

2018年11月中国通用仓储市场动态报告

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空置情况和租金水平，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《2018年11月中国通用仓储市场动态报告》。2018年11月，物联云仓全国在线仓库面积新增1,270万 m^2 ，总面积超2.49亿 m^2 ，较10月增长5.37%；在线可租面积超3,850万 m^2 ，较10月增长10.62%。仓库资源覆盖32个省份，198个城市，5,578个园区。

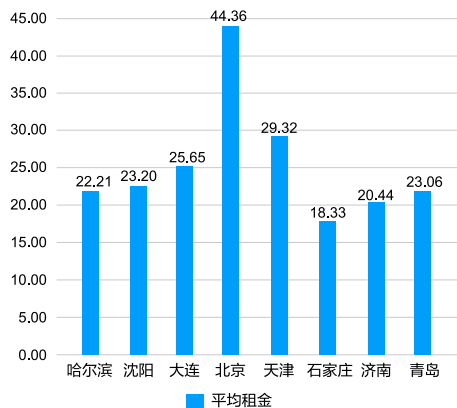
2018年11月中国仓储设施租金水平

全国30个城市仓库平均租金为26.99元/ $\text{m}^2 \cdot \text{月}$ ，环比上涨0.37%，其中，华南、华东地区仓库平均租金略高于华北、华中、华西地区。相较于10月，华南、华中地区仓库平均租金小幅下降，华东、华北、华西地区仓库平均租金小幅上涨。

仓库平均租金最高的城市为北京、上海、深圳，平均租金均高于39元/ $\text{m}^2 \cdot \text{月}$ 。相较于10月，北京、上海仓库平均租金小幅上涨；深圳因外贸依存度高，受中美贸易战影响，仓库平均租金下降了1.81%。因政府不断提高物流项目的税收贡献率和容积率、城市扩容物流用地供应逐年紧缩等因素驱动，超一线城市仓库需求持续旺盛，北京、上海、深圳仓库平均租金相比其他城市独“高”一格。据北京、上海、深圳国土资源局土地交易信息显示，11月50笔土地成交交易中，仅有6笔为工业（物流）用地，远远供不应求。

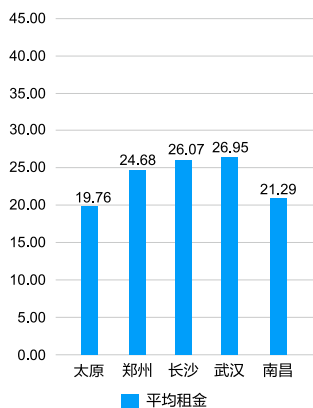
仓库平均租金最低的城市为兰州、石家庄、太原，平均租金均低于20元/ $\text{m}^2 \cdot \text{月}$ 。相较于10月，兰州、太原仓库平均租金保持平稳；受“双十一”购物季以及未来“双十二”、圣诞、元旦等节日备货需求拉动的影响，石家庄仓库平均租金上涨2.35%。此外，昆明因购物季影响，第三方物流及电商企业临时租仓需求增加，仓库平均租金涨幅最大，上涨了3.23%（0.76元）。

11月华北地区仓库租金情况
(单位: 元/ $\text{m}^2 \cdot \text{月}$)



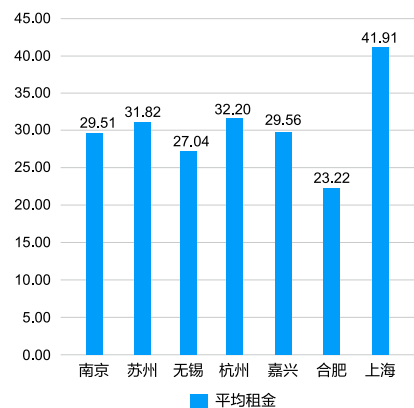
*数据来源: 物联云仓 (www.50yc.com)
图一

11月华中地区仓库租金情况
(单位: 元/ $\text{m}^2 \cdot \text{月}$)



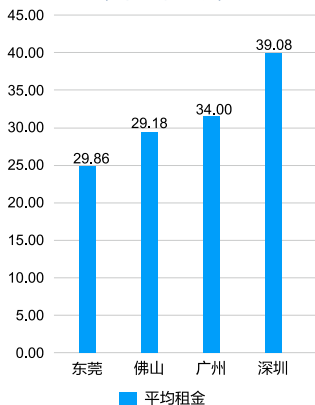
*数据来源: 物联云仓 (www.50yc.com)
图二

11月华东地区仓库租金情况
(单位: 元/ $\text{m}^2 \cdot \text{月}$)



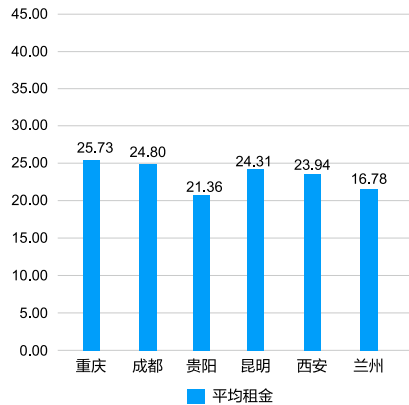
*数据来源: 物联云仓 (www.50yc.com)
图三

11月华南地区仓库租金情况
(单位: 元/ $\text{m}^2 \cdot \text{月}$)



*数据来源: 物联云仓 (www.50yc.com)
图四

11月华西地区仓库租金情况
(单位: 元/ $\text{m}^2 \cdot \text{月}$)



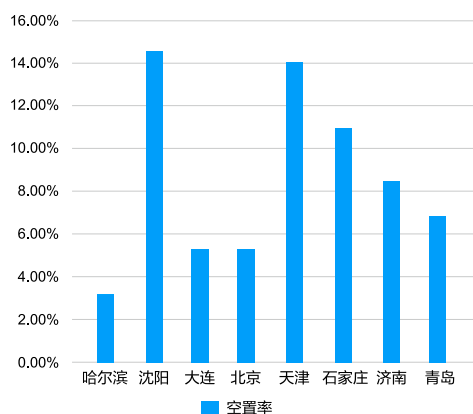
*数据来源: 物联云仓 (www.50yc.com)
图五

2018年11月中国仓储设施空置率情况

全国30个城市仓库平均空置率为10.43%，环比下降0.18%，其中，华西地区仓库空置率要显著高于其他四个大区。相较10月，华南、华北地区仓库空置率有小幅上涨，华东、华中、华西地区仓库空置率有小幅下降。

仓库空置率最高的城市为重庆、兰州、昆明，空置率均超25%，仓储市场供大于求明显。相较10月，兰州空置率与上月持平；重庆、昆明空置率环比有所下降。仓库空置率最低的城市为佛山、苏州，空置率低于3%，仓库市场供需匹配度较高。相较10月，佛山、苏州空置率波动不大；重庆因渝北区、江北区、九龙坡区仓库租赁需求旺盛，空置率降幅明显，下降了6.58%。

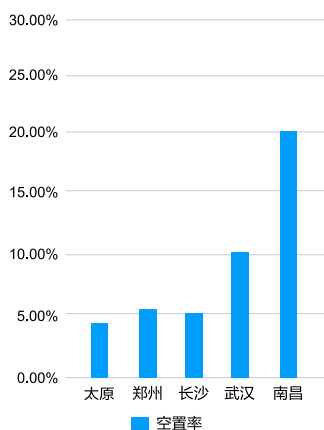
11月华北地区仓库空置率情况



*数据来源：物联云仓（www.50yc.com）

图六

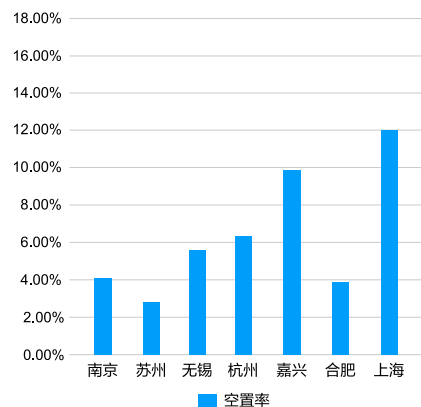
11月华中地区仓库空置率情况



*数据来源：物联云仓（www.50yc.com）

图七

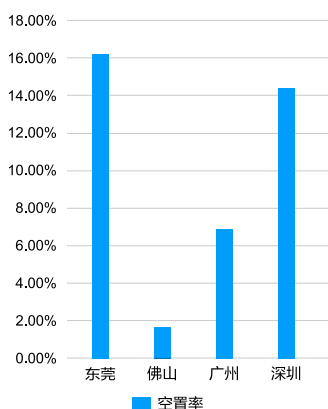
11月华东地区仓库空置率情况



*数据来源：物联云仓（www.50yc.com）

图八

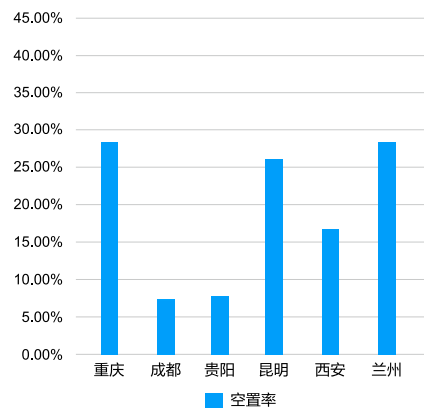
11月华南地区仓库空置率情况



*数据来源：物联云仓（www.50yc.com）

图九

11月华西地区仓库空置率情况



*数据来源：物联云仓（www.50yc.com）

图十

全国30个城市平均租金和空置率一览表

城市	平均租金 (元/㎡·月)	环比变化	空置率	环比变化
北京	44.36	2.61%	5.48%	-1.37%
上海	41.91	0.82%	12.06%	0.02%
深圳	39.08	-1.81%	14.68%	1.41%
苏州	31.82	0.47%	2.58%	-0.22%
杭州	32.20	1.07%	6.59%	1.44%
广州	34.00	0.53%	7.01%	0.47%
东莞	29.86	-0.30%	16.50%	0.10%
南京	29.51	0.31%	4.10%	-1.90%
佛山	29.18	0.14%	1.72%	0.26%
嘉兴	29.56	0.89%	9.86%	-1.28%
长沙	26.07	0.46%	5.12%	-0.85%
天津	29.32	1.03%	14.09%	3.61%
无锡	27.04	-0.95%	5.41%	-1.09%
大连	25.65	0.27%	5.53%	1.12%
重庆	25.73	-0.19%	28.07%	-6.58%
武汉	26.95	0.19%	10.19%	-0.19%
郑州	24.68	-1.71%	6.16%	0.60%
沈阳	23.20	0.17%	14.51%	-2.23%
合肥	23.22	2.61%	3.86%	-3.56%
昆明	24.31	3.23%	25.66%	-2.03%
哈尔滨	22.21	1.51%	3.19%	0.43%
成都	24.80	-0.44%	7.94%	0.94%
青岛	23.06	0.00%	7.05%	0.06%
西安	23.94	0.42%	16.30%	-1.64%
贵阳	21.36	-0.47%	8.20%	2.55%
太原	19.76	0.00%	3.92%	0.00%
济南	20.44	-2.48%	8.42%	2.74%
南昌	21.29	0.00%	19.96%	0.00%
石家庄	18.33	2.35%	11.01%	1.99%
兰州	16.78	0.00%	27.83%	0.00%

*数据来源：物联云仓（www.50yc.com）

优质仓源推荐



华中区域:

仓库地址: 长沙市岳麓区桐梓坡路

可租面积: 5,000平方米

项目特点: 仓库位于岳麓区, 专业的医药恒温库, 仓库带有装卸平台及防风雨棚, 全自动无人操作货架, 丙二类消防资质, 是长沙市内少有的高品质专业医药库

联系人: 谢艳模

联系电话: 15928138523

仓库地址: 郑州市中牟县郑庵镇寻江东路

可租面积: 15,000平方米

项目特点: 高标库高台库, 多边月台, 进深60米, 一层净高14米以上, 每个门配一个自动升降平台, 超大雨棚, 丙二类消防等级, 配套设施齐全

联系人: 王坤

联系电话: 15225100971

华北区域:

仓库地址: 青岛市城阳区正阳西路

可租面积: 3,000平方米

项目特点: 丙二类仓库, 适用于消费品托管业务, 与各快递公司合作良好, 并自
有极强的干线、零担能力

联系人: 杨飞

联系电话: 13061208829

仓库地址: 营口市鲅鱼圈区新鞍钢路

可租面积: 20,000平方米

项目特点: 仓库为鲅鱼圈区高标仓库, 内置站台, 金刚砂环氧地坪, 设有高位货架, 园区交通便利, 距离高速公路5公里, 港口10公里

联系人: 井绍轩

联系电话: 13889244310

仓库地址: 天津市北辰区西堤头工业园区

可租面积: 20,000平方米

项目特点: 高台库, 丙一类消防资质; 位置优越, 交通便利, 紧邻国道112线和京津高速, 距离京津高速6.5KM, 距离滨保高速10KM, 距离津蓟高速7.6KM

联系人: 隋超

联系电话: 18610640033

华南区域:

仓库地址: 广州市黄埔区新业路

可租面积: 6,000平方米

项目特点: 该物流中心距广惠高速3公里, 开创大道, 广园路15分钟车程, 便捷通往周边各大高速公路, 距天河区市中心30分钟

联系人: 李磊

联系电话: 13719250347

华西区域:

仓库地址: 重庆南岸区广阳镇

可租面积: 30,000平方米

项目特点: 占地约500亩, 主要以10个单体仓库组成, 交通便利距离绕城高速1公里, 距G50沪渝高速3公里, 标准丙二类仓库

联系人: 黄天将

联系电话: 18123304630

华东区域:

仓库地址: 杭州市萧山区纬八路

可租面积: 40,000平方米

项目特点: 该物流中心距萧山机场15公里车程, 便捷通往杭州周边各大高速公路距杭州市区30公里

联系人: 毛林林

联系电话: 17767108004

仓库地址: 无锡市无锡新区长江东路

可租面积: 5,000平方米

项目特点: 该项目位于无锡新吴区, 周边交通非常便利, 地理位置优越。距苏州绕城高速4KM, 距G2沪宁高速7KM, 距无锡硕放机场6.5KM, 距无锡市中心20KM

联系人: 徐坤

联系电话: 18018127953

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、冷链物流、保税仓储、危险品仓储、金融仓储、中药材仓储、技术工程与工程服务、包装与单元化物流、智慧物流、自助仓储、钢材仓储等11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

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。

The Dynamic Report of China' s General Warehouse Market in November 2018

Under the guidance of the China Association of Warehousing and Distribution, Internet of Cloud Warehousing (IoCW) has launched four consecutive issues of The Dynamic Report of China' s General Warehouse Market. Through collecting and sorting out the real-time data of IoCW, the Report comprehensively reflects the vacancy situation and the rent fee level of warehousing facilities in major logistics node cities in China, demonstrates the dynamic change of supply and demand in general warehousing market, summarizes the law of market development, predicts the development trend of market, and provides reference for the comprehension of the development of warehousing market and rational investment into this market.

Internet of Cloud Warehousing (IoCW) has launched The Dynamic Report of China' s General Warehouse Market in November 2018 after extending the results of the previous reports, expanding the scope of statistics and strengthening the analysis of warehousing market. In November, the area of online warehouses nationwide increased by 12.7 million m², with a total space of more than 249 million m², an increase of 5.37% over October; and online available areas exceeded 38.5 million m², an increase of 10.62% over October. Warehouse resources cover 32 provinces, 198 cities and 5,578 parks.

Rental Level of Warehousing Facilities in China in November 2018

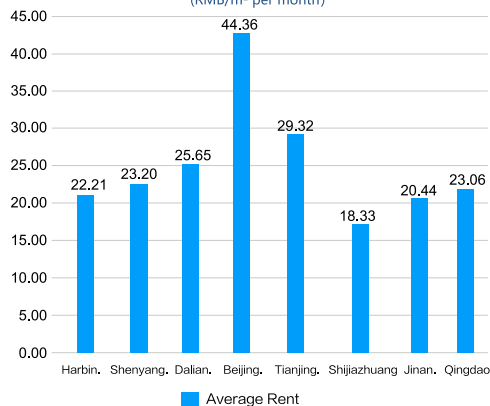
The average rent fee of warehouses in 30 cities across the country was RMB26.99 /m²per month, up 0.37% from the previous month, and the average rent fee of warehouses in South China¹ and East China was slightly higher than that in North China, Central China and West China. Compared with figures of October, the average rent fee of warehouses in South China and Central China decreased slightly, while the average rent fee of warehouses in East China, North China and West China increased slightly.

The average rent fee of warehouse was the highest in Beijing, Shanghai and Shenzhen, and the average rent fee was higher than RMB39/m²per month. Compared with October, the average rent fee of warehouses in Beijing and Shanghai rose slightly. Because of its high dependence on foreign trade, the average rent fee of warehouses in Shenzhen fell by 1.81 % due to the impact of the Sino-US trade war. Driven by the government's continuous increase in the tax contribution rate and volume ratio of logistics projects, the urban expansion, and the shrinking supply of logistics land year by year, the demand for warehouses in super-first-tier cities continues to be strong. The average rent fee for warehouses in Beijing, Shanghai and Shenzhen was higher than in other cities. According to the statistics by the Land Resources Bureau, in Beijing, Shanghai and Shenzhen, only 6 of the 50 land transactions in November were for industrial (logistics) land. The supply was not adequate to the demand.

The average rent fee of warehouse was the lowest in Lanzhou, Shijiazhuang and Taiyuan, the average rent fee was less than RMB20/m²per month. Compared with October, the average rent fee of Lanzhou and Taiyuan warehouses remained stable; affected by the "Double Eleven" shopping season and the coming "Double Twelve", Christmas, New Year's Day and other holiday stock demand, the average rent fee of Shijiazhuang warehouses rose by 2.35%. In addition, due to the impact of the shopping season, the demand for temporary rentals of third-party logistics and e-commerce companies in Kunming increased, and the average rent fee of warehouses saw the biggest increase, rising by 3.23% (RMB0.76).

1. The geographical divisions in this report are based on the business of the Internet of Cloud Warehousing.

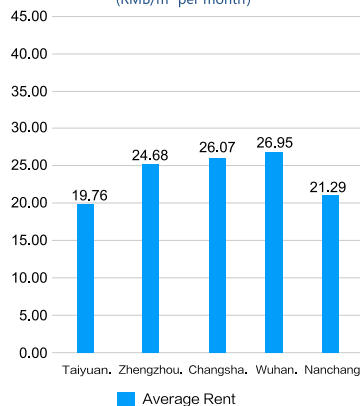
North China Warehouse Rent Fee in November
(RMB/m² per month)



*source: Internet of Cloud Warehousing (www.50yc.com)

Chart 1

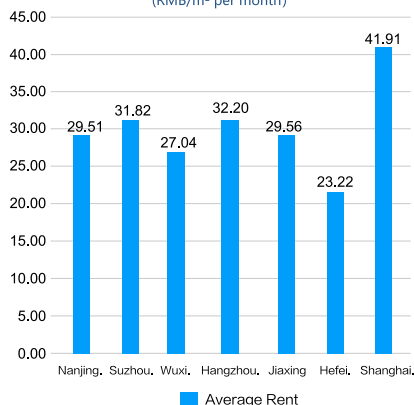
Central China Warehouse Rent Fee in November
(RMB/m² per month)



*source: Internet of Cloud Warehousing (www.50yc.com)

Chart 2

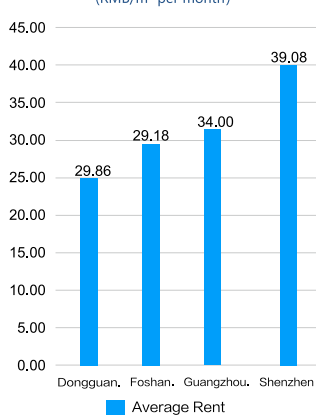
East China Warehouse Rent Fee in November
(RMB/m² per month)



*source: Internet of Cloud Warehousing (www.50yc.com)

Chart 3

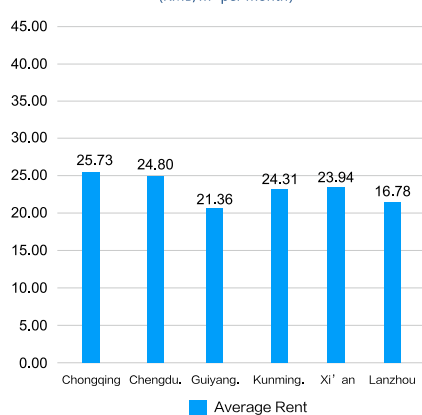
South China Warehouse Rent Fee in November
(RMB/m² per month)



*source: Internet of Cloud Warehousing (www.50yc.com)

Chart 4

West China Warehouse Rent Fee in November
(RMB/m² per month)



*source: Internet of Cloud Warehousing (www.50yc.com)

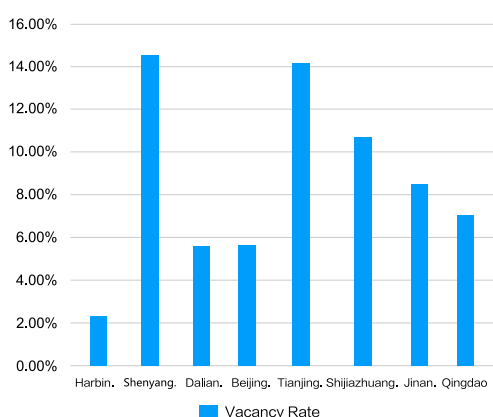
Chart 5

China's Warehousing Facilities Vacancy Rate in November 2018

The average vacancy rate of warehouses in 30 cities across the country was 10.43%, down 0.18% from the previous month, and the vacancy rate in West China was significantly higher than that in the other 4 regions. Compared with October, the warehouse vacancy rate in South China and North China increased slightly, and the warehouse vacancy rate in East, Central and West China decreased slightly.

The cities with the highest warehouse vacancy rates were Chongqing, Lanzhou, and Kunming, with vacancy rates exceeding 25%, and the storage market was in excess of demand. Compared with October, the vacancy rate in Lanzhou was the same as last month; the vacancy rates in Chongqing and Kunming fell month-on-month. The cities with the lowest warehouse vacancy rate were Foshan and Suzhou, with a vacancy rate of less than 3%, shows a high degree of matching between supply and demand in the warehouse market. Compared with October, the vacancy rate in Foshan and Suzhou fluctuated little; in Chongqing, due to the strong demand for warehouse leasing in Yubei District, Jiangbei District and Jiulongpo District, the vacancy rate dropped significantly, down 6.58%.

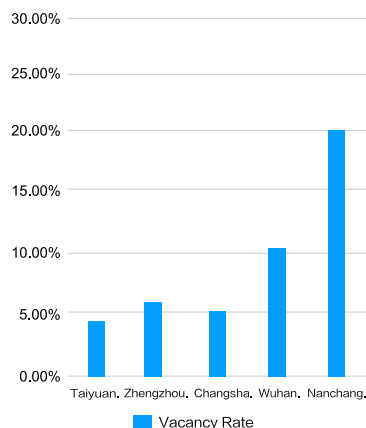
The Vacancy Rate of Warehouses in North China in November



*source: Internet of Cloud Warehousing (www.50yc.com)

Chart 6

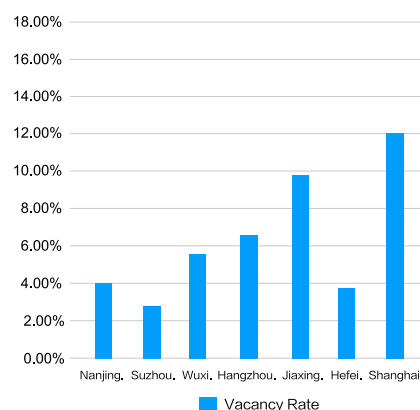
The Vacancy Rate of Warehouses in Central China in November



*source: Internet of Cloud Warehousing (www.50yc.com)

Chart 7

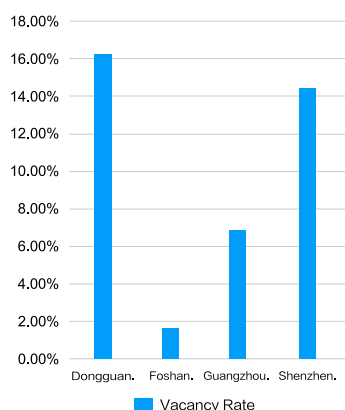
The Vacancy Rate of Warehouses in East China in November



*source: Internet of Cloud Warehousing (www.50yc.com)

Chart 8

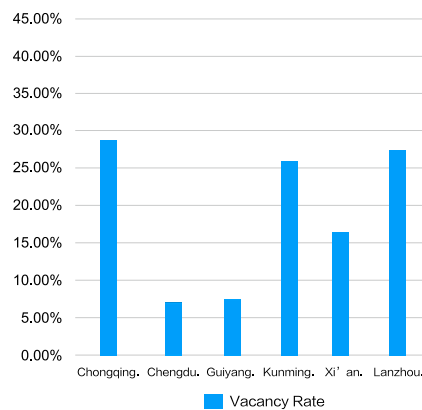
The Vacancy Rate of Warehouses in South China in November



*source: Internet of Cloud Warehousing (www.50yc.com)

Chart 9

The Vacancy Rate of Warehouses in West China in November



*source: Internet of Cloud Warehousing (www.50yc.com)

Chart 10

List of Average Rent Fee and Vacancy Rates in 30 Cities of China

City	Average rent (RMB/m ² per month)	month-to-month comparisons	Vacancy rate	month-to-month comparisons
Beijing	44.36	2.61%	5.48%	-1.37%
Shanghai	41.91	0.82%	12.06%	0.02%
Shenzhen	39.08	-1.81%	14.68%	1.41%
Suzhou	31.82	0.47%	2.58%	-0.22%
Hangzhou	32.20	1.07%	6.59%	1.44%
Guangzhou	34.00	0.53%	7.01%	0.47%
Dongguan	29.86	-0.30%	16.50%	0.10%
Nanjing	29.51	0.31%	4.10%	-1.90%
Foshan	29.18	0.14%	1.72%	0.26%
Jiaxing	29.56	0.89%	9.86%	-1.28%
Changsha	26.07	0.46%	5.12%	-0.85%
Tianjin	29.32	1.03%	14.09%	3.61%
Wuxi	27.04	-0.95%	5.41%	-1.09%
Dalian	25.65	0.27%	5.53%	1.12%
Chongqing	25.73	-0.19%	28.07%	-6.58%
Wuhan	26.95	0.19%	10.19%	-0.19%
Zhengzhou	24.68	-1.71%	6.16%	0.60%
Shenyang	23.20	0.17%	14.51%	-2.23%
Hefei	23.22	2.61%	3.86%	-3.56%
Kunming	24.31	3.23%	25.66%	-2.03%
Harbin	22.21	1.51%	3.19%	0.43%
Chengdu	24.80	-0.44%	7.94%	0.94%
Qingdao	23.06	0.00%	7.05%	0.06%
Xi' an	23.94	0.42%	16.30%	-1.64%
Guiyang	21.36	-0.47%	8.20%	2.55%
Taiyuan	19.76	0.00%	3.92%	0.00%
Jinan	20.44	-2.48%	8.42%	2.74%
Nanchang	21.29	0.00%	19.96%	0.00%
Shijiazhuang	18.33	2.35%	11.01%	1.99%
Lanzhou	16.78	0.00%	27.83%	0.00%

*source: Internet of Cloud Warehousing (www.50yc.com)

Warehouse Recommendation



Central China Region:

Warehouse Address: Tongzipo Road, Yuelu District, Changsha City

Available Area: 5,000m²

Project Features: The warehouse is a professional medicine constant temperature storehouse located in Yuelu District. The storehouse equips with loading and unloading platform, weatherproof sheds, automatic unmanned operation shelf and the C-class fire protection qualification. It is a rare high-quality and specialized medicine storehouse in Changsha city

Contact: Xie Yanmo

Contact number: 1592 8138 523

Warehouse Address: Xunjiang East Road, Zheng' an Town, Zhongmu County, Zhengzhou City

Available Area: 15,000m²

Project Features: The warehouse provides high-standard building storehouse and high-rise storehouse with the C-class fire protection qualification, multi-platform, 60 meters deep, 14 meters net height of each floor, automatic lift for each door, oversized canopy and complete supporting facilities.

Contact: Wang Kun

Contact number: 1522 5100 971

North China Region:

Warehouse Address: Zhengyang West Road, Chengyang District, Qingdao City

Available Area: 3,000m²

Project Features: This is a Class C warehouse, suitable for consumer goods custody business. It has a good cooperation with various courier companies and has strong trunk line capacity and breakbulk capacity.

Contact: Yang Fei

Contact number: 1306 1208 829

Warehouse Address: Xin'angang Road, Bayuquan District, Yingkou City

Available Area: 20,000m²

Project Features: This is a high standard warehouse in the Bayuquan District, equipped with built-in platform, emery epoxy floor and high shelf. It enjoys convenient transportation with 5 kilometers from the expressway and 10 kilometers from the port.

Contact: Jing Shaoxuan

Contact number: 1388 9244 310

Warehouse Address: Xiditou Industrial Park, Beichen District, Tianjin City

Available Area: 20,000m²

Project Features: This is a high-rise warehouse with C class fire protection qualification. It has a superior location and convenient transportation. It is adjacent to the 112 national highway and Beijing-Tianjin highway, 6.5 kilometers away from Jinning highway, 10 kilometers away from Binbao highway and 7.6 kilometers from Jinji highway.

Contact: Sui Chao

Contact number: 1861 0640 033

South China Region:

Warehouse Address: Xinye Road, Huangpu District, Guangzhou City

Available Area: 6,000m²

Project Features: The logistics center is 3 kilometers away from Guanghui Expressway and 15 minutes' drive to Kaichuang Avenue and Guangyuan Road, surrounding with several major highways, and 30 minutes from the center of Tianhe District.

Contact: Li Lei

Contact number: 1371 9250 347

West China Region:

Warehouse Address: Guangyang Town, Nan' an District, Chongqing City

Available Area: 30,000m²

Project features: The warehouse covers an area of about 500 mu (≈33.33 hectares) with the C-class fire protection qualification, mainly consisting of 10 single warehouses. It enjoys convenient transportation with 1 kilometer away from the City Expressway and 3 kilometers from the G50 Shanghai-Chongqing highway.

Contact: Huang Tianjiang

Contact number: 1812 3304 630

East China Region:

Warehouse Address: Weiba Road, Xiaoshan District, Hangzhou City

Available Area: 40,000m²

Project Features: The logistics center is 15 kilometers away from Xiaoshan Airport and is convenient to all major highways around Hangzhou and there are 30 kilometers away from downtown Hangzhou.

Contact: Mao Linlin

Contact number: 1776 7108 004

Warehouse Address: Changjiang East Road, Wuxi New District, Wuxi City

Available Area: 5,000m²

Project Features: The project is located in Xinwu District, Wuxi City. It enjoys convenient surrounding traffic and superior geographical position. There are 4 kilometers from Suzhou Ring Expressway, 7 kilometers from the G2 Shanghai-Nanjing Expressway, 6.5 kilometers from Wuxi Shuofang Airport and 20 kilometers from downtown Wuxi.

Contact: Xu Kun

Contact number: 1801 8127 953

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 11 branches including joint distribution, cold chain logistics, bonded warehousing, dangerous goods warehousing, financial warehousing, traditional Chinese medicine warehousing, technical engineering and engineering services, packaging and unitized logistics, intelligent logistics, self-service warehousing, steel warehousing, 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 Internet of Cloud Warehousing (IoCW):

IoCW (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. IoCW 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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