal Platform Development	EG Building	11 98-gil Teheranro Gangnamgu	6,700
Macrogen	Medical Research & Development	Daebong Building	238 Teheran-ro Gangnam-gu	6,211
Regus Korea	CRE Lease Service	Autoway Tower	417 Youngdongdaero Gangnamgu	5,300
Zigbang	System Software Development	GT Tower	411 Seochodae-ro Seocho-gu	2,840
Fastfive	CRE Lease Service	Inwoo Building	145 Dosandae-ro Gangnamgu	4,489
Kyobo Securities	Security Brokerage	GT Tower	411 Seochodae-ro Seocho-gu	2,225
Wonik Investment Partners	Finance Investment	Haesung 1 Building	504 Teheran-ro Gangnam-gu	1,732
Hyundai Glovis	Freight Transport Service	Korean Technology Center	305 Teheranro Gangnam-gu	1,215

ETC

Tenant	Business Type	Building Name	Address	Leasing Area (㎡)
Coopang	E-commerce Retail	World Tower	558 Songpadae-ro Songpa-gu	13,200
Hyundai L&C	Plastic Manufacturing	East Central	1077 Chunhodaero Gangdong-gu	8,636
Palmsvil	Health Product Manufacturing	Palmsvil Magok Hub	37 3-gil Magokjoongang-ro Gangseo-gu	6,139
Samsung C&T	Pharmaceutical Construction	East Central	1077 Chunhodaero Gangdong-gu	5,289
Takeda Pharmaceutical	Pharmaceutical Wholesale	Lotte World Tower	29 Shinchun-dong Songpagu	3,531
Sparkplus	Software Development & Supply	Esfactory	11 15-gil Yonmujang Sungdong-gu	2,314

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