

June 2020

The Dynamic Report of China's General Warehouse Market

中国通用仓储市场

2020 年 6 月 动态报告

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》已连续发布二十三期。《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6月中国通用仓储市场动态报告》。2020年6月，物联云仓全国在线仓库总面积超3.18亿 m^2 ；在线可租面积超4,765万 m^2 ，较5月增长0.91%。仓库资源覆盖32个省份，225个城市，7,342个园区。

2020 年 6 月中国通用仓储设施租金水平

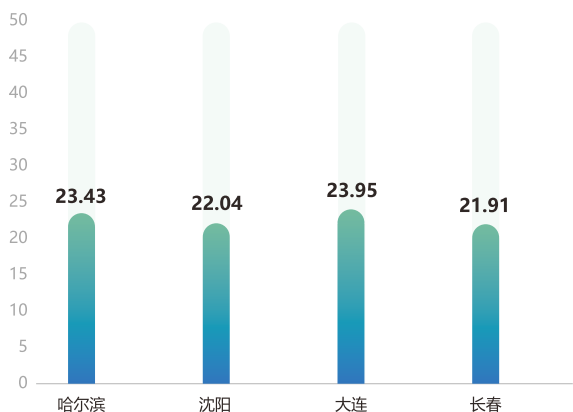
全国32个城市仓库平均租金为27.66元/ $\text{m}^2\cdot\text{月}$ ，环比上涨0.04%。其中，东部地区仓库平均租金（31.99元/ $\text{m}^2\cdot\text{月}$ ）高于西部（24.05元/ $\text{m}^2\cdot\text{月}$ ）、中部（22.92元/ $\text{m}^2\cdot\text{月}$ ）、东北（22.83元/ $\text{m}^2\cdot\text{月}$ ）地区。相较5月，东北地区仓库平均租金有小幅下降，降幅为0.65%；东部、西部、中部地区仓库平均租金保持平稳，增（降）幅在 $\pm 0.5\%$ 以内。

北京、上海、深圳仓库平均租金仍然领跑全国，均高于40元/ $\text{m}^2\cdot\text{月}$ ，其中，北京、上海已超过46元/ $\text{m}^2\cdot\text{月}$ 。相较5月，上海、深圳仓储市场稳定，平均租金波动不大；北京受疫情影响，租仓需求略显疲软，部分园区租仓客户收缩租仓面积，同时园区业主降价招租，导致仓库平均租金有小幅下降，降幅为0.91%。

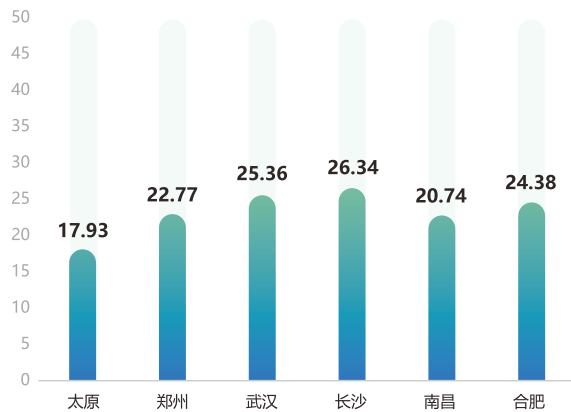
受仓储设施条件、地理位置等影响，太原、石家庄仓库租金水平仍较低，均低于20元/ $\text{m}^2\cdot\text{月}$ 。相较5月，太原、石家庄仓库租金波动不大，市场相对稳定。

相较5月，昆明仓库平均租金波动最大，受市场供需双重影响，环比下降2.12%。一方面随着仓库租赁淡季的到来，当地租仓需求减少；另一方面，部分物流园区项目在本月建成交付，如深国际七甸物流园（10万 m^2 ）等，导致平均租金有所下降。

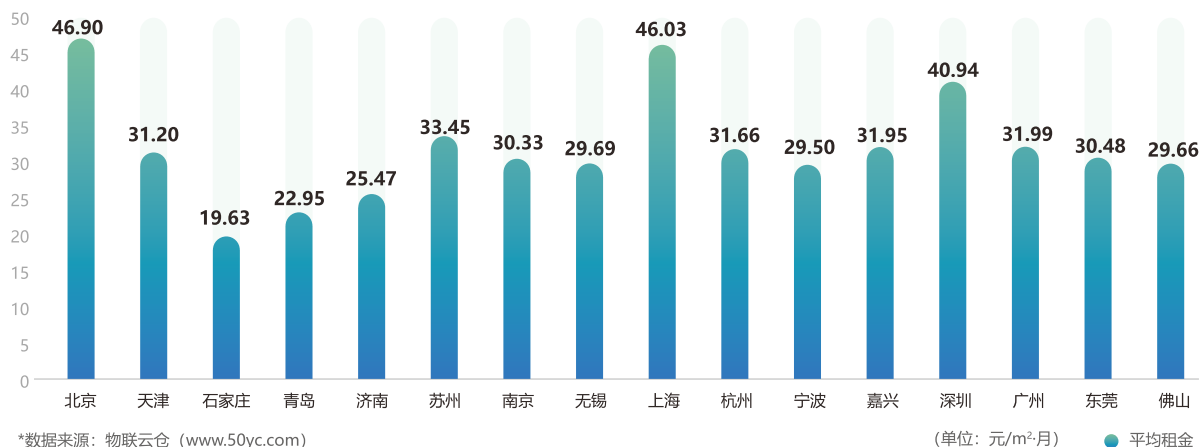
6月东北地区仓库租金情况

*数据来源：物联云仓 (www.50yc.com) (单位：元/ $\text{m}^2\cdot\text{月}$) ● 平均租金

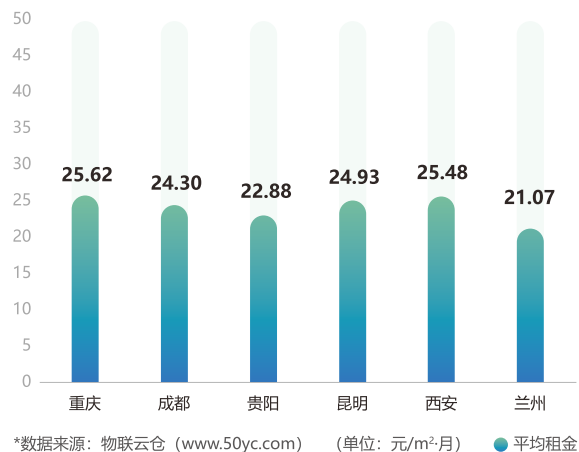
6月中部地区仓库租金情况

*数据来源：物联云仓 (www.50yc.com) (单位：元/ $\text{m}^2\cdot\text{月}$) ● 平均租金

6月东部地区仓库租金情况



6月西部地区仓库租金情况



2020 年 6 月中国通用仓储设施空置率情况

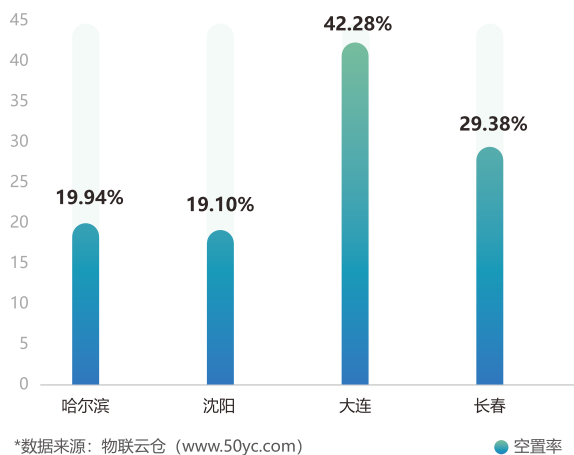
全国32个城市仓库平均空置率为15.64%，环比上升0.86个百分点。其中，东北地区仓库空置率（27.67%）远高于西部（14.80%）、东部（13.85%）、中部（13.25%）地区。相较5月，西部、东部地区仓库空置率有所上升，升幅分别为2.07和1.27个百分点；东北、中部地区仓库空置率相对稳定，升（降）幅变化在±1个百分点以内。

仓库空置率较高的城市为大连、重庆、长春，均高于25%。相较5月，大连、重庆市场稳定，仓库空置率波动不大；长春延续上月企业调整战略、收缩业务趋势，仓库空置率上升3.15个百分点。

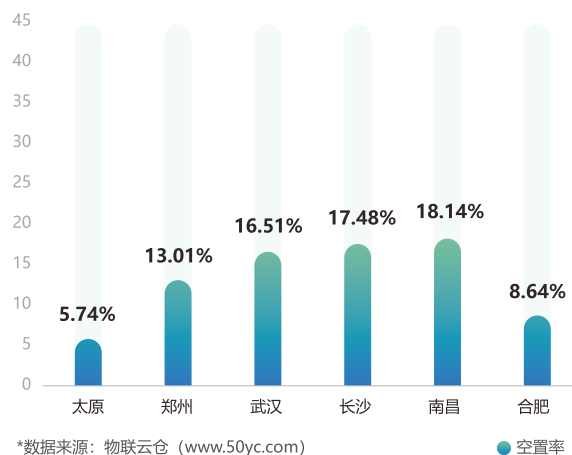
仓库空置率最低的城市为苏州、太原，均低于6%。相较5月，两个城市仓库空置率波动不大，市场稳定。

相较5月，嘉兴仓库空置率波动最大，仓库空置率上升9.12个百分点，主要因部分物流园区项目在本月建成交付，如嘉兴秀洲区王店集散区三个物流园交付，交付面积约21万㎡。

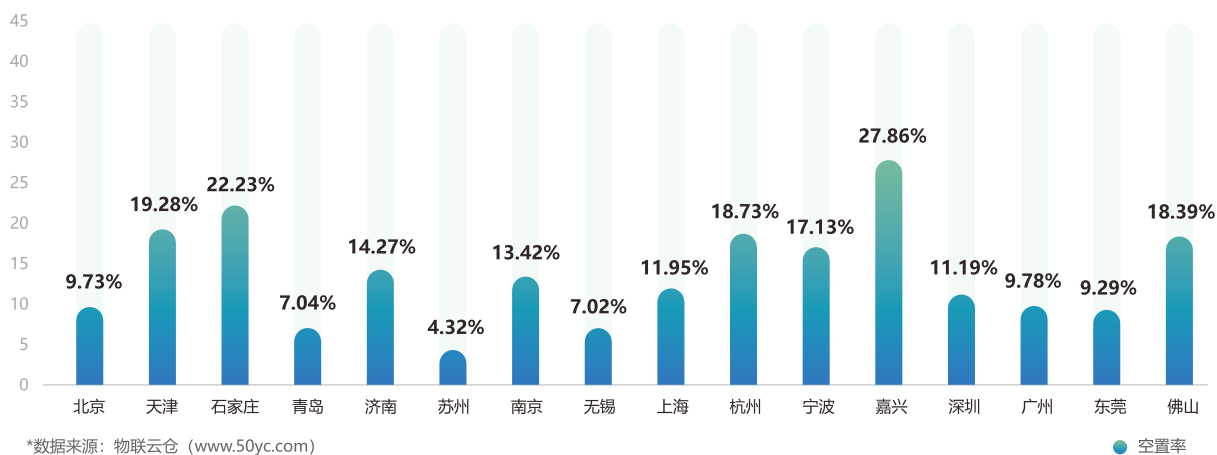
6月东北地区仓库空置率情况



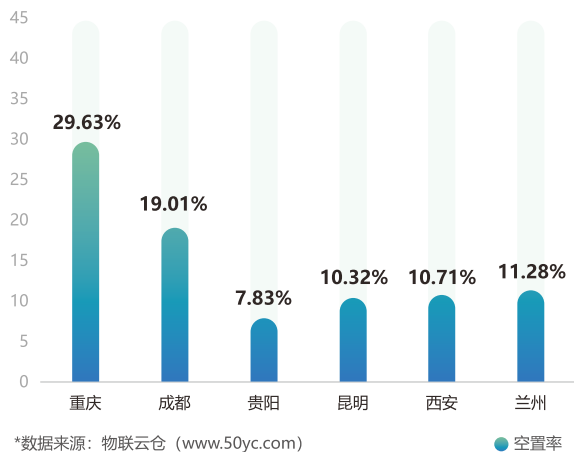
6月中部地区仓库空置率情况



6月东部地区仓库空置率情况



6月西部地区仓库空置率情况

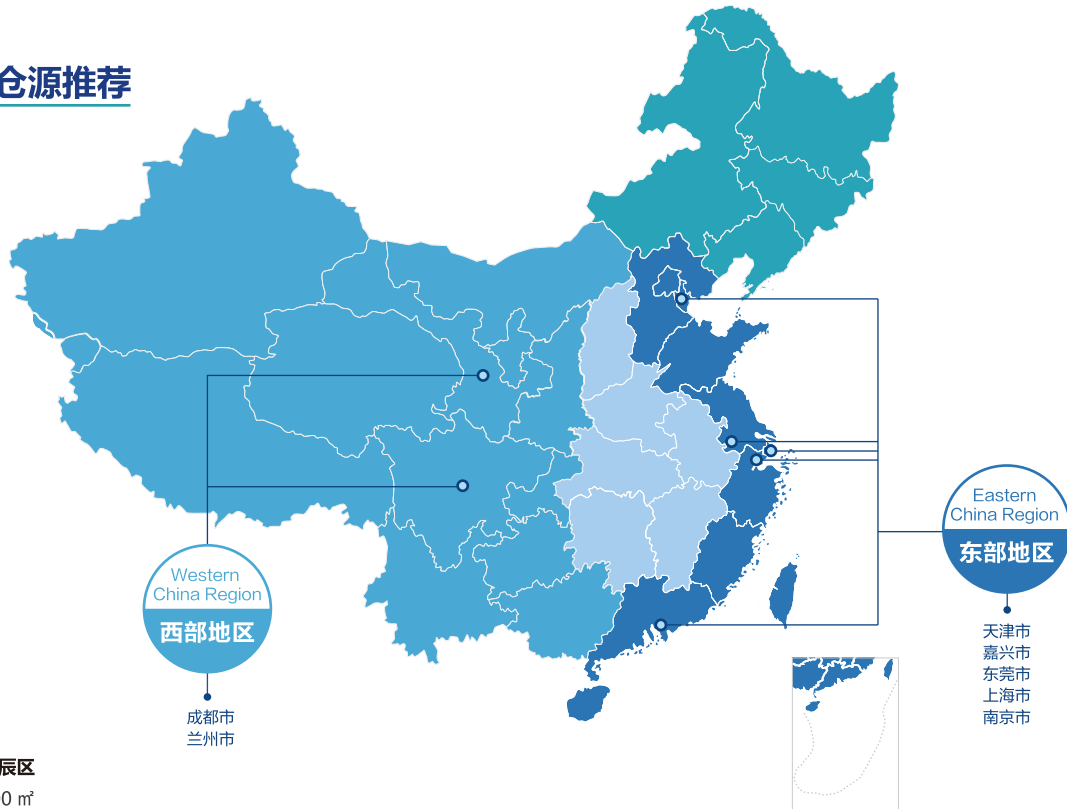


全国32个城市平均租金和空置率一览表

城市	平均租金 (元 / m ² · 月)	环比变化	空置率	环比变化 (百分点)
北京	46.90	-0.91%	9.73%	0.09
上海	46.03	-0.41%	11.95%	0.47
深圳	40.94	0.00%	11.19%	0.13
苏州	33.45	0.51%	4.32%	-0.06
杭州	31.66	0.13%	18.73%	-0.48
宁波	29.50	0.72%	17.13%	3.17
广州	31.99	-0.47%	9.78%	1.40
东莞	30.48	0.56%	9.29%	1.09
南京	30.33	-0.16%	13.42%	-1.11
佛山	29.66	0.20%	18.39%	-1.25
嘉兴	31.95	0.76%	27.86%	9.12
长沙	26.34	0.27%	17.48%	-1.87
天津	31.20	-0.41%	19.28%	1.16
无锡	29.69	-0.13%	7.02%	0.66
大连	23.95	-0.99%	42.28%	0.89
长春	21.91	0.14%	29.38%	3.15
重庆	25.62	1.39%	29.63%	0.36
武汉	25.36	0.24%	16.51%	-0.01
郑州	22.77	0.26%	13.01%	-0.32
沈阳	22.04	-1.65%	19.10%	-5.78
合肥	24.38	0.00%	8.64%	0.00
昆明	24.93	-2.12%	10.32%	4.47
哈尔滨	23.43	0.00%	19.94%	-1.32
成都	24.30	-0.74%	19.01%	0.12
青岛	22.95	-0.26%	7.04%	0.69
西安	25.48	1.84%	10.71%	0.95
贵阳	22.88	1.15%	7.83%	0.91
太原	17.93	0.00%	5.74%	0.00
济南	25.47	-0.35%	14.27%	0.09
南昌	20.74	0.00%	18.14%	0.00
石家庄	19.63	1.39%	22.23%	5.18
兰州	21.07	1.01%	11.28%	5.61

*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：天津北辰区

可租面积：120,000 m²

项目特点：（1）基本情况：天津北辰物流中心位于北辰区，总用地面积 26 万平方米，建筑形式为坡道库，建有 6 栋双层坡道库 24 万平米，2 栋综合配套楼 2 万平米；（2）建筑标准：高标库，建筑高度为 24 米，单层高度 12 米，仓库内净高 9 米，丙二类。（3）配套齐全：配有综合办公楼、食堂、住宿、办公区、充电桩等；（4）项目于 2020 年 4 月底交付。（5）租赁形式：可分割，可改造，有租赁优惠期。

联系人：隋超

联系电话：18610640033

仓库地址：嘉兴秀洲王店

可租面积：52,946 m²

项目特点：仓库位于华东核心区，50km 辐射半径覆盖嘉兴、上海、杭州、苏州等华东核心城市，是华东区域分拨的理想选择。仓库距 G60 沪昆高速 4km，距 G15W 常台高速 5km，距嘉兴市区 7km，距上海市 45km，距杭州市 50Kkm，距苏州市 55km。

联系人：沈建锋

联系电话：18158716633

仓库地址：东莞麻涌

可租面积：50,390 m²

项目特点：东莞麻涌新沙项目，地处连接广州、东莞、深圳融合区域的中心地带，位于东莞市麻涌镇漳澎村。项目用地面积 41,939.9 m²，总建筑面积 50,390.15 m²。项目建筑为二栋双层坡道库，仓库一层层高 9.8 米，二层层高 9 米，每层设有 9 个升降平台。配套有设备房、办公区域。

联系人：辛成宽

联系电话：15844334434

仓库地址：上海市闵行区物流园

可租面积：20,000 m²

项目特点：项目距外环高速 7.5 公里，距沪金高速 3.5 公里，距申嘉湖高速 6.5 公里，距虹桥机场 17 公里，距浦东机场 46 公里。一栋三层库，总面积 47,000 平方米，配有集卡坡道和多部货梯。二楼坡道库，三楼电梯。

底层 7.9m，二层 6.8m，三层 5.6m。承重：底层 3t、二层 2t、三层 1t。

联系人：谭伟

联系电话：17717330045

仓库地址：南京六合区

可租面积：20,000 m²

项目特点：项目位于南京六合经济技术开发区，总建筑面积约 7.2 万平方米。该物业地理位置优越，靠近宁连高速与宁扬高速。

联系人：谭伟

联系电话：17717330045

西部地区

仓库地址：兰州新区

可租面积：39,000 m²

项目特点：项目总占地面积约 752 亩，总建筑面积约 27 万平方米，计划投资 15 亿元。主要包括多层冷库六座 8.53 万平方米、汽车及展示库两座 2.55 万平方米、综合库十座 9.26 万平方米、电商及服务楼两座 3.52 万平方米、倒班楼一座 2.04 万平方米及其他配套设施。

联系人：李晨

联系电话：13119138713

仓库地址：成都青白江通站路

可租面积：24,500 m²

项目特点：项目位于大弯火车站旁，内置月台，标准丙二仓库，价格实惠，提供仓配一体服务，层高 9 米。

联系人：黄天将

联系电话：18123304630

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。

* 声明：文中的一切资料及数据，仅作参考之用，物联云仓保留一切权利，转载请保留原文链接或注明出处。

The Dynamic Report of China's General Warehouse Market in June 2020

At present, The Dynamic Report of China's General Warehouse Market has been issued twenty-three 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 June 2020 after extending the results of previous reports, expanding the scope of selected statistics and deepening the analysis of warehousing market. In June 2020, the total available warehouse area of Warehouse in Cloud (WIC) exceeded 318 million square meters, and the online rentable area exceeded 47.65 million square meters, up 0.91% from May 2020. Warehouse resources has covered 32 provinces, 225 cities, and 7,342 parks.

Rental level of Warehousing Facilities in China in June 2020

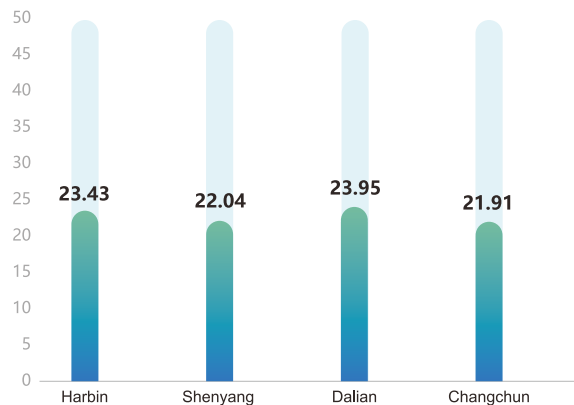
The average rent of warehouses in 32 cities across the country was RMB 27.66 / m^2 per month, an increase of 0.04% from the previous month. Among them, the average rent of warehouses in the eastern region (RMB31.99/ m^2 per month) was higher than that in the western region (RMB24.05/ m^2 per month), the central region (RMB22.92/ m^2 per month) and the northeast (RMB22.83/ m^2 per month). Compared with May 2020, the average warehouse rent in the northeastern region decreased by 0.65%; while in the eastern, western and central 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/ m^2 per month, which was in the leading position among other cities in China. Among them, the average warehouse rent of Beijing and Shanghai was exceeded RMB46/ m^2 per month. Compared with May, the warehousing market in Beijing, Shanghai and Shenzhen was stable. Demand for rented warehouses in Beijing was slightly weaker due to the epidemic, with some park tenants reducing the size of their rented warehouses, while park landlords cut prices to attract tenants, resulting in a slight decrease in the average warehouse rent of 0.91%.

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/ m^2 per month. Compared with May, warehouse rents in these two cities fluctuated little and the market was stable.

Compared to May, under the dual impact of supply and demand in the market, Kunming warehouse average rent fluctuated the most, down 2.12%. On the one hand, with the arrival of the off-season of warehouse leasing, the demand for leased warehouses decreased; on the other hand, part of the logistics park was completed and put into use in this month, such as the Shenguoji Logistic Park in Qidian with an area of 100 thousand square meters, and has led to a decrease in the average rent.

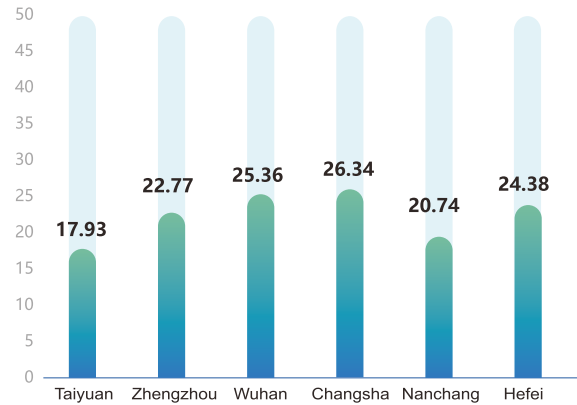
Northeast China Warehouse Rent in June



*Source: (WIC) Warehouse In Cloud (www.50yc.com)

(RMB/m² per month) ● Average Rent

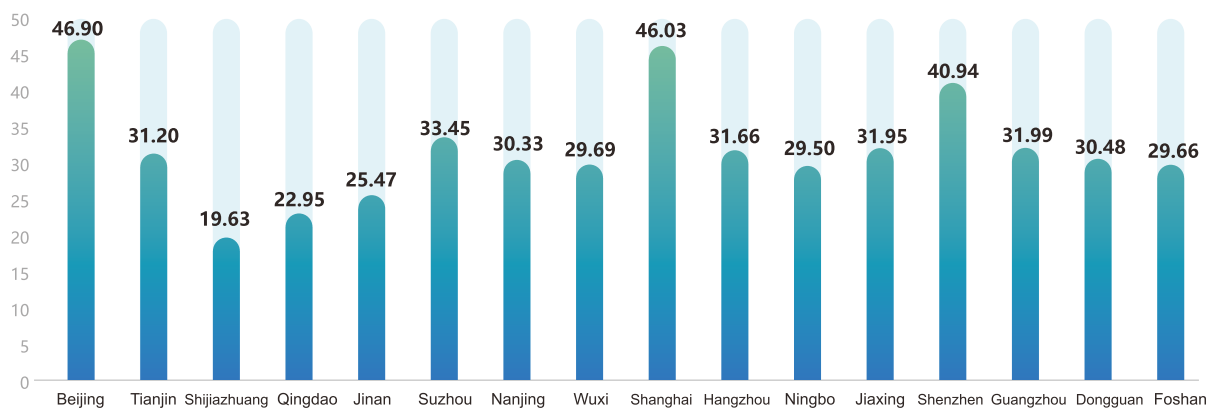
Central China Warehouse Rent in June



*Source: (WIC) Warehouse In Cloud (www.50yc.com)

(RMB/m² per month) ● Average Rent

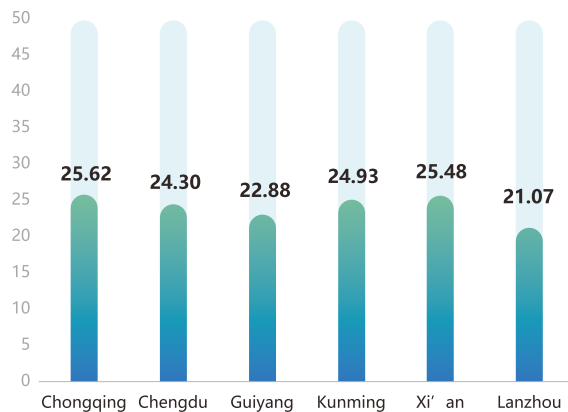
East China Warehouse Rent in June



*Source: (WIC) Warehouse In Cloud (www.50yc.com)

(RMB/m² per month) ● Average Rent

West China Warehouse Rent in June



*Source: (WIC) Warehouse In Cloud (www.50yc.com)

(RMB/m² per month) ● Average Rent



China's Warehousing Facilities Vacancy Rate in June 2020

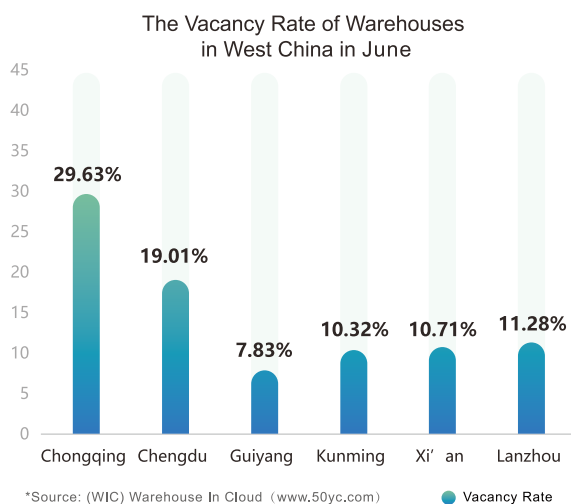
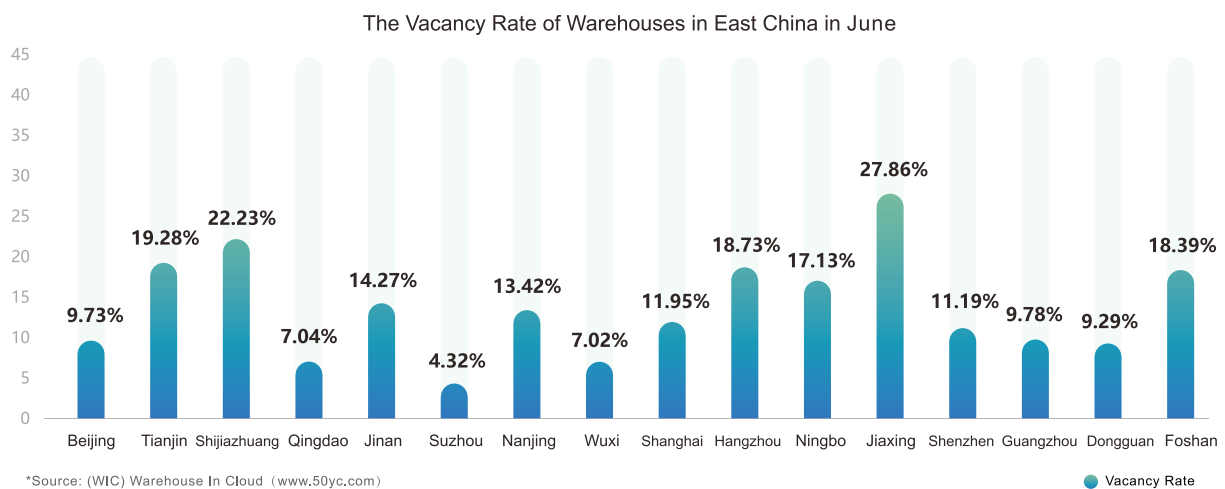
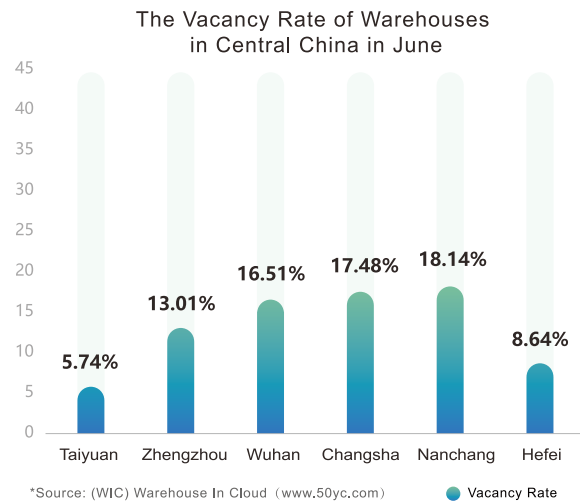
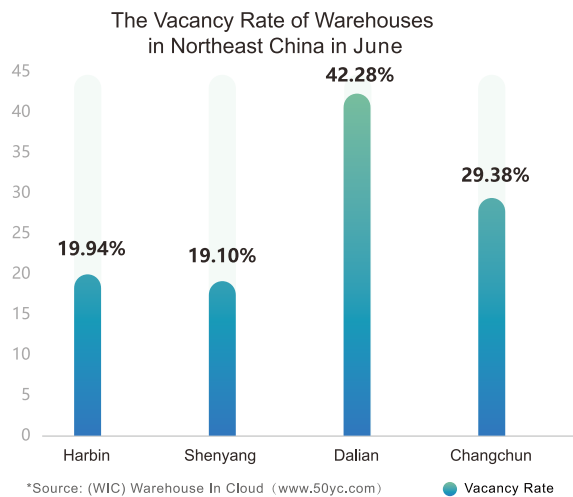
Average vacancy rates were 15.64% in 32 cities nationwide, up 0.86% from month to month. Among them, the vacancy rate in Northeast China (27.67%) was much higher than that in western (14.80%), eastern (13.85%) and central (13.25%) areas. Compared with May, vacancy rate in the western and eastern regions rose by 2.07% and 1.27% respectively; while the vacancy rate in the northeastern and central regions remained relatively stable, rising (falling) within 1%.

The cities with higher warehouse vacancy rates were Dalian, Chongqing and Changchun, all of which are higher than 25%. Compared with May, the markets in Dalian and Chongqing were stable, and the warehouse vacancy rate

fluctuated little. Changchun continued the trend of enterprises adjusting strategy and shrinking business since last month, and the warehouse vacancy rate increased by 3.15%.

The cities with the lowest warehouse vacancy rates were Suzhou and Taiyuan, both of which were less than 6%. Compared with May, the vacancy rate of warehouses in the two cities fluctuated little and the market remained stable.

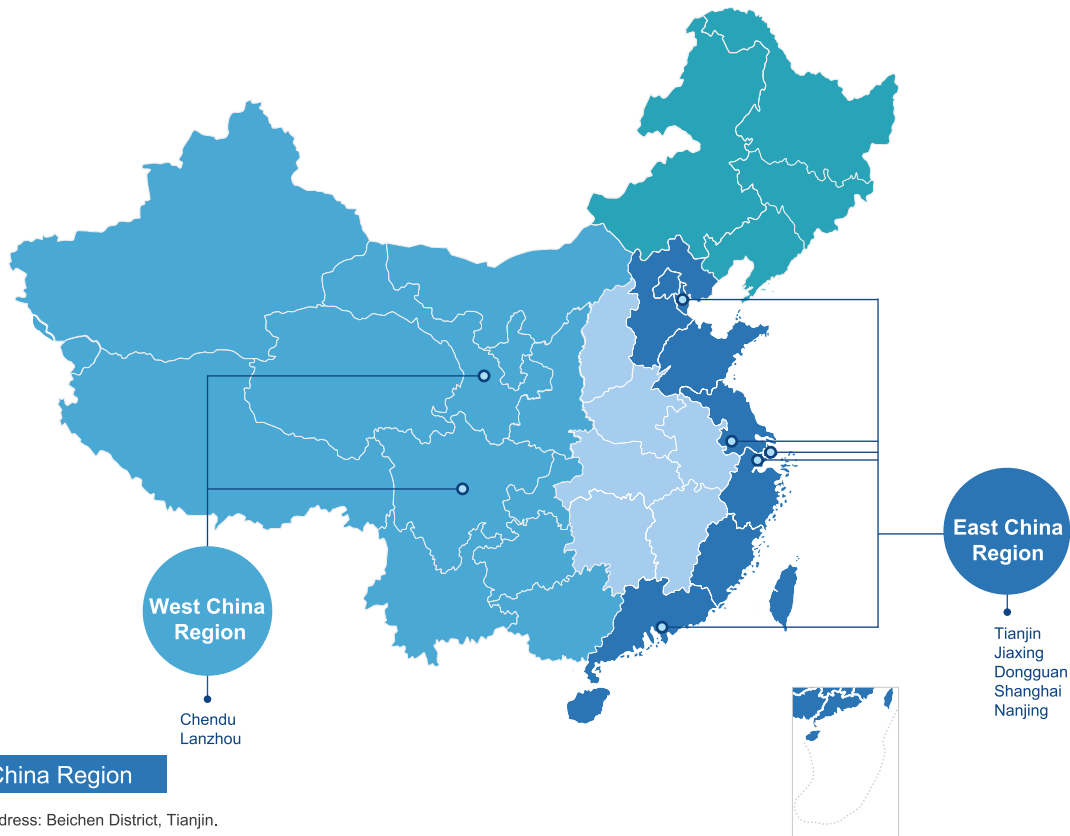
Compared with May, the vacancy rate of Jiaxing warehouse fluctuated the most, increasing by 9.12%, mainly because some logistics parks were completed and put into use this month, such as the three logistics parks in Wangdian distribution area, Xiuzhou District, Jiaxing, with a total area of about 210 thousand square meters.



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

City	Average Rent Fee (RMB/m ² per month)	Month-to-Month Comparisons	Vacancy Rate	Month-to-Month Comparisons (Percentage point)
Beijing	46.90	-0.91%	9.73%	0.09
Shanghai	46.03	-0.41%	11.95%	0.47
Shenzhen	40.94	0.00%	11.19%	0.13
Suzhou	33.45	0.51%	4.32%	-0.06
Hangzhou	31.66	0.13%	18.73%	-0.48
Ningbo	29.50	0.72%	17.13%	3.17
Guangzhou	31.99	-0.47%	9.78%	1.40
Dongguan	30.48	0.56%	9.29%	1.09
Nanjing	30.33	-0.16%	13.42%	-1.11
Foshan	29.66	0.20%	18.39%	-1.25
Jiaxing	31.95	0.76%	27.86%	9.12
Changsha	26.34	0.27%	17.48%	-1.87
Tianjin	31.20	-0.41%	19.28%	1.16
Wuxi	29.69	-0.13%	7.02%	0.66
Dalian	23.95	-0.99%	42.28%	0.89
Changchun	21.91	0.14%	29.38%	3.15
Chongqing	25.62	1.39%	29.63%	0.36
Wuhan	25.36	0.24%	16.51%	-0.01
Zhengzhou	22.77	0.26%	13.01%	-0.32
Shenyang	22.04	-1.65%	19.10%	-5.78
Hefei	24.38	0.00%	8.64%	0.00
Kunming	24.93	-2.12%	10.32%	4.47
Harbin	23.43	0.00%	19.94%	-1.32
Chengdu	24.30	-0.74%	19.01%	0.12
Qingdao	22.95	-0.26%	7.04%	0.69
Xi' an	25.48	1.84%	10.71%	0.95
Guiyang	22.88	1.15%	7.83%	0.91
Taiyuan	17.93	0.00%	5.74%	0.00
Jinan	25.47	-0.35%	14.27%	0.09
Nanchang	20.74	0.00%	18.14%	0.00
Shijiazhuang	19.63	1.39%	22.23%	5.18
Lanzhou	21.07	1.01%	11.28%	5.61

*Source: (WIC) Warehouse In Cloud (www.50yc.com)



East China Region

Warehouse Address: Beichen District, Tianjin.

Rentable Area: 120,000 square meters

Project Features: (1) basic situation: Beichen Logistics Center is located in Beichen District, Tianjin, with a total land area of 260,000 square meters. The warehouse type in this park is mainly ramp storehouse. There are six double-deck ramp depots covering an area of about 240,000 square meters and two comprehensive matching buildings covering about 20,000 square meters. (2) Building standards: high-standard warehouse with a height of 24 meters, single-story height of 12 meters, warehouse net height of 9 meters, with C-class Ⅱ fire protection qualification. (3) supporting facilities: the park is equipped with comprehensive office buildings, canteens, accommodation, office areas, charging piles, etc.; (4) the park was put into use by the end of April 2020. (5) the form of lease: it be leased in separate areas, and the warehouse can be renovated according to the request, and there is preferential lease period.

Contact: Sui Chao

Tel: 18610640033

Warehouse Address: Jiaxing Xiuzhou Wangdian.

Rentable Area: 52,946 square meters

Project Features: the warehouse is located in the core area of East China, and the radiation radius of 50 kilometers can cover the core cities in East China, such as Jiaxing, Shanghai, Hangzhou, Suzhou and so on. The warehouse is 4 kilometers away from G60 Shanghai-Kunshan Expressway, 5 kilometers away from G15W Changtai Expressway, 7 kilometers away from Jiaxing City, 45 kilometers from Shanghai, 50 kilometers from Hangzhou and 55 kilometers from Suzhou.

Contact: Shen Jianfeng

Tel: 18158716633

Warehouse Address: Zhangpeng Village, Machong Town, Dongguan City.

Rentable Area: 50,390 square meters

Project Features: Dongguan Mayong Xinsha Logistics Park, located in the center of the integration area connecting Guangzhou, Dongguan and Shenzhen, is located in Zhangpeng Village, Machong Town, Dongguan City. The area of the park is 41,939.9 square meters, with a total construction area of 50,390.15 square meters. The buildings in the park are two double-layer ramp storehouses, the warehouse is 9.8 meters high on the first floor and 9 meters high on the second floor, with 9 lifting platforms on each floor. The park is equipped with equipment room and office area.

Contact: Xin Chengkuan

Tel: 15844334434

Warehouse Address: logistics Park, Minhang District, Shanghai.

Rentable Area: 20,000 square meters.

Project Features: the logistics park is 7.5 kilometers away from the Outer Ring Highway, 3.5 kilometers away from Hujin Expressway, 6.5 kilometers away from Shenjiahu Expressway, 17 kilometers away from Hongqiao Airport and 46 kilometers away from Pudong Airport. The park contains a three-story warehouse with a total area of 47,000

square meters, being equipped with ramps for container trucks and a number of freight elevators. The second floor is the ramp library, and the third floor is equipped with elevators. The net height of the first floor is 7.9 meters, the second floor is 6.8 meters, and the third floor is 5.6 meters. The first floor has a load bearing capacity of 3 tons, the second floor 2 tons, and the third floor 1 ton.

Contact: Tan Wei

Tel: 17717330045

Warehouse Address: Liuhe District, Nanjing.

Rentable Area: 20,000 square meters

Project Features: This park is located in Nanjing Liuhe Economic and technological Development Zone, with a total construction area of about 72,000 square meters. The park has a superior location, being close to Ninglian Expressway and Ningyang Expressway.

Contact: Tan Wei

Tel: 17717330045

West China Region

Warehouse Address: Lanzhou New District.

Rentable Area: 39,000 square meters

Project Features: This park covers a total area of about 752mu, with a construction area of about 270,000 square meters and a planned investment of 1.5 billion yuan. The park contains six multi-storey cold stores, covering about 85,300 square meters, two cars and exhibition warehouses, covering an area of 25,500 square meters, ten comprehensive warehouses, about 92,600 square meters, two e-commerce and service buildings, an area of 35,200 square meters, a shift building covering 20,400 square meters and other supporting facilities.

Contact: Li Chen

Tel: 1311 9138713

Warehouse Address: Tongzhan Road, Qingbaijiang District, Chengdu.

Rentable Area: 24,500 square meters.

Project Features: This park is located next to Dawan Railway Station. The warehouse has a built-in platform with a floor height of 9 meters and is qualified for C-class Ⅱ fire protection qualification. The warehouse park provides with integrated services of storage and distribution and its rent is favorable.

Contact: Huang Tianjiang

Tel: 18123304630

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 in 1995. 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 WULIANYIDA 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.

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