

2019年4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《2019年4月中国通用仓储市场动态报告》。2019年4月，物联云仓全国在线仓库面积新增496万 m^2 ，总面积超2.74亿 m^2 ，较2019年3月增长1.84%；在线可租面积超3,549万 m^2 ，较3月增长7.08%。仓库资源覆盖32个省份，207个城市，6,228个园区。

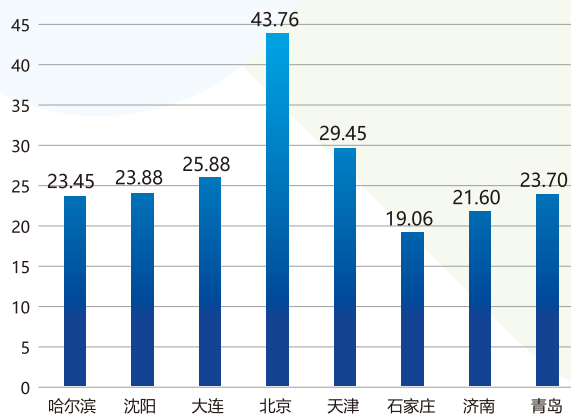
• 2019年4月 中国通用仓储设施租金水平

全国30个城市仓库平均租金为27.34元/ m^2 ·月，环比上涨0.37%。其中，华南¹、华东地区仓库平均租金高于华北、华西、华中地区。相较3月，五大区仓库平均租金波动幅度不大，涨幅分别为0.59%（华西）、0.34%（华北）、0.33%（华南）、0.30%（华中）、0.29%（华东）。

仓库平均租金最高的城市仍然是北京、上海、深圳，均高于40元/ m^2 ·月。相较3月，三个城市仓库租金波动不大，几乎没有变化。

仓库平均租金最低的城市为石家庄、南昌、兰州，均低于20元/ m^2 ·月。其中，南昌部分地区房屋拆除征收工作于4月启动，东新乡部分老旧小商品物流城商户和快递物流公司受其影响，仓库需求有所增加，刺激仓库租金小幅上涨，涨幅为5.29%。

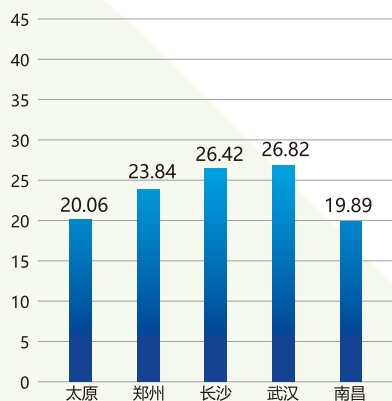
4月华北地区仓库租金情况

(单位：元/ m^2 ·月)

*数据来源：物联云仓 (www.50yc.com)

■ 平均租金

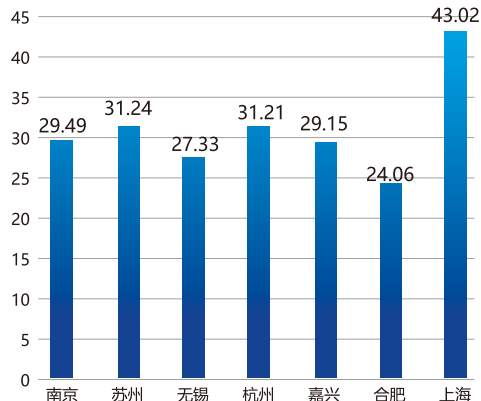
4月华中地区仓库租金情况

(单位: 元/m²·月)

*数据来源: 物联云仓 (www.50yc.com)

■ 平均租金

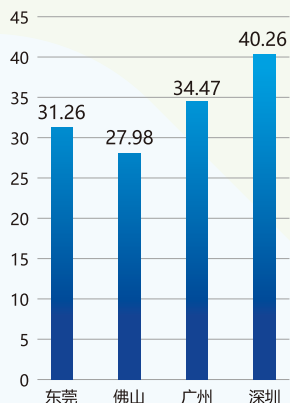
4月华东地区仓库租金情况

(单位: 元/m²·月)

*数据来源: 物联云仓 (www.50yc.com)

■ 平均租金

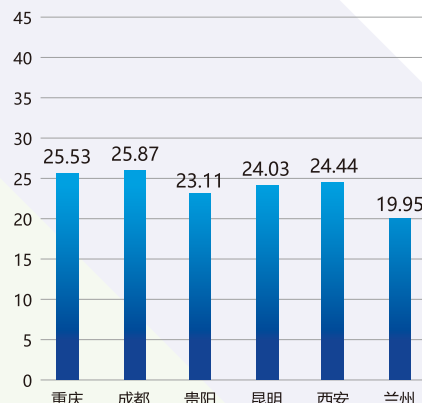
4月华南地区仓库租金情况

(单位: 元/m²·月)

*数据来源: 物联云仓 (www.50yc.com)

■ 平均租金

4月华西地区仓库租金情况

(单位: 元/m²·月)

*数据来源: 物联云仓 (www.50yc.com)

■ 平均租金

• 2019年4月 中国通用仓储设施空置率情况

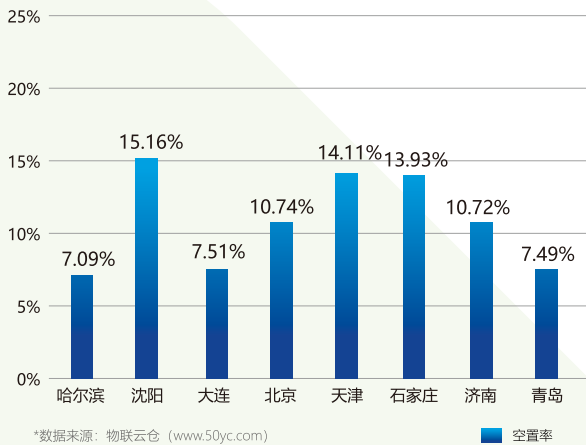
全国30个城市仓库平均空置率为10.93%，环比下降0.15%。其中，华东、华北地区仓库空置率低于华中、华西、华南。相较3月，华南、华西、华中地区仓库空置率有所下降，降幅分别为2.69%、0.73%、0.23%；华东、华北地区仓库空置率有小幅上涨，涨幅分别为1.14%、0.52%。

仓库空置率最高的城市为东莞、重庆、南昌，均超过21%。相较3月，重庆、南昌仓库空置率波动不大；根据海关统计，4月份，我国进出口总值2.51万亿元，增长6.5%。其中，出口1.3万亿元，增长3.1%；进口1.21万亿元，增长10.3%，进出口形势趋好，使得作为港口城市的东莞仓储需求有所增加，空置率有小幅下降，降幅为1.51%。

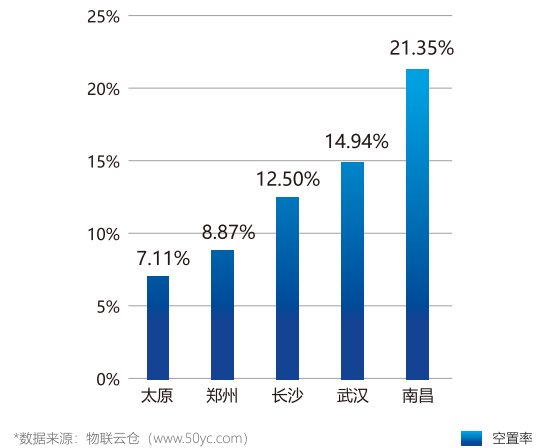
仓库空置率最低的城市为佛山、苏州、无锡，均低于5%。相较3月，无锡、苏州仓库空置率波动不大；佛山因一环改造段47个收费站获批，对附近仓库租赁市场产生了消极影响，仓库业主出于长远考虑，加大招商优惠力度，导致仓库出租率反而增高，促使佛山仓库空置率有所下降，降幅为3.21%。

与3月相比，仓库空置率波动最大的城市为嘉兴，环比上涨5.54%。一方面，因海宁物流园大型双层坡道高标仓一期（约7.2万m²）于4月交付，使嘉兴仓库空置率有所上涨；另一方面，嘉兴市政府加大力度落实仓库注册落税政策，部分往期无需落税的仓库要求必须注册落税，企业运营成本增加，导致部分租仓客户退仓。

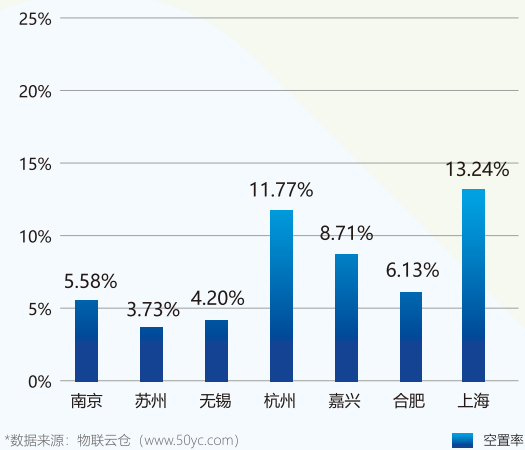
4月华北地区仓库空置率情况



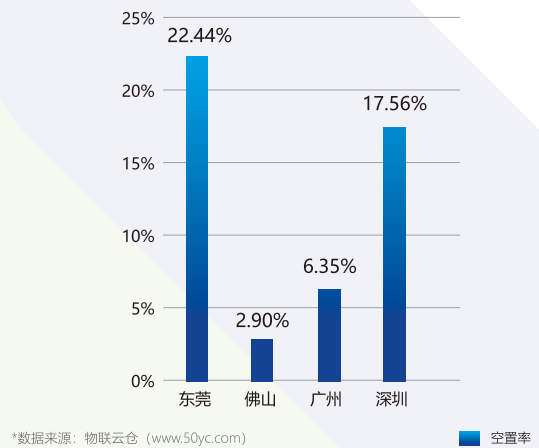
4月华中地区仓库空置率情况



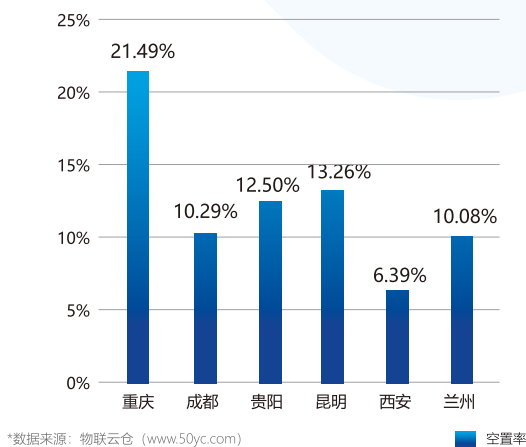
4月华东地区仓库空置率情况



4月华南地区仓库空置率情况



4月华西地区仓库空置率情况

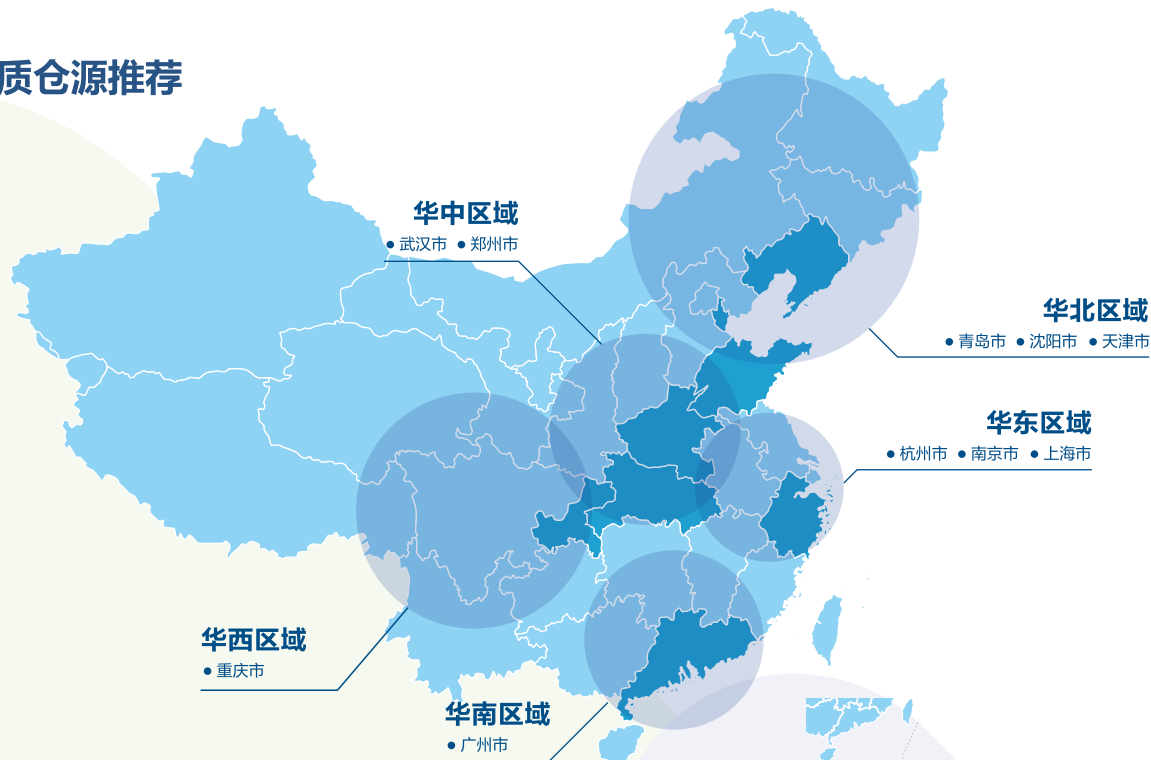


• 表：全国30个城市平均租金和空置率一览表

城市	平均租金 (元/㎡·月)	环比变化	空置率	环比变化
北京	43.76	0.07%	10.74%	2.09%
上海	43.02	-0.07%	13.24%	2.71%
深圳	40.26	0.00%	17.56%	-1.28%
苏州	31.24	-0.22%	3.73%	0.26%
杭州	31.21	-0.16%	11.77%	0.81%
广州	34.47	0.38%	6.35%	-4.74%
东莞	31.26	1.17%	22.44%	-1.51%
南京	29.49	0.17%	5.58%	-0.05%
佛山	27.98	-0.18%	2.90%	-3.21%
嘉兴	29.15	-0.95%	8.71%	5.54%
长沙	26.42	0.96%	12.50%	-0.54%
天津	29.45	0.14%	14.11%	-0.32%
无锡	27.33	0.63%	4.20%	-0.13%
大连	25.88	0.00%	7.51%	-0.51%
重庆	25.53	-0.04%	21.49%	-0.14%
武汉	26.82	-0.04%	14.94%	-1.42%
郑州	23.84	-3.60%	8.87%	1.27%
沈阳	23.88	-0.04%	15.16%	1.50%
合肥	24.06	3.57%	6.13%	-1.17%
昆明	24.03	0.84%	13.26%	-3.40%
哈尔滨	23.45	0.86%	7.09%	0.83%
成都	25.87	-0.12%	10.29%	-0.22%
青岛	23.70	0.81%	7.49%	0.54%
西安	24.44	0.49%	6.39%	0.50%
贵阳	23.11	2.57%	12.50%	3.42%
太原	20.06	0.00%	7.11%	-0.45%
济南	21.60	0.56%	10.72%	0.10%
南昌	19.89	5.29%	21.35%	0.00%
石家庄	19.06	0.79%	13.93%	0.00%
兰州	19.95	0.00%	10.08%	-4.58%

*数据来源：物联云仓（www.50yc.com）

• 优质仓源推荐



华南区域

仓库地址：广州市增城区荔新公路仙村路口
可租面积：12,000平方米
项目特点：高台库，丙二类消防，设施齐全，地理位置优势明显，交通便利，距广惠高速1公里

联系人：李磊
联系电话：13719250347

华西区域

仓库地址：重庆市巴南区公路物流基地
可租面积：97,000平方米
项目特点：项目紧邻重庆绕城高速入口，可直通包茂高速（G65）与兰海高速（G75），是南下云南、贵州与广西的必经之路，紧邻保税物流中心

联系人：黄天将
联系电话：18123304630

华东区域

仓库地址：杭州市余杭东湖街道临平大道与星光街交口
可租面积：102,100平方米
项目特点：园区设施齐全，交通便利，距离沪杭高速8.2公里，杭州绕城高速16公里，杭州市中心30公里，萧山机场45公里

联系人：毛林林
联系电话：17767108004

仓库地址：南京江宁宁诚信大道
可租面积：21,000平方米
项目特点：园区距离宁宣高速1公里，南京绕城高速路口3.2公里，距离火车站10公里，距离市中心直线距离17公里，距离禄口机场24公里，交通便利

联系人：徐坤
联系电话：18018127953

仓库地址：上海市嘉定区外冈镇
可租面积：38,000平方米
项目特点：框架钢筋混凝土结构，丙二类消防，环氧地坪，一楼高标库二至三层为电梯库，另辅助设施齐全，交通便利，门口大车出入方便

联系人：沈建锋
联系电话：15858329935

华中区域

仓库地址：武汉市江夏区白沙洲大道与金龙大道交汇处
可租面积：12,000平方米
项目特点：全新平库招租，宿舍，食堂，办公室配套齐全；位置优越，交通便利，价格面议

联系人：谢艳模
联系电话：15928138523

仓库地址：郑州市经开国际物流园浍江东路
可租面积：5,000平方米
项目特点：项目靠107国道旁、紧邻京港澳高速，高标仓库、丙类消防，证件齐全，国际物流园区，合中高端产品适

联系人：王坤
联系电话：15225100971

华北区域

仓库地址：青岛市市北区傍海南路
可租面积：47,000平方米
项目特点：交通网络极为便利，道路通畅，毗邻港口、高速公路、铁路，机场。消防设施齐全，是市内四区仅有的现代化丙二类仓库

联系人：杨飞
联系电话：13061208829

仓库地址：沈阳市苏家屯区机场路
可租面积：20,000平方米
项目特点：园区全部为丙一类，丙二类高标仓，具有暖库，交通便利，距离机场8公里，距离沈海高速8公里，临近沈阳四环旁

联系人：井绍轩
联系电话：13889244310

仓库地址：天津市东丽区空港国际物流区第二大街
可租面积：30,000平方米
项目特点：一期9万平方米，二期10万平方米，交通条件优越，于机场进场路与通南路交叉口，距天津滨海国际机场1公里

联系人：隋超
联系电话：18610640033

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。现有冷链物流、共同配送、保税仓储、危险品仓储、金融仓储、中药材仓储、自助仓储、技术应用与工程服务、包装与单元化物流、智慧物流、家居物流等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。

THE DYNAMIC REPORT OF CHINA' S

GENERAL WAREHOUSE MARKET IN APRIL 2019

At present, The Dynamic Report of China' s General Warehouse Market has been issued nine 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.

Internet of Warehouses (IoW) has launched The Dynamic Report of China' s General Warehouse Market in April 2019 after extending the results of previous reports, expanding the scope of selected statistics and deepening the analysis of warehousing market. In April 2019, the total available warehouse area of Internet of Warehouses (IoW) increased by 4.96 million square meters, with a total area of over 274 million square meters, an increase of 1.84% compared with March 2019; the rentable area exceeded 35.49 million square meters, an increase of 7.08% from March, and warehouse resources has covered 32 provinces, 207 cities, and 6,228 parks.

Rental level of Warehousing Facilities in China in April 2019

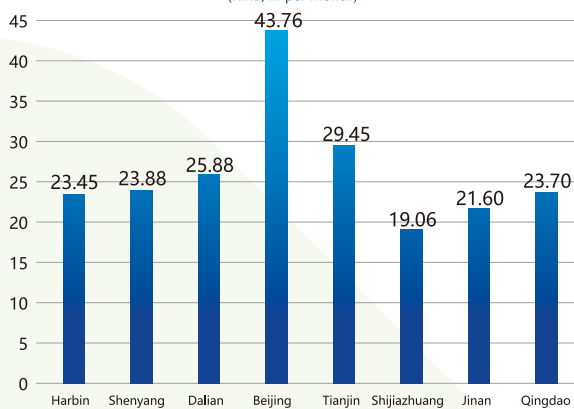
The average rent of warehouses in 30 cities across the country was RMB 27.34 / m² per month, an increase of 0.37% from the previous month. Among them, the average rent fee in South China¹ and East China was still higher than that in North China, West China and Central China. Compared with March, the average warehouse rent in the five regions fluctuated little, with increases of 0.59% in West China, 0.34% in North China, 0.33% in South China, 0.30% in Central China and 0.29% in East China.

The cities with the highest average warehouse rent remained to be Beijing, Shanghai and Shenzhen, all above RMB 40 / m² per month. Compared with March, warehouse rents in the three cities fluctuated little and remained virtually unchanged.

The cities with the lowest average rent of warehouses were Shijiazhuang, Nanchang and Lanzhou, all of which were lower than RMB 20 / m² per month. In Nanchang, the demolition and expropriation of some outmoded buildings was launched in April, including some old and small-sized commodity logistics parks and logistics and express companies in Dongxin Township. The demand for warehouse increased correspondingly, which led to a rise of 5.29% in warehouse rent.

1. The geographical divisions in this report are based on the platform operations of Internet of Warehouses.

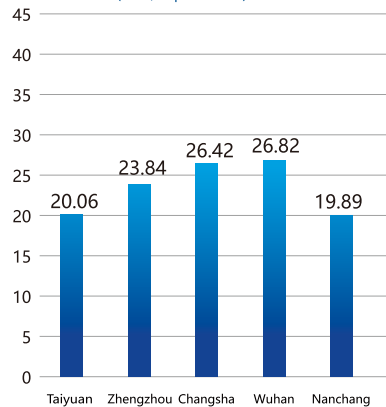
North China Warehouse Rent in April

(RMB/m² per month)

*Source: (IoW) Internet of Warehouses (www.50yc.com)

Average Rent

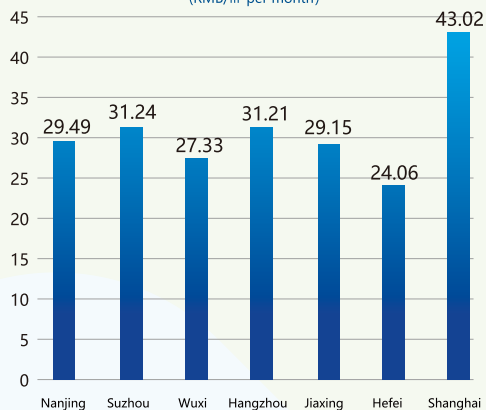
Central China Warehouse Rent in April

(RMB/m² per month)

*Source: (IoW) Internet of Warehouses (www.50yc.com)

Average Rent

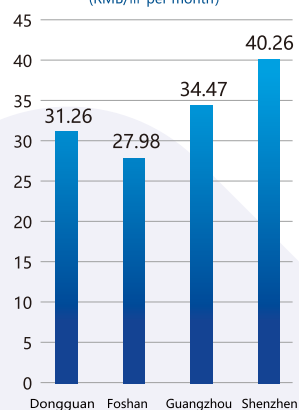
East China Warehouse Rent in April

(RMB/m² per month)

*Source: (IoW) Internet of Warehouses (www.50yc.com)

Average Rent

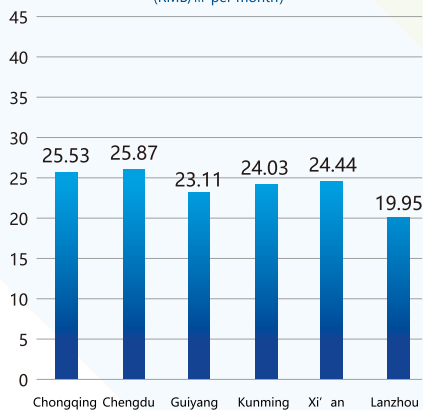
South China Warehouse Rent in April

(RMB/m² per month)

*Source: (IoW) Internet of Warehouses (www.50yc.com)

Average Rent

West China Warehouse Rent in April

(RMB/m² per month)

*Source: (IoW) Internet of Warehouses (www.50yc.com)

Average Rent

China's Warehousing Facilities Vacancy Rate in April 2019

The average vacancy rate of warehouses in 30 cities nationwide was 10.93%, a decrease of 0.15% from the previous month. Among them, the warehouse vacancy rate in East China and North China was lower than that in Central China, West China and South China. Compared with March, the vacancy rate of warehouses in South China, West China and Central China decreased by 2.69%, 0.73% and 0.23%, respectively. The vacancy rate of warehouses in East China and North China rose slightly, by 1.14% and 0.52%, respectively.

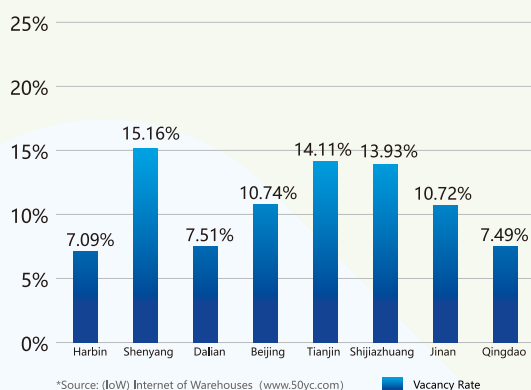
The cities with the highest warehouse vacancy rate were Dongguan, Chongqing and Nanchang, all of which were more than 21%. Compared with March, the vacancy rate of warehouses in Chongqing and Nanchang fluctuated little. According to statistics from the Chinese Customs, in April, the general import and export value of China was RMB2.51 trillion, an increase of 6.5%. Of this total, export value

was RMB1.3 trillion, an increase of 3.1%, and import value was RMB1.21 trillion, an increase of 10.3%. With the improvement of the import and export performance, the warehousing demand of Dongguan, as a port city, has increased, and the vacancy rate has decreased slightly, by 1.51%.

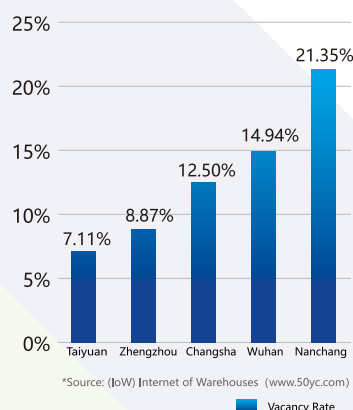
The cities with the lowest warehouse vacancy rates were Foshan, Suzhou and Wuxi, all of which were less than 5%. Compared with March, the vacancy rate of Wuxi and Suzhou warehouses fluctuated little. Foshan has been approved for 47 toll booths in the reconstruction section of the first ring road, which has had a negative impact on the nearby warehouse rental market. In order to eliminate the adverse effects, warehouse owners increased investment incentives, resulting in the warehouse rental rate increased, Foshan warehouse vacancy rate decreased by 3.21%.

Compared with March, the city with the largest fluctuation in warehouse vacancy rate was Jiaxing, up 5.54% from the previous month. On the one hand, due to the delivery of the first phase of the large double ramp high-standard warehouse in Haining Logistics Park (about 72,000 m²) in April, the vacancy rate of Jiaxing warehouse has increased. On the other hand, Jiaxing Municipal Government has stepped up efforts to implement the warehouse tax registration policy, some of the warehouse that do not need to be taxed in the past must be registered now, which increased the operating costs of warehouse enterprises, resulting in the withdrawal of some warehouse customers.

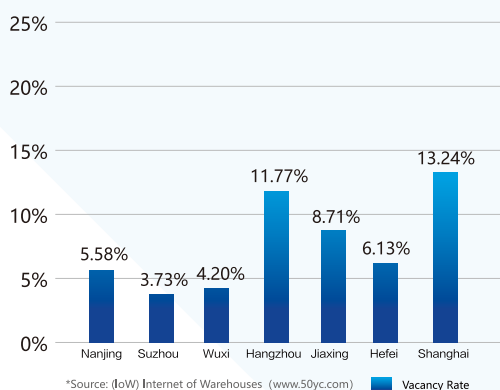
The Vacancy Rate of Warehouses in North China in April



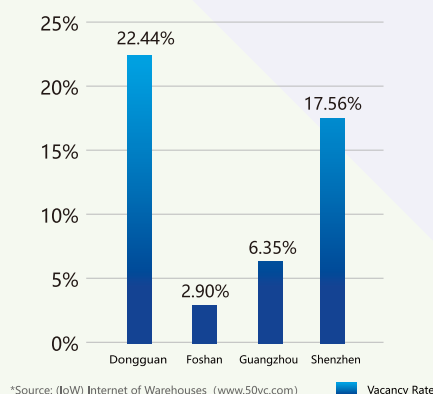
The Vacancy Rate of Warehouses in Central China in April



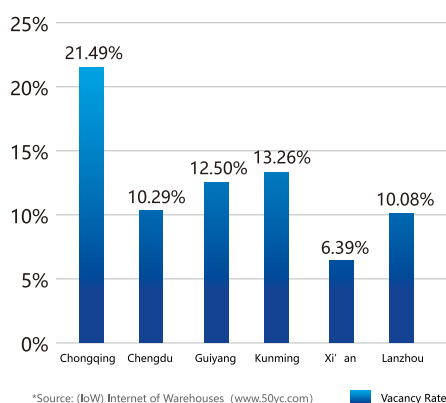
The Vacancy Rate of Warehouses in East China in April



The Vacancy Rate of Warehouses in South China in April



The Vacancy Rate of Warehouses in West China in April

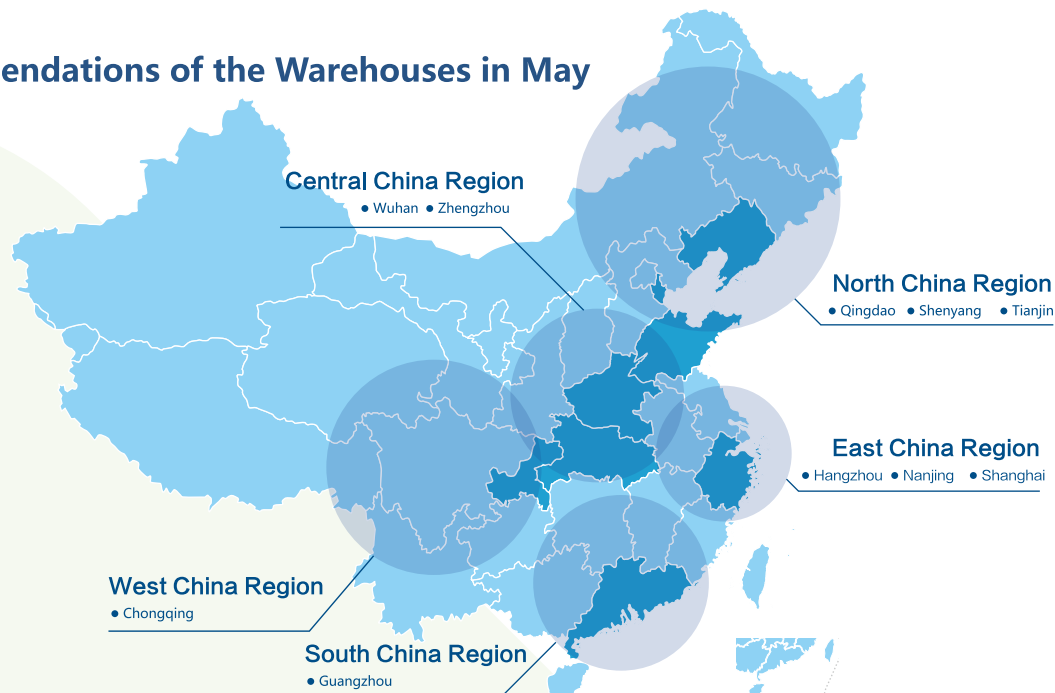


List of Average Rents and Vacancy Rates in 30 Cities of China

City	Average Rent Fee (RMB/m ² per month)	Month-to-Month Comparisons	Vacancy Rate	Month-to-Month Comparisons
Beijing	43.76	0.07%	10.74%	2.09%
Shanghai	43.02	-0.07%	13.24%	2.71%
Shenzhen	40.26	0.00%	17.56%	-1.28%
Suzhou	31.24	-0.22%	3.73%	0.26%
Hangzhou	31.21	-0.16%	11.77%	0.81%
Guangzhou	34.47	0.38%	6.35%	-4.74%
Dongguan	31.26	1.17%	22.44%	-1.51%
Nanjing	29.49	0.17%	5.58%	-0.05%
Foshan	27.98	-0.18%	2.90%	-3.21%
Jiaxing	29.15	-0.95%	8.71%	5.54%
Changsha	26.42	0.96%	12.50%	-0.54%
Tianjin	29.45	0.14%	14.11%	-0.32%
Wuxi	27.33	0.63%	4.20%	-0.13%
Dalian	25.88	0.00%	7.51%	-0.51%
Chongqing	25.53	-0.04%	21.49%	-0.14%
Wuhan	26.82	-0.04%	14.94%	-1.42%
Zhengzhou	23.84	-3.60%	8.87%	1.27%
Shenyang	23.88	-0.04%	15.16%	1.50%
Hefei	24.06	3.57%	6.13%	-1.17%
Kunming	24.03	0.84%	13.26%	-3.40%
Harbin	23.45	0.86%	7.09%	0.83%
Chengdu	25.87	-0.12%	10.29%	-0.22%
Qingdao	23.70	0.81%	7.49%	0.54%
Xi' an	24.44	0.49%	6.39%	0.50%
Guiyang	23.11	2.57%	12.50%	3.42%
Taiyuan	20.06	0.00%	7.11%	-0.45%
Jinan	21.60	0.56%	10.72%	0.10%
Nanchang	19.89	5.29%	21.35%	0.00%
Shijiazhuang	19.06	0.79%	13.93%	0.00%
Lanzhou	19.95	0.00%	10.08%	-4.58%

*Source: (IoW) Internet of Warehouses (www.50yc.com)

Recommendations of the Warehouses in May



South China Region:

Warehouse Address: Lixin Highway Xiancun intersection, Zengcheng District, Guangzhou city.

Rentable Area: 12,000 square meters.

Project Features: A high-rise warehouse with C-class II fire protection qualification. It has convenient transportation and complete supporting facilities. It is two kilometers away from the Guangzhou-Huizhou Expressway.

Contact: Li Lei

Tel: 13719250347

West China Region:

Warehouse Address: Highway Logistics Base, Banan District, Chongqing.

Rentable Area: 97,000 square meters.

Project Features: The warehouse is close to the entrance of the Chongqing Belt Expressway and can lead directly to the Baomao Expressway (G65) and the Lanhai Expressway (G75). It is located on the only way to Yunnan, Guizhou and Guangxi province, and is sited around the bonded logistics center.

Contact: Huang Tianjiang

Tel: 18123304630

East China Region:

Warehouse Address: Intersection of Linping Avenue and Xingguang Street, Donghu Street, Yuhang, Hangzhou

Rentable Area: 102,100 square meters

Project Features: The warehouse park has complete supporting facilities and convenient transportation. It is 8.2 kilometers away from the Huhang Expressway, 16 kilometers from the Hangzhou Belt Highway, 30 kilometers from downtown Hangzhou and 45 kilometers from Hangzhou Xiaoshan Airport.

Contact: Mao Linlin

Tel: 17767108004

Warehouse Address: Chengxin Avenue, Jiangning District, Nanjing.

Rentable Area: 21,000 square meters.

Project Features: This warehouse park has convenient transportation. It is 1 kilometer away from the Ningxuan Expressway, 3.2 kilometers from the Nanjing Belt Highway, 10 kilometers from the South Railway Station, 17 kilometers from downtown Nanjing and 24 kilometers from Lukou Airport.

Contact: Xu Kun

Tel: 18018127953

Warehouse Address: Waigang town, Jiading district, Shanghai.

Rentable Area: 38,000 square meters.

Project Features: The frame of the warehouse is reinforced concrete structure paved with epoxy floor. It has C-class II fire protection qualification. The first floor is high-standard storehouse, the second and the third floor are elevator storehouses. The warehouse park is equipped with complete auxiliary facilities and enjoys convenient transportation. It also has convenient access for the heavily loaded vehicles to come in and out of the park.

Contact: Shen Jianfeng

Tel: 15858329935

Central China Region:

Warehouse Address: Intersection of Baishazhou Avenue and Jinlong Avenue, Jiangxia District, Wuhan City

Rentable Area: 12,000 square meters

Project Features: This is a new platform library equipped with complete supporting facilities, including dormitories, canteen and offices. It enjoys superior location and convenient transportation. The price is negotiable.

Contact: Xie Yanmo

Tel: 15928138523

Warehouse Address: Xunjiang East Road, Economic Development Park, Zhengzhou City

Rentable Area: 5,000 square meters

Project Features: The warehouse is located next to the 107 National Highway and Beijing-Hong Kong-Macau Expressway. It is a high-standard warehouse with C-class fire protection qualification and all the necessary licenses and certificates. As an international logistics park, it is suitable for storing high-end products.

Contact: Wang Kun

Tel: 15225100971

North China Region:

Warehouse Address: Banghai Road South, Shibei District, Qingdao City.

Rentable Area: 47,000 square meters.

Project Features: Being adjacent to the port, highway, railway and airport, the warehouse is boasts with convenient transportation network and clear roads. It has complete firefighting facilities, and it is the only high-standard warehouse with C-class II fire protection qualification in the four urban districts.

Contact: Yang Fei

Tel: 13061208829

Warehouse Address: Airport Road, Sujiatun District, Shenyang City

Rentable Area: 20,000 square meters

Project Features: The warehouses in this park are all high-standard storehouses and equipped with C-class I and C-class II fire protection qualification and provided with conservatory storehouses. It enjoys convenient transportation, with 8 kilometers from the airport, 8 kilometers from the Shenhai Expressway and is near the Shenyang Fourth Ring Road.

Contact: Jing Shaoxuan

Tel: 13889234310

Warehouse Address: The Second Avenue, Airport International Logistics District, Dongli District, Tianjin.

Rentable Area: 30,000 square meters.

Project Features: This project includes 90,000 square meters in the first phase and 100,000 square meters in the second phase. It has superior traffic condition as it locates at the intersection area of the airport entrance road and the Tongnian Road and has 1 kilometer away from Tianjin Binhai International Airport.

Contact: Sui Chao

Tel: 18610640033

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 Internal 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-owned Assets Supervision & Administration 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 application 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 Warehouses (IoW):

IoW(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. IoW 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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