

## **[Osaka City] What Replaced Demolished Office Buildings?**

### **Changes in Use and Number of Buildings Before and After Rebuilding in Osaka City**

March 16, 2026

## **Introduction**

The real estate stock accumulated in cities has undergone repeated reorganization over time against the backdrop of changes in economic activity, industrial structure, and demographic trends. Office buildings, in particular, are a prime example of assets that undergo renewal through rebuilding or repurposing, driven by factors such as the passage of time, changes in work styles, and the need for more advanced facilities.

To gain an understanding of the actual state of office stock renewal, Xymax Research Institute conducted analyses focusing on trends before and after office buildings were rebuilt. In February 2026, it published the results of an analysis covering Tokyo's 23 wards\*<sup>1</sup>. In this second installment of the report, we expand our focus to Osaka City to shed light on the reality of building restructuring that begins with demolition.

\*1 *What Replaced Demolished Office Buildings?*, published on February 26, 2026

<https://soken.xymax.co.jp/report/upload/20260226.pdf>

For this analysis, we tracked the post-redevelopment uses and building configurations (number of buildings) by utilizing not only the building database independently maintained and updated by Xymax Research Institute, but also supplementary methods such as publicly available information and on-site checks. This provides a multifaceted overview of the characteristics of office stock renewal in Osaka City.

We hope that the findings from this survey will serve as a useful resource not only for market stakeholders such as property owners, users, and investors, but also for those involved in urban policy, as they consider future area strategies and the role of urban functions.

1 tsubo = 3.3 sqm

### **Key Findings**

- Most demolished office buildings are small and medium-sized, but a certain number of large-scale properties are also included.
- The demolition rate of office buildings in Osaka City has remained generally in the 1% range annually from 2016 to 2024, indicating that demolitions have been occurring at a stable rate over the long term.
- Among properties that were demolished and rebuilt, residential use accounts for more than half, while office use also represents a significant proportion; conversions to hotels, retail facilities, and parking lots have also been observed.
- While "office→residential" conversions are the most common in Kita and Chuo wards, "office→office" and "office→hotel" are also relatively frequent. In contrast, in other parts of Osaka City, "office→residential" conversions are the norm, while "office→office" is less common than in the city center.
- Across Osaka City as a whole, the change in the number of buildings before and after redevelopment is primarily "1 building→1 building." While in Kita Ward and Chuo Ward, a certain number of renewals involve "multiple buildings→1 building" redevelopments, in other parts of Osaka City, there is a large proportion of "1 building→1 building" renewals.

## Survey Overview

Survey period:	March 2025 to January 2026
Target properties:	Office properties registered in the property database as of March 2025
Geographical coverage:	Osaka City
Survey method:	In addition to data collected independently by Xymax Research Institute, online research and on-site surveys were conducted to compile data.

*Some of the texts in this report have been revised (April 15, 2026).*

## 1. Summary of Target Properties and Comparison of Property Attributes

In this chapter, we compare and analyze the basic attributes of existing and demolished properties in order to clarify the renewal trends of office buildings in Osaka City.

The analysis used a building database continuously maintained by Xymax Research Institute, which covers buildings in Osaka City that are primarily used as offices. In order to ensure the accuracy of the analysis, properties whose year of completion is unknown have been excluded.

The "demolished properties" included in this survey are properties registered as "demolished" in the database as of March 2025 and subsequently tracked and supplemented through online research and on-site verification during the survey period. Therefore, these properties include some that have been demolished in the past.

It should be noted that the extent to which demolition dates have been identified varies, and the comprehensiveness of the data is particularly limited when looking further back in time.

We first compared these properties with existing properties as of December 2025, summarizing each property type's number of buildings, gross building area, and building age (as of 2025 for existing properties; as of the time of demolition for demolished properties). The results are shown in Figure 1.

**Figure 1: Comparison of Existing and Demolished Properties  
(Number of Buildings, Gross Building Area, Building Age)**

	Number of buildings	Average gross building area (tsubo)	Average building age (year)
Existing properties	2,131	2,674	35.6
Demolished properties	555	1,496	45.5

Next, in order to understand how large the demolished properties were, Figure 2 shows the distribution of gross building area as a histogram. The distribution of gross building area peaks in the small-scale segment while gradually extending to large-scale properties exceeding 5,000 tsubo. In other words, while the focus of renewal is on small and medium-sized buildings, it is clear that demolition is occurring to some extent regardless of building size.

**Figure 2: Gross Building Area Histogram of Demolished Properties**

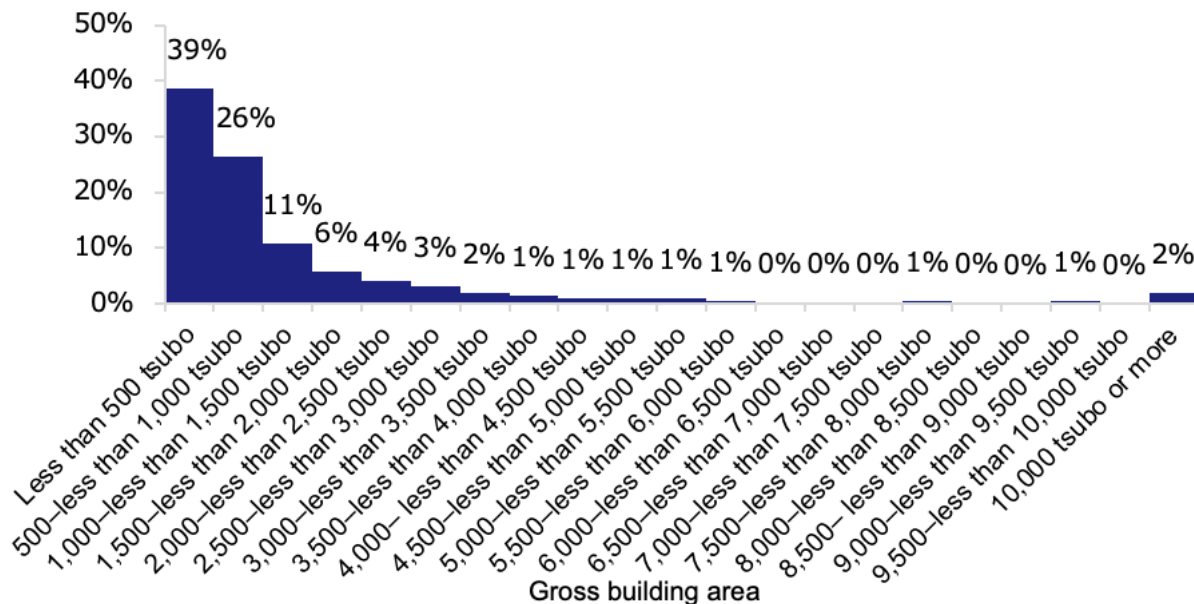
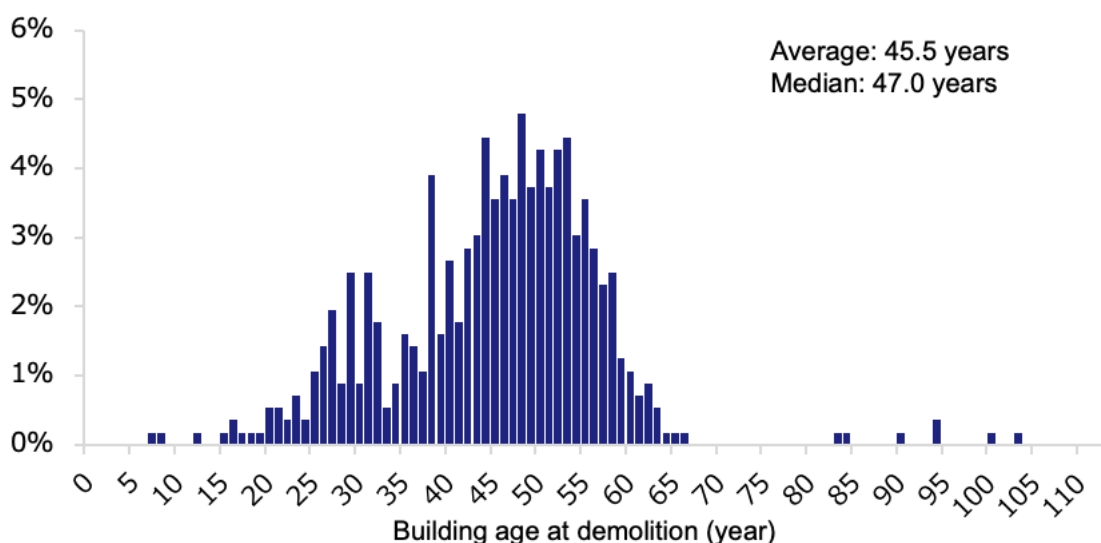


Figure 3 shows the distribution of the age of demolished properties (at the time of demolition). The average age of the buildings is 45.5 years (median: 47.0 years). Since the majority fall into the 45–55-year age bracket, this suggests that older office buildings are the primary targets for demolition. On the other hand, while a significant number of the demolished properties are relatively new—built around 30 years ago—there are also a few that are over 80 years old. The decision to demolish a building is influenced not only by physical factors such as the building’s age but also by economic factors, such as the growing demand for hotels over offices; consequently, there are likely cases where redevelopment is chosen at a relatively early stage of the building’s lifespan.

**Figure 3: Building Age Histogram of Demolished Properties**



Furthermore, to assess the renewal status of Osaka City’s office stock, Figure 4 shows the annual demolition rates for each year from 2016 to 2024. The demolition rate refers to the proportion (based on gross building area) of properties that existed as of January 1 of each year and were demolished during that year. As shown in Figure 4, although there are annual fluctuations, the highest demolition rate was 1.94% in 2017 and the lowest was 1.06% in 2024, with the rate generally hovering around 1%. In other words, while the demolition of office buildings in Osaka City is subject to short-term fluctuations, the data suggests that it occurs with a certain degree of regularity over the long term.

**Figure 4: Annual Demolition Rate of Office Properties in Osaka City Between 2016 and 2024 (Gross Building Area Basis)**

Year	2016	2017	2018	2019	2020	2021	2022	2023	2024
Demolition rate	1.17%	1.94%	1.47%	1.34%	1.57%	1.25%	1.71%	1.25%	1.06%

## 2. Changes in Usage and Number of Buildings After Demolition

In this chapter, we examine what kind of buildings were built on the sites of the demolished properties identified in the previous chapter, organizing the data by usage and number of buildings.

In identifying the new buildings, we first cross-referenced the locations and site details of the demolished properties with Xymax Research Institute's building database and identified the new properties built on the same site. For cases where identification or verification was difficult using the database, we confirmed the current status through online research and on-site surveys to supplement the information regarding the primary use and number of buildings after demolition.

Through this process, we determined the primary post-demolition use and number of buildings for properties that were used as offices prior to demolition.

### 2.1. Post-demolition trends broken down by usage

For properties where the primary post-demolition use of office buildings is known, we compiled data on the number of properties, the average gross building area prior to demolition, and the average building age at the time of demolition, broken down by primary use category (Figure 5).

As shown in Figure 5, the most common change of use is "office→residential," accounting for more than half of the total. This is followed by "office→office" and "office→hotel." In other words, in addition to "office→office" rebuildings, conversions into residential or hotel properties has become a major pattern of redevelopment in Osaka City.

Looking at the average gross building area prior to demolition, "office→office" rebuildings accounted for the largest share at 2,826 tsubo, which is significantly larger in scale compared to conversions to other uses (residential: 976 tsubo; hotel: 1,630 tsubo; retail facility: 770 tsubo; parking lot: 978 tsubo). On the other hand, the average building age at the time of demolition was generally 45 years; while this was slightly shorter for "office→residential" conversions, there was no significant difference among the various usages.

**Figure 5: Number of Buildings Broken Down by Primary Post-Demolition Use, Average Gross Building Area, and Average Building Age**

Change in primary use	Number of properties	Avg. gross building area of property before demolition (tsubo)	Avg. building age at demolition (year)
Office→Office	113	2,826	47.4
Office→Residential	273	976	43.7
Office→Hotel	79	1,630	46.2
Office→Retail	25	770	48.3
Office→Parking lot	33	978	47.2
Office→Other	10	2,398	37.2
Total	530	1,480	45.1

(Properties whose usage after demolition is known)

Figure 6 compares how the primary post-demolition use of these properties differs between office districts (Kita Ward, Chuo Ward) and other wards.

In Kita and Chuo wards, while residential use accounts for the highest percentage (43%) of post-demolition use, offices and hotels account for 25% and 22%, respectively. While the conversion to residential use is progressing in the city center, a relatively large proportion of properties continue to be used for office purposes or are being converted into hotels.

In contrast, in other parts of Osaka City, residential use account for more than 60% of the total (63%), while offices account for only 16%. After demolition, buildings are typically converted into residential use, and the proportion of office renewals is lower than in the city center. In other parts of Osaka City, residential redevelopment may be the preferred land-use option due to differences in location characteristics and demand patterns. Another notable feature is that, given the high level of car usage and demand for parking in Osaka City, conversions to parking lots account for 6% of the total.

**Figure 6: Post-Demolition Usage – By District**

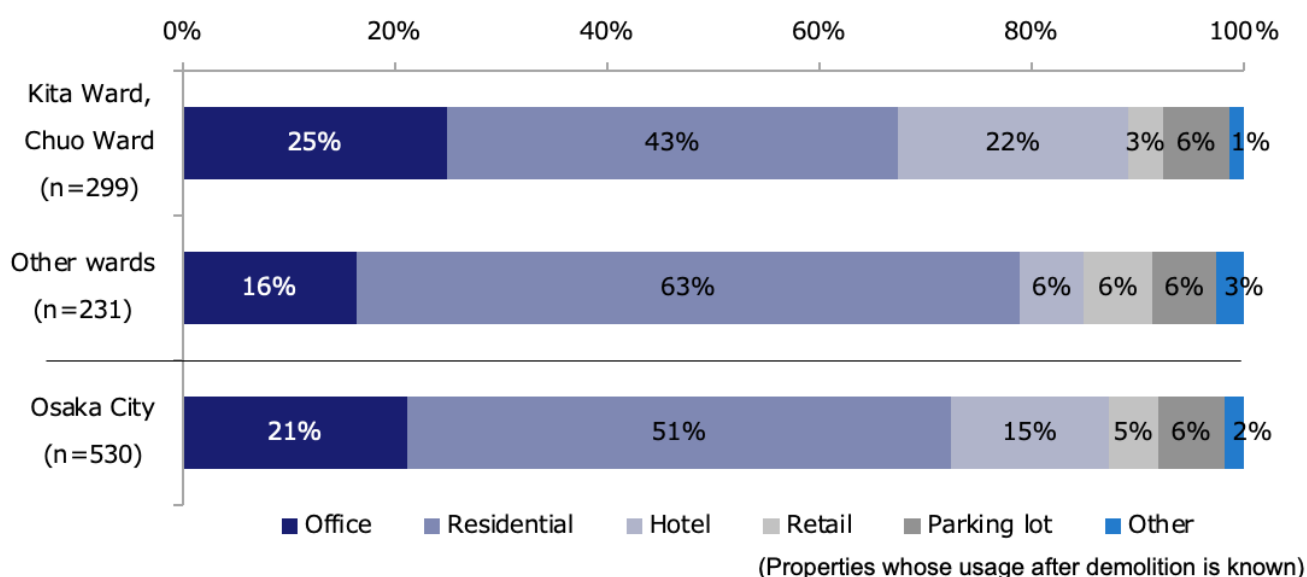


Figure 7 shows the results of plotting the properties by primary use to understand the distribution of properties’ primary post-demolition usages in Osaka City.

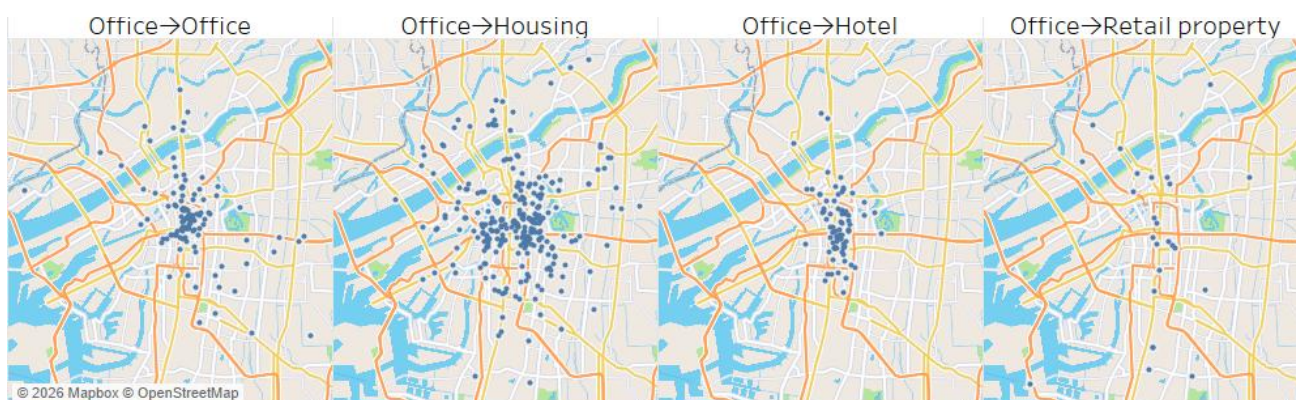
As shown in Figure 7, “office→office” rebuildings are concentrated in major office districts, particularly Kita Ward and Chuo Ward. One characteristic of the Osaka City area is that while activity is centered around the Umeda–Yodoyabashi–Honmachi area, the region north of Umeda is also becoming increasingly active (across all usages) due to the development of Kita Yard.

On the other hand, while a certain number of “office→residential” conversions can be found in the city center, they are widely scattered in areas outside the city center. This indicates that the shift toward residential use is occurring across a wide range of locations, not limited to specific core areas.

Furthermore, while the number of “office→hotel” and “office→retail” conversions is limited, they tend to be concentrated in areas near major train stations or where high foot traffic is expected. In particular, the “office→hotel” trend extends from north to south (from the Umeda area to Tennoji). The direction of

repurposing is not uniform; it may be determined based on location-specific characteristics (such as the concentration of offices, foot traffic, and proximity to transportation hubs).

**Figure 7: Regional Distribution of Rebuilt Properties by Primary Use**



*Mapbox and OpenStreetMap are used for background maps.*

## 2.2. Changes in number of buildings before and after rebuilding

In addition to usage, we also identified how the number of buildings on the site changed before and after rebuilding. Specifically, for each demolished property, we identified how many buildings existed on the site before demolition and how many buildings were newly constructed on the site after demolition. We then defined the changes in the number of buildings as follows.

- One building is demolished, and one is built (1 building→1 building)
- One building is demolished, and multiple buildings are built (1 building→multiple buildings)
- Multiple buildings are demolished, and one is built (multiple buildings→1 building)
- Multiple buildings are demolished, and multiple buildings are built (multiple buildings→multiple buildings)

Figure 8 summarizes the average gross building area of the property before demolition and the average building age at the time of demolition for each of the above patterns.

Changes in building configuration are primarily “1 building→1 building” and “multiple buildings→1 building.” Land use following rebuilding generally converges on either “renewal of a single building” or “consolidation within the site.” In particular, the consolidation of multiple buildings into a single structure may be motivated by a desire to streamline the layout of buildings on the site and improve utilization efficiency through the integration of the buildings. On the other hand, “1 building→multiple buildings” and “multiple buildings→multiple buildings” are limited. Cases where the number of buildings increases after redevelopment are rare. It should be noted that there are no significant differences in average gross building area or age of building among the various patterns; therefore, the choice of building configuration is likely influenced by individual factors such as site conditions and project constraints, rather than being determined solely by age or scale.

**Figure 8: Average Gross Building Area Before Demolition and Average Building Age by Change in Number of Buildings**

Change in number of buildings before and after rebuilding	Number of properties	Avg. gross building area of property before demolition (tsubo)	Avg. building age at demolition (year)
1→1	365	1,372	45.1
Multiple→1	116	1,715	45.3
Multiple→Multiple	11	4,427	46.5
1→Multiple	13	1,152	41.7
Total	505	1,511	45.1

(Properties whose number of buildings before and after rebuilding is known)

To examine how building configuration differs between Kita & Chuo wards and other parts of Osaka City, Figure 9 shows the percentage mix in each district.

As shown in Figure 9, in Kita & Chuo wards, “1 building→1 building” accounts for about 70%, followed by “multiple buildings→1 building” at just under 30%. In other words, while single-building renewals are the norm even in the city center, there are also a fair number of cases involving redevelopment that consolidates structures within a single site. In contrast, the proportion of “1 building→1 building” is even higher in other parts of Osaka City, at just under 80%, while “multiple buildings→1 building” accounts for less than 20%. Compared to the city center, renewals involving the consolidation of properties within a single site is limited, and the focus is primarily on the renewal of single buildings.

**Figure 9: Change in Number of Buildings – By District**

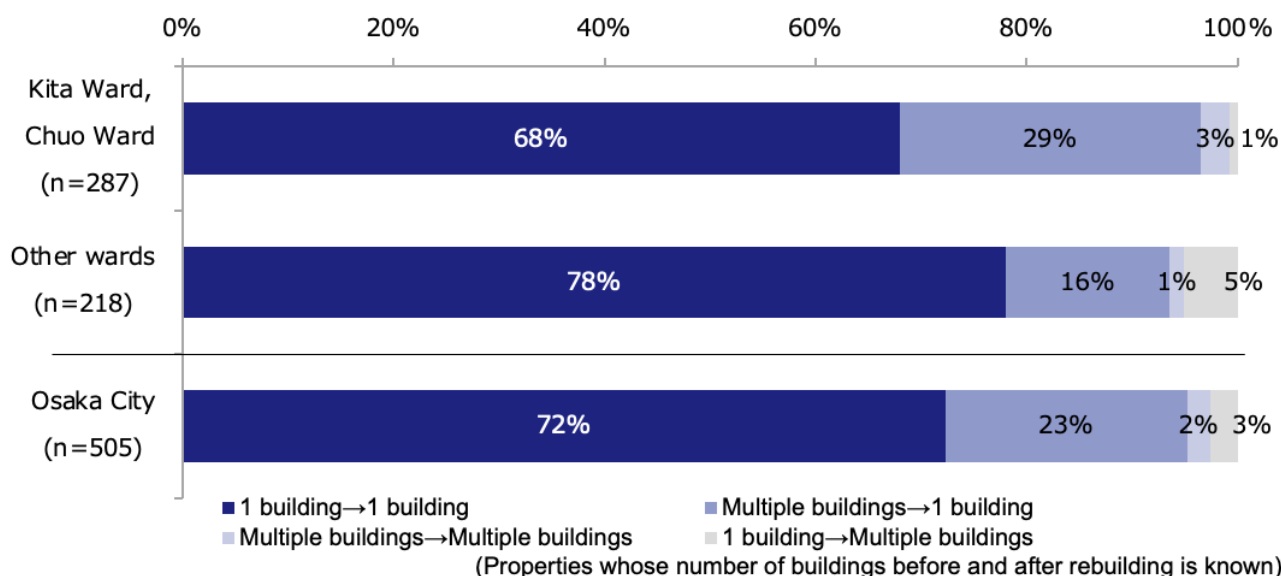
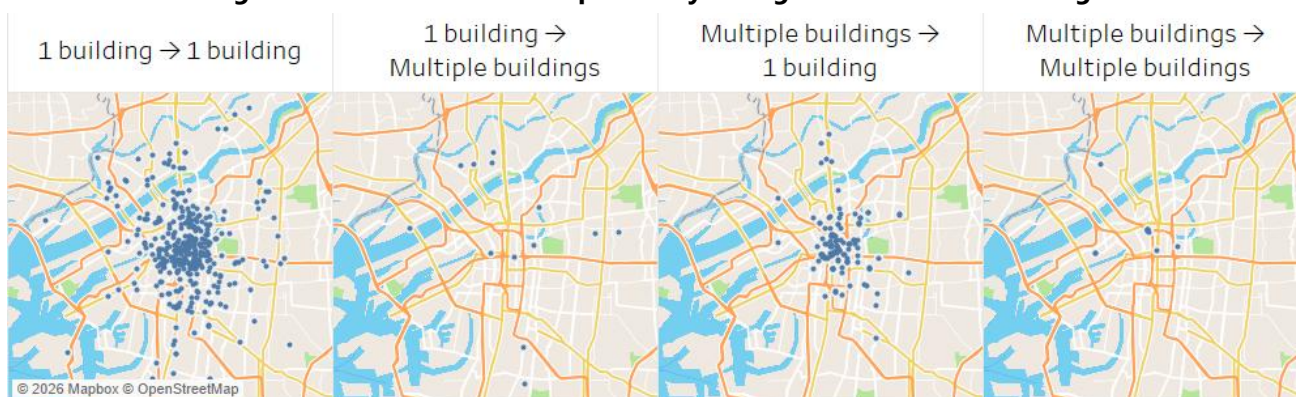


Figure 10 shows the spatial distribution of properties plotted on a map according to changes in the number of buildings. “1 building→1 building” is widespread throughout Osaka City and can be commonly observed not only in the city center but in various other areas as well. On the other hand, “multiple buildings→1 building” are more common in the city center, with clusters of such rebuilding projects visible in major office districts such as the Umeda–Nakanoshima–Honmachi area.

The number of “multiple buildings→multiple buildings” and “1 building→multiple buildings” is limited, and they are sparsely distributed on the map. The pattern of changes in the number of buildings is not uniform; while a certain degree of redevelopment involving the consolidation of sites can be observed in the city center, the result indicates that single-building renewal is the primary trend across a wide area outside the city center.

**Figure 10: Distribution of Properties by Change in Number of Buildings**



Mapbox and OpenStreetMap are used for background maps.

## Conclusion

This survey examined office buildings in Osaka City, focusing on changes in their primary post-demolition uses and building composition, to provide an overview of the overall trend in building replacement.

In Kita and Chuo wards, while residential use is the most common post-demolition use, there are also a fair number of cases where buildings are rebuilt as offices. Conversions to hotels are relatively common as well. The map also shows that office renewals are most common along Midosuji Avenue in the Umeda-Yodoyabashi-Honmachi area. In contrast, in other wards, the focus is on converting buildings into residential use, and such conversions are widespread throughout areas outside the city center.

Furthermore, looking at changes in the number of buildings, the trend across Osaka City as a whole is primarily “1 building→1 building.” While a fair number of renewal projects in Kita Ward and Chuo Ward involve “multiple buildings→1 building,” the proportion of single-building renewals is higher in other parts of Osaka City. We can see on the map that consolidation-type building renewals are relatively more prevalent in the city center, suggesting that differences in site conditions and development environments may be reflected in the form of renewal.

As work styles and industrial structures continue to evolve, the renewal of office stock will not only be carried out to address aging infrastructure but will also affect the distribution of urban functions through the selection of uses and the reorganization of land use based on the demand structure of each location. Xymax Research Institute will continue to monitor the actual state of real estate stock renewal in urban areas and provide foundational information through data-driven analysis to examine the changes in the real estate market and the future of cities.

The percentage mix in the charts contained in this report is rounded to the first decimal place and, therefore, may not add up to 100%.

**For further inquiries, please contact below:**

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