

2019年6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》已连续发布十一期，《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6月中国通用仓储市场动态报告》。2019年6月，物联云仓全国在线仓库面积新增570万 m^2 ，总面积超2.87亿 m^2 ，较5月增长2.02%；在线可租面积超3,310万 m^2 ，较5月增长8.58%。仓库资源覆盖32个省份，215个城市，6,517个园区。

• 2019年6月 中国通用仓储设施租金水平

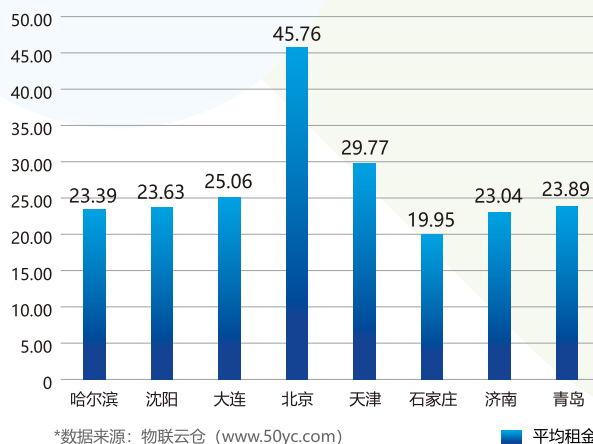
全国30个城市仓库平均租金为27.77元/ $\text{m}^2\cdot\text{月}$ ，环比上涨0.95%。其中，华南¹、华东地区仓库平均租金高于华北、华西、华中地区。相较5月，华西、华东地区仓库平均租金波动不大，保持平稳；华中、华北、华南地区仓库平均租金均有所上涨，涨幅分别为1.58%（华中）、1.44%（华北）、1.01%（华南）。

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/ $\text{m}^2\cdot\text{月}$ 。相较5月，上海、深圳仓库平均租金波动不大；北京因全国最大的综合立体交通枢纽大兴国际机场竣工且即将投运，对附近仓库租赁市场产生了积极影响，仓库业主上调仓库租金，拉动北京仓库平均租金有所上涨，涨幅为4.24%。

仓库平均租金最低的城市为太原、石家庄、兰州，均低于21元/ $\text{m}^2\cdot\text{月}$ 。相较5月，兰州、石家庄仓库租金波动不大；太原因受618年中大促影响，租户集中在5月租仓，6月仓库需求逐渐呈回落态势，导致仓库平均租金有所下降，降幅为5.85%。

在需求和供给双重驱动下，南昌仓库平均租金水平波动最大，环比上涨15.43%。一方面，政府持续推进旧城改造规划，南昌青山湖区、西湖区、东湖区、新建区部分老旧仓库将面临拆迁，租仓需求增加，拉动租金上涨；另一方面，部分新建优质仓库资源投入市场，也拉高了当地仓库平均租金水平。

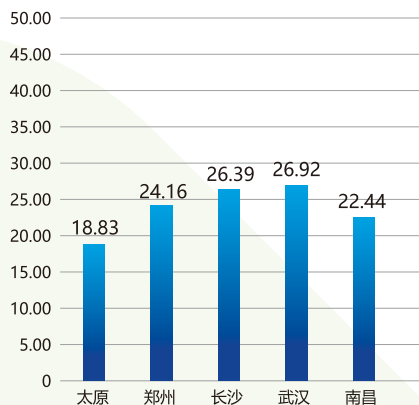
6月华北地区仓库租金情况

(单位：元/ $\text{m}^2\cdot\text{月}$)

1. 本报告中的地理分区依据物联云仓平台业务进行划分。

6月华中地区仓库租金情况

(单位: 元/m²·月)

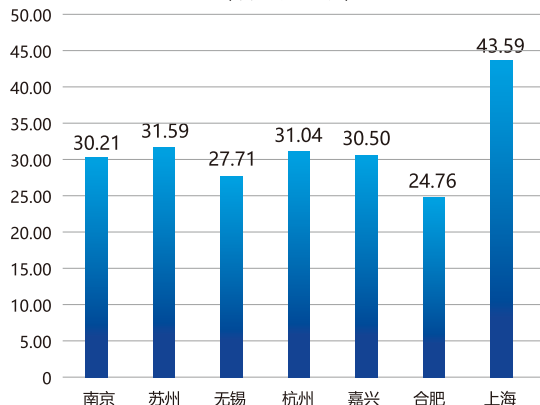


*数据来源: 物联云仓 (www.50yc.com)

■ 平均租金

6月华东地区仓库租金情况

(单位: 元/m²·月)

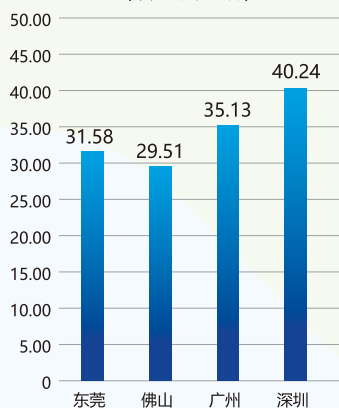


*数据来源: 物联云仓 (www.50yc.com)

■ 平均租金

6月华南地区仓库租金情况

(单位: 元/m²·月)

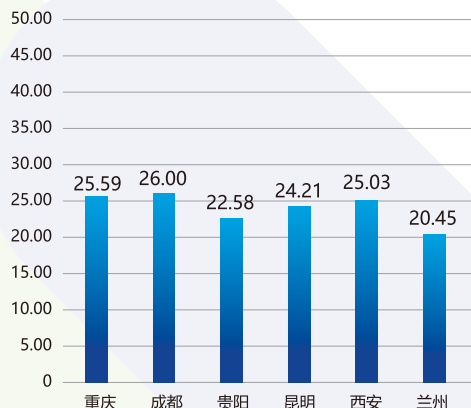


*数据来源: 物联云仓 (www.50yc.com)

■ 平均租金

6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

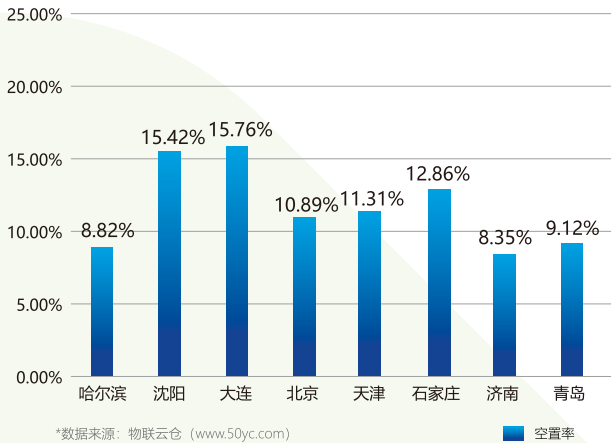
• 2019年6月 中国通用仓储设施空置率情况

全国30个城市仓库平均空置率为10.77%，环比上涨1.13%。其中，华西、华北、华中地区仓库空置率高于华南、华东。相较5月，华南、华中、华西地区仓库空置率波动不大；华北、华东地区仓库空置率有所上涨，涨幅分别为2.04%（华北）、1.19%（华东）。

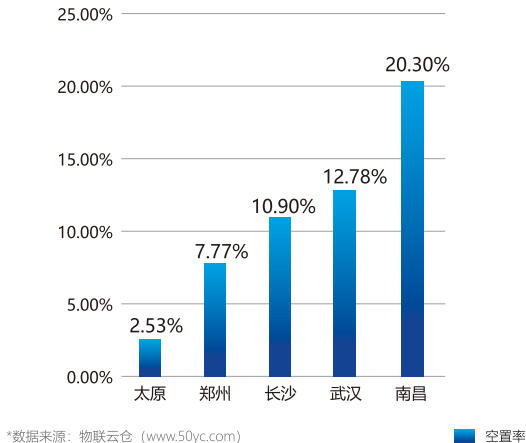
仓库空置率最高的城市为重庆、南昌，均超过20%。相较5月，重庆仓库空置率波动不大；南昌由于有部分高标库投入市场，如江西中江国际物流（约9万m²）、南昌众泽物流（1.2万m²）、苏宁物流基地仓库（超5万m²）等，导致仓库空置率有所上涨，涨幅为7.05%。

仓库空置率最低的城市为太原、无锡，均低于5%。相较5月，无锡、太原仓库空置率波动不大，仓储市场基本保持平稳。本月无锡硕放机场高标仓库（2.4万m²）建成、太原晋德帮医药物流产业园（整体规划30万m²）部分库区建成，未来两个月太原阳曲康产业园区也预计将有33万m²仓库投入市场，届时太原仓库空置率或将有所上涨。

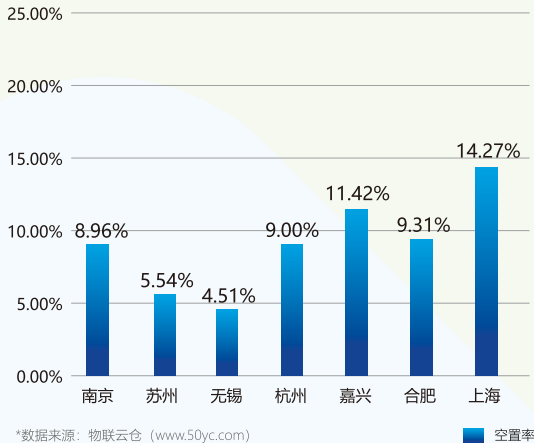
6月华北地区仓库空置率情况



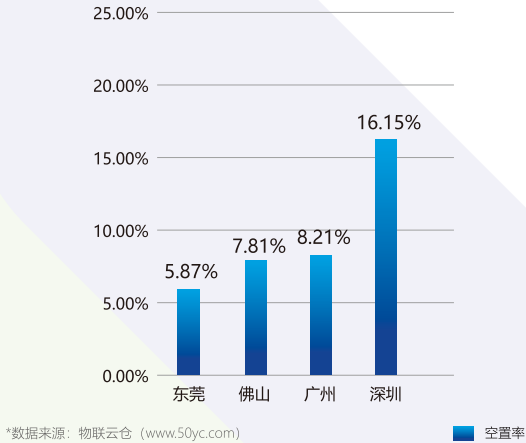
6月华中地区仓库空置率情况



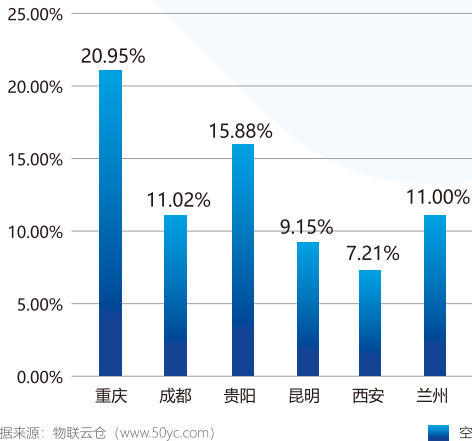
6月华东地区仓库空置率情况



6月华南地区仓库空置率情况



6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	45.76	4.24%	10.89%	0.85%
上海	43.59	0.46%	14.27%	-0.29%
深圳	40.24	0.00%	16.15%	-1.83%
苏州	31.59	1.45%	5.54%	2.07%
杭州	31.04	-0.03%	9.00%	2.23%
广州	35.13	0.40%	8.21%	2.78%
东莞	31.58	1.58%	5.87%	-3.35%
南京	30.21	0.00%	8.96%	0.79%
佛山	29.51	2.54%	7.81%	5.70%
嘉兴	30.50	1.53%	11.42%	2.63%
长沙	26.39	-0.08%	10.90%	0.01%
天津	29.77	0.20%	11.31%	-0.54%
无锡	27.71	0.87%	4.51%	-0.09%
大连	25.06	-2.45%	15.76%	6.34%
重庆	25.59	0.04%	20.95%	1.72%
武汉	26.92	0.15%	12.78%	-2.56%
郑州	24.16	0.00%	7.77%	0.36%
沈阳	23.63	-0.55%	15.42%	-0.07%
合肥	24.76	-0.16%	9.31%	0.98%
昆明	24.21	0.00%	9.15%	-0.40%
哈尔滨	23.39	-0.26%	8.82%	3.38%
成都	26.00	0.39%	11.02%	0.85%
青岛	23.89	0.34%	9.12%	2.28%
西安	25.03	1.91%	7.21%	-0.99%
贵阳	22.58	-2.29%	15.88%	1.13%
太原	18.83	-5.85%	2.53%	-1.77%
济南	23.04	6.13%	8.35%	1.65%
南昌	22.44	15.43%	20.30%	7.05%
石家庄	19.95	2.99%	12.86%	2.41%
兰州	20.45	0.00%	11.00%	0.61%

*数据来源：物联云仓（www.50yc.com）

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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会组织。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 JUNE 2019

At present, The Dynamic Report of China' s General Warehouse Market has been issued eleven 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 2019 after extending the results of previous reports, expanding the scope of selected statistics and deepening the analysis of warehousing market. In June 2019, the total available warehouse area of Warehouse in Cloud (WIC) increased by 5.70 million square meters, with a total area of over 287 million square meters, an increase of 2.02% compared with May 2019; the rentable area exceeded 33.10 million square meters, an increase of 8.58% from May, and warehouse resources has covered 32 provinces, 215 cities, and 6,517 parks.

Rental level of Warehousing Facilities in China in June 2019

The average rent of warehouses in 30 cities across the country was RMB 27.77 /m²per month, an increase of 0.95% from the previous month. Among them, the average rent in South China¹ and East China was higher than that in North China, West China and Central China. Compared with May, the average warehouse rent in West and East China fluctuates little and remains stable. The average warehouse rent increased by 1.58% in Central China, 1.44% in North China and 1.01% in South China.

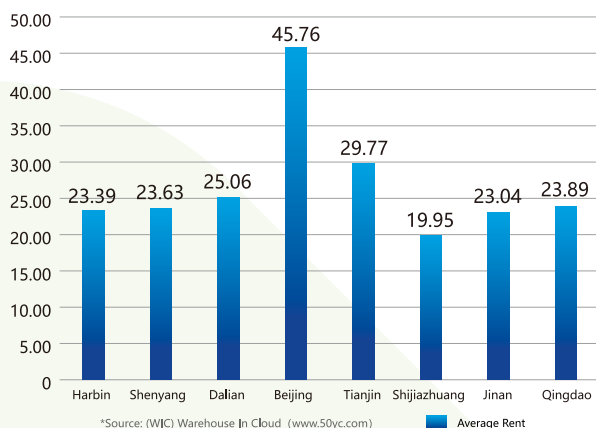
The cities with the highest average warehouse rent remained to be Beijing, Shanghai and Shenzhen, all above RMB 40/m²per month. Compared with May, average rents in warehouses in Shanghai and Shenzhen fluctuated little. The completion and commissioning of China's largest Integrated Stereo Transport Hub- Daxing International Airport in Beijing has created positive impact on surrounding warehouse renting market as warehouse owners raised warehouse rents and drove the average rent of the warehouse in Beijing to increase by 4.24%.

The cities with the lowest average rent of warehouses are Taiyuan, Shijiazhuang and Lanzhou, all of which are less than RMB21/m²per month. Compared with May, the warehouse rent of Lanzhou and Shijiazhuang fluctuated little. Due to the influence of the "618 Shopping Festival" , most of the tenants rented warehouses in May, and warehouse demand gradually fell in June, resulting in a decrease in the average warehouse rent by 5.85%.

Driven by both the demand and supply sides, the average rent level of Nanchang warehouse fluctuated the most, up 15.43% from the previous month. On the one hand, as the government continues to promote the reconstruction of old areas, outmoded warehouses in Qingshanhu District, Xihu District, Donghu District and Xinjian District is facing demolition, which increased the demand for substitute warehouses, driving up rent of warehouse in Nanchang. On the other hand, some new high-quality warehouse resources have been put into the market, which has also raised the average rent level of local warehouses.

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

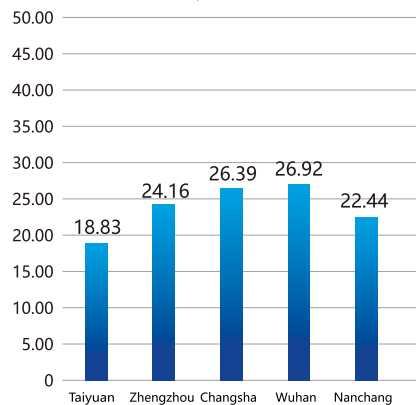
North China Warehouse Rent in June
(RMB/m² per month)



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

Average Rent

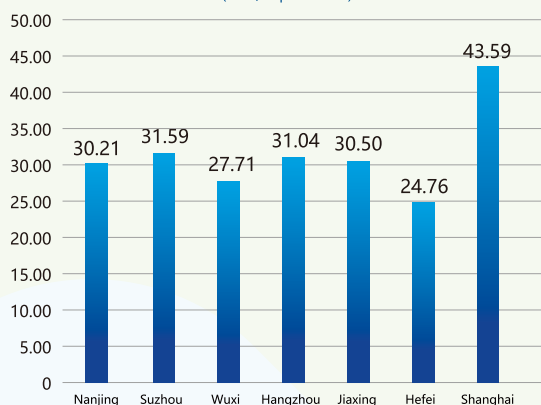
Central China Warehouse Rent in June
(RMB/m² per month)



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

Average Rent

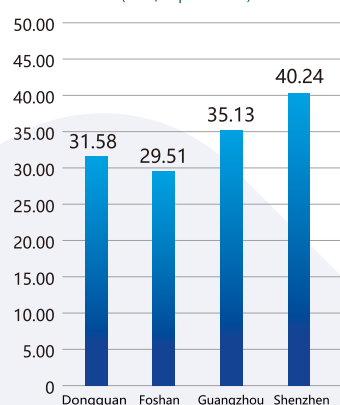
East China Warehouse Rent in June
(RMB/m² per month)



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

Average Rent

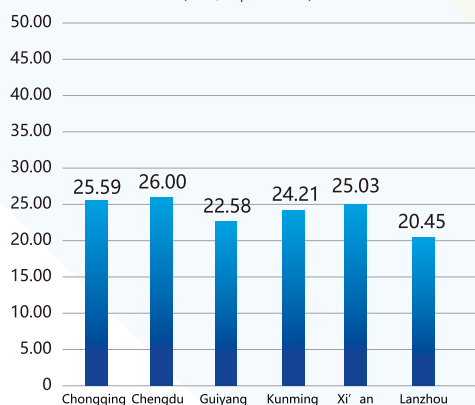
South China Warehouse Rent in June
(RMB/m² per month)



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

Average Rent

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



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

Average Rent

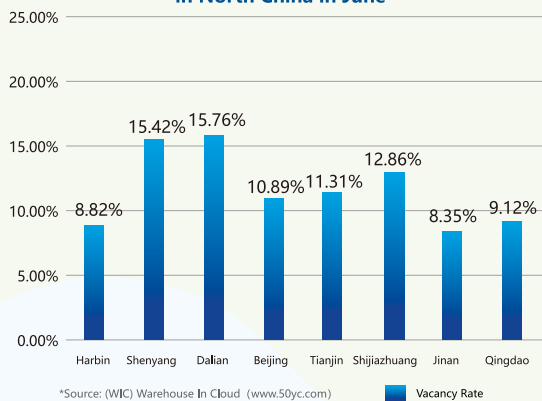
China's Warehousing Facilities Vacancy Rate in June 2019

The average vacancy rate of warehouses in 30 cities across the country was 10.77%, up 1.13% from the previous month. Among them, the vacancy rate of warehouses in West China, North China and Central China was higher than that in South China and East China. Compared with May, the warehouse vacancy rate in South China, Central China and West China fluctuated little, while the warehouse vacancy rate increased by 2.04% in North China and 1.19% in East China.

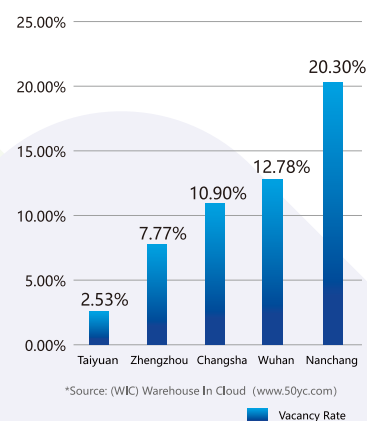
The cities with the highest warehouse vacancy rates are Chongqing and Nanchang, both of which are more than 20%. Compared with May, the vacancy rate of warehouse in Chongqing fluctuated little. Due to the fact that some high-standard warehouses have been put into the market in Nanchang, such as the Zhongjiang International Logistics of about 90,000 square meters in Jiangxi Province, Nanchang Zhongze Logistics with 12,000 square meters, SUNNING Logistics Base Warehouse of over 50,000 square meters, the vacancy rate of warehouses has increased by 7.05%.

The cities with the lowest warehouse vacancy rate were Taiyuan and Wuxi, both less than 5%. Compared with May, the vacancy rate of warehouses in these two cities fluctuated little, and the warehousing market remained basically stable. This month, Shuofang Airport High-standard Warehouse park with 24,000 square meters in Wuxi and part of the Jindebang Pharmaceutical Logistics Industrial Park with an overall planning of 300,000 square meters in Wuxi were completed. In the next two months, there will be an area of 330,000 square meters in Taiyuan Yangqukang Industrial Park put into the market, and the vacancy rate of Taiyuan warehouse will increase.

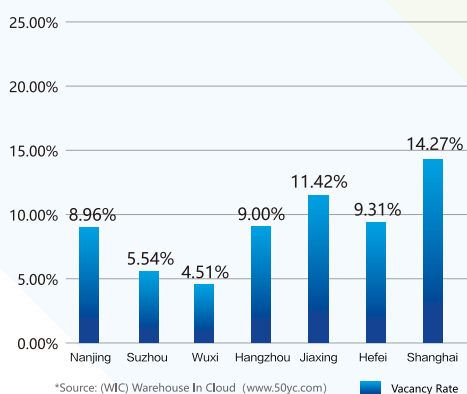
The Vacancy Rate of Warehouses
in North China in June



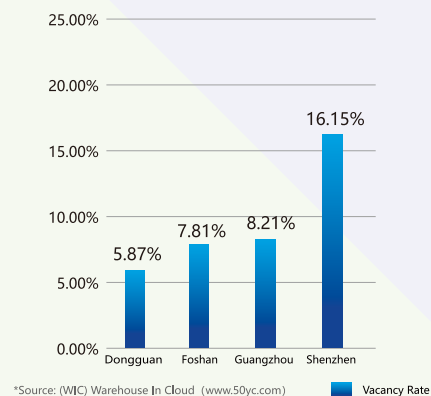
The Vacancy Rate of Warehouses
in Central China in June



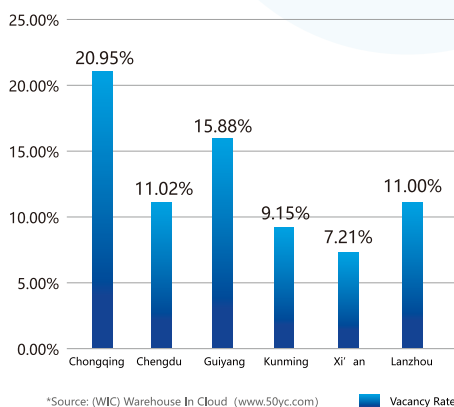
The Vacancy Rate of Warehouses
in East China in June



The Vacancy Rate of Warehouses
in South China in June



The Vacancy Rate of Warehouses
in West China in June

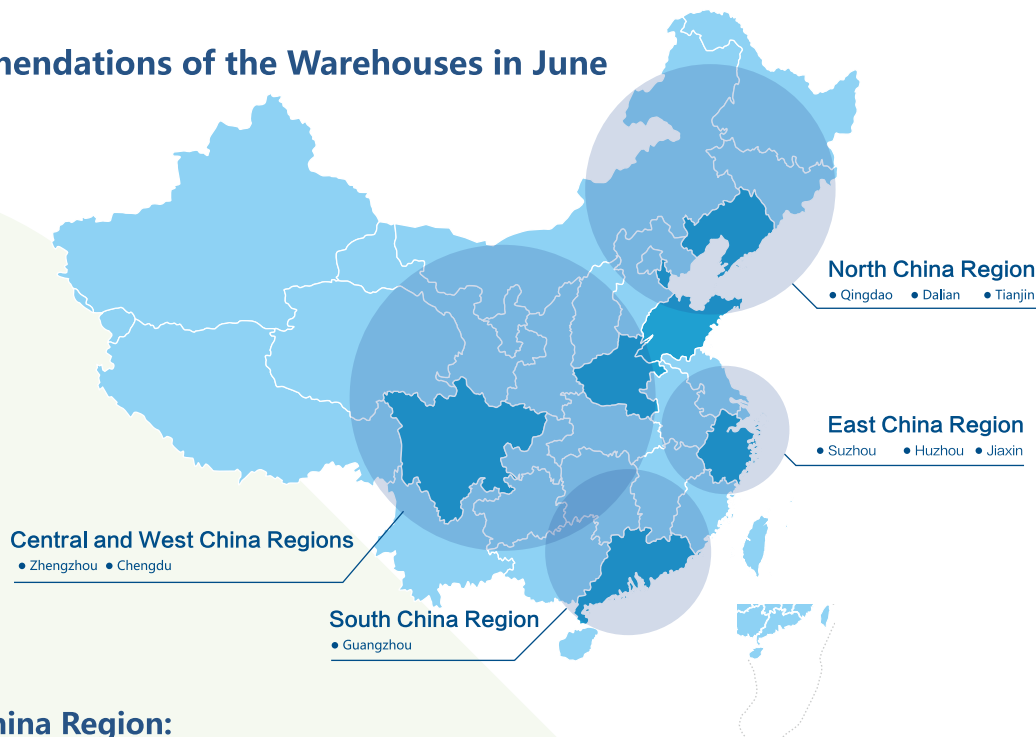


List of Average Rents and Vacancy Rates in 30 Cities of China

City	Average Rent Fee (RMB/m ² per month)	Month-to-Month Comparisons	Vacancy Rate	Month-to-Month Comparisons
Beijing	45.76	4.24%	10.89%	0.85%
Shanghai	43.59	0.46%	14.27%	-0.29%
Shenzhen	40.24	0.00%	16.15%	-1.83%
Suzhou	31.59	1.45%	5.54%	2.07%
Hangzhou	31.04	-0.03%	9.00%	2.23%
Guangzhou	35.13	0.40%	8.21%	2.78%
Dongguan	31.58	1.58%	5.87%	-3.35%
Nanjing	30.21	0.00%	8.96%	0.79%
Foshan	29.51	2.54%	7.81%	5.70%
Jiaxing	30.50	1.53%	11.42%	2.63%
Changsha	26.39	-0.08%	10.90%	0.01%
Tianjin	29.77	0.20%	11.31%	-0.54%
Wuxi	27.71	0.87%	4.51%	-0.09%
Dalian	25.06	-2.45%	15.76%	6.34%
Chongqing	25.59	0.04%	20.95%	1.72%
Wuhan	26.92	0.15%	12.78%	-2.56%
Zhengzhou	24.16	0.00%	7.77%	0.36%
Shenyang	23.63	-0.55%	15.42%	-0.07%
Hefei	24.76	-0.16%	9.31%	0.98%
Kunming	24.21	0.00%	9.15%	-0.40%
Harbin	23.39	-0.26%	8.82%	3.38%
Chengdu	26.00	0.39%	11.02%	0.85%
Qingdao	23.89	0.34%	9.12%	2.28%
Xi' an	25.03	1.91%	7.21%	-0.99%
Guiyang	22.58	-2.29%	15.88%	1.13%
Taiyuan	18.83	-5.85%	2.53%	-1.77%
Jinan	23.04	6.13%	8.35%	1.65%
Nanchang	22.44	15.43%	20.30%	7.05%
Shijiazhuang	19.95	2.99%	12.86%	2.41%
Lanzhou	20.45	0.00%	11.00%	0.61%

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

Recommendations of the Warehouses in June



South China Region:

Warehouse Address: AoHangXianCun Logistics Park, Xiancun Avenue, Zengcheng District, Guangzhou

Rentable Area: 25,000 square meters

Project Features: This storehouse park was completed in August 2016, being the new high-standard warehouse with 8 meters wide unloading platform and 10 meters wide rain shed. The net height of the warehouse is 14.5 meters, and the carborundum ground has a bearing capacity of 4 tons. Office and dormitory supporting facilities are complete. There are 5 kilometers away from Guangyuan Expressway, 3 kilometers away from Guanghui Expressway, 8 kilometers away from Huanggang Expressway and 10 kilometers from Beijing-Hong Kong-Macao Expressway.

Contact: Xin Chengkuan

Number: 13424009588

East China Region:

Warehouse Address: Jingban Road, Kunshan City, Suzhou

Rentable Area: 60,000 square meters

Project Features: This warehouse is located in the north of Kunshan, east of Taicang and Shanghai, west of Suzhou Industrial Park, and connected with the Beijing-Shanghai Expressway, Shanghai-Ningbo Intercity High-speed Railway, Shanghai-Ningbo Expressway, the 312 National Highway, Su-Kun-Tai Expressway and Suzhou Belt Expressway and other transportation hubs. It can be used as a suitable location for industrial logistics covering Suzhou Industrial Park, Changshu, Taicang and other large-scale manufacturing distribution centers, as well as an excellent vector for the distribution and transit of urban consumer goods in Shanghai, Kunshan, Suzhou and other places.

Contact: Xu Kun

Number: 18018127953

Warehouse Address: Deqing Port International Logistics Park, Huzhou City

Rentable Area: 20,000 square meters

Project Features: This warehouse locates in Deqing Port, which is the northern extension of Hangzhou city, occupied by many large-scale production and processing enterprises, creating a strong demand on water and land transport and warehousing of Deqing Port. The project is adjacent to the Beijing-Hangzhou Grand Canal and Deqing Port. It is about 9 kilometers away from the Hangzhou-Ningbo Expressway, 9 kilometers from Lianhang Expressway, 5 kilometers from Deqing Highspeed Rail Station and 15 minutes' drive to Hangzhou city.

Contact: Mao Linlin

Number: 17767108004

Warehouse Address: Wangdian Town, Xiuzhou District, Jiaxing City

Rentable Area: 50,000 square meters

Project Features: This warehouse park is only 2 kilometers away from three high-speed intersections, enjoys convenient transportation and easy entry for trucks. The first phase of the project covers an area of 165 mu, equipped with 202 scattered freight dedicated line stalls and more than 50,000 square meters of storage area. There are also 20,000 square meters of office and living supporting area. Storehouse of this park has C-class II fire protection qualification.

Contact: Shen Jianfeng

Number: 15858329935

Central and West China Regions:

Warehouse Address: Liangzhou Avenue, Haizao Road, Airport Port District, Zhengzhou

Rentable Area: 20,000 square meters

Project Features: They are high platform storehouse with a net height of 9.0 meters, platform height of 1.3 meters (built-in platform), double-sided unloading stalls, turnover fields of 40 meters, column net width of 28 meters, a depth of 11.5 meters. They all have C-class II fire protection qualification and equipped with fire hydrant system, ESFR sprinkler system. Effective rent can be RMB0.9 /m² per day and provide with preparation usage for free. And it also has a favorable location.

Contact: Wang Kun

Number: 18539978971

Warehouse Address: Intersection of Huangang Road and Muhua Road, Shuangliu District, Chengdu

Rentable Area: 30,000 square meters

Project Features: This warehouse covers an area of about 536 mu, mainly divided by 8 e-commerce logistics centers, each with a storage area of about 20,000 square meters. There are also corresponding supporting facilities such as operation center, power center and dormitory, which consists of five functional areas of warehousing and distribution, road freight distribution, business information service, commercial trade and supporting residence.

Contact: Huang Tianjiang

Number: 18123304630

North China Region:

Warehouse Address: Konggangwei Fifth Road, Dongli District, Tianjin

Rentable Area: 80,000 square meters

Project Features: This is a high-platform warehouse with C-class II fire protection qualification. All kinds of facilities are complete, being layered with carborundum floor and canopy and equipped with unloading platform. The park enjoys appropriate layout planning, independent office area and convenient transportation. It is 3 kilometers away from the Ningjing Expressway, 4 kilometers from Beijing-Tianjin-Tangshan Expressway, 10 kilometers from Beijing-Tianjin Expressway and 9 kilometers from Binhai Airport. It is suitable for being the e-commerce product storage and the urban distribution warehouse.

Contact: Sui Chao

Number: 18610640033

Warehouse Address: Jiangshan North Road, West Coast New District, Qingdao

Rentable Area: 35,000 square meters

Project Features: The park has 35,000 square meters of warehouse area and 70,000 square meters of container yards; the maximum storage capacity can reach 40,000 tons. The main storage materials are plastic pellets, steel, food raw materials, etc., and are equipped with garment sorting, inspection and other services.

Contact: Yang Fei

Number: 13061208829

Warehouse Address: Sanlibao Port Industrial Zone, Puwan New District, Dalian City

Rentable Area: 50,000 square meters

Project Features: This park is a high-standard warehouse with conservatory storehouses. It enjoys convenient transportation as is eight kilometers away from Shenda Expressway and only 0.5 kilometers away from the Bohai Avenue.

Contact: Jing Shaoxuan

Tel: 13889244310

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 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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