

# 2019年9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》已连续发布十四期。《报告》通过对物联云仓实时数据进行汇总、整理,全面反映我国主要物流节点城市的仓储设施租金水平和空置情况,体现通用仓储市场的供需动态变化,总结市场发展规律,预测市场发展趋势,为了解仓储市场发展情况、合理投资提供参考依据。

物联云仓延续往期《报告》成果,不断扩大统计范围,加强仓储市场分析,发布《2019年9月中国通用仓储市场动态报告》。2019年9月,物联云仓全国在线仓库面积新增160万㎡,总面积超3亿㎡,较8月增长0.56%;在线可租面积超3,314万㎡,较8月增长1.51%。仓库资源覆盖32个省份,217个城市,6,885个园区。

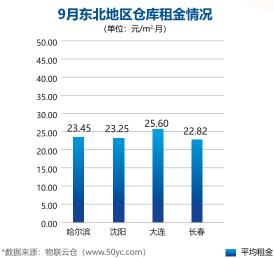
# • 2019年9月中国通用仓储设施租金水平

全国32个城市仓库平均租金为27.63元/㎡·月,环比上涨0.04%。其中,东部地区仓库平均租金(31.52元/㎡·月)高于西部(23.98元/㎡·月)、东北(23.78元/㎡·月)、中部(23.44元/㎡·月)地区。相较8月,东部地区仓库平均租金有小幅上涨,涨幅为0.64%;西部、东北、中部地区仓库平均租金保持平稳,增(降)幅在±0.1%以内。

北京、上海、深圳仓库平均租金仍然领先全国,均高于40元/㎡·月。相较8月,三地通用仓储市场稳定,平均租金波动不大,增(降)幅在±0.30%以内。本月25日,北京大兴国际机场正式投运,同时随着《北京新机场临空经济区规划(2016-2020年)》的推进,未来北京市礼贤镇、兴隆场等区域及河北省廊坊市、固安县、永清县部分区域仓储物流市场或将迎来爆发式增长。

受仓储设施条件、地理位置等影响,南昌、石家庄、太原仓库租金水平仍旧较低,均低于21元/㎡·月。相较8月,南昌、太原仓库租金波动不大,市场保持稳定;石家庄因市区三环内不再规划新建大型仓储设施,同时2019年1月起三环内全天禁止中型、重型载货汽车驶入,部分企业正逐步向周边区县转移,三环外仓库租赁需求增加,石家庄仓库平均租金自3月起持续上涨,9月延续上涨趋势,涨幅为1.20%。

相比8月,兰州仓库平均租金水平波动最大,环比上涨1.32%。因国庆、"双11"等促销旺季的到来,部分企业尤其是日用品、电商、快递快运企业临时扩仓需求增加。



(单位:元/m²·月) 50.00 45 00 40.00 35.00 30.00 26.80 25.88 24.73 24 33 25.00 20.69 18.18 20.00 15.00 10.00 5.00 太原 郑州 武汉 长沙 南昌 合肥

平均租金

\*数据来源:物联云仓 (www.50yc.com)

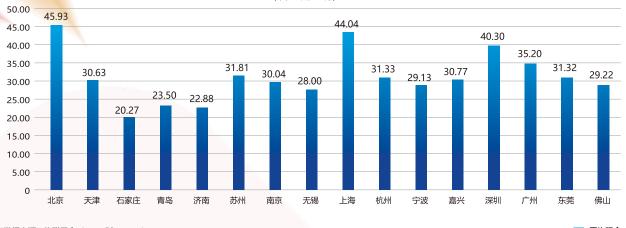
9月中部地区仓库租金情况





#### 9月东部地区仓库租金情况

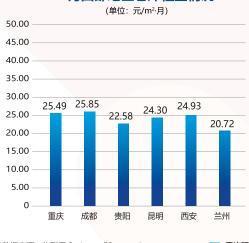
(单位:元/m²·月)



\*数据来源:物联云仓 (www.50yc.com)

- 平均租金

#### 9月西部地区仓库租金情况



\*数据来源:物联云仓 (www.50yc.com)

■ 平均租金

# • 2019年9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12.13%,环比下降1.14%。其中,东北地区仓库空置率(21.93%)远高于西部(12.15%)、中部(11.33%)、东部(9.98%)地区。相较8月,中部地区仓库空置率有小幅下降,降幅为0.76%;其他三个地区仓库空置率波动不大,增(降)幅在±0.2%以内。

仓库空置率最高的城市为长春、大连,平均在30%左右。相较8月,长春延续上月仓库空置率上升趋势,空置率升幅约2.99%;大连因2019年"双11"电商节临近,快递快运企业业务流量增加,临时扩仓需求加大,导致仓库空置率有小幅下降,降幅为1.36%。

仓库空置率最低的城市为苏州、无锡,均低于4%。相较8月,苏州、无锡仓库空置率波动不大。本月无锡市新吴库79,213㎡、松澜苏州相城园区51,240㎡建成交付。

相较8月,成都安博青白江物流园(5.1万㎡)、丰树青白江物流园(11.7万㎡)新建仓储项目竣工交付, 拉动当地仓库空置率上升幅度较大,升幅为6.65%。



# 9月东北地区仓库空置率情况

# 35.00% 32.61% 30.00% 29.16% 25.00% 20.00% 16.59% 15.00% 10.00% 9.34% 5.00% 0.00% 哈尔滨 沈阳 大连 长春

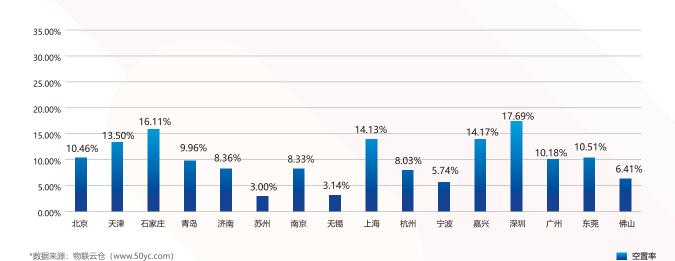
\*数据来源: 物联云仓 (www.50yc.com)

#### 9月中部地区仓库空置率情况

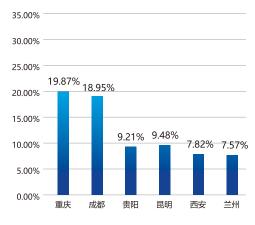


# 9月东部地区仓库空置率情况

空置率



## 9月西部地区仓库空置率情况



\*数据来源:物联云仓 (www.50yc.com)

空置率

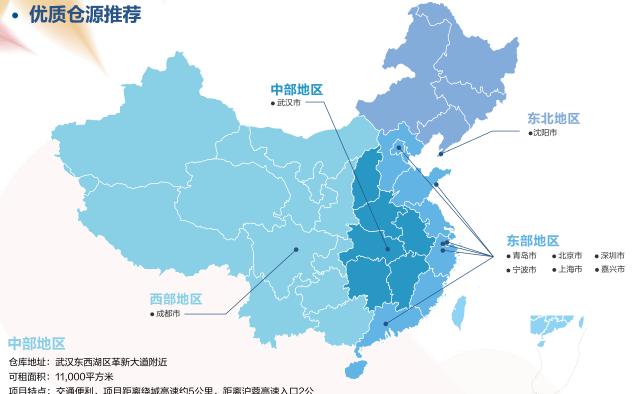


# • 表: 全国32个城市平均租金和空置率一览表

北京 45.93					
上海 44.04 0.11% 14.13% -0.65% 深圳 40.30 0.27% 17.69% 0.92%	城市	平均租金	环比变化	空置率	环比变化
深圳 40.30 0.27% 17.69% 0.92%	北京	45.93	-0.30%	10.46%	-0.14%
が州 31.81 0.28% 3.00% 0.01% 杭州 31.33 -0.22% 8.03% -0.13% 子波 29.13 0.34% 5.74% -1.72%	上海	44.04	0.11%	14.13%	-0.65%
抗州 31.33	深圳	40.30	0.27%	17.69%	0.92%
宁波       29.13       0.34%       5.74%       -1.72%         广州       35.20       -0.26%       10.18%       0.49%         东莞       31.32       0.00%       10.51%       -0.04%         南京       30.04       0.30%       8.33%       0.18%         佛山       29.22       0.00%       6.41%       0.00%         嘉兴       30.77       0.46%       14.17%       0.57%         长沙       25.88       0.00%       11.69%       1.33%         天津       30.63       0.10%       13.50%       0.70%         无锡       28.00       0.36%       3.14%       -0.43%         大達       25.60       0.08%       29.16%       -1.36%         长春       22.82       0.00%       32.61%       2.99%         重庆       25.49       -0.12%       19.87%       0.01%         武汉       26.80       0.04%       12.66%       -0.16%         郑州       24.33       0.29%       6.93%       -0.23%         沈阳       23.25       -0.13%       16.59%       0.63%         合肥       24.73       -0.84%       7.81%       -0.13%         哈尔滨       23.45       0.17%	苏州	31.81	0.28%	3.00%	0.01%
广州 35.20	杭州	31.33	-0.22%	8.03%	-0.13%
东莞 31.32 0.00% 10.51% -0.04% 南京 30.04 0.30% 8.33% 0.18% (佛山 29.22 0.00% 6.41% 0.00% 嘉兴 30.77 0.46% 14.17% 0.57% 长沙 25.88 0.00% 11.69% 1.33% 天津 30.63 0.10% 13.50% 0.70% 天場 28.00 0.36% 3.14% -0.43% 大连 25.60 0.08% 29.16% -1.36% 长春 22.82 0.00% 32.61% 2.99% 重庆 25.49 -0.12% 19.87% 0.01% 武汉 26.80 0.04% 12.66% -0.16% 3 3.14% 24.33 0.29% 6.93% -0.23% 沈阳 23.25 -0.13% 16.59% 0.63% 合肥 24.73 -0.84% 7.81% -0.13% 自分 23.45 0.17% 9.34% -0.01% 哈尔滨 23.45 0.17% 9.34% -1.47% 成都 25.85 -0.27% 18.95% 6.65% 青岛 23.50 -0.68% 9.96% -0.71% 西安 24.93 -0.68% 7.82% 0.69% カリニー・カー・カー・カー・カー・カー・カー・カー・カー・カー・カー・カー・カー・カー	宁波	29.13	0.34%	5.74%	-1.72%
南京 30.04 0.30% 8.33% 0.18% (俳山 29.22 0.00% 6.41% 0.00% 嘉兴 30.77 0.46% 14.17% 0.57% 长沙 25.88 0.00% 11.69% 1.33% 天津 30.63 0.10% 13.50% 0.70% 无锡 28.00 0.36% 3.14% -0.43% 大连 25.60 0.08% 29.16% -1.36% 1.32% 五字 2.82 0.00% 32.61% 2.99% 重庆 25.49 -0.12% 19.87% 0.01% 五汉 26.80 0.04% 12.66% -0.16% 郑州 24.33 0.29% 6.93% -0.23% 沈阳 23.25 -0.13% 16.59% 0.63% 6.88 24.73 -0.84% 7.81% -0.13% 16.59% 0.63% 6.88 23.45 0.17% 9.34% -1.47% 成都 25.85 -0.27% 18.95% 6.65% 6.65% 6.65% 18.18 -0.49% 5.43% 3.78%	广州	35.20	-0.26%	10.18%	0.49%
<ul> <li>佛山 29.22 0.00% 6.41% 0.00%</li> <li>嘉兴 30.77 0.46% 14.17% 0.57%</li> <li>长沙 25.88 0.00% 11.69% 1.33%</li> <li>天津 30.63 0.10% 13.50% 0.70%</li> <li>无锡 28.00 0.36% 3.14% -0.43%</li> <li>大连 25.60 0.08% 29.16% -1.36%</li> <li>长春 22.82 0.00% 32.61% 2.99%</li> <li>重庆 25.49 -0.12% 19.87% 0.01%</li> <li>武汉 26.80 0.04% 12.66% -0.16%</li> <li>郑州 24.33 0.29% 6.93% -0.23%</li> <li>冷阳 23.25 -0.13% 16.59% 0.63%</li> <li>合肥 24.73 -0.84% 7.81% -0.13%</li> <li>昆明 24.30 -0.45% 9.48% -0.01%</li> <li>哈尔滨 23.45 0.17% 9.34% -1.47%</li> <li>成都 25.85 -0.27% 18.95% 6.65%</li> <li>青岛 23.50 -0.68% 9.96% -0.71%</li> <li>西安 24.93 -0.68% 7.82% 0.69%</li> <li>贵阳 22.58 0.00% 9.21% -4.48%</li> <li>太原 18.18 -0.49% 5.43% 3.78%</li> <li>济南 22.88 0.00% 8.36% 0.00%</li> <li>南昌 20.69 0.34% 23.44% -6.20%</li> <li>石家庄 20.27 1.20% 16.11% 0.52%</li> </ul>	东莞	31.32	0.00%	10.51%	-0.04%
嘉兴 30.77 0.46% 14.17% 0.57% 长沙 25.88 0.00% 11.69% 1.33% 天津 30.63 0.10% 13.50% 0.70% 无锡 28.00 0.36% 29.16% -1.36% 长春 22.82 0.00% 32.61% 2.99% 重庆 25.49 -0.12% 19.87% 0.01% 武汉 26.80 0.04% 12.66% -0.16% 郑州 24.33 0.29% 6.93% -0.23% 沈阳 23.25 -0.13% 16.59% 0.63% 6.88 24.73 -0.84% 7.81% -0.01% 哈尔滨 23.45 0.17% 9.34% -1.47% 成都 25.85 -0.27% 18.95% 6.65% 青岛 23.50 -0.68% 9.96% -0.71% 西安 24.93 -0.68% 7.82% 0.69% 贵阳 22.58 0.00% 9.21% -4.48% 太原 18.18 -0.49% 5.43% 3.78% 济南 22.88 0.00% 8.36% 0.00% 高高量 20.69 0.34% 23.44% -6.20% 石家庄 20.27 1.20% 16.11% 0.552%	南京	30.04	0.30%	8.33%	0.18%
长沙       25.88       0.00%       11.69%       1.33%         天津       30.63       0.10%       13.50%       0.70%         无場       28.00       0.36%       3.14%       -0.43%         大達       25.60       0.08%       29.16%       -1.36%         长春       22.82       0.00%       32.61%       2.99%         重庆       25.49       -0.12%       19.87%       0.01%         武汉       26.80       0.04%       12.66%       -0.16%         郑州       24.33       0.29%       6.93%       -0.23%         沈阳       23.25       -0.13%       16.59%       0.63%         合肥       24.73       -0.84%       7.81%       -0.13%         昆明       24.30       -0.45%       9.48%       -0.01%         哈尔滨       23.45       0.17%       9.34%       -1.47%         成都       25.85       -0.27%       18.95%       6.65%         青岛       23.50       -0.68%       9.96%       -0.71%         西安       24.93       -0.68%       7.82%       0.69%         贵阳       22.58       0.00%       9.21%       -4.48%         太原       18.18       -0.49%	佛山	29.22	0.00%	6.41%	0.00%
天津       30.63       0.10%       13.50%       0.70%         无锡       28.00       0.36%       3.14%       -0.43%         大達       25.60       0.08%       29.16%       -1.36%         长春       22.82       0.00%       32.61%       2.99%         重庆       25.49       -0.12%       19.87%       0.01%         武汉       26.80       0.04%       12.66%       -0.16%         郑州       24.33       0.29%       6.93%       -0.23%         沈阳       23.25       -0.13%       16.59%       0.63%         合肥       24.73       -0.84%       7.81%       -0.13%         昆明       24.30       -0.45%       9.48%       -0.01%         哈尔滨       23.45       0.17%       9.34%       -1.47%         成都       25.85       -0.27%       18.95%       6.65%         青岛       23.50       -0.68%       9.96%       -0.71%         西安       24.93       -0.68%       7.82%       0.69%         贵阳       22.58       0.00%       9.21%       -4.48%         太原       18.18       -0.49%       5.43%       3.78%         济南       22.88       0.00%	嘉兴	30.77	0.46%	14.17%	0.57%
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大连       25.60       0.08%       29.16%       -1.36%         长春       22.82       0.00%       32.61%       2.99%         重庆       25.49       -0.12%       19.87%       0.01%         武汉       26.80       0.04%       12.66%       -0.16%         郑州       24.33       0.29%       6.93%       -0.23%         沈阳       23.25       -0.13%       16.59%       0.63%         合肥       24.73       -0.84%       7.81%       -0.13%         昆明       24.30       -0.45%       9.48%       -0.01%         哈尔滨       23.45       0.17%       9.34%       -1.47%         成都       25.85       -0.27%       18.95%       6.65%         青岛       23.50       -0.68%       9.96%       -0.71%         西安       24.93       -0.68%       7.82%       0.69%         贵阳       22.58       0.00%       9.21%       -4.48%         太原       18.18       -0.49%       5.43%       3.78%         济南       22.88       0.00%       8.36%       0.00%         南昌       20.69       0.34%       23.44%       -6.20%         石家庄       20.27       1.20%	天津	30.63	0.10%	13.50%	0.70%
长春       22.82       0.00%       32.61%       2.99%         重庆       25.49       -0.12%       19.87%       0.01%         武汉       26.80       0.04%       12.66%       -0.16%         郑州       24.33       0.29%       6.93%       -0.23%         沈阳       23.25       -0.13%       16.59%       0.63%         合肥       24.73       -0.84%       7.81%       -0.13%         昆明       24.30       -0.45%       9.48%       -0.01%         哈尔滨       23.45       0.17%       9.34%       -1.47%         成都       25.85       -0.27%       18.95%       6.65%         青岛       23.50       -0.68%       9.96%       -0.71%         西安       24.93       -0.68%       7.82%       0.69%         贵阳       22.58       0.00%       9.21%       -4.48%         太原       18.18       -0.49%       5.43%       3.78%         济南       22.88       0.00%       8.36%       0.00%         南昌       20.69       0.34%       23.44%       -6.20%         石家庄       20.27       1.20%       16.11%       0.52%	无锡	28.00	0.36%	3.14%	-0.43%
重庆 25.49	大连	25.60	0.08%	29.16%	-1.36%
武汉 26.80 0.04% 12.66% -0.16% 郑州 24.33 0.29% 6.93% -0.23% 沈阳 23.25 -0.13% 16.59% 0.63% 合肥 24.73 -0.84% 7.81% -0.13% 昆明 24.30 -0.45% 9.48% -0.01% 哈尔滨 23.45 0.17% 9.34% -1.47% 成都 25.85 -0.27% 18.95% 6.65% 青岛 23.50 -0.68% 9.96% -0.71% 西安 24.93 -0.68% 7.82% 0.69% 贵阳 22.58 0.00% 9.21% -4.48% 太原 18.18 -0.49% 5.43% 3.78% 济南 22.88 0.00% 8.36% 0.00% 南昌 20.69 0.34% 23.44% -6.20% 石家庄 20.27 1.20% 16.11% 0.52%	长春	22.82	0.00%	32.61%	2.99%
郑州 24.33 0.29% 6.93% -0.23%  沈阳 23.25 -0.13% 16.59% 0.63%  合肥 24.73 -0.84% 7.81% -0.13%  昆明 24.30 -0.45% 9.48% -0.01%  哈尔滨 23.45 0.17% 9.34% -1.47%  成都 25.85 -0.27% 18.95% 6.65%  青岛 23.50 -0.68% 9.96% -0.71%  西安 24.93 -0.68% 7.82% 0.69%  贵阳 22.58 0.00% 9.21% -4.48%  太原 18.18 -0.49% 5.43% 3.78%  济南 22.88 0.00% 8.36% 0.00%  南昌 20.69 0.34% 23.44% -6.20%  石家庄 20.27 1.20% 16.11% 0.52%	重庆	25.49	<b>−</b> 0.12%	19.87%	0.01%
沈阳   23.25   -0.13%   16.59%   0.63%     合肥   24.73   -0.84%   7.81%   -0.13%     昆明   24.30   -0.45%   9.48%   -0.01%     哈尔滨   23.45   0.17%   9.34%   -1.47%     成都   25.85   -0.27%   18.95%   6.65%     青岛   23.50   -0.68%   9.96%   -0.71%     西安   24.93   -0.68%   7.82%   0.69%     贵阳   22.58   0.00%   9.21%   -4.48%     太原   18.18   -0.49%   5.43%   3.78%     济南   22.88   0.00%   8.36%   0.00%     南昌   20.69   0.34%   23.44%   -6.20%     石家庄   20.27   1.20%   16.11%   0.52%	武汉	26.80	0.04%	12.66%	-0.16%
合肥 24.73	郑州	24.33	0.29%	6.93%	-0.23%
昆明 24.30	沈阳	23.25	-0.13%	16.59%	0.63%
哈尔滨 23.45 0.17% 9.34% -1.47% 成都 25.85 -0.27% 18.95% 6.65% 青岛 23.50 -0.68% 9.96% -0.71% 西安 24.93 -0.68% 7.82% 0.69% 贵阳 22.58 0.00% 9.21% -4.48% 太原 18.18 -0.49% 5.43% 3.78% 济南 22.88 0.00% 8.36% 0.00% 南昌 20.69 0.34% 23.44% -6.20% 石家庄 20.27 1.20% 16.11% 0.52%	合肥	24.73	-0.84%	7.81%	-0.13%
成都 25.85	昆明	24.30	-0.45%	9.48%	-0.01%
青岛       23.50       -0.68%       9.96%       -0.71%         西安       24.93       -0.68%       7.82%       0.69%         贵阳       22.58       0.00%       9.21%       -4.48%         太原       18.18       -0.49%       5.43%       3.78%         济南       22.88       0.00%       8.36%       0.00%         南昌       20.69       0.34%       23.44%       -6.20%         石家庄       20.27       1.20%       16.11%       0.52%	哈尔滨	23.45	0.17%	9.34%	-1.47%
西安 24.93 -0.68% 7.82% 0.69% 贵阳 22.58 0.00% 9.21% -4.48% 太原 18.18 -0.49% 5.43% 3.78% 济南 22.88 0.00% 8.36% 0.00% 南昌 20.69 0.34% 23.44% -6.20% 石家庄 20.27 1.20% 16.11% 0.52%	成都	25.85	-0.27%	18.95%	6.65%
贵阳     22.58     0.00%     9.21%     -4.48%       太原     18.18     -0.49%     5.43%     3.78%       济南     22.88     0.00%     8.36%     0.00%       南昌     20.69     0.34%     23.44%     -6.20%       石家庄     20.27     1.20%     16.11%     0.52%	青岛	23.50	-0.68%	9.96%	-0.71%
太原     18.18     -0.49%     5.43%     3.78%       济南     22.88     0.00%     8.36%     0.00%       南昌     20.69     0.34%     23.44%     -6.20%       石家庄     20.27     1.20%     16.11%     0.52%	西安	24.93	-0.68%	7.82%	0.69%
济南     22.88     0.00%     8.36%     0.00%       南昌     20.69     0.34%     23.44%     -6.20%       石家庄     20.27     1.20%     16.11%     0.52%	贵阳	22.58	0.00%	9.21%	-4.48%
南昌     20.69     0.34%     23.44%     -6.20%       石家庄     20.27     1.20%     16.11%     0.52%	太原	18.18	-0.49%	5.43%	3.78%
石家庄 20.27 1.20% 16.11% 0.52%	济南	22.88	0.00%	8.36%	0.00%
	南昌	20.69	0.34%	23.44%	-6.20%
<b>兰州</b> 20.72 1.32% 7.57% −2.82%	石家庄	20.27	1.20%	16.11%	0.52%
	兰州	20.72	1.32%	7 <mark>.57%</mark>	-2.82%

\*数据来源: 物联云仓(www.50yc.com)





项目特点:交通便利,项目距离绕城高速约5公里,距离沪蓉高速入口2公里,紧邻107国道 ,距离市中心汉口站26.5公里。三位一体的交通网络、七合一立体交通,区域生活配套齐全;单层丙二类高台库,进深20米,一

层净高9.5米, 1.3x4.5外置6吨月台

联系人: 王坤

联系电话: 15225100971

#### 西部地区

仓库地址:四川成都市青白江区东莞路二段一号

可租面积: 160,000平方米

项目特点:位于四川省广汉与青白江交界处,项目东靠成绵高速,西靠国道 G108,北靠成都二绕高速,处于成德绵经济带核心区。项目占地400亩, 建成9栋高标准物流仓库和一座综合办公楼,集食堂、宿舍、仓储一体,仓

储面积达16万平方米 联系人: 黄天将 联系电话: 18123304630

#### 东部地区

仓库地址: 山东省青岛市平度南村 可租面积: 50,000平方米

项目特点:仓库位于平度即墨胶州交界处,交通便利,空港、铁路、公路立

体交通,高标准现代化仓库,证件齐全,性价比高

联系人: 杨飞

联系电话: 13061208829

仓库地址: 北京市大兴区天河北路

可租面积: 10,000平方米

项目特点:高台库,丙二类,设施齐全,金刚砂地面,具备卸货平台,有雨棚,园区规划合理,有独立办公区域,交通便利,附近有多条高速经过紧邻

南六环

联 系 人: 隋超

联系电话: 18610640033

仓库地址:深圳市宝安区福永街道和平村荔园路

可租面积: 75,000平方米

项目特点: 园区共5栋,宿舍2栋,办公1栋,配套齐全,消防丙二带喷淋, 层高6米,距107国道与高速入口3公里,地铁2公里,适合国际物流,货代,

电商仓储办公,物流快递,高新科技研发等群体

联系人: 辛成宽 联系电话: 15844334434 仓库地址: 宁波江北区通宁路 可租面积: 10,000平方米

项目特点:项目地位于宁波绕城高速以内,为宁波市区对外交互的节点位

置,选址于此主要可服务城市快消配送

联系人: 毛林林 联系电话: 17767108004

仓库地址: 上海市青浦区天瑞路附近

可租面积: 21,000平方米

项目特点: 位于国家级上海张江高新青浦园区,毗邻上海虹桥交通枢纽,借助完善的交通网络可为上海及周边地区提供快速有效的物流服务, 3幢3层坡道及电梯仓储设施,园区总面积约110,160平方米, 2020年2月1日起可租赁面积21,000平方米,室内净高9M,地面承重3吨/平方米,带卸货平台,丙二类。距离上海绕城高速2公里,至昆山花桥14KM,至上海

虹桥国际机场22KM,至上海市中心35KM

联 系 人: 谭伟

联系电话: 17717330045

仓库地址: 嘉兴市南湖区高标物流园

可租面积: 50,000平方米

项目特点:项目坐落于江浙沪三省交汇处的嘉兴南湖地区,坐拥嘉兴市东大门,是嘉兴接轨上海的前沿阵地,所在位置交通条件极为优越,位于G60、S7、S11三条高速合围而成的黄金三角地带,其中距G60沪杭高速入口仅2.5公里。同时,项目距三环东路仅3公里,亦便于为嘉兴市区

工业及消费品配送提供载体

联 系 人: 沈建锋

联系电话: 15858329935

## 东北地区

仓库地址:沈阳市苏家屯区机场路1011号

可租面积: 40,000平方米

项目特点:园区紧邻沈阳南四环,距离机场7公里,园区为高标丙二类仓

库,交通便利 联系人: 井绍轩 联系电话: 13889244310



# 中国仓储与配送协会简介

中国仓储与配送协会前身是1995年经原国内贸易部审批、在国家民政部登记注册的中国仓储协会,2016年5月经国务院国资委审批、民政部核准,更名为中国仓储与配送协会,是全国仓储配送行业的非营利性社团组织。现有共同配送、冷链、危险品、保税、钢材、金融仓储、中药材仓储、技术应用与工程服务、自助仓储、包装与单元化物流、家居物流、智慧物流等十二个分支机构。协会以推动中国仓储配送行业现代化、促进现代物流业的发展为宗旨,重点围绕各类仓储与配送设施建设、各类配送中心发展、仓配一体化服务与技术创新等开展政策研究、行业管理与自律、标准制定与实施、信息统计、资源整合、培训咨询、会议交流等。

# 物联云仓简介

物联云仓(www.50yc.com)是由四川物联亿达科技有限公司推出的互联网仓储综合服务平台,于2015年10月上线,主要提供仓库租赁、仓配一体、仓库物资、仓库技术等服务。物联云仓旨在通过互联网仓储服务平台+云端应用+线下服务的方式,为传统行业实现高效、经济、快速的转型升级提供坚强支撑。

声明:文中的一切资料及数据,仅作参考之用,物联云仓保留一切权利,转载请保留原文链接或注明出处。



# THE DYNAMIC REPORT OF CHINA'S

# **GENERAL WAREHOUSE MARKET IN SEPTEMBER 2019**

At present, The Dynamic Report of China's General Warehouse Market has been issued fourteen 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 September 2019 after extending the results of previous reports, expanding the scope of selected statistics and deepening the analysis of warehousing market. In September 2019, the total available warehouse area of Warehouse in Cloud (WIC) increased by 1.60 million square meters, with a total area of over 300 million square meters, an increase of 0.56% compared with August 2019; the rentable area exceeded 33.14 million square meters, an increase of 1.51% from August, and warehouse resources has covered 32 provinces, 217 cities, and 6,885 parks.

# Rental level of Warehousing Facilities in China in September 2019

The average rent of warehouses in 32 cities across the country was RMB 27.63 / m² per month, an increase of 0.04% from the previous month. Among them, the average rent of warehouses in the eastern region (RMB31.52/m² per month) was higher than that in the western region (RMB23.98/m² per month), the northeast (RMB23.78/m² per month) and the central region (RMB23.44/m² per month). Compared with Augest, the average warehouse rent in the eastern region increased slightly, by 0.64%; the average rent of warehouses in the western, northeast and central regions remained stable, with an increase (decrease) of less than 0.1%.

The average rent of warehouses in Beijing, Shanghai and Shenzhen was still higher than RMB40/ m² per month. Compared with August, the general warehousing market in the three places was stable, the average rent fluctuated little, and the range of increase (decrease) was less than 0.30%. On the 25th of this month, Beijing Daxing International Airport was officially put into operation. At the same time, with the advance of the Beijing New Airport Air Economic Zone Planning (2016-2020), Lixian Town, Xinglongchang in Beijing, Langfang City, Gu'an County, Yongqing County in Hebei Province and some other regional warehousing logistics markets may usher in explosive growth.

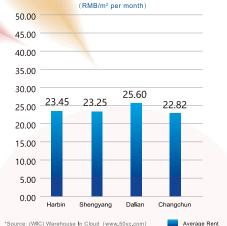
Affected by the conditions and geographical location of storage facilities, the rent level of Nanchang, Shijiazhuang and Taiyuan warehouses was still low, all below RMB21/m² per month. Compared with August, the rent of Nanchang and Taiyuan warehouses fluctuated little, and the market remained stable. Due to the fact that Shijiazhuang no longer plans to build new large warehousing facilities in the third Ring Road in the urban area, and at the same time, medium and heavy trucks are prohibited from driving in the third Ring Road throughout the day from January 2019, some enterprises were gradually transferring to the surrounding districts and counties, and the rental demand for warehouses outside the third Ring Road has increased. The average rental of warehouses in Shijiazhuang has continued to rise since March and continued its upward trend in September, up 1.20%.

Compared with August, the average rental level of warehouses in Lanzhou fluctuated the most, up 1.32% from the previous month. Due to the arrival of the National Day, "11.11 global shopping festival" and other promotional peak season, some enterprises, especially daily necessities, e-commerce, express enterprises increased demand on temporary expansion.

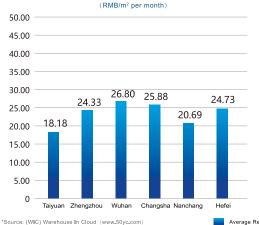




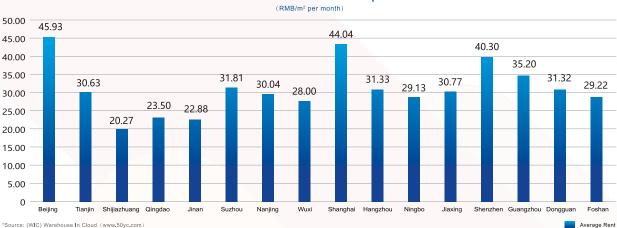
#### Northeast China Warehouse Rent in September



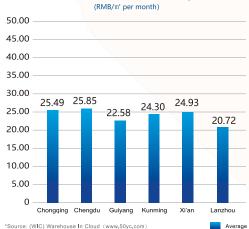
#### Central China Warehouse Rent in September



#### East China Warehouse Rent in September



#### West China Warehouse Rent in September



# China's Warehousing Facilities Vacancy Rate in September 2019

The average vacancy rate of warehouses in 32 cities across the country was 12.13%, down 1.14% from the previous month. Among them, the warehouse vacancy rate in northeast China (21.93%) was way higher than that in Eastern (9.98%), Central (11.33%) and Western (12.15%) areas. Compared with Augest, the warehouse vacancy rate in central China decreased by 0.76%, while the warehouse vacancy rate in the other three regions fluctuated little, with an increase (decrease) of less than 0.2%.

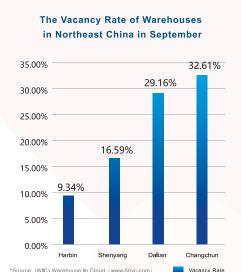
The cities with the highest vacancy rate of warehouses were Changchun and Dalian, with an average of about 30%. Compared with August, Changchun continued the rising trend of warehouse vacancy rate last month, with an increase of about 2.99%. In Dalian, due to the approach of the "11.11 global e-commerce shopping festival" in

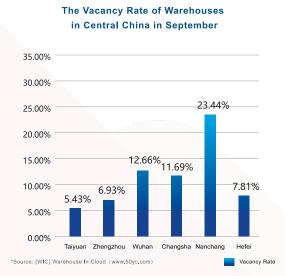


2019, the business flow of express delivery enterprises has increased, and the demand for temporary warehouse expansion has raised, resulting in a slight decline in warehouse vacancy rate, a drop of 1.36%.

The cities with the lowest vacancy rate of warehouses were Suzhou and Wuxi, all of which were less than 4%. Compared with August, the vacancy rate of Suzhou and Wuxi warehouses fluctuated little. The Xinwu Warehouse, located in Wuxi, covers an area of 79,213 square meters and Songlan Suzhou Xiangcheng Park, covering an area of 51,240 square meters has been completed and put into use in this month.

Compared with August, the Anbo Qingbai River Logistics Park in Chengdu, covering an area of 51,000 square meters and Fengshu Qingbai River Logistics Park, covering an area of 117,000 square meters has completed and put into use, driving a large increase in the vacancy rate of local warehouses. The increase was 6.65%.





The Vacancy Rate of Warehouses in East China in September 35.00% 30.00% 25.00% 20.00% 17.69% 16.11% 14.13% 14.17% 13.50% 15.00% 10.18% 10.51% 10.46% 9.96% 8.36% 8.33% 8.03% 10.00% 6.41% 5.74% 5.00% 0.00% Nanjing Shanghai Hangzhou Ningbo Beijing Tianjin Shijiazhuang Qingdao Jinan Suzhou Wuxi Jiaxing Shenzhen Guangzhou Dongguan Foshan \*Source: (WIC) Warehouse In Cloud (www,50yc,com)







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

	•			
City	Average Rent Fee (RMB/m² per month)	Month-to-Month Comparisons	Vacancy Rate	Month-to-Month Comparisons
Beijing	45.93	-0.30%	10.46%	-0.14%
Shanghai	44.04	0.11%	14.13%	-0.65%
Shenzhen	40.30	0.27%	17.69%	0.92%
Suzhou	31.81	0.28%	3.00%	0.01%
Hangzhou	31.33	-0.22%	8.03%	-0.13%
Ningbo	29.13	0.34%	5.74%	-1.72%
Guangzhou	35.20	-0.26%	10.18%	0.49%
Dongguan	31.32	0.00%	10.51%	-0.04%
Nanjing	30.04	0.30%	8.33%	0.18%
Foshan	29.22	0.00%	6.41%	0.00%
Jiaxing	30.77	0.46%	14.17%	0.57%
Changsha	25.88	0.00%	11.69%	1.33%
Tianjin	30.63	0.10%	13.50%	0.70%
Wuxi	28.00	0.36%	3.14%	-0.43%
Dalian	25.60	0.08%	29.16%	-1.36%
Changchun	22.82	0.00%	32.61%	2.99%
Chongqing	25.49	-0.12%	19.87%	0.01%
Wuhan	26.80	0.04%	12.66%	-0.16%
Zhengzhou	24.33	0.29%	6.93%	-0.23%
Shenyang	23.25	-0.13%	16.59%	0.63%
Hefei	24.73	-0.84%	7.81%	-0.13%
Kunming	24.30	-0.45%	9.48%	-0.01%
Harbin	23.45	0.17%	9.34%	-1.47%
Chengdu	25.85	-0.27%	18.95%	6.65%
Qingdao	23.50	-0.68%	9.96%	-0.71%
Xi'an	24.93	-0.68%	7.82%	0.69%
Guiyang	22.58	0.00%	9.21%	-4.48%
Taiyuan	18.18	-0.49%	5.43%	3.78%
Jinan	22.88	0.00%	8.36%	0.00%
Nanchang	20.69	0.34%	23.44%	-6.20%
Shijiazhuang	20.27	1.20%	16.11%	0.52%
Lanzhou	20.72	1.32%	<mark>7.5</mark> 7%	-2.82%
				100







highways. This is a high-standard modern warehouse park all the necessary licenses and certificates and has a high cost performance.

Number: 13061208829

Contact: Yang Fei

Warehouse Address: Tianhe North Road, Daxing District, Beijing City

Rentable area: 10,000 square meters

Project Features: This warehouse is composed of high platform storehouses with C-class  $\, \mathbb{I} \,$ fire protection qualification and equipped with complete facilities, such as unloading platforms and rain shed. The storehouses are layered with carborundum floor. This park has reasonable planning, independent office area and convenient transportation as there are several highways passing by or adjacent to the South sixth Ring Road.

Contact: Sui Chao Number: 18610640033

Warehouse Address: Liyuan Road, Heping Village, Fuyong Street, Baoan District, Shenzhen City

Rentable Area: 75,000 square meters

Project Features: there are 5 buildings in the park, including 2 dormitories and 1 office building. The park has a complete range of supporting. It has C-class  $\ensuremath{\mathbb{I}}$  fire protection qualification and sprinklers fire protection. The warehouse floor is 6 meters high. It enjoys convenient transportation as there are 3 kilometers away from the 107 National Highway and the expressway entrance, and 2 kilometers to the subway station. It is suitable for international logistics, freight forwarding, e-commerce warehousing and office, logistics

express delivery, high-tech R & D and other businesses. Contact: Xin Chengkuan

Number: 15844334434

Warehouse Address: Tongning Road, Jiangbei District, Ningbo

Rentable Area: 10,000 square meters

Project Features: The park is located within the Ningbo Ring Expressway and is the node location for the external interaction of Ningbo City. It is suitable for the distribution of urban

Fast Moving Consumer Goods. Contact: Mao Linlin Number: 17767108004

Warehouse Address: Near Tianrui Road, Qingpu District, Shanghai

Rentable Area: 21,000 square meters

Project Features: The park is located in Qingpu Park of Zhangjiang Hi-tech District, Shanghai, It is adjacent to the Shanghai Honggiao Transportation Hub, With a comprehensive transportation network, it can provide fast and efficient logistics services for Shanghai and surrounding areas. The park contains three 3-storey ramps and elevator storage facilities. The total area of the park is about 110,160 square meters. The leasable area will reach 21,000 square meters from February 1, 2020. The warehouse has a net height of 9 meters and a ground bearing capacity of 3 tons per square meter. It has an unloading platform and has C-class  $\, \mathbb{I} \,$  fire protection qualification. It is 2 kilometers from Shanghai Ring Expressway, 14 kilometers from Kunshan Huaqiao, 22 kilometers from Shanghai Hongqiao International Airport and 35 kilometers from downtown Shanghai.

Contact: Tan Wei Number: 17717330045 Warehouse Address: Gaobiao Logistics Park, Nanhu District, Jiaxing City

Rentable Area: 50,000 square meters

Project Features: The park is located around the Nanhu area of Jiaxing city, the intersection of Jiangsu, Zhejiang and Shanghai. It is in the east of Jiaxing City and is an important gateway from Jiaxing to Shanghai. The traffic conditions in the park are favorable. It is located in the triangle zone of three major expressways: G60, S7 and S11. It is only 2.5 kilometers away from the entrance of G60 Shanghai-Hangzhou Expressway, 3 kilometers away from the East Road of the 3rd Ring Road. It can serve as a carrier for industrial and consumer goods distribution in Jiaxing City.

Contact: Shen Jianfeng Number: 15858329935

#### **Central China Region**

Warehouse Address: Near Gexin Avenue, Dongxihu District, Wuhan City

Rentable Area: 11,000 square meters

Project Features: The park enjoys convenient transportation. It is about 5 kilometers away from the belt expressway of the city, 2 kilometers away from the entrance of Shanghai-Chengdu Expressway, close to the 107 National Highway, and about 26.5 kilometers from Hankou Station in the city center. Trinity transportation network, 7-in-1 three-dimensional traffic networks. It also has complete living facilities within the area. The storehouse buildings are single-story high-rise warehouses with C-class II fire protection qualification, 20 meters deep, net height of one floor is 9.5 meters, 1.3x4.5, the external platform has a loading capacity of 6 tons.

Contact: Wang Kun Number: 15225100971

# **Western China Region**

Warehouse Address: No.1, Section 2, Dongguan Road, Qingbaijiang District, Chengdu, Sichuan

Rentable Area: 160,000 square meters

Project Features: The park is located at the junction of Guanghan City and Qingbaijiang District in Sichuan Province, east to Chengdu-Mianyang Expressway, west to the G108, National Highway and north to Chengdu Second Belt Expressway. It is located in the core area of Chengdu, Deyang and Mianyang Economic Belt. The park covers an area of 400 mu, including 9 high-standard logistics warehouses and a comprehensive office building, canteens and dormitory areas. The total storage area is about 160,000 square meters.

Contact: Huang Tianjiang Number: 18123304630

#### Northeast China Region

Warehouse Address: Airport Road 1011, Sujiatun District, Shenyang City Rentable Area: 40,000 square meters

Project Features: The warehouses in this park are all high-standard storehouses and equipped with and C-class II fire protection qualification. It enjoys convenient transportation, with 7 kilometers from the airport and is near the Shenyang Fourth Ring Road. Contact: Jing Shaoxuan

Number: 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 Domestic Trade and registered with the Ministry of Civil Affairs in1995. It was renamed as China Association of Warehousing and Distribution in May 2016 after being approval by the State Assets Commission of the State Council and examined by the Ministry of Civil Affairs. It is a non-profit organization in the national warehousing and distribution industry. There are 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 Warehouse in Cloud (WIC):

WIC (www.50yc.com) is an Internet warehousing integrated service platform presented by Sichuan WULIANY-IDA 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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