

April 2020

The Dynamic Report of China's General Warehouse Market

中国通用仓储市场

2020年7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》已连续发布二十四期。《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7月中国通用仓储市场动态报告》。2020年7月,物联云仓全国在线仓库面积新增291万㎡,总面积超3.21亿㎡,较6月增长0.92%;在线可租面积超4,499万㎡,较6月下降5.58%。仓库资源覆盖32个省份,225个城市,7,378个园区。

2020年7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 27.67 元/㎡·月,环比上涨 0.04%。其中,东部地区仓库平均租金 (32.12元/㎡·月)高于西部 (24.25元/㎡·月)、中部 (22.86元/㎡·月)、东北 (22.62元/㎡·月)地区。相较 6月,东北地区仓库平均租金有小幅下降,降幅为 0.92%;西部地区仓库平均租金有小幅上涨,涨幅为 0.83%;东部、中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,其中,北京、上海已超过46元/㎡月。 相较6月,三个城市仓储市场稳定,平均租金波动不大。

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6月,石家庄仓库租金波动不大,市场相对稳定;太原受地理区位限制,租仓需求长期较少,加之受经济下行压力影响,部分工业企业停产,低价工业厂房仓库空置增多,导致当地平均租金有小幅下降,降幅为2.62%。

相较 6 月,长春仍延续上两月企业调整战略、收缩业务趋势,仓库空置率居高不下,仓库业主为加大招商力度,降低仓库租金,导致仓库平均租金波动最大,环比下降 4.93%。



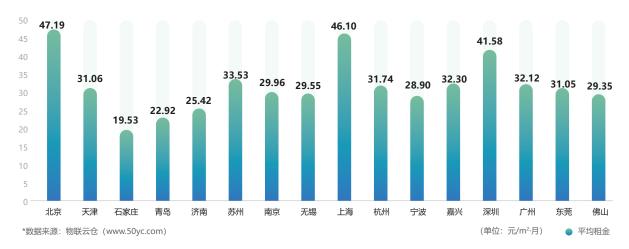


7月中部地区仓库租金情况





7月东部地区仓库租金情况



7月西部地区仓库租金情况



◆◆ 2020 年 7 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 14.75%, 环比下降 0.89 个百分点。其中, 东北地区仓库空置率 (26.92%) 远高于西部 (15.32%)、中部 (13.08%)、东部 (12.57%)地区。相较 6 月, 东部地区仓库空置率有所下降, 降幅为 1.28 个百分点;东北、中部、西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、长春、重庆,均高于26%。相较6月,长春仓库空置率波动不大;大连、重庆因临近下半年租仓旺季,租仓需求逐渐回升,使得两地仓库空置率有所下降,降幅分别为2.90个百分点、2.97个百分点。

仓库空置率最低的城市为无锡、苏州,均低于6%。相较6月,苏州仓库空置率波动不大,市场稳定;无锡仓库空置率下降2.04个百分点,主要因临近下半年租仓旺季,当地仓库租赁市场逐渐活跃,其中高标仓租赁需求明显增加。

相较 6 月,佛山仓库空置率波动最大,仓库空置率下降 7.29 个百分点,主要因广州黄埔区姬堂、白云区江南市场等部分区域推行仓储物流设施拆迁计划,促使部分租仓需求转移至佛山。





7月东北地区仓库空置率情况



7月中部地区仓库空置率情况



7月东部地区仓库空置率情况



7月西部地区仓库空置率情况





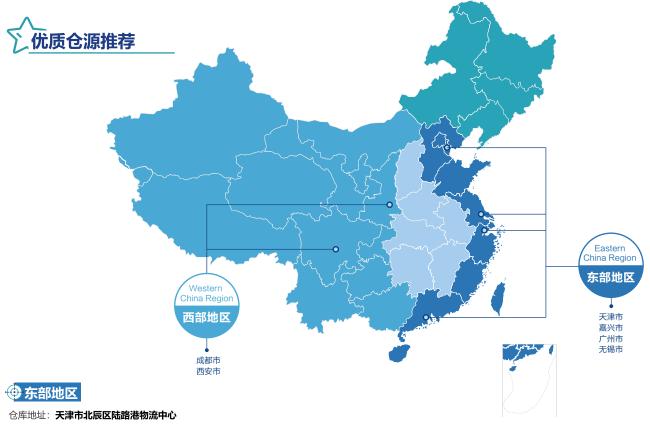
全国32个城市平均租金和空置率一览表

城市	平均租金 (元/m²·月)	环比变化	空置率	环比变化 (百分点)
北京	47.19	0.62%	10.05%	0.32
上海	46.10	0.15%	8.41%	-3.54
深圳	41.58	1.56%	12.90%	1.71
苏州	33.53	0.24%	5.34%	1.02
杭州	31.74	0.25%	13.90%	-4.83
宁波	28.90	-2.03%	13.24%	-3.89
广州	32.12	0.41%	8.28%	-1.49
东莞	31.05	1.87%	13.13%	3.84
南京	29.96	-1.22%	14.42%	1.00
佛山	29.35	-1.05%	11.10%	-7.29
嘉兴	32.30	1.10%	25.79%	-2.07
长沙	26.27	-0.27%	15.68%	-1.80
天津	31.06	-0.45%	18.07%	-1.21
无锡	29.55	-0.47%	4.98%	-2.04
大连	24.14	0.79%	39.38%	-2.90
长春	20.83	-4.93%	29.06%	-0.32
重庆	25.50	-0.47%	26.66%	-2.97
武汉	25.45	0.35%	16.58%	0.07
郑州	22.64	-0.57%	11.82%	-1.20
沈阳	22.08	0.18%	21.97%	2.88
合肥	24.26	-0.49%	7.72%	-0.92
昆明	26.05	4.49%	9.36%	-0.96
哈尔滨	23.43	0.00%	17.28%	-2.66
成都	24.10	-0.82%	18.52%	-0.49
青岛	22.92	-0.13%	6.36%	-0.68
西安	25.51	0.12%	12.11%	1.40
贵阳	23.26	1.66%	14.01%	6.18
太原	17.46	-2.62%	6.30%	0.56
济南	25.42	-0.20%	11.53%	-2.74
南昌	21.08	1.64%	20.37%	2.23
石家庄	19.53	-0.51%	23.68%	1.44
兰州	21.07	0.00%	11.28%	0.00

^{*}数据来源: 物联云仓 (www.50yc.com)

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可租面积: 20,000 m²

项目特点:仓库地处天津陆路港物流基地 -- 北天津区域重要的物流基地,地理位置优越。整个园区将分阶段建造 13 幢单层标准仓储设施,共提供270,000 ㎡物流空间,项目亦可提供定制开发方案。项目全天候运作、小车停车场、闭路电视安防系统、便利店、ESFR 喷淋系统、保安系统。

联系人: 隋超

联系电话: 18610640033

仓库地址: **嘉兴南湖区** 可租面积: 55,000 m²

项目特点:综合性高标仓园区,同园区内包含冷冻库、冷藏库、变温库、常温库。项目至 G15 常台高速 1.4km,至 G320/ 嘉洪大道 2km,至 G60/ 沪昆高速 5km,至嘉兴市中心 6.7km,至嘉兴南站 7.8km,至杭州70km,至苏州 68km,至上海 94km,至无锡 97km,至宁波 28km。

联系人: 沈建锋

联系电话: 15858329935

仓库地址: **广州增城区** 可租面积: 15,000 m²

项目特点:增城区高台库出租,电商,物流、分拨中心理想仓储。证件齐全、丙二类消防、物流用地,适合客户群体--物流,快运,快递分拨配送,仓

储等。空地面积约 35,000 ㎡。

联系人: 辛成宽

联系电话: 15844334434

仓库地址: **无锡市梅村** 可租面积: 20,000 m²

项目特点: 该物流园位于无锡高新技术开发区,周边商业配套发达,物流仓储企业众多,有规模优势。项目可租赁面积为62,648平方米,靠近无锡硕放机场,G42高速公路,可以快速进入长三角地区。项目位置被公认为是区域配送中心和存储中心的绝佳选择。便捷的交通网络,距G42高速公路6公里,距S19高速公路8公里,距无锡硕放机场7公里,距无锡东高铁站5公里,距无锡新区高铁站12公里,距无锡市区8公里,距苏

州市区 20 公里, 距常州市区 80 公里,距上海市区 90 公里。

联系人: 谭伟

联系电话: 17717330045

● 西部地区

仓库地址: **西安北郊草滩** 可租面积: 62,363 m²

项目特点:项目紧邻机场高速,距离西安绕城高速和北三环 2km,距福银高速 8km,交通极为便利,距西安市政府 5km,距西安北站 2km。紧邻市区,

城配及电商非常合适,有很好的的时效。

联系人: 李晨

联系电话: 13119138713

仓库地址:成都市龙泉物流中心

可租面积: 161,120 ㎡

项目特点:仓库位于龙泉物流中心,2018年4月建成,属于高标准丙二类仓库,仓库水、电、网、消防及基础的仓储设备齐全,双层坡道仓库,园区内24小时安保,目前1楼2楼都有仓库面积出租,欢迎需要看仓的客户前来看仓。园区三证齐全,24小时安保,目前园区大量招租价格美丽。

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 July 2020

At present, The Dynamic Report of China's General Warehouse Market has been issued twenty-four 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 July 2020 after extending the results of previous reports, expanding the scope of selected statistics and deepening the analysis of warehousing market. In July 2020, the national online warehouse area of Warehouse in Cloud (WIC) added 2.91 million square meters, with a total area of over 321 million square meters, up 0.92% from June; the online rentable area was over 44.99 million square meters, down 5.58% from June. The warehouse resources cover 32 provinces, 225 cities, 7,378 parks.

Rental level of Warehousing Facilities in China in July 2020

The average rent of warehouses in 32 cities across the country was RMB 27.67/ m² per month, an increase of 0.04% from the previous month. Among them, the average rent of warehouses in the eastern region (RMB32.12/ m² per month) was higher than that in the western region (RMB24.25/ m² per month), the northeast (RMB22.62/ m² per month) and the central region (RMB22.86/ m² per month). Compared with June 2020, the average warehouse rent in the northeastern region decreased by 0.92%; The average rent of warehouses in the west rose 0.83%; while remained stable in the east and central regions, with the increase (decrease) within 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. Among them, the average warehouse rent of Beijing and Shanghai was exceeded RMB46/ m² per month. Compared to June, the three cities warehouse market remained stable, and average warehouse fluctuated little.

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 June, warehouse rents in this two cities fluctuated little and the market was stable. Taiyuan is restricted by geographical location, the demand for leasing warehouses is low for a long period of time, coupled with the downward pressure on the economy, some industrial enterprises shut down, low-priced industrial warehouses vacancy increased, resulting in a slight decrease of 2.62% in the local average rent.

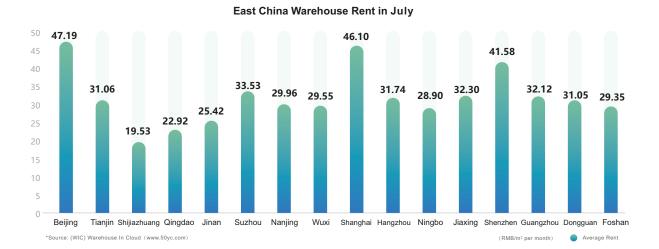
Compared with June, enterprises in Changchun continued the strategic adjustment and business contraction trend of the previous two months, and the warehouse vacancy rate remained high. In order to promote investment and reduce warehouse rent, the average warehouse rent fluctuated and decreased by 4.93% compared with the previous month.













China's Warehousing Facilities Vacancy Rate in July 2020

Average vacancy rates were 14.75% in 32 cities nationwide, down 0.89% from month to month. Among them, the vacancy rate in Northeast China (26.92%) was much higher than that in western (15.32%), central (13.08%) and eastern (12.57%) areas. Compared with June, vacancy rate in the eastern regions decreased by 1.28%; while the vacancy rate in the northeastern, central and western 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 26%. Compared with June, the vacancy rate of the warehouse market in Changchun fluctuated little; due to the approaching peak rental season in the second half of the year, the demand for renting warehouses in Dalian and Chongqing gradually rebounded, resulting in a decline in the vacancy rate of warehouses in the two places, by 2.90% and 2.97% respectively.

The cities with the lowest warehouse vacancy rates are Wuxi and Suzhou, both of which are less than 6%. Compared with June, the vacancy rate of the warehouse market in Suzhou fluctuated little; the vacancy rate of the warehouse market in Wuxi decreased by 2.04%, mainly because the local warehouse rental market was gradually active near the peak season of warehouse leasing in the second half of the year, among which the demand for high-standard warehouse rental increased significantly.

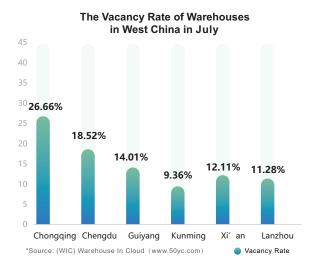
Compared with June, the vacancy rate in Foshan warehouse market fluctuated the most, falling by 7.29%. This was mainly due to the implementation of warehousing and logistics facilities demolition plans in some areas, such as Jitang, Huangpu District of Guangzhou, and Jiangnan Market of Baiyun District, prompting part of the rental demand to be transferred to Foshan.













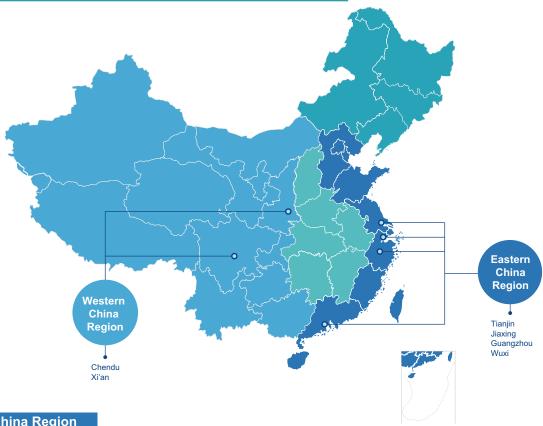
List of Average Rents and Vacancy Rates in 32 Cities of China

City	Average Rent Fee	Month-to-Month Comparisons	Vacancy Rate	Month-to-Month Comparisons (Percentage point)
Beijing	47.19	0.62%	10.05%	0.32
Shanghai	46.10	0.15%	8.41%	-3.54
Shenzhen	41.58	1.56%	12.90%	1.71
Suzhou	33.53	0.24%	5.34%	1.02
Hangzhou	31.74	0.25%	13.90%	-4.83
Ningbo	28.90	-2.03%	13.24%	-3.89
Guangzhou	32.12	0.41%	8.28%	-1.49
Dongguan	31.05	1.87%	13.13%	3.84
Nanjing	29.96	-1.22%	14.42%	1.00
Foshan	29.35	-1.05%	11.10%	-7.29
Jiaxing	32.30	1.10%	25.79%	-2.07
Changsha	26.27	-0.27%	15.68%	-1.80
Tianjin	31.06	-0.45%	18.07%	-1.21
Wuxi	29.55	-0.47%	4.98%	-2.04
Dalian	24.14	0.79%	39.38%	-2.90
Changchun	20.83	-4.93%	29.06%	-0.32
Chongqing	25.50	-0.47%	26.66%	-2.97
Wuhan	25.45	0.35%	16.58%	0.07
Zhengzhou	22.64	-0.57%	11.82%	-1.20
Shenyang	22.08	0.18%	21.97%	2.88
Hefei	24.26	-0.49%	7.72%	-0.92
Kunming	26.05	4.49%	9.36%	-0.96
Harbin	23.43	0.00%	17.28%	-2.66
Chengdu	24.10	-0.82%	18.52%	-0.49
Qingdao	22.92	-0.13%	6.36%	-0.68
Xi'an	25.51	0.12%	12.11%	1.40
Guiyang	23.26	1.66%	14.01%	6.18
Taiyuan	17.46	-2.62%	6.30%	0.56
Jinan	25.42	-0.20%	11.53%	-2.74
Nanchang	21.08	1.64%	20.37%	2.23
Shijiazhuang	19.53	-0.51%	23.68%	1.44
Lanzhou	21.07	0.00%	11.28%	0.00

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



Recommendations of the Warehouses in May



East China Region

Warehouse Address: Land Port Logistics Center, Beichen District, Tianjin City.

Rentable Area: 20,000 square meters.

Project Features: The warehouse is located in Tianjin Land Port Logistics Center, which is an important logistics base in North Tianjin. The park will build 13 single-story standard warehousing buildings in stages, providing a total of 270,000 square meters of logistics space. The park can also provide customized development solutions. The park can operate around the clock, including comprehensive services such as: car parking, closed-circuit television security system, convenience store, ESFR sprinkler system and security system.

Contact: Sui Chao. Tel: 18610640033

Warehouse Address: Nanhu District, Jiaxing. Rentable Area: 55,000 square meters

Project Features: The park is a comprehensive high-standard warehouse base, including freezer, cold storage, variable temperature warehouse, room temperature warehouses. The park is 1.4 kilometers to G15 Changtai Expressway, 2 kilometers to G320 / Jiahong Avenue, 5 kilometers to G60 / Shanghai-Kunming Expressway, 6.7 kilometers to Jiaxing City Center, 7.8 kilometers to Jiaxing South Railway Station, 70 kilometers to Hangzhou, 68 kilometers to Suzhou, 94 kilometers to Shanghai, 97 kilometers to Wuxi and 28 kilometers to Ningbo.

Contact: Shen Jianfeng Tel: 15858329935

Warehouse Address: Zengcheng District, Guangzhou.

Rentable Area: 15,000 square meters.

Project Features: Warehouses in the park are high-platform storehouses, which is ideal for e-commerce, logistics and distribution services. The park has complete certifications and C-class II fire protection qualification, which is suitable for logistics, express delivery, distribution, warehousing and other types of customer rental. The leasable area is about 35,000 square meters.

Contact: Xin Chengkuan.

Tel: 15844334434

Warehouse Address: Meicun, Wuxi. Rentable Area: 20,000 square meters.

Project Features: The logistics park is located in Wuxi Hightech Development Zone, the surrounding commercial facilities are complete. There are many logistics warehousing enterprises around, and it enjoys the advantage of regional scale. The leasable area of the park is 62,648 square meters. It is close to Wuxi Shuofang Airport, and the G42 highway is a convenient way to the Yangtze River Delta. The location of the park is recognized as an excellent choice for regional distribution and storage centers because of its convenient transportation network, with 6 kilometers away from G42 highway, 8 kilometers away from S19 highway, 7 kilometers away from Wuxi Shuofang Airport, 5 kilometers away from Wuxi East High-speed Railway Station, 12 kilometers away from Wuxi New area Highspeed Railway Station, 8 kilometers away from Wuxi City, 20 kilometers away from Suzhou City, 80 kilometers away from Changzhou City and 90 kilometers away from Shanghai City. Contact: Tan Wei.

Tel: 17717330045

West China Region

Warehouse Address: Caotan in the north suburb of Xi'an. Rentable Area: 62,363 square meters.



Project Features: This park boasts with convenient transportation, being close to the airport highway, with 2 kilometers away from the Xi'an roundabout highway and the North third Ring Road, 8 kilometers away from the Fuyin highway, 5 kilometers away from the Xi'an municipal government, 2 kilometers away from the Xi'an North Railway Station, and is close to the urban area. It is suitable for urban distribution and e-commerce enterprises with its effectiveness. Contact: Li Chen.

Tel: 13119138713

Warehouse Address: Longquan Logistics Center, Chengdu Rentable Area: 161,120 square meters.

Project Features: This warehouse park is located in Longquan logistics center, and was completed in April 2018. It is high-standard warehouse with C-class II fire protection qualification. Supporting facilities such as water supply, electricity, network, fire protection and basic storage equipment are complete. The type of warehouses in this park are mainly double ramp warehouse. It is equipped with 24-hour security, the second floor of the first floor are currently available for rent. Customers with warehouse needs are welcome to visit on the spot. The park has all the certificates that needed and now leasing for rent.

Contact: Huang Tianjiang.

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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 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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