

中国通用仓储市场动态报告

2020年2月

在中国仓储与配送协会指导下,物联云仓《中国通用仓储市场动态报告》已连续发布十九期。《报告》通过对物联云仓实时数据进行汇总、整理,全面反映我国主要物流节点城市的仓储设施租金水平和空置情况,体现通用仓储市场的供需动态变化,总结市场发展规律,预测市场发展趋势,为了解仓储市场发展情况、合理投资提供参考依据。

物联云仓延续往期《报告》成果,不断扩大统计范围,加强仓储市场分析,发布《2020年2月中国通用仓储市场动态报告》。2020年2月,物联云仓全国在线仓库面积新增50万㎡,总面积超3.08亿㎡,较1月增长0.16%;在线可租面积超4,007万㎡,较1月下降1.83%。仓库资源覆盖32个省份,220个城市,7,224个园区。

□ 2020年2月 中国通用仓储设施租金水平

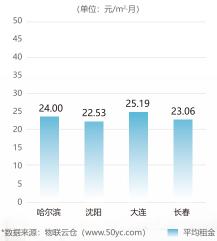
全国32个城市仓库平均租金为27.72元/㎡·月,环比下降0.40%。其中,东部地区仓库平均租金(31.86元/㎡·月)高于西部(24.03元/㎡·月)、东北(23.70元/㎡·月)、中部(23.07元/㎡·月)地区。相较1月,中部地区仓库平均租金有小幅下降,降幅为0.6%;东北部、东部、西部地区仓库平均租金保持平稳,增(降)幅在±0.5%以内。

北京、上海、深圳仓库平均租金仍然领跑全国,均高于40元/㎡·月。相较1月,上海、深圳仓储市场稳定,平均租金波动不大;北京受春节假期和新冠肺炎疫情双重影响,仓储物流企业延期复工、业务中断,仓库租赁需求减少,导致仓库平均租金有小幅下降,降幅为1.17%。

受仓储设施条件、地理位置等影响,太原、石家庄仓库租金水平仍较低,均低于20元/㎡·月。相较1月,石家庄仓库平均租金保持平稳;太原仓库平均租金有所下降,降幅为1.02%,因受春节假期及新冠肺炎疫情影响,当地大部分租户处于观望状态,部分业主为加大招商力度,主动小幅降低仓库租金,吸引客户。预计未来随着企业复工复产,太原仓库租金或将有所回暖。

相比1月,兰州仓库平均租金波动最大,环比下降2.20%。因当地租赁需求长期以厂房为主,仓库租赁需求相对较少,使得仓库平均租金承压,维持在低位;同时,受新冠肺炎疫情影响,当地仓储物流行业受到一定冲击,仓库租赁需求进一步减少,导致仓库租金有所下降。据悉,当前榆中县部分厂房正在拆迁中,同时随着疫情逐步得到控制,预计兰州仓库租赁需求或将有所释放,仓库平均租金或将有所回暖。

2月东北地区仓库租金情况



2月中部地区仓库和金情况







2月东部地区仓库租金情况



*数据来源: 物联云仓 (www.50yc.com)

平均租金

2月西部地区仓库租金情况



2020年2月 中国通用仓储设施空置率情况

全国32个城市仓库平均空置率为12.87%,环比下降0.28%。其中,东北地区仓库空置率(23.49%)远高 于西部 (12.04%) 、中部 (11.67%) 、东部 (10.99%) 地区。相较1月,四大地区仓库空置率相对稳定,升 (降) 幅在±1%以内。

仓库空置率较高的城市为大连、嘉兴、重庆、沈阳、南昌、长春,均高于20%。相较1月,大连、嘉兴、 重庆、沈阳、长春仓库空置率波动不大,相对稳定;南昌因受新冠肺炎疫情影响,仓储物流业务中断,仓库租 赁需求减少,导致仓库空置率有所上升,升幅为2.29%。

仓库空置率最低的城市为苏州、太原,均低于5%。相较1月,两地仓库空置率波动不大,市场稳定,升 (降) 幅在±0.5%以内。

相较1月,石家庄仓库空置率波动最大。为应对疫情,石家庄加大抗疫物资储备,但因石家庄仓库资源存 量有限,疫情期间对临时散租部分仓库需求增加,致使仓库空置率环比下降3.92%,租仓区域主要集中在鹿泉 区、栾城区。



2月东北地区仓库空置率情况



2月中部地区仓库空置率情况



2月东部地区仓库空置率情况



*数据来源:物联云仓 (www.50yc.com)

空置率

2月西部地区仓库空置率情况



*数据来源:物联云仓 (www.50yc.com)

空置率



• 表: 全国32个城市平均租金和空置率一览表

城市	平均租金 (元/m²·月)	环比变化	空置率	环比变化
北京	45.79	-1.17%	8.31%	-0.38%
上海	45.69	0.11%	9.88%	-2.80%
深圳	41.35	0.51%	7.30%	-2.73%
苏州	33.33	0.00%	2.88%	0.41%
杭州	31.91	-1.60%	11.82%	2.25%
宁波	30.39	-0.56%	15.79%	-0.47%
广州	31.79	-0.19%	7.57%	-0.09%
东莞	30.02	0.10%	7.14%	0.36%
南京	30.58	0.79%	12.33%	1.57%
佛山	29.10	-0.48%	15.79%	-2.52%
嘉兴	31.26	-0.10%	24.51%	-1.42%
长沙	26.48	-0.04%	11.62%	-1.91%
天津	31.30	-0.48%	12.31%	-1.45%
无锡	29.66	0.00%	13.65%	-0.33%
大连	25.19	-0.20%	42.96%	0.00%
长春	23.06	-0.43%	20.37%	0.20%
重庆	25.45	-0.27%	24.22%	-0.91%
武汉	25.54	0.04%	15.85%	0.45%
郑州	23.61	-1.25%	7.40%	0.23%
沈阳	22.53	-0.79%	22.30%	0.36%
合肥	24.12	-1.43%	9.69%	0.19%
昆明	25.45	1.31%	6.92%	-1.41%
哈尔滨	24.00	0.29%	8.33%	0.23%
成都	24.83	-0.48%	18.83%	-1.44%
青岛	22.77	-0.70%	8.00%	1.16%
西安	25.32	-0.59%	9.20%	0.06%
贵阳	22.64	0.00%	6.05%	-0.06%
太原	17.50	-1.02%	4.78%	0.47%
济南	25.40	-1.97%	6.24%	0.55%
南昌	21.17	0.00%	20.69%	2.29%
石家庄	19.40	-0.15%	12.27%	-3.92%
兰州	20.46	-2.20%	7.01%	2.18%

*数据来源:物联云仓(www.50yc.com)





• 优质仓源推荐



东部地区

仓库地址:北京市大兴区 可租面积:10,000平方米

项目特点: 园区规划总建筑面积95,000平方米,拥有五栋单层的仓库。目前已全部投入运营,位于京开高速公路、北京六环路、京九铁路交汇点位置,毗邻京哈、京九、京沪、京广等干线铁路。园区内拥有6条铁路专用线、行包专列处理场,它是北京唯一具有公路转铁路运输的综合物流基地。是北京唯一具有公路转铁路运输的综合物流基地,区位优势得天独厚。

联系人: 隋超

联系电话: 18610640033

仓库地址:广州增城区汽车产业园

可租面积: 6,000平方米

项目特点:便捷交通,园区门前八车道的荔新公路,距广园快速路3公里,距广深高速公路5公里,距广州开发区15分钟车程,周边广本,富士康入驻,适合汽配行业客户入驻,且以广莞深为中心,辐射珠三角乃至华南地区的城

市配送中心的极佳选址。 联 系 人: 辛成宽 联系电话: 15844334434

仓库地址: 苏州相城区 可租面积: 40,000平方米

项目特点:四层楼库,一层净高8.8米,二到四层4.5米。丙二类消防,产证 齐全。高标仓,金刚砂地面,八部货梯,独立办公室,另配宿舍,内设月台。苏州北站附近,距高速口4公里,五分钟到达苏州中环北线,交通方便,2小时覆盖圈苏州、上海、无锡、常州、南通、湖州、嘉兴等城市。提供代采代付等一揽子供应链金融解决方案,可长期合作。

联系人:张禄

联系电话: 13162063366

仓库地址:上海金山 可租面积: 45,000平方米

项目特点: 位于金山廊下,张堰收费站上海市金山区汇高路5.1公里,上海市金山区金张公路1858号5.8公里吕巷收费站,上海市金山区荣发路6.0公里。

联系人: 谭伟

联系电话: 17717330045

仓库地址:杭州余杭区 可和面积:25.000平方米

项目特点:园区为世界500强全资物流子公司,在杭州、上海、厦门、广州、无锡等地拥有丰富的钢架仓,楼层仓库房资源;长期合作国内外客户,行业操作经验丰富:汽配,医疗器械,红酒等各种液体饮料,食品,鞋服,自动化电商操作经验等等,涵盖物流,信息,金融,商务等环节,

为您提供定制化的供应链服务方案。

联 系 人: 沈建锋

联系电话: 18158716633

中部地区

仓库地址:郑州新郑郭店 可租面积:40,500平方米

项目特点:项目地理位置优越,10分钟内可抵达郑州外环,25分钟内可抵达郑州新郑国际机场,园区周边交通便捷,3分钟内便可驶入107国道和郑新快速通道。园区内建设现代化高标准双层坡道库,可为客户进行定制化服务,同时配套齐全,可为客户解决员工住宿问题。本项目预计于2020年2季度竣工。

联系人: 王坤

联系电话: 15225100971

西部地区

仓库地址:成都龙泉经开区可租面积:80,000平方米

项目特点:仓库位于龙泉物流中心,2016年6月建成,园区共8栋双层坡道仓库,提供近20万平米高标准仓库,设施齐全。欢迎需要看仓的客户前来看仓。

联系人: 黄天将 联系电话: 18123304630

仓库地址: 西安高陵 可租面积: 60,000平方米

项目特点:大型高标准仓库,配套齐全,丙二类消防。

联系人: 李晨

联系电话: 13119138713







中国仓储与配送协会简介

中国仓储与配送协会前身是1995年经原国内贸易部审批、在国家民政部登记注册的中国仓储协会,2016年5月经国务院国资委审批、民政部核准,更名为中国仓储与配送协会,是全国仓储配送行业的非营利性社团组织。现有共同配送、冷链、危险品、保税、钢材、金融仓储、中药材仓储、技术应用与工程服务、自助仓储、包装与单元化物流、家居物流、智慧物流等十二个分支机构。协会以推动中国仓储配送行业现代化、促进现代物流业的发展为宗旨,重点围绕各类仓储与配送设施建设、各类配送中心发展、仓配一体化服务与技术创新等开展政策研究、行业管理与自律、标准制定与实施、信息统计、资源整合、培训咨询、会议交流等。

物联云仓简介

物联云仓(www.50yc.com)是由四川物联亿达科技有限公司推出的互联网仓储综合服务平台,于2015年10 月上线,主要提供仓库租赁、仓配一体、仓库物资、仓库技术等服务。物联云仓旨在通过互联网仓储服务平台+ 云端应用+线下服务的方式,为传统行业实现高效、经济、快速的转型升级提供坚强支撑。





Trough of the same

THE DYNAMIC REPORT OF CHINA'S

GENERAL WAREHOUSE MARKET IN FEBRUARY 2020

At present, The Dynamic Report of China's General Warehouse Market has been issued nineteen consecutive times under the guidance of the China Association of Warehousing and Distribution. Through collecting and sorting out the real-time related information, this report reflects the vacancy situation and rental level of warehousing facilities in major logistics node cities of China in a comprehensive manner, demonstrates the dynamic change of supply and demand in general warehousing market, summarizes the rule of market development, predicts the development trend of the market and provides reference for comprehending the development of warehousing market and making rational investment into this market.

Warehouse in Cloud (WIC) has launched The Dynamic Report of China's General Warehouse Market in February 2020 after extending the results of previous reports, expanding the scope of selected statistics and deepening the analysis of warehousing market. In February 2020, the total available warehouse area of Warehouse in Cloud (WIC) increased by 0.5 million square meters, with a total area of over 308 million square meters, an increase of 0.16% compared with January 2020; the rentable area exceeded 40.07 million square meters, an decrease of 1.83% from January 2020, and warehouse resources has covered 32 provinces, 220 cities, and 7,224 parks.

Rental level of Warehousing Facilities in China in February 2020

The average rent of warehouses in 32 cities across the country was RMB 27.72 / m² per month, a decrease of 0.40% from the previous month. Among them, the average rent of warehouses in the eastern region (RMB31.86/ m² per month) was higher than that in the western region (RMB24.03/ m² per month), the northeast (RMB23.70/ m² per month) and the central region (RMB23.07/ m² per month). Compared with February 2020, the average warehouse rent in the central region decreased by 0.6%; while in the northeast, eastern and western regions, the average warehouse rent remained stable, with an increase (decrease) of less than 0.5%.

The average rent of warehouses in Beijing, Shanghai and Shenzhen was still higher than RMB40/ m² per month, which was in the leading position among other cities in China. Compared with January, the warehousing market in Shanghai and Shenzhen was stable, and the average rent fluctuated little; due to the dual impact of the Spring Festival holiday and the COVID-19 epidemic, warehousing and logistics enterprises delayed returning to work, business interrupted, and warehouse rental demand decreased, resulting in a slight decline of 1.17% in average warehouse rent.

Affected by the conditions of storage facilities and geographical location, the level of warehouse rent in Taiyuan and Shijiazhuang was still low, which was less than RMB20/ m² per month. Compared with January, the average warehouse rent of Shijiazhuang remained stable; the average rent of Taiyuan warehouse decreased by 1.02%. Due to the Spring Festival holiday and the COVID-19 epidemic, most local tenants chose to postpone the lease, and some landlords took the initiative to reduce warehouse rent by a small margin to attract customers. It is expected that with the resumption of work and production in the future, the rent of Taiyuan warehouse may pick up accordingly.

Compared with January, the average rent of Lanzhou warehouse fluctuated the most, down 2.20% from the previous month. As the local rental demand has been dominated by plant building for a long time, and the demand for warehouse leasing is relatively small, the average rent of the warehouse is under pressure and remains at a low price; at the same time, affected by the COVID-19 epidemic, the local warehousing and logistics industries has been impacted to a certain extent, and the demand for warehouse leasing has further reduced, resulting in a decline in warehouse rent. It is reported that at present, some factories in Yuzhong County are being demolished, and as the epidemic is gradually brought under control, it is expected that Lanzhou warehouse rental demand may be released, and the average warehouse rent may pick up gradually.



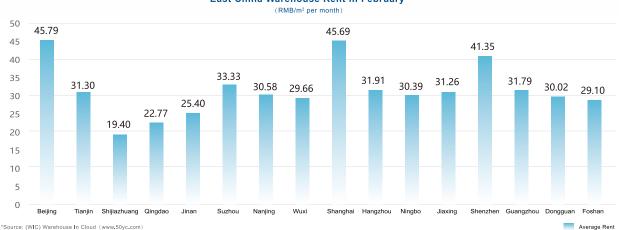




Central China Warehouse Rent in February



East China Warehouse Rent in February







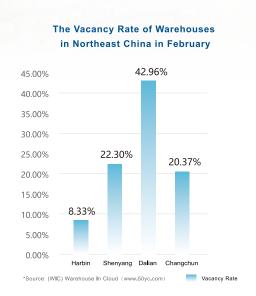
China's Warehousing Facilities Vacancy Rate in February 2020

Average vacancy rates were 12.87% in 32 cities nationwide, down 0.28% from month to month. Among them, the vacancy rate in Northeast China (23.49%) was much higher than that in western (12.04%), central (11.67%) and eastern (10.99%) areas. Compared with January, vacancy rate in these four regions remained relatively stable, rising (falling) within 1%.

Cities with relatively high vacancy rates were Dalian, Jiaxing, Chongqing, Shenyang, Nanchang and Changchun, which were all higher than 20%. Compared with January, warehouse vacancy rate of Dalian, Jiaxing, Chongqing, Shenyang and Changchun were relatively stable. Due to the impact of COVID-19 epidemic in Nanchang, the warehousing and logistics business was interrupted and the demand for warehouse leasing decreased, resulting in an increase in warehouse vacancy rate of 2.29%.

The cities with the lowest warehouse vacancy rates were Suzhou and Taiyuan, both of which were less than 5%. Compared with January, the vacancy rate of the warehouses of the two places fluctuated little, and the market was stable, with an increase (decline) of less than 0.5%.

Compared with January, the vacancy rate of Shijiazhuang warehouse fluctuated most. In order to deal with the epidemic situation of novel coronavirus, Shijiazhuang increased the reserve of anti-epidemic materials, but due to the limited stocking capacity of Shijiazhuang warehouse resources, the temporary demand for some warehouses has increased during the epidemic, resulting in a 3.92% drop in warehouse vacancy rate compared with the previous month. The rental resources were mainly concentrated in Luquan District and Luancheng District.











List of Average Rents and Vacancy Rates in 32 Cities of China

City	Average Rent Fee (RMB/m² per month)	Month-to-Month Comparisons	Vacancy Rate	Month-to-Month Comparisons
Beijing	45.79	-1.17%	8.31%	-0.38%
Shanghai	45.69	0.11%	9.88%	-2.80%
Shenzhen	41.35	0.51%	7.30%	-2.73%
Suzhou	33.33	0.00%	2.88%	0.41%
Hangzhou	31.91	-1.60%	11.82%	2.25%
Ningbo	30.39	-0.56%	15.79%	-0.47%
Guangzhou	31.79	-0.19%	7.57%	-0.09%
Dongguan	30.02	0.10%	7.14%	0.36%
Nanjing	30.58	0.79%	12.33%	1.57%
Foshan	29.10	-0.48%	15.79%	-2.52%
Jiaxing	31.26	-0.10%	24.51%	-1.42%
Changsha	26.48	-0.04%	11.62%	-1.91%
Tianjin	31.30	-0.48%	12.31%	-1.45%
Wuxi	29.66	0.00%	13.65%	-0.33%
Dalian	25.19	-0.20%	42.96%	0.00%
Changchun	23.06	-0.43%	20.37%	0.20%
Chongqing	25.45	-0.27%	24.22%	-0.91%
Wuhan	25.54	0.04%	15.85%	0.45%
Zhengzhou	23.61	-1.25%	7.40%	0.23%
Shenyang	22.53	-0.79%	22.30%	0.36%
Hefei	24.12	-1.43%	9.69%	0.19%
Kunming	25.45	1.31%	6.92%	-1.41%
Harbin	24.00	0.29%	8.33%	0.23%
Chengdu	24.83	-0.48%	18.83%	-1.44%
Qingdao	22.77	-0.70%	8.00%	1.16%
Xi'an	25.32	-0.59%	9.20%	0.06%
Guiyang	22.64	0.00%	6.05%	-0.06%
Taiyuan	17.50	-1.02%	4.78%	0.47%
Jinan	25.40	-1.97%	6.24%	0.55%
Nanchang	21.17	0.00%	20.69%	2.29%
Shijiazhuang	19.40	-0.15%	12.27%	-3.92%
Lanzhou	20.46	-2.20%	7.01%	2.18%



Recommendations of the Warehouses in March



East China Region

Warehouse Address: Daxing District, Beijing Rentable Area: 10,000 square meters

Project Features: The park has a total construction area of 95,000 square meters with five single-storey warehouses. At present, it has been fully put into operation and is located at the intersection of Jingkai Expressway, Beijing sixth Ring Road and Beijing-Kowloon Railway, and it is adjacent to Beijing-Harbin, Beijing-Kowloon, Beijing-Shanghai, Beijing-Guangzhou and other trunk railways. The park has six special railway lines and luggage special train processing yard, which is the only comprehensive logistics base in Beijing with road to railway transport.

Contact: Sui Chao Tel: 1861 0640033

Warehouse Address: Automobile Industry Park, Zengcheng District, Guangzhou Rentable Area: 6.000 square meters

Project Features: This warehouse park enjoys a convenient transportation network, with Lixin Highway of eight lanes in front of the door. The park is three kilometers away from the Guangyuan Expressway, five kilometers away from the Guangzhou-Shenzhen Expressway and 15 minutes by car from Guangzhou Development Zone. There are Guangben, Foxconn and other large enterprises around the park, suitable for auto parts industry warehousing. With Guangdong, Dongguan and Shenzhen as the center, the park radiates the urban distribution centers in the Pearl River Delta and even South China.

Contact: Xin Chengkuan Tel: 15844334434

Warehouse Address: Xiangcheng District, Suzhou

Rentable Area: 40,000 square meters

Project Features: There are four-storey warehouses in the park, with a net height of 8.8 meters on the first floor and 4.5 meters on the second to fourth floors. Warehouses here are high-standard warehouse with C-class II fire protection qualification and has gained all the necessary licenses and certificates. The storehouses are layered with carborundum floor, equipped with eight freight elevators, independent office, dormitories, internal platform. It is near the Suzhou North Railway Station and with 4 kilometers away from the highway, five minutes to Suzhou Central North Line, within 2 hours' drive to Suzhou, Shanghai, Wuxi, Changzhou, Nantong, Huzhou, Jiaxing and other cities. The warehouse park can also provide a package of supply chain financial solutions such as purchasing and payment for long-term cooperation.

Contact: Zhang Lu Tel: 1316 2063366

Warehouse Address: Jinshan District, Shanghai

Rentable Area: 45,000 square meters

Project Features: This storage park is located under Jinshan Corridor, Zhangyan Toll Station. Huigao Road, Jinshan District, Shanghai. 5.1kilometers. Lvxiang Toll Station, 1858 Jinshan Road Jinshan District, Shanghai. 5.8 kilometers. Rongfa Road, Jinshan District, Shanghai. 6 kilometers.

Contact: Tan Wei Tel: 17717330045 Warehouse Address: Yuhang District, Hangzhou

Rentable Area: 25,000 square meters

Project Features: the warehousing park is a subsidiary of the world's top 500 wholly owned logistics companies with rich steel frame warehouses and floor warehouse resources in Hangzhou, Shanghai, Xiamen, Guangzhou, Wuxi and other places around the country. It has conducted long-term cooperation with customers at home and abroad, boasting rich experience in industry operation, such as automobile accessory, medical devices, red wine and other liquid beverages, food, shoes and dothing, automated e-commerce, covering logistics, information, finance, business and other fields. It can provide customers with customized supply chain service solutions.

Contact: Shen Jianfeng Tel: 18158716633

Central China Region

Warehouse Address: Xinzheng Guodian, Zhengzhou City

Rentable Area: 40,500 square meters

Project Features: This storage park has a superior location which can reach Zhengzhou Outer Ring within 10 minutes by car and within 25 minutes to Zhengzhou Xinzheng International Airport. The traffic around the park is convenient, as it is 3 minutes' drive from the 107 National Highway and Zhengxin Expressway. The park has a modern high-standard double-deck ramp libraries that can provide customized services for customers. The supporting facilities are complete, including staff accommodation. The storage park is expected to be completed in the second quarter of 2020.

Contact: Wang Kun Tel: 1522 5100971

West China Region

 $\label{thm:constraint} Warehouse\ Address:\ Longquan\ Economic\ Development\ District,\ Chengdu$

Rentable Area: 80,000 square meters

Project Features: the warehouse is located in Longquan Logistics Center and was completed in June 2016. There are 8 double-deck ramp warehouses in the park, providing nearly 200,000 square meters of high-standard warehouse resources with complete facilities. Customers in need are welcome to come and check.

Contact: Huang Tianjiang Tel: 18123304630

Warehouse Address: Gaoling District, Xi'an City, Shanxi Province

Rentable Area: 60,000 square meters

Project Features: This is a large size, high-standard warehouse with complete supporting and C-class ${\, \mathbb I \,}$ fire protection qualification.

Contact: Li Chen Tel: 13119138713







Introduction of China Association of Warehousing and Distribution:

China Association of Warehousing and Distribution (CAWD) originated from previous China Association of Warehousing and Storage which was approved by the former Ministry of Domestic Trade and registered with the Ministry of Civil Affairs in1995. It was renamed as China Association of Warehousing and Distribution in May 2016 after being approval by the State Assets Commission of the State Council and examined by the Ministry of Civil Affairs. It is a non-profit organization in the national warehousing and distribution industry. There are 12 branches including joint distribution, cold chain logistics, dangerous goods warehousing, bonded warehousing, steel warehousing, financial warehousing, traditional Chinese medicine warehousing, technical engineering and engineering services, self-service warehousing, packaging and unitized logistics, household logistics, intelligent logistics etc. Aiming at promoting the modernization of China's warehousing and distribution industry and the development of modern logistics industry, the association carries out the function of policy research, industry management and self-discipline, industry standards formulation and implementation, information and statistics collection, resource integration, training consultation, conference and exhibition and so on focusing on the construction of various warehousing and distribution facilities, the development of various distribution centers and integrated warehousing and distribution services and technological innovation.

Introduction of Warehouse in Cloud (WIC):

WIC (www.50yc.com) is an Internet warehousing integrated service platform presented by Sichuan WULIANY-IDA Technology Co., Ltd. It was launched in October 2015, mainly providing warehouse leasing, warehouse and distribution integration, warehouse materials, warehouse technology and other services. WIC aims to provide strong support for traditional industries to achieve efficient, economic and rapid transformation and upgrading by Internet warehousing service platform + cloud application + offline service.

