

August 2020

The Dynamic Report of China's General Warehouse Market

中国通用仓储市场

2020 年 8 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》已连续发布二十五期。《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 8 月中国通用仓储市场动态报告》。2020 年 8 月，物联云仓全国在线仓库面积新增 16 万 m²，总面积超 3.21 亿 m²，较 7 月增长 0.05%；在线可租面积超 4,482 万 m²，较 7 月下降 0.38%。仓库资源覆盖 32 个省份，226 个城市，7,395 个园区。

2020 年 8 月中国通用仓储设施租金水平

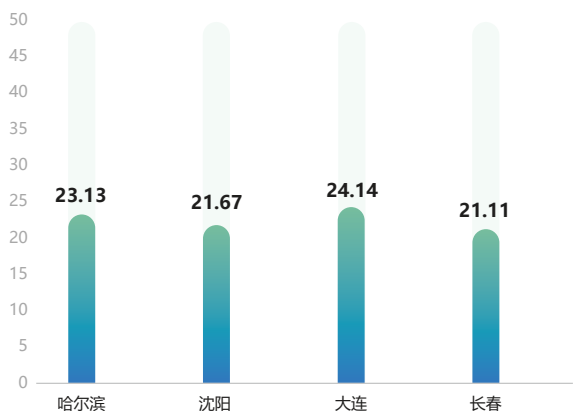
全国 32 个城市仓库平均租金为 27.65 元 / m²·月，环比下降 0.07%。其中，东部地区仓库平均租金 (32.05 元 / m²·月) 高于西部 (24.07 元 / m²·月)、中部 (22.95 元 / m²·月)、东北 (22.51 元 / m²·月) 地区。相较 7 月，西部地区仓库平均租金有小幅下降，降幅为 0.74%；东北、东部、中部地区仓库平均租金保持平稳，增 (降) 幅在 ±0.5% 以内。

北京、上海、深圳仓库平均租金仍然领跑全国，均高于 40 元 / m²·月。相较 7 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，石家庄、太原仓库租金水平仍较低，均低于 20 元 / m²·月。相较 7 月，太原仓库平均租金波动不大，市场稳定；因临近中秋、国庆、“双 11”等促销旺季，企业积极备货，带动仓库需求上升，石家庄仓库平均租金有所上涨，涨幅为 2.20%。

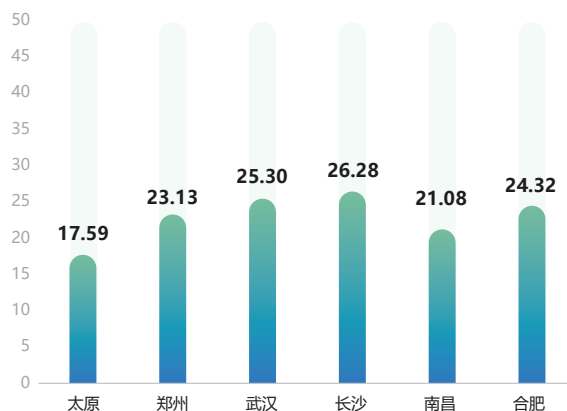
相较 7 月，兰州仓库平均租金波动最大，环比下降 2.56%，主要因新区交付约 6 万 m² 仓库，租金相对较低，小幅拉低了平均租金水平。

8月东北地区仓库租金情况



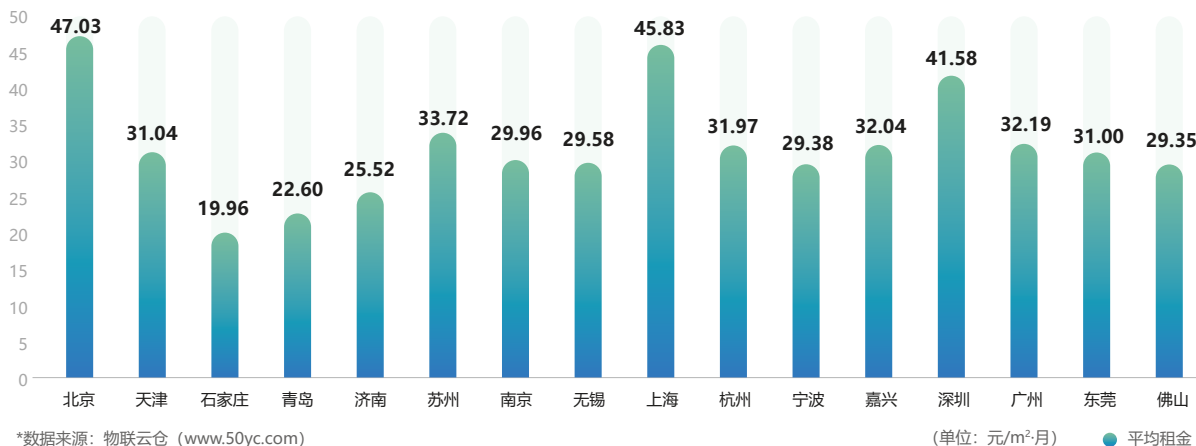
*数据来源：物联云仓 (www.50yc.com) (单位：元/m²·月) ● 平均租金

8月中部地区仓库租金情况

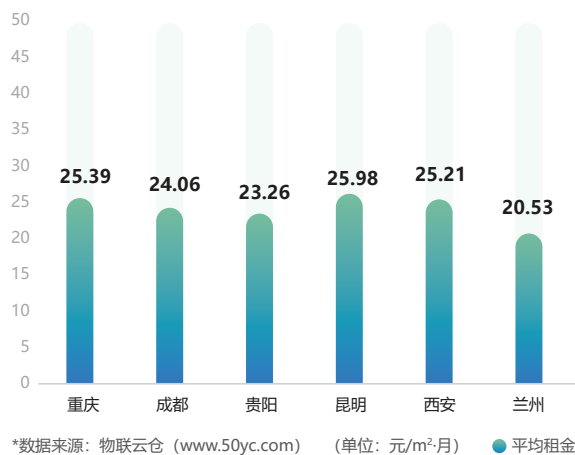


*数据来源：物联云仓 (www.50yc.com) (单位：元/m²·月) ● 平均租金

8月东部地区仓库租金情况



8月西部地区仓库租金情况



2020 年 8 月中国通用仓储设施空置率情况

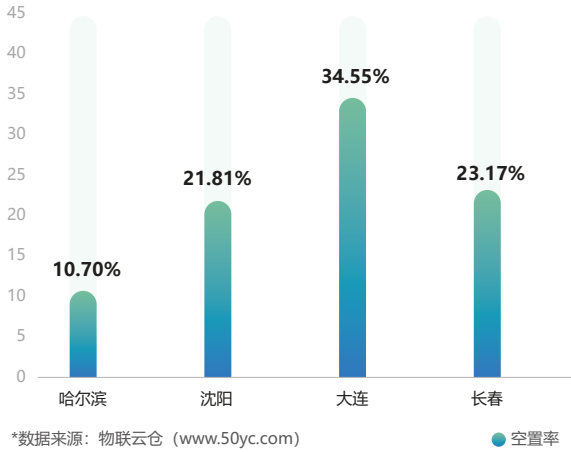
全国 32 个城市仓库平均空置率为 13.64%，环比下降 1.11 个百分点。其中，东北地区仓库空置率 (22.56%) 远高于西部 (14.05%)、中部 (13.01%)、东部 (11.50%) 地区。相较 7 月，东北、西部地区仓库空置率有所下降，降幅分别为 4.36 和 1.27 个百分点；东部、中部地区仓库空置率相对稳定，升 (降) 幅变化在 ±1 个百分点以内。

仓库空置率较高的城市为大连、重庆，均高于 25%。相较 7 月，重庆仓库空置率波动不大；大连延续上月需求回升趋势，为应对下半年销售旺季，部分快递、电商企业临时租仓，仓库空置率有所下降，降幅为 4.83 个百分点。

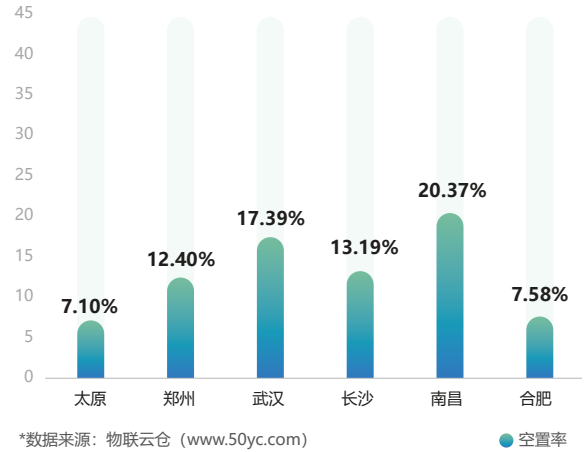
仓库空置率最低的城市为苏州、无锡、兰州，均低于 6%。相较 7 月，苏州、无锡仓库空置率波动不大，市场稳定；兰州受城市规划影响，拆迁部分区域老旧仓库，如城关区东岗、定远以及榆中县，导致空置率下降 5.72 个百分点。

相较 7 月，哈尔滨仓库空置率波动最大，下降 6.58 个百分点，因平房区约有 8 万 m² 仓库成交，在一定程度上拉低了空置率。

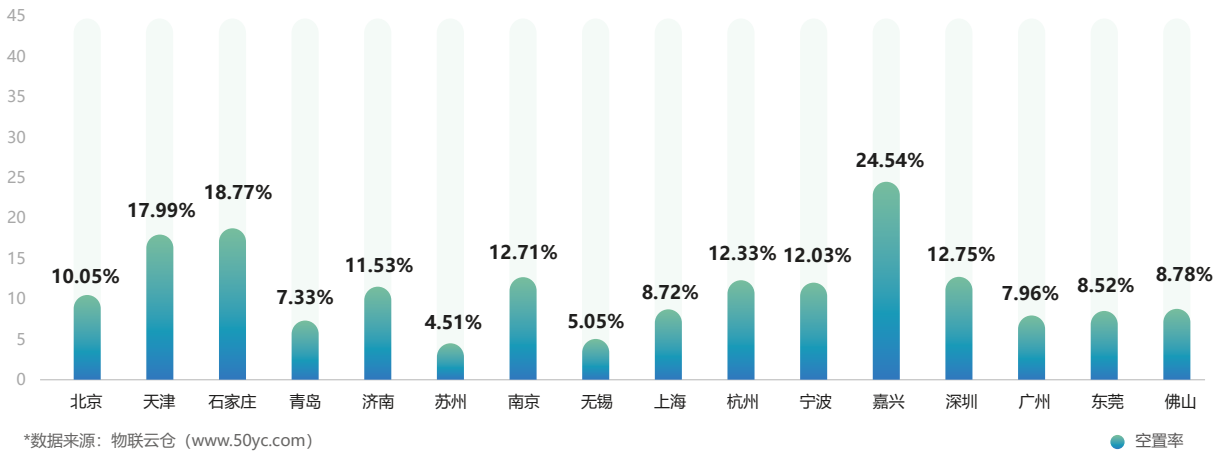
8月东北地区仓库空置率情况



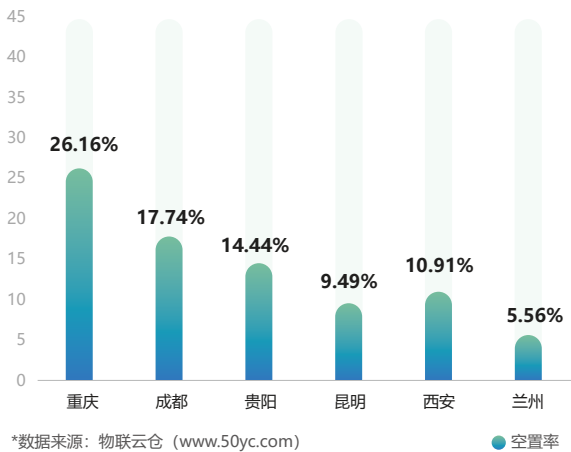
8月中部地区仓库空置率情况



8月东部地区仓库空置率情况



8月西部地区仓库空置率情况

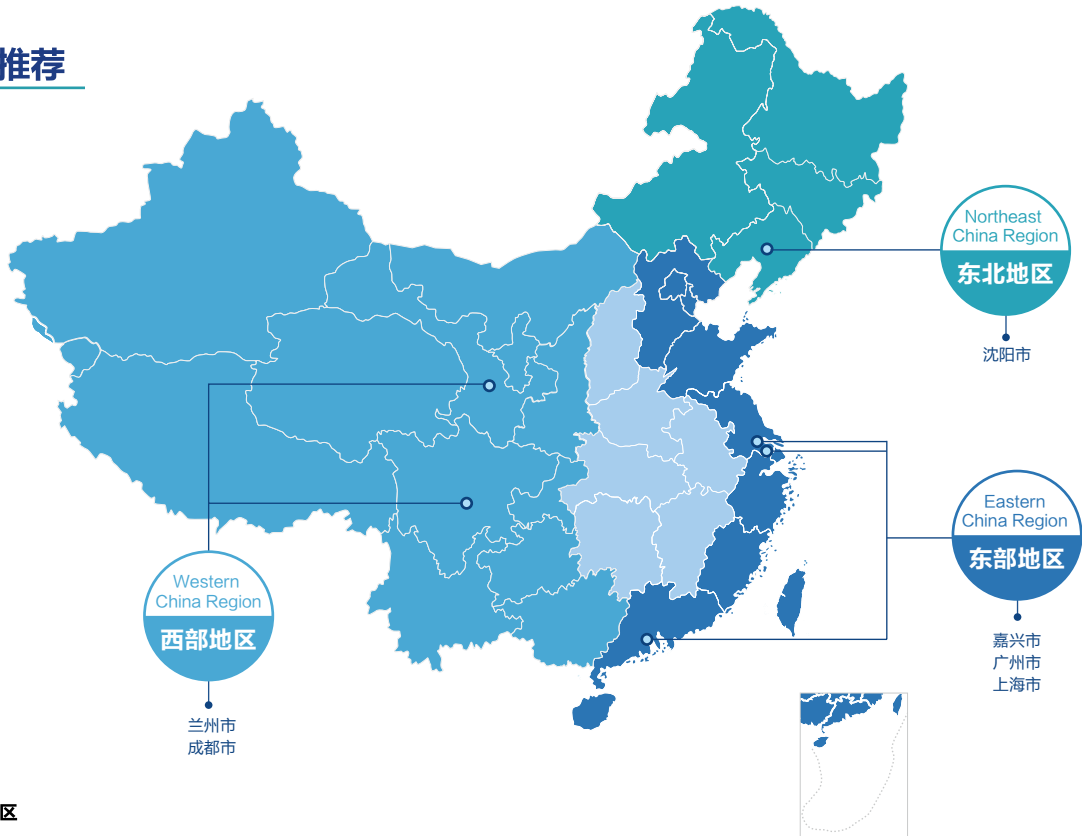


全国32个城市平均租金和空置率一览表

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	47.03	-0.34%	10.50%	0.44
上海	45.83	-0.59%	8.72%	0.31
深圳	41.58	0.00%	12.75%	-0.15
苏州	33.72	0.57%	4.51%	-0.84
杭州	31.97	0.72%	12.33%	-1.57
宁波	29.38	1.66%	12.03%	-1.21
广州	32.19	0.22%	7.96%	-0.32
东莞	31.00	-0.16%	8.52%	-4.61
南京	29.96	0.00%	12.71%	-1.71
佛山	29.35	0.00%	8.78%	-2.33
嘉兴	32.04	-0.80%	24.54%	-1.25
长沙	26.28	0.04%	13.19%	-2.49
天津	31.04	-0.06%	17.99%	-0.08
无锡	29.58	0.10%	5.05%	0.07
大连	24.14	0.00%	34.55%	-4.83
长春	21.11	1.34%	23.17%	-5.89
重庆	25.39	-0.43%	26.16%	-0.50
武汉	25.30	-0.59%	17.39%	0.81
郑州	23.13	2.16%	12.40%	0.59
沈阳	21.67	-1.86%	21.81%	-0.17
合肥	24.32	0.25%	7.58%	-0.14
昆明	25.98	-0.27%	9.49%	0.13
哈尔滨	23.13	-1.28%	10.70%	-6.58
成都	24.06	-0.17%	17.74%	-0.78
青岛	22.60	-1.40%	7.33%	0.97
西安	25.21	-1.18%	10.91%	-1.20
贵阳	23.26	0.00%	14.44%	0.43
太原	17.59	0.74%	7.10%	0.80
济南	25.52	0.39%	11.53%	0.00
南昌	21.08	0.00%	20.37%	0.00
石家庄	19.96	2.20%	18.77%	-4.90
兰州	20.53	-2.56%	5.56%	-5.72

*数据来源：物联云仓 (www.50yc.com)

优质仓源推荐



东北地区

仓库地址: 沈阳市于洪区

可租面积: 50,052 m²

项目特点: 园区位于沈阳市于洪区沙岭路 108 号, 共 7 栋高标丙二类仓库, 建筑面积约 15 万平方米。园区地理位置优越, 紧邻沈阳西四环路与京哈高速 (G1), 距沈阳绕城高速 8 公里, 距机场 30 公里。园区内部配套设施完善, 配备办公室、寝室、食堂、洗车房、修车厂。

联系人: 隋超

联系电话: 18610640033

东部地区

仓库地址: 嘉兴平湖市

可租面积: 82,613 m²

项目特点: 产业园拥有 83,876 m² 的现代仓储空间, 由 2 个双层坡道仓及 1 个多层电梯仓的多用途工业建筑构成。该区域内工业制造、物流业、电商产业发达。项目地理位置优越, 紧邻上海, 距 G15 沈海高速出口 5 公里, 交通便利, 周边配套完善。

联系人: 沈建锋

联系电话: 15858329935

仓库地址: 广州白云机场附近

可租面积: 200,000 m²

项目特点: 物流园项目用地总面积 1,528.9 亩, 仓储总规划面积约 123 万平方米。非保税货物仓储和综合保税物流业务联动发展, 楼仓、坡道仓、冷仓和保税仓等多种节能环保型仓库类型高度集中。园区已建成综合办公大楼、高尚住宅区、假日酒店、公寓、宿舍、食堂、商场区、实验小学等相关生活配套设施。

联系人: 辛成宽

联系电话: 15844334434

仓库地址: 上海市浦东空港物流中心

可租面积: 17,198 m²

项目特点: 项目毗邻浦东机场西区货运站, 专供货运航空使用的第三跑道旁, 近 19.8 万平方坡道式现代化仓储设施, 分 3 期开发。第一期近 43,000 平方米已于 2012 年 7 月竣工, 第二期近 56,800 平方米已于

2013 年 11 月竣工, 第三期两层坡道式优质物流设施, 约 97,600 平方米, 已于 2016 年 1 月竣工, 第三期一层, 约 49,100 平方米可供租赁空间, 净高 8 米, 地面承重 3 吨 / 平方米, 并配备 49 个装卸货平台, 第二期二层, 约 48,500 平方米可供租赁空间, 净高 9 米, 地面承重 2.2 吨 / 平方米, 并配备 45 个装卸货平台。

联系人: 谭伟

联系电话: 17717330045

西部地区

仓库地址: 兰州西固区

可租面积: 5,000 m²

项目特点: 项目位于兰州市西固区新城镇, 兰州国际港务区内, 仓库位置优越, 交通便利, 具备良好的基础设施和条件, 入园后也会有国家政策扶持。

联系人: 李晨

联系电话: 13119138713

仓库地址: 成都市新都国际物流港

可租面积: 50,000 m²

项目特点: 项目位于成都新都物流园区内——地处公路货运集散中心, 集聚了成都公路交通运输的优质资源, 具备独特的区位优势; 城市配送的理想选择——紧邻成都绕城高速公路 (G4201) 和货运大道, 快速通达成都周边公路网, 交通极为便利, 距市中心仅 15 公里; 区域分拨的优良节点——通过货运大道快速接驳成都青白江国际铁路港, 为开展“一带一路”和公铁联运业务提供得天独厚的条件。

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

物联云仓以物联云仓平台 (www.50yc.com) 为核心，通过互联网仓储大数据 + 云仓科技 + 数字化运营 + 数据增值服务的方式，结合智能物联网应用与人工智能等技术，创新国内供应链物流的新模式，致力于打造世界领先的产业互联网综合服务平台，构建开放式、数字化、智能物联的数字供应链生态网络。公司以科技为核心驱动力，深耕供应链与物流行业，拥有一流技术水平的研发团队、经验丰富的运营管理专家团队、快速响应的实施团队，汇聚了业界顶尖的管理与技术人才，数字化产品与服务已覆盖供应链端到端的全环节。

* 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 August 2020

At present, The Dynamic Report of China's General Warehouse Market has been issued twenty-five 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 August 2020 after extending the results of previous reports, expanding the scope of selected statistics and deepening the analysis of warehousing market. In August 2020, the national online warehouse area of Warehouse in Cloud (WIC) added 160 thousand square meters, with a total area of over 321 million square meters, up 0.05% from July; the online rentable area was over 44.82 million square meters, down 0.38% from July. The warehouse resources cover 32 provinces, 226 cities, 7,395 parks.

Rental level of Warehousing Facilities in China in August 2020

The average rent of warehouses in 32 cities across the country was RMB 27.65 / m² per month, a decrease of 0.07% from the previous month. Among them, the average rent of warehouses in the eastern region (RMB32.05/ m² per month) was higher than that in the western region (RMB24.07/ m² per month), the northeast (RMB22.51/ m² per month) and the central region (RMB22.95/ m² per month). Compared with July, the average warehouse rent in the western region decreased slightly, by 0.74%; the average warehouse rent in the northeast, eastern and central regions remained stable, with an increase (decrease) of less than ±0.5%.

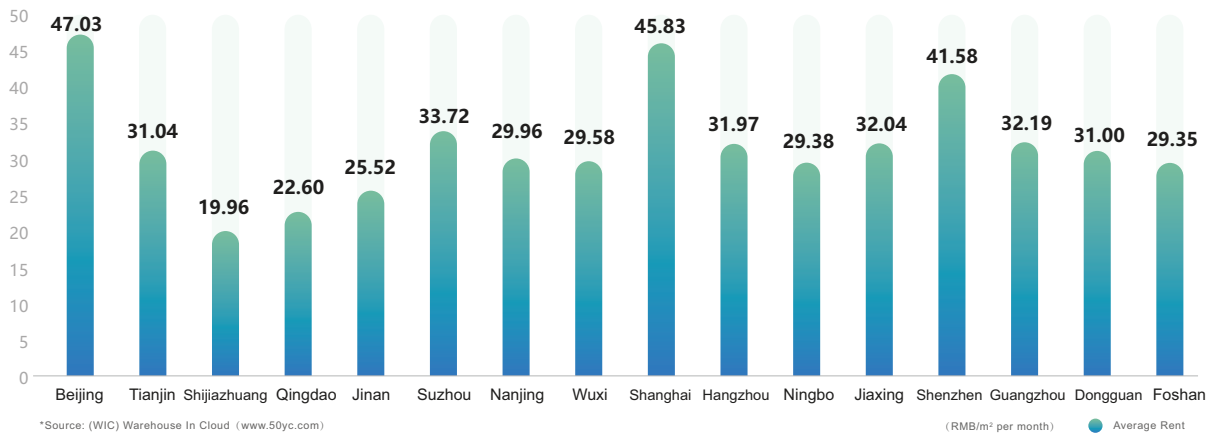
The average rent of warehouses in Beijing, Shanghai and Shenzhen was still higher than RMB40/ m² per month, which was in the leading position among other cities in China. Compared to July, this three cities warehouse market remained stable.

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 July, warehouse rents in Taiyuan fluctuated little and the market was stable. Due to the approach of the Mid-Autumn Festival, National Day, "the Double 11 Shopping Festival" and other promotional peak season, enterprises have a large number of stocks, leading to a rise in warehouse demand, the average rent of Shijiazhuang warehouse has risen, an increase of 2.20%.

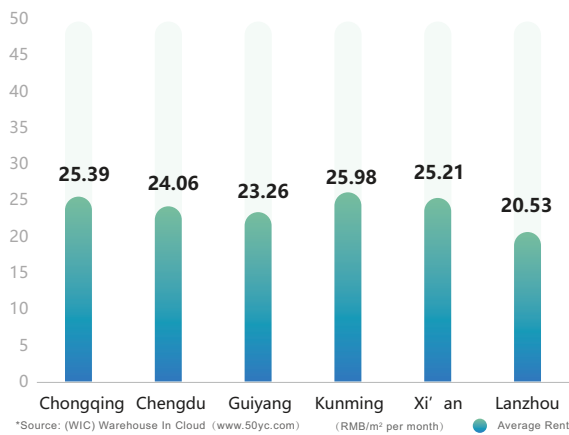
Compared with July, the average rent of Lanzhou warehouse fluctuated the most, falling 2.56% from the previous month, mainly due to the delivery of about 60,000 square meters of warehouse in the new area, and the rent was relatively low, which slightly lowered the average rent level.



East China Warehouse Rent in August



West China Warehouse Rent in August



China's Warehousing Facilities Vacancy Rate in August 2020

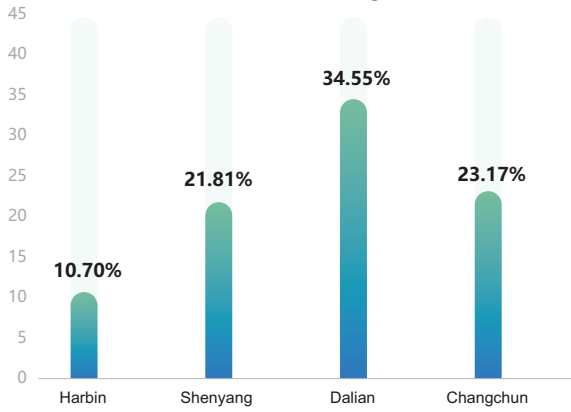
Average vacancy rates were 13.64% in 32 cities nationwide, down 1.11% from month to month. Among them, the vacancy rate in Northeast China (22.56%) was much higher than that in western (14.05%), central (13.01%) and eastern (11.50%) areas. Compared with July, vacancy rate in the northeastern region and the western region decreased by 4.36% and 1.27% respectively; while the vacancy rate in the eastern and central regions remained relatively stable, rising (falling) within 1%.

The cities with higher warehouse vacancy rates are Dalian and Chongqing, both of which are higher than 25%. Compared with July, Chongqing warehouse vacancy rate fluctuated slightly. Dalian continued the rebound trend of demand last month. In response to the peak sales season in the second half of the year, some express delivery and e-commerce enterprises rented temporary warehouses, and the warehouse vacancy rate decreased by 4.83%.

The cities with the lowest warehouse vacancy rates are Suzhou, Wuxi and Lanzhou, all less than 6%. Compared with July, the vacancy rate of warehouses in Suzhou and Wuxi fluctuated little and the market was stable. Affected by urban planning, some old warehouses in Lanzhou were demolished, such as Dongguan and Dingyuan in Chengguan District, and Yuzhong County, resulting in a decrease of 5.72% in the vacancy rate.

Compared with July, the vacancy rate of warehouses in Harbin fluctuated the most, falling by 6.58%. As about 80,000 square meters of warehouses in Pingfang District were rented, which reduced the vacancy rate to a certain extent.

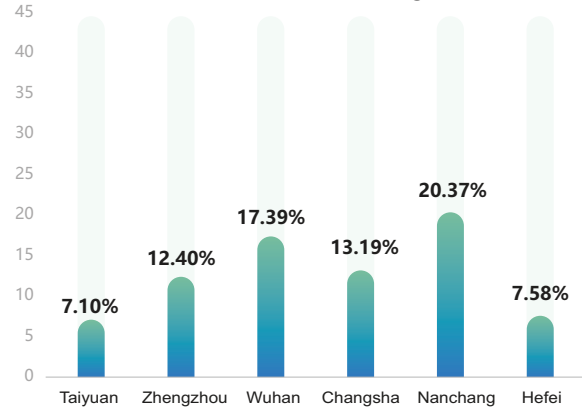
The Vacancy Rate of Warehouses in Northeast China in August



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

● Vacancy Rate

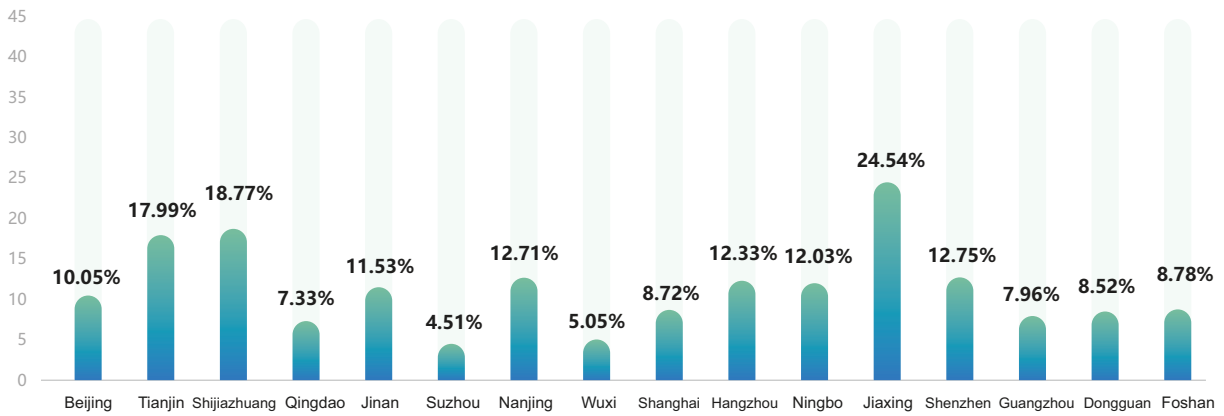
The Vacancy Rate of Warehouses in Central China in August



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

● Vacancy Rate

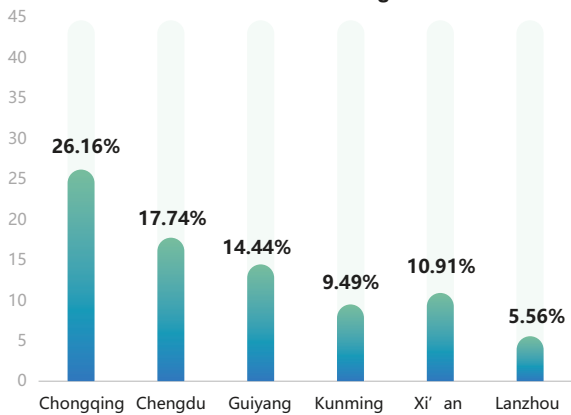
The Vacancy Rate of Warehouses in East China in August



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

● Vacancy Rate

The Vacancy Rate of Warehouses in West China in August



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

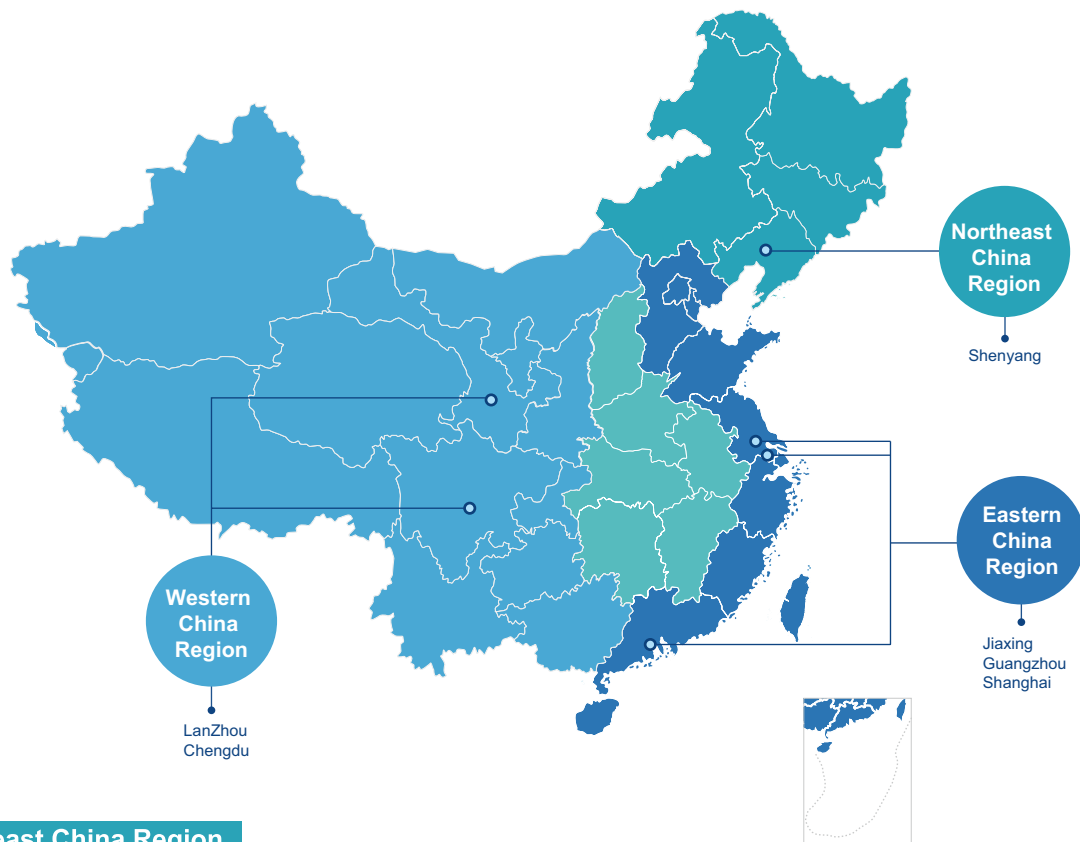
● Vacancy Rate

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	47.03	-0.34%	10.50%	0.44
Shanghai	45.83	-0.59%	8.72%	0.31
Shenzhen	41.58	0.00%	12.75%	-0.15
Suzhou	33.72	0.57%	4.51%	-0.84
Hangzhou	31.97	0.72%	12.33%	-1.57
Ningbo	29.38	1.66%	12.03%	-1.21
Guangzhou	32.19	0.22%	7.96%	-0.32
Dongguan	31.00	-0.16%	8.52%	-4.61
Nanjing	29.96	0.00%	12.71%	-1.71
Foshan	29.35	0.00%	8.78%	-2.33
Jiaxing	32.04	-0.80%	24.54%	-1.25
Changsha	26.28	0.04%	13.19%	-2.49
Tianjin	31.04	-0.06%	17.99%	-0.08
Wuxi	29.58	0.10%	5.05%	0.07
Dalian	24.14	0.00%	34.55%	-4.83
Changchun	21.11	1.34%	23.17%	-5.89
Chongqing	25.39	-0.43%	26.16%	-0.50
Wuhan	25.30	-0.59%	17.39%	0.81
Zhengzhou	23.13	2.16%	12.40%	0.59
Shenyang	21.67	-1.86%	21.81%	-0.17
Hefei	24.32	0.25%	7.58%	-0.14
Kunming	25.98	-0.27%	9.49%	0.13
Harbin	23.13	-1.28%	10.70%	-6.58
Chengdu	24.06	-0.17%	17.74%	-0.78
Qingdao	22.60	-1.40%	7.33%	0.97
Xi'an	25.21	-1.18%	10.91%	-1.20
Guiyang	23.26	0.00%	14.44%	0.43
Taiyuan	17.59	0.74%	7.10%	0.80
Jinan	25.52	0.39%	11.53%	0.00
Nanchang	21.08	0.00%	20.37%	0.00
Shijiazhuang	19.96	2.20%	18.77%	-4.90
Lanzhou	20.53	-2.56%	5.56%	-5.72

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

Recommendations of the Warehouses



Northeast China Region

Warehouse Address: Yuhong District, Shenyang City.

Rentable Area: 50,052 square meters.

Project Features: this storage park is located at 108 Shaling Road, Yuhong District, Shenyang City, and has a construction area of about 150,000 square meters in which there are 7 high-standard warehouses with C-class II fire protection qualification. The park has a superior location, being close to Shenyang West fourth Ring Road and Beijing-Harbin Expressway (G1), 8 kilometers away from Shenyang Expressway and 30 kilometers away from the airport. The park has complete internal facilities, including offices, dormitories, canteens, car washes and garages.

Contact: Sui Chao.

Tel: 18610640033

1.23 million square meters. The park can be used for the joint development of non-bonded goods warehousing and comprehensive bonded logistics business, and there are many types of energy-saving and environment-friendly warehouses, such as building warehouse, ramp warehouse, cold warehouse and bonded warehouse. The park has built comprehensive office buildings, noble residential areas, holiday inn, apartments, dormitories, canteens, shopping malls, experimental primary schools and other related living facilities.

Contact: Xin Chengkuan.

Tel: 15844334434

East China Region

Warehouse Address: Pinghu City, Jiaxing.

Rentable Area: 82,613 square meters

Project Features: the industrial park has a modernized storage space of 83,876 square meters, which is composed of two double-layer ramp warehouses and a multi-storey elevator warehouse. The industrial manufacturing, logistics and e-commerce industries in the region are well developed. The park has a superior geographical location, being close to Shanghai, and it is 5 kilometers away from the exit of G15 Shenhai Expressway. It also enjoys convenient transportation and perfect surrounding facilities.

Contact: Shen Jianfeng.

Tel: 15858329935

Warehouse Address: Airport Logistics Center, Pudong District, Shanghai.

Rentable Area: 17,198 square meters.

Project Features: This logistics park is adjacent to the freight terminal in the west area of Pudong Airport, next to the third runway for cargo aviation, and has nearly 198,000 square ramps of modern storage facilities. The park was developed in 3 phases. The first phase, covering an area of nearly 43,000 square meters, was completed in July 2012; the second phase, covering an area of nearly 56,800 square meters, was completed in November 2013; and the third phase, with a two-story, ramp-type and high-quality logistics facility of about 97,600 square meters, was completed in January 2016. The first floor of the third phase has about 49,100 square meters of leasable space, with a net height of 8 meters, a ground load of 3 tons per square meter, and 49 loading and unloading platforms; the second floor of the third phase has about 48,500 square meters of leased space, with a net height of 9 meters, and a ground load of 2.2tons per square meter. and equipped with 45 loading and unloading platforms.

Contact: Tan Wei.

Tel: 17717330045

Warehouse Address: near Guangzhou Baiyun Airport.

Rentable Area: 200,000 square meters.

Project Features: the total land area of this logistics park is 1,528.9 mu, and the total planned storage area is about

West China Region

Warehouse Address: Xigu District, Lanzhou.

Rentable Area: 5,000 square meters.

Project Features: this park is located in Xigu District, Lanzhou City, Lanzhou International Port District, with superior warehouse location, convenient transportation, good infrastructure and conditions, and can enjoy national policy support after entering the park.

Contact: Li Chen.

Tel: 13119138713

Warehouse Address: Chengdu Xindu international logistics port.

Rentable Area: 50,000 square meters.

Project Features: this logistics park is located in Xindu Logistics

Park, Chengdu city. Being located in the highway freight distribution center, it gathers the high-quality resources of Chengdu highway transportation, enjoying unique location advantages, and is an ideal choice for urban distribution. The park is close to Chengdu round highway (G4201) and Freight Avenue, can quickly access the highway network around Chengdu. The traffic of the park is very convenient, with only 15 kilometers away from the city center, is an excellent node for regional distribution. The park can be quickly connected to Chengdu Qingbaijiang International Railway Port through the Freight Avenue, providing unique conditions for the development of "Belt and Road Initiative" and road-rail intermodal transport business.

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 approved 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):

Taking Internet of Warehouses platform (www.50yc.com) as its core, Warehouse in Cloud (WIC) combined with intelligent IOT applications, artificial intelligence and other technologies through integrated approaches including big data of Internet warehousing, cloud warehouse technology, digital operation and data value-added services, aiming at innovating a new model of domestic logistics supply chain. It is also committed to building the world's leading comprehensive online service platform for warehouse industry, and creating an open, digital, intelligent IOT-based ecological network of digital supply chain. With technology as the core driving force, Warehouse in Cloud (WIC) is deeply committed to the supply chain and logistics industry, and boasts with first-class technical level of research and development team, experienced team of operation and management experts, rapid response implementation team, bringing together top management and technical talents of this industry, and digital products and services have covered the entire end-to-end supply chain.

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