

中国通用仓储市场动态报告

2020年3月

在中国仓储与配送协会指导下,物联云仓《中国通用仓储市场动态报告》已连续发布二十期。《报告》通过对物联云仓实时数据进行汇总、整理,全面反映我国主要物流节点城市的仓储设施租金水平和空置情况,体现通用仓储市场的供需动态变化,总结市场发展规律,预测市场发展趋势,为了解仓储市场发展情况、合理投资提供参考依据。

物联云仓延续往期《报告》成果,不断扩大统计范围,加强仓储市场分析,发布《2020年3月中国通用仓储市场动态报告》。2020年3月,物联云仓全国在线仓库面积新增301万㎡,总面积超3.11亿㎡,较2月增长0.98%;在线可租面积超4,192万㎡,较2月增长4.61%。仓库资源覆盖32个省份,221个城市,7,283个园区。

2020年3月 中国通用仓储设施租金水平

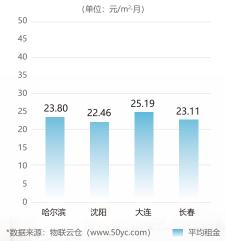
全国32个城市仓库平均租金为27.67元/㎡·月,环比下降0.18%。其中,东部地区仓库平均租金(31.79元/㎡·月)高于西部(24.11元/㎡·月)、东北(23.64元/㎡·月)、中部(22.93元/㎡·月)地区。相较2月,中部地区仓库平均租金有小幅下降,降幅为0.61%;东北部、东部、西部地区仓库平均租金保持平稳,增(降)幅在±0.5%以内。

北京、上海、深圳仓库平均租金仍然领跑全国,均高于40元/m²·月,其中北京、上海已超过45元/m²·月。相较2月,北京、上海仓储市场稳定,平均租金波动不大;深圳仓库平均租金有小幅下降,降幅为0.7%,一方面受疫情影响仓库租赁需求较小,导致租金有所下降;另一方面,部分业主对复工企业给予一定优惠政策,包括降低租金、延长免租期等。

受仓储设施条件、地理位置等影响,太原、石家庄仓库租金水平仍较低,均低于20元/m²·月。相较2月,两个城市仓库租金波动不大,市场平稳。

相比2月, 兰州仓库平均租金波动最大, 环比上涨2.30%。因榆中县部分厂房、仓库正在拆迁, 相关企业不得不另寻仓源, 同时随着当地疫情逐步得到控制, 企业复工复产, 使得当地仓库租赁需求得以释放, 仓库平均租金有所上涨。

3月东北地区仓库租金情况



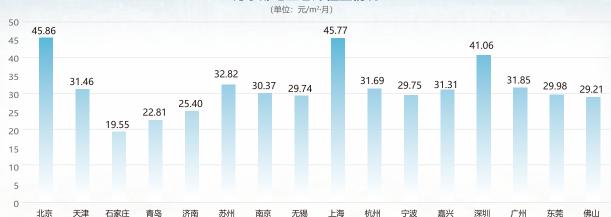
3月中部地区仓库租金情况







3月东部地区仓库租金情况



*数据来源: 物联云仓 (www.50yc.com)

平均租金

3月西部地区仓库租金情况



□ 2020年3月 中国通用仓储设施空置率情况

全国32个城市仓库平均空置率为13.11%,环比上涨0.24%。其中,东北地区仓库空置率(23.67%)远高于中部(12.59%)、西部(12.55%)、东部(10.88%)地区。相较2月,四大地区仓库空置率相对稳定,升(降)幅在±1%以内。

仓库空置率较高的城市为大连、重庆,均高于25%。相较2月,大连因金州区部分物流和制造企业复工复产,仓库租赁需求有所回暖,仓库空置率下降了 5.26%; 重庆受部分短租客户退仓影响,仓库空置率有所上升,升幅为2.30%, 其中电器类企业退租现象较为明显。

仓库空置率最低的城市为苏州、太原,均低于5%。相较2月,太原仓库空置率波动不大,市场稳定;苏州因受疫情影响,企业复工较晚,部分客户的租仓时间延后,仓库空置率延续2月上升趋势,升幅为1.87%。

相较2月,无锡仓库空置率波动最大,仓库空置率环比下降5.47%。一方面因疫情影响,无锡民生需求增加,仓库租赁需求也随之增大,如极兔、盒马,美团等都在寻找合适仓源;另一方面随着疫情逐渐情得到控制,当地企业逐渐复工复产,出现企业集中租仓现象。



3月东北地区仓库空置率情况



3月中部地区仓库空置率情况



3月东部地区仓库空置率情况



3月西部地区仓库空置率情况





• 表: 全国32个城市平均租金和空置率一览表

城市	平均租金 (元/m²·月)	环比变化	空置率	环比变化
北京	45.86	0.15%	8.17%	-0.14%
上海	45.77	0.18%	9.50%	-0.38%
深圳	41.06	-0.70%	6.16%	-1.14%
苏州	32.82	-1.53%	4.75%	1.87%
杭州	31.69	-0.69%	11.95%	0.13%
宁波	29.75	-2.11%	14.18%	-1.61%
广州	31.85	0.19%	7.57%	0.00%
东莞	29.98	-0.13%	6.52%	-0.61%
南京	30.37	-0.69%	13.34%	1.01%
佛山	29.21	0.38%	16.25%	0.46%
嘉兴	31.31	0.16%	21.85%	-2.66%
长沙	26.11	-1.40%	14.61%	2.99%
天津	31.46	0.51%	15.15%	2.84%
无锡	29.74	0.27%	8.18%	-5.47%
大连	25.19	0.00%	37.71%	-5.26%
长春	23.11	0.22%	22.69%	2.32%
重庆	25.49	0.16%	26.52%	2.30%
武汉	25.59	0.20%	15.74%	-0.10%
郑州	23.25	-1.52%	9.93%	2.53%
沈阳	22.46	-0.31%	24.13%	1.83%
合肥	24.33	0.87%	9.42%	-0.27%
昆明	25.39	-0.24%	6.75%	-0.18%
哈尔滨	23.80	-0.83%	10.16%	1.84%
成都	24.64	-0.77%	19.36%	0.52%
青岛	22.81	0.18%	7.36%	-0.64%
西安	25.28	-0.16%	10.04%	0.84%
贵阳	22.92	1.24%	7.12%	1.07%
太原	17.61	0.63%	4.67%	-0.11%
济南	25.40	0.00%	6.71%	0.47%
南昌	20.70	-2.22%	21.16%	0.47%
石家庄	19.55	0.77%	16.41%	4.14%
兰州	20.93	2.30%	5.51%	- 1.50%

*数据来源:物联云仓(www.50yc.com)









东部地区

仓库地址:广州增城区汽车产业园

可租面积: 6,000平方米

项目特点:便捷交通,园区门前八车道的荔新公路,距广园快速路3公里,距广深高速公路5公里,距广州开发区15分钟车程,周边广本、富士康入驻,适合汽配行业客户入驻,且以广莞深为中心,辐射珠三角乃至华南地区的城

市配送中心的极佳选址。 联 系 人: 辛成宽

联系电话: 15844334434

仓库地址: 苏州工业园区 可租面积: 5,000平方米

项目特点:仓库类型2层楼库;总建筑面积94,919㎡;存储泊位17,018个;存储量14,700托;层高10米;装卸平台24个;排风机12个;消防等级丙二

类;有喷淋;安保设施;仓库红外线对射报警系统。

联 系 人: 张禄

联系电话: 13162063366

仓库地址: 苏州昆山巴城 可租面积: 15,800平方米

项目特点:项目位于昆山市巴城镇内,园区总占地面积228亩,总建筑面积97,919平方米;其中包括3幢高标准物流仓库、1幢综合展示楼和2幢综合配套楼。区域优势:项目所在地位于昆山北部,东邻太仓、上海,西连苏州工业园区;京沪高铁、沪宁城际高铁、沪宁高速公路、312国道、苏昆太高速公路和苏州绕城高速公路等交通枢纽纵横穿越;可成为辐射苏州工业园、常熟、太仓等大型制造业集散地工业物流的优秀选址,并可作为上海、昆山、苏州等地的城市消费品配送和中转的的绝佳载体。

联系人: 谭伟

联系电话: 17717330045

仓库地址:杭州余杭区临平 可租面积: 4,100平方米

项目特点: 距离联行高速12公里、沪杭高速17公里、绕城高速18公里 距离余杭区政府13公里、余杭高铁站16公里、杭州东站29公里、武林广场33公

里、杭州萧山机场56公里、上海市中心170公里。

联系人: 沈建锋 联系电话: 18158716633

东北地区

仓库地址:沈阳市房沈北新区可租面积:38,703平方米

项目特点:该园区位于沈北新区,据沈阳绕城高速口陵园街3公里,园区配套设施完善,安保严密。园区最大可进17.5米长车辆,同时交通便利,附近有多家汽配行业。适合大家电及配件、小家电及配件、3C产品、家居及日用品、服装鞋帽、食品及保健品、酒水饮料、办公文体用品、图书音像制品、汽车及配件用品、家具及建材、五金配件、医疗器械等行业。

联系人: 隋超

联系电话: 18610640033

西部地区

仓库地址:成都龙泉物流中心可租面积:6,000平方米

项目特点:仓库位于成都龙泉物流中心,仓库总面积132000平米,共有9个仓库,可分割进行出租,最低2000平米起租;仓库有月台及装卸化平台,库内运输线、穿梭车、打包机、叉车及计量装置等设备,另外还配有仓库管理系统WMS、配送管理系统、办公管理系统OA、监管仓、办公室、停车场、住宿及食堂等配套服务。还可为入驻的客户提供装卸、运输、配送、包装、帖标签、报关商检、金融监管等服务,欢迎有仓库需求的客户到实地进行考察。

联系人: 黄天将 联系电话: 18123304630

仓库地址:西安高陵 可租面积: 45,000平方米

项目特点:邻西安经济技术开发区的全新优质物流中心,位于拥有汽车、新材料等重要产业的西安高陵经济技术开发区,正规丙二类仓库,层高10米,共5幢单层仓储设施。周边均为工业区,距市区较近,进出车辆较快

,运输方便并可做城配,节省物流成本。

联系人: 李晨

联系电话: 13119138713





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。







THE DYNAMIC REPORT OF CHINA'S GENERAL WAREHOUSE MARKET IN MARCH 2020

At present, The Dynamic Report of China's General Warehouse Market has been issued twenty 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 March 2020 after extending the results of previous reports, expanding the scope of selected statistics and deepening the analysis of warehousing market. In March 2020, the total available warehouse area of Warehouse in Cloud (WIC) increased by 3.01 million square meters, with a total area of over 311 million square meters, an increase of 0.98% compared with February 2020; the rentable area exceeded 41.92 million square meters, an increase of 4.61% from February 2020, and warehouse resources has covered 32 provinces, 221 cities, and 7,283 parks.

■ Rental level of Warehousing Facilities in China in March 2020

The average rent of warehouses in 32 cities across the country was RMB 27.67 / m² per month, a decrease of 0.18% from the previous month. Among them, the average rent of warehouses in the eastern region (RMB31.79/ m² per month) was higher than that in the western region (RMB24.11/ m² per month), the northeast (RMB23.64/ m² per month) and the central region (RMB22.93/ m² per month). Compared with February 2020, the average warehouse rent in the central region decreased by 0.61%; while in the northeast, eastern and western regions, the average warehouse rent remained stable, with an increase (decrease) of less than 0.5%.

The average rent of warehouses in Beijing, Shanghai and Shenzhen was still higher than RMB40/ m² per month, which was in the leading position among other cities in China. Among them, the average rent of Beijing and Shanghai was exceeded RMB45/ m² per month. Compared with February, the warehousing market in Beijing and Shanghai was stable; the average rent of Shenzhen warehouse decreased slightly, by 0.7%. On the one hand, affected by the epidemic, the demand for warehouse rental was relatively small, resulting in a decline in rent; on the other hand, some landlords have given certain preferential policies to enterprises returning to work, including reducing rent, extending rent-free period, and so on.

Affected by the conditions of storage facilities and geographical location, the level of warehouse rent in Taiyuan and Shijiazhuang was still low, which was less than RMB20/ m² per month. Compared with February, warehouse rents in the two cities fluctuated little and the market was stable.

Compared with February, the average rent of Lanzhou warehouse fluctuated the most, rising 2.30% from the previous month. As some factories and warehouses in Yuzhong County are being demolished, relevant enterprises must find another warehouse source. At the same time, as the local epidemic has been gradually brought under control and enterprises return to work and production, the rental demand and average rent for local warehouses has increased.









China's Warehousing Facilities Vacancy Rate in March 2020

Average vacancy rates were 13.11% per cent in 32 cities nationwide, up 0.24% from month to month. Among them, the vacancy rate in Northeast China (23.67%) was much higher than that in western (12.55%), central (12.59%) and eastern (10.88%) areas. Compared with February, vacancy rate in these four regions remained relatively stable, rising (falling) within 1%.

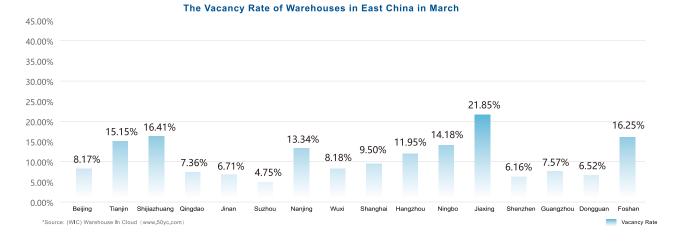
The cities with higher vacancy rate are Dalian and Chongqing which were higher than 25%. Compared with February, due to partial logistics and manufacturing enterprises resumed production, the warehouse rental demand in Dalian recovered and warehouse vacancy rate dropped 5.26%; Chongqing was affected by withdrawal of some short rental customers, most of which were electrical enterprises, and the warehouse vacancy rate rose to 2.30%.

The cities with the lowest vacancy rate were Suzhou and Taiyuan, both of which were lower than 5%. Compared with February, Taiyuan warehouse vacancy rate fluctuated little and the market remained stable; due to epidemic, enterprises in Suzhou resumed late, some customers postponed renting, which caused the warehouse vacancy rate continued the rising trend of February, increase 1.87%.

Compared with February, warehouse vacancy rate fluctuated greatly in Wuxi, dropped by 5.47% per month. On one hand due to epidemic situation Wuxi livelihood demand increased warehouse rental demand also increased such as J&T, Hema and Meituan etc. are looking for suitable warehouse source; on the other hand, along with the epidemic situation has been gradually controlled, local enterprises resume production and many large enterprises start to seek warehouse resources.











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	45.86	0.15%	8.17%	-0.14%
Shanghai	45.77	0.18%	9.50%	-0.38%
Shenzhen	41.06	-0.70%	6.16%	-1.14%
Suzhou	32.82	-1.53%	4.75%	1.87%
Hangzhou	31.69	-0.69%	11.95%	0.13%
Ningbo	29.75	-2.11%	14.18%	-1.61%
Guangzhou	31.85	0.19%	7.57%	0.00%
Dongguan	29.98	-0.13%	6.52%	-0.61%
Nanjing	30.37	-0.69%	13.34%	1.01%
Foshan	29.21	0.38%	16.25%	0.46%
Jiaxing	31.31	0.16%	21.85%	-2.66%
Changsha	26.11	-1.40%	14.61%	2.99%
Tianjin	31.46	0.51%	15.15%	2.84%
Wuxi	29.74	0.27%	8.18%	-5.47%
Dalian	25.19	0.00%	37.71%	-5.26%
Changchun	23.11	0.22%	22.69%	2.32%
Chongqing	25.49	0.16%	26.52%	2.30%
Wuhan	25.59	0.20%	15.74%	-0.10%
Zhengzhou	23.25	-1.52%	9.93%	2.53%
Shenyang	22.46	-0.31%	24.13%	1.83%
Hefei	24.33	0.87%	9.42%	-0.27%
Kunming	25.39	-0.24%	6.75%	-0.18%
Harbin	23.80	-0.83%	10.16%	1.84%
Chengdu	24.64	-0.77%	19.36%	0.52%
Qingdao	22.81	0.18%	7.36%	-0.64%
Xi'an	25.28	-0.16%	10.04%	0.84%
Guiyang	22.92	1.24%	7.12%	1.07%
Taiyuan	17.61	0.63%	4.67%	-0.11%
Jinan	25.40	0.00%	6.71%	0.47%
Nanchang	20.70	-2.22%	21.16%	0.47%
Shijiazhuang	19.55	0.77%	16.41%	4.14%
Lanzhou	20.93	2.30%	5.51%	-1.50%



Recommendations of the Warehouses in April



East China Region

Warehouse Address: Automobile Industry Park, Zengcheng District, Guangzhou.

Rentable Area: 6,000 square meters.

Project Features: This warehouse park enjoys a convenient transportation network, with Lixin Highway of eight lanes in front of the door. The park is three kilometers away from the Guangyuan Expressway, five kilometers away from the Guangzhou-Shenzhen Expressway and 15 minutes by car from Guangzhou Development Zone. There are Guangben, Foxconn and other large enterprises around the park, suitable for auto parts industry warehousing. With Guangdong, Dongguan and Shenzhen as the center, the park radiates the urban distribution centers in the Pearl River Delta and even South China.

Contact: Xin Chengkuan Tel: 15844334434

Warehouse Address: Suzhou Industrial Park.

Rentable Area: 5,000 square meters.

Project Features: The type of warehouse in this park is 2-story warehouse; the total construction area is 94,919 square meters; there are 17,018 storage berths; the storage capacity is 14,700 pallets; the floor height is 10 meters; there are 24 loading and unloading platforms; 12 exhaust fans; C-class $\rm I\!I$ fire protection qualification; sprinkler fire control system; complete security facilities; infrared shooting alarm system.

Contact: Zhang Lu Tel: 13162063366

Warehouse Address: Bacheng, Kunshan, Suzhou.

Rentable Area: 15,800 square meters.

Project Features: This storage park is located in Bacheng Town, Kunshan City, covering a total area of 228mu and a total construction area of 97,919 square meters, including three high-standard logistics warehouses, one comprehensive exhibition building and two comprehensive supporting buildings. Regional advantages: the project is located in the north of Kunshan, adjacent to Taicang and Shanghai in the east and Suzhou Industrial Park in the west; it is connected with transportation hubs such as Beijing-Shanghai high-speed railway, Shanghai-Nanjing intercity high-speed railway, Shanghai-Nanjing Expressway, 312 National Highway, Su-Kun-Tai Expressway and Suzhou Round City Expressway. This park can be an excellent location for industrial logistics covering Suzhou Industrial Park, Changshu, Taicang and other large manufacturing distribution centers, and can be used as an excellent carrier for urban consumer goods distribution and transit in Shanghai, Kunshan, Suzhou and other places.

Contact: Tan Wei Tel: 17717330045

Warehouse Address: Linping, Yuhang District, Hangzhou.

Rentable Area: 4,100 square meters.

Project Features: This park is 12 kilometers away from Lianhang Expressway, 17 kilometers from Shanghai-Hangzhou Expressway, 18 kilometers from Round City Expressway, 13 kilometers from Yuhang District Government, 16 kilometers from Yuhang High-speed Railway Station, 29 kilometers from Hangzhou East Railway Station, 33 kilometers from Wulin Square, 56 kilometers from Hangzhou Xiaoshan Airport and 170 kilometers from downtown Shanghai. Contact: Shen Jianfeng

Tel: 18158716633

Northeast China Region

Warehouse Address: Fangshenbei New District, Shenyang.

Rentable Area: 38,703 square meters.

Project Features: This park is located in Shenbei New District, Shenyang City, with 3 kilometers away from the entrance of Shenyang Expressway. The park has complete facilities and a strict security system. The park can accommodate trucks with a size of 17.5 meters, and the transportation is convenient, and there are a number of auto parts companies nearby. This park is suitable for large household appliances and accessories, small household appliances and accessories, 3C products, household and daily necessities, clothing, shoes and hats, food and health products, beverages, office stationery and sports supplies, books, audio and video products, cars and accessories, furniture and building materials, hardware accessories, medical devices and other industries.

Contact: Sui Chao Tel: 1861 0640033

West China Region

Warehouse Address: Longquan Logistics Center, Chengdu, Sichuan.

Rentable Area: 6,000 square meters.

Project Features: the warehouse is located in Longquan Logistics Center, Chengdu City, with a total area of 132,000 square meters taken by 9 warehouses, which can be leased in separate areas with a minimum rent of 2000 square meters. The warehouse is equipped with platform and loading and unloading platform, and there are transport lines, shuttle vehicles, baling machines, forklifts, metering devices and other equipment in the warehouse. In addition, it is also equipped with warehouse management system (WMS), distribution management system, office management system (OA), supervision warehouse, office, parking lot, accommodation and canteen and other supporting services. It can also provide customers with loading and unloading, transportation, distribution, packaging, sticker, customs declaration, commodity inspection, financial supervision and other services. Customers with warehouse needs are welcome to visit on the spot.

Contact: Huang Tianjiang Tel: 18123 304630

Warehouse Address: Gaoling District, Xi'an City, Shaanxi Province.

Rentable Area: 45,000 square meters.

Project Features: This park is a new high-quality logistics center adjacent to Xi'an Economic and technological Development Zone, which is located in Xi'an Gaoling Economic and technological Development Zone with important industries such as automobiles and new materials. The warehouses are all qualified for C-class $\rm II$ fire protection qualification, with a height of 10 meters and a total of 5 single-layer storage facilities. The park is surrounded by industrial areas, close to the urban area, convenient for vehicles in and out, convenient for transportation, suitable for urban distribution with low logistics cost.

Contact: Li Chen

Tel: 1311 9138713







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 12 branches including joint distribution, cold chain logistics, dangerous goods warehousing, bonded warehousing, steel warehousing, financial warehousing, traditional Chinese medicine warehousing, technical engineering and engineering services, self-service warehousing, packaging and unitized logistics, household logistics, intelligent logistics etc. Aiming at promoting the modernization of China's warehousing and distribution industry and the development of modern logistics industry, the association carries out the function of policy research, industry management and self-discipline, industry standards formulation and implementation, information and statistics collection, resource integration, training consultation, conference and exhibition and so on focusing on the construction of various warehousing and distribution facilities, the development of various distribution centers and integrated warehousing and distribution services and technological innovation.

Introduction of Warehouse in Cloud (WIC):

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.

