

April 2021

The Dynamic Report of China's General Warehouse Market

中国通用仓储市场

2021年4月 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》已连续发布三十三期。《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《2021年4月中国通用仓储市场动态报告》。2021年4月，物联云仓全国在线仓库面积新增17.20万 m^2 ，总面积超3.29亿 m^2 ，较3月增长0.52%；在线可租面积超4,555万 m^2 。仓库资源覆盖32个省份，229个城市，7,525个园区。

2021年4月中国通用仓储设施租金水平

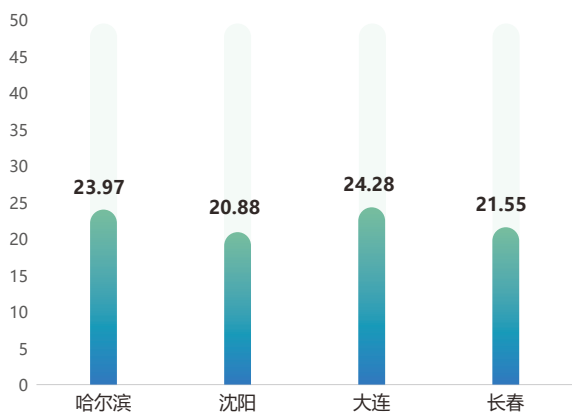
全国32个城市仓库平均租金为27.79元/ m^2 ·月，环比下降0.83%。其中，东部地区仓库平均租金（32.18元/ m^2 ·月）高于西部（23.81元/ m^2 ·月）、中部（22.93元/ m^2 ·月）、东北（22.67元/ m^2 ·月）地区。相较3月，东北地区仓库平均租金有所上涨，增幅为4.22%；东部、中部、西部地区仓库平均租金有所下降，降幅分别为5.72%、4.55%、2.47%。

北京、上海、深圳仓库平均租金仍然领跑全国，均高于40元/ m^2 ·月。相较3月，三个城市仓储市场稳定，仓库平均租金波动不大。

受仓储设施条件、地理位置等影响，太原、兰州、石家庄、沈阳仓库租金水平较低，均低于21元/ m^2 ·月。相较3月，四个城市仓库平均租金波动不大，市场稳定。

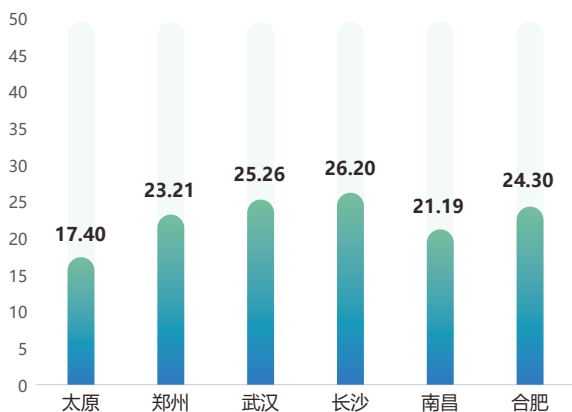
相较3月，哈尔滨仓库平均租金波动最大，环比上涨4.35%，根据哈尔滨政府统计数据显示，近期当地汽车、医药、食品、电子行业增速明显，从而带动仓储需求有所增加。

4月东北地区仓库租金情况



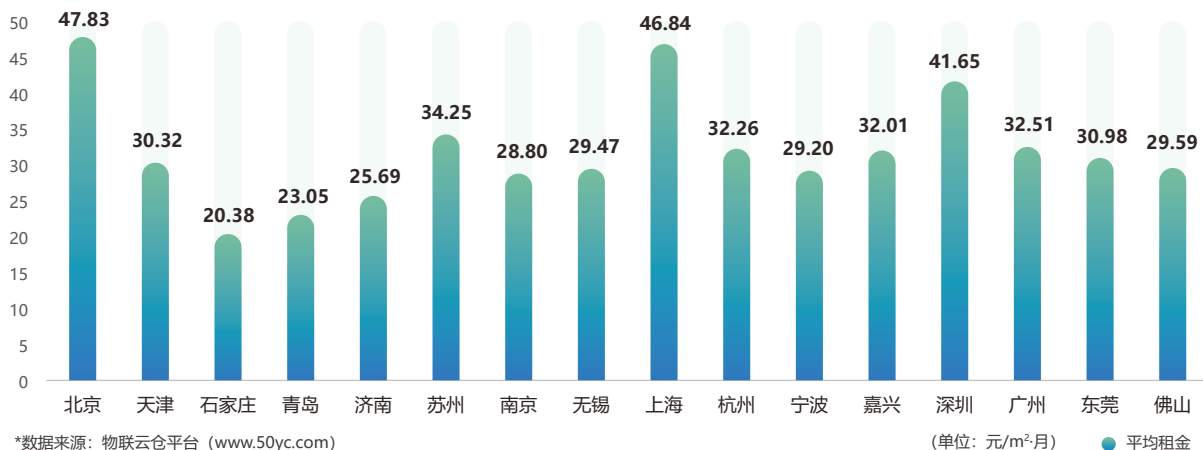
*数据来源：物联云仓平台 (www.50yc.com) (单位：元/ m^2 ·月) ● 平均租金

4月中部地区仓库租金情况

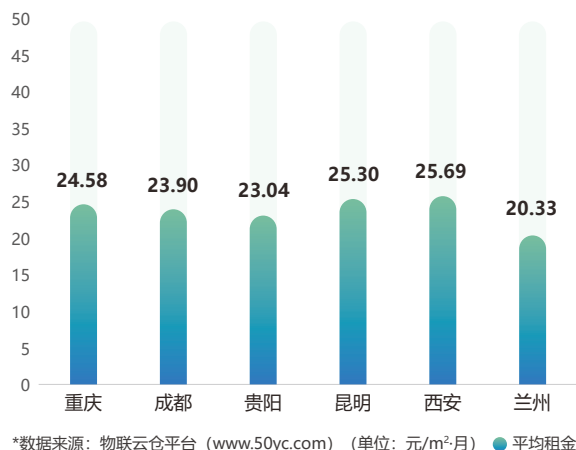


*数据来源：物联云仓平台 (www.50yc.com) (单位：元/ m^2 ·月) ● 平均租金

4月东部地区仓库租金情况



4月西部地区仓库租金情况



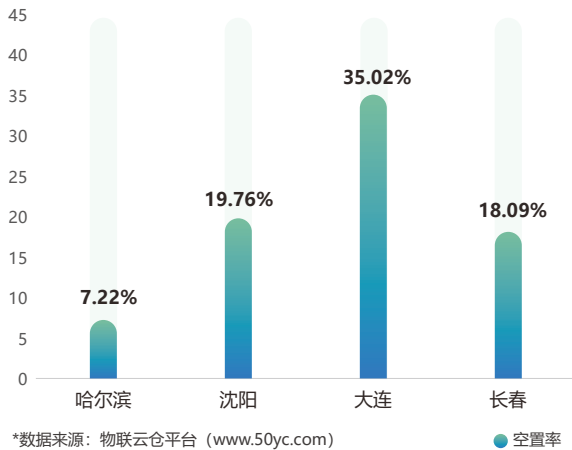
2021 年 4 月中国通用仓储设施空置率情况

全国 32 个城市仓库平均空置率为 11.84%，环比下降 0.56 个百分点。其中，东北地区仓库空置率 (20.02%) 远高于中部 (12.30%)、西部 (11.96%)、东部 (9.57%) 地区。相较 3 月，西部地区仓库空置率有所下降，降幅为 6.28%；东北、中部、东部地区仓库空置率相对稳定，升（降）幅变化在 ±1 个百分点以内。

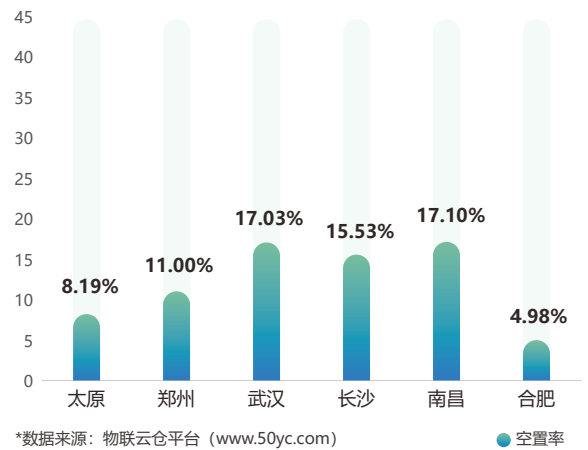
仓库空置率较高的城市为大连、重庆，均高于 25%。相较 3 月，两个城市仓库空置率相对稳定，波动不大。仓库空置率较低的城市为苏州，低于 3.84%。相较 3 月，苏州仓库空置率波动不大，市场稳定。

相较 3 月，济南仓库空置率波动最大，环比下降 6.23 个百分点，主要因济南老城区老旧仓库拆迁，部分企业被迫另寻仓源，释放了部分租仓需求。

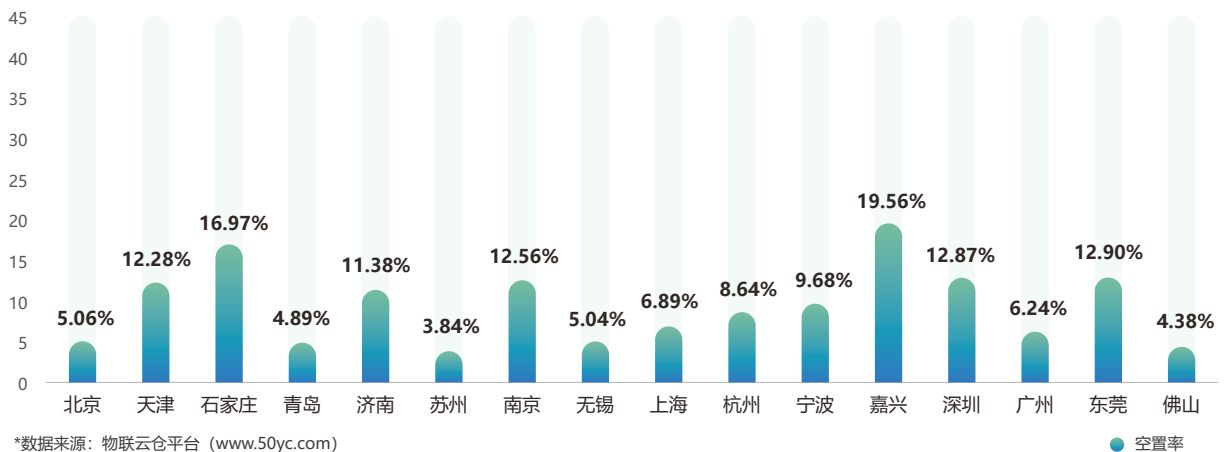
4月东北地区仓库空置率情况



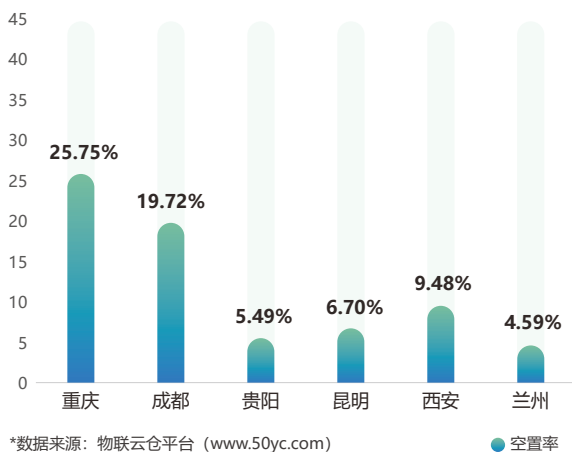
4月中部地区仓库空置率情况



4月东部地区仓库空置率情况



4月西部地区仓库空置率情况

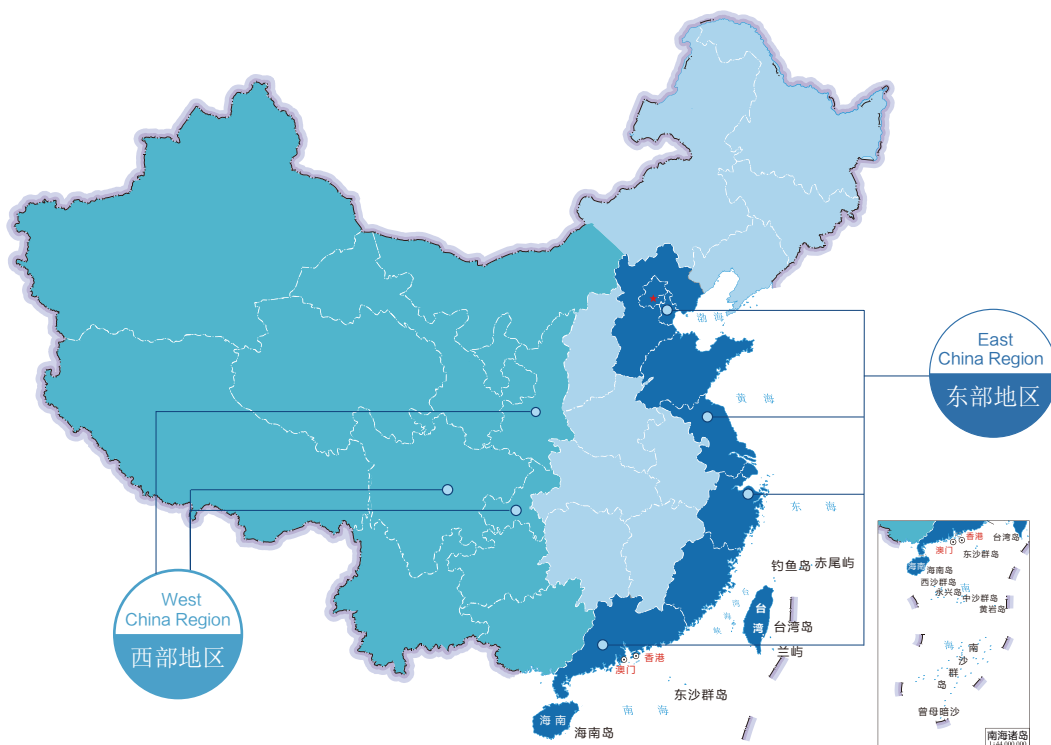


全国32个城市平均租金和空置率一览表

城市	平均租金 (元/m ² ·月)	环比变化	空置率	环比变化 (百分点)
北京	47.83	1.08%	5.06%	-0.70
上海	46.84	0.50%	6.89%	0.58
深圳	41.65	0.61%	12.87%	1.26
苏州	34.25	0.58%	3.84%	0.36
杭州	32.26	0.84%	8.64%	-0.20
宁波	29.20	-0.95%	9.68%	0.36
广州	32.51	1.94%	6.24%	-0.98
东莞	30.98	0.05%	12.90%	-0.79
南京	28.80	-0.17%	12.56%	0.05
佛山	29.59	0.00%	4.38%	-1.89
嘉兴	32.01	0.88%	19.56%	0.02
长沙	26.20	0.51%	15.53%	-0.06
天津	30.32	-0.12%	12.28%	-0.64
无锡	29.47	-0.67%	5.04%	0.26
大连	24.28	0.01%	35.02%	0.00
长春	21.55	0.81%	18.09%	0.63
重庆	24.58	-1.28%	25.75%	-0.75
武汉	25.26	0.23%	17.03%	-0.22
郑州	23.21	1.19%	11.00%	-2.26
沈阳	20.88	-1.02%	19.76%	0.66
合肥	24.30	0.01%	4.98%	0.00
昆明	25.30	1.17%	6.70%	-2.16
哈尔滨	23.97	4.35%	7.22%	0.26
成都	23.90	-0.25%	19.72%	-0.27
青岛	23.05	0.70%	4.89%	-1.67
西安	25.69	1.43%	9.48%	-0.67
贵阳	23.04	0.50%	5.49%	-0.31
太原	17.40	-0.93%	8.19%	-0.11
济南	25.69	0.55%	11.38%	-6.23
南昌	21.19	3.07%	17.10%	0.88
石家庄	20.38	-1.19%	16.97%	-3.31
兰州	20.33	-2.26%	4.59%	-0.24

*数据来源：物联云仓平台 (www.50yc.com)

优质仓源推荐



东部地区

仓库地址：天津市宝坻区
可租面积：75,000 m²
项目特点：本项目可以通过京哈高速直达北京国贸，耗时只需一个小时，临近的津蓟高速帮助车辆从项目花 40 分钟即可到达天津市区。
联系人：隋超
联系电话：18610640033

仓库地址：肇庆市四会市
可租面积：25,000 m²
项目特点：项目位于四会市大沙镇马房开发区，地理位置优越，交通便利，具备良好的物流园开发条件。园区距离广州市中心直线距离仅 50 公里，二广高速和 321 国道贯穿东西，可快速通往广州市区、白云机场、肇庆、佛山、江门和中山等地。
联系人：隋超
联系电话：18610640033

仓库地址：淮安市清江浦区
可租面积：31,230 m²
项目特点：项目位于国家级淮安经济开发区内，将提供 4 栋国际标准的单层钢结构仓库，总建筑面积 57,568 m²。毗邻京沪高速公路，并连接长深高速、盐淮高速、盐靖高速、G15 沿海高速和淮徐高速。同时，G205 国道、S235、S237、S238 省道亦环绕在侧。区域内新长铁路与京杭大运河融会贯通，与淮安涟水机场一起，为本项目提供了高效的多式联运交通网络。
联系人：沈建锋
联系电话：15858329935

仓库地址：宁波市镇海区
可租面积：83,250 m²
项目特点：项目位于宁波市镇海区物流枢纽港，包括 3 栋双层坡道库，总面积约 11.2 万平。地理位置优越，是区域配送中心和存储中心的绝佳选择。
联系人：沈建锋
联系电话：15858329935

西部地区

仓库地址：重庆市南岸区
可租面积：30,000 m²
项目特点：新建 7 栋标准高台库，层高 9 米，内置月台，靠近东港码头，配套齐全，安保完善。
联系人：陈佳
联系电话：18380355719

仓库地址：成都市双流区
可租面积：5,000 m²
项目特点：位于成都双流国际机场航空物流园区中心区域内，标准丙二类消防，交通便利。距离机场高速入口 3 公里，成雅高速入口 4 公里，市中心 15 公里。
联系人：陈佳
联系电话：18380355719

仓库地址：西安市长安区
可租面积：40,000 m²
项目特点：交通便利，位置优越，配套齐全。
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会组织。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

物联云仓以物联云仓平台 (www.50yc.com) 为核心，通过互联网仓储大数据 + 云仓科技 + 数字化运营 + 数据增值服务的方式，结合智能物联网应用与人工智能等技术，创新国内供应链物流的新模式，致力于打造世界领先的产业互联网综合服务平台，构建开放式、数字化、智能物联的数字供应链生态网络。公司以科技为核心驱动力，深耕供应链与物流行业，拥有一流技术水平的研发团队、经验丰富的运营管理专家团队、快速响应的实施团队，汇聚了业界顶尖的管理与技术人才，数字化产品与服务已覆盖供应链端到端的全环节。

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The Dynamic Report of China's General Warehouse Market in April 2021

At present, The Dynamic Report of China's General Warehouse Market has been issued thirty-three 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 April 2021 after extending the results of previous reports, expanding the scope of selected statistics and deepening the analysis of warehousing market. In April 2021, the total national online warehouse area of Warehouse in Cloud (WIC) was over 329 million square meters; adding 172 thousand square meters, an increase of 0.52% compared with March. The online rentable area was over 45.55 million square meters. The warehouse resources cover 32 provinces, 229 cities, 7,525 parks.

Rental level of Warehousing Facilities in China in April 2021

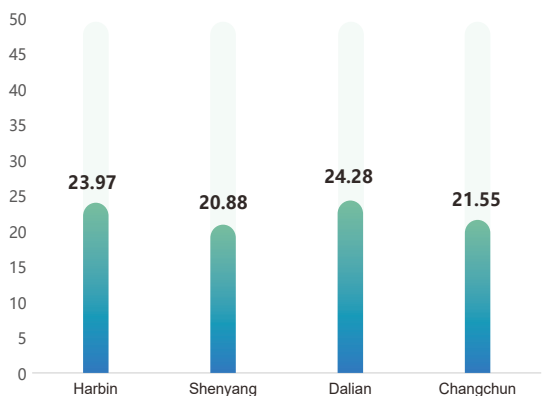
The average rent of warehouses in 32 cities across the country was RMB 27.79 /m² per month, down 0.83% compared with last month. Among them, the average rent of warehouses in the eastern region (RMB32.18/m² per month) was higher than that in the western region (RMB23.81/m² per month), the northeast (RMB22.67/m² per month) and the central region (RMB22.93/m² per month). Compared with March, the average warehouse rent in Northeast China increased by 4.22%, while that in the eastern, central and western regions decreased by 5.72%, 4.55% and 2.47%, respectively.

The average rent of warehouses in Beijing, Shanghai and Shenzhen still led the country, all higher than RMB40/m² per month. Compared with March, the warehousing market in the three cities was stable, and the average warehouse rent fluctuated little.

Affected by the conditions of storage facilities and geographical locations, the level of warehouse rent in Taiyuan, Lanzhou and Shijiazhuang was still low, which was less than RMB21/m² per month. Compared with March, the average warehouse rent of these four cities did not fluctuate much and the market was stable.

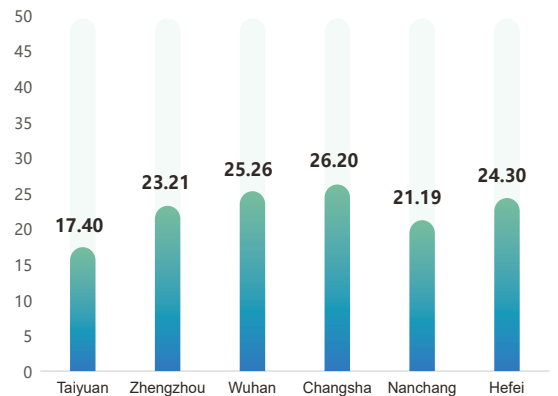
Compared with March, the average rent of the warehouse in Harbin fluctuated the most, rising 4.35% month-on-month. According to statistics recently released by the Harbin government, the local automobile, pharmaceutical, food and electronics industries have increased significantly, leading to an increase in warehousing demand.

Northeast China Warehouse Rent in April



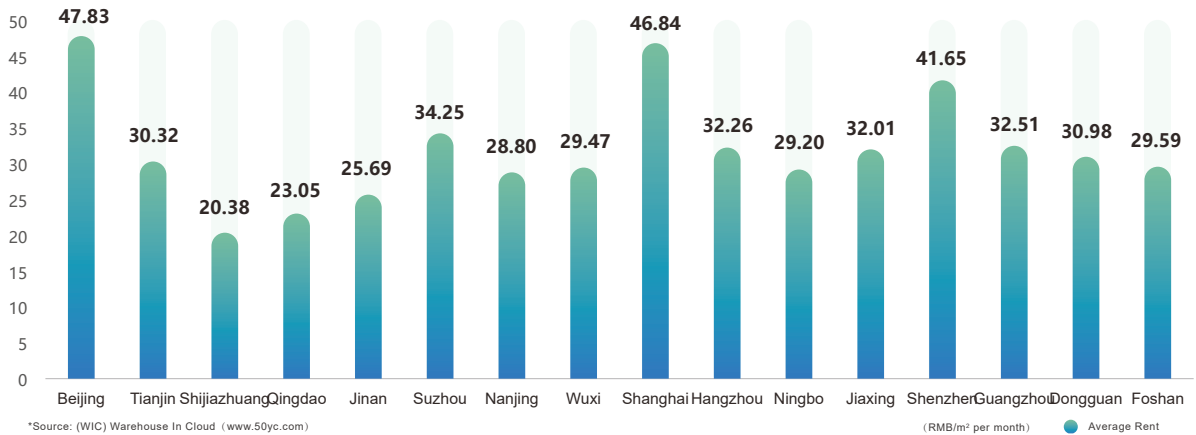
*Source: (WIC) Warehouse In Cloud (www.50yc.com) (RMB/m² per month) ● Average Rent

Central China Warehouse Rent in April

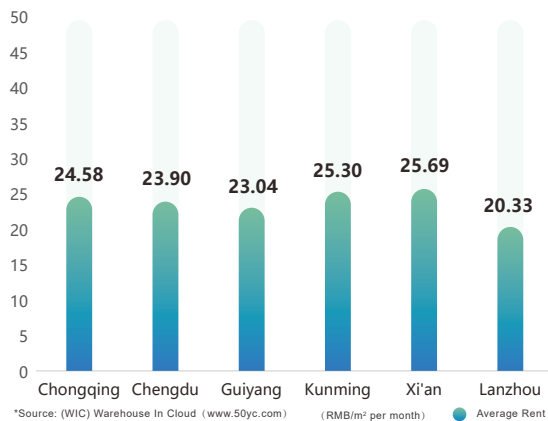


*Source: (WIC) Warehouse In Cloud (www.50yc.com) (RMB/m² per month) ● Average Rent

East China Warehouse Rent in April



West China Warehouse Rent in April



China's Warehousing Facilities Vacancy Rate in April 2021

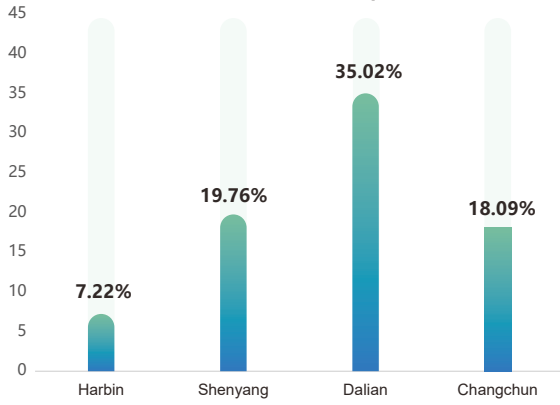
The average vacancy rates were 11.84% in 32 cities nationwide, down 0.56% from month to month. Among them, the vacancy rate in Northeast China (20.02%) was much higher than that in western (11.96%), central (12.30%) and eastern (9.57%) areas. Compared with March, the vacancy rate of warehouses in the western region decreased by 6.28%, and that in the northeastern, eastern and central regions was relatively stable, rising (falling) within 1%.

The cities with higher warehouse vacancy rates were Dalian and Chongqing, both of which were higher than 25%. Compared with March, the vacancy rate of warehouses in the two cities was relatively stable and fluctuated little.

The city with low warehouse vacancy rate was Suzhou, which was less than 3.84%. Compared with March, the vacancy rate of Suzhou warehouse fluctuated little and the market was stable.

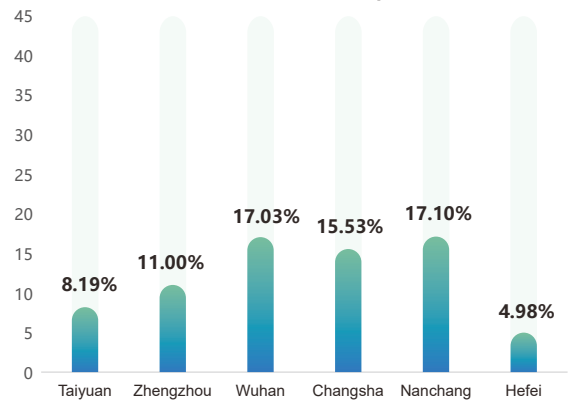
Compared with March, the vacancy rate of warehouses in Jinan fluctuated the most, falling by 6.23% month-on-month, mainly due to the demolition of rundown warehouses in the old city of Jinan, forcing some enterprises to find other sources of warehouses and releasing part of the demand for renting warehouses.

The Vacancy Rate of Warehouses in Northeast China in April



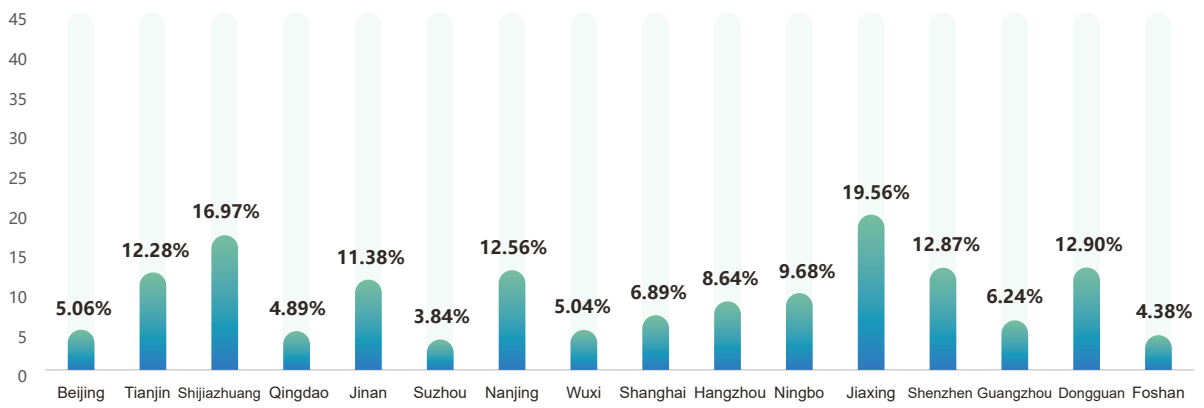
*Source: (WIC) Warehouse In Cloud (www.50yc.com) ● Vacancy Rate

The Vacancy Rate of Warehouses in Central China in April



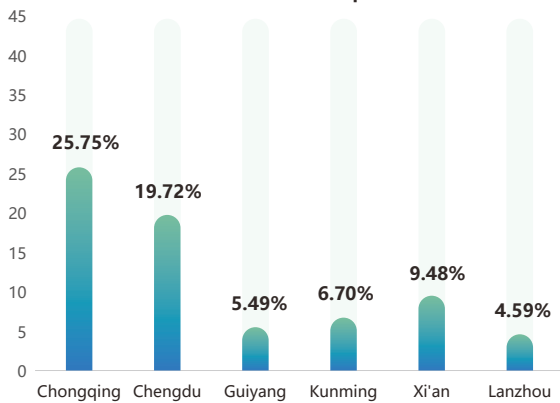
*Source: (WIC) Warehouse In Cloud (www.50yc.com) ● Vacancy Rate

The Vacancy Rate of Warehouses in East China in April



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

The Vacancy Rate of Warehouses in West China in April



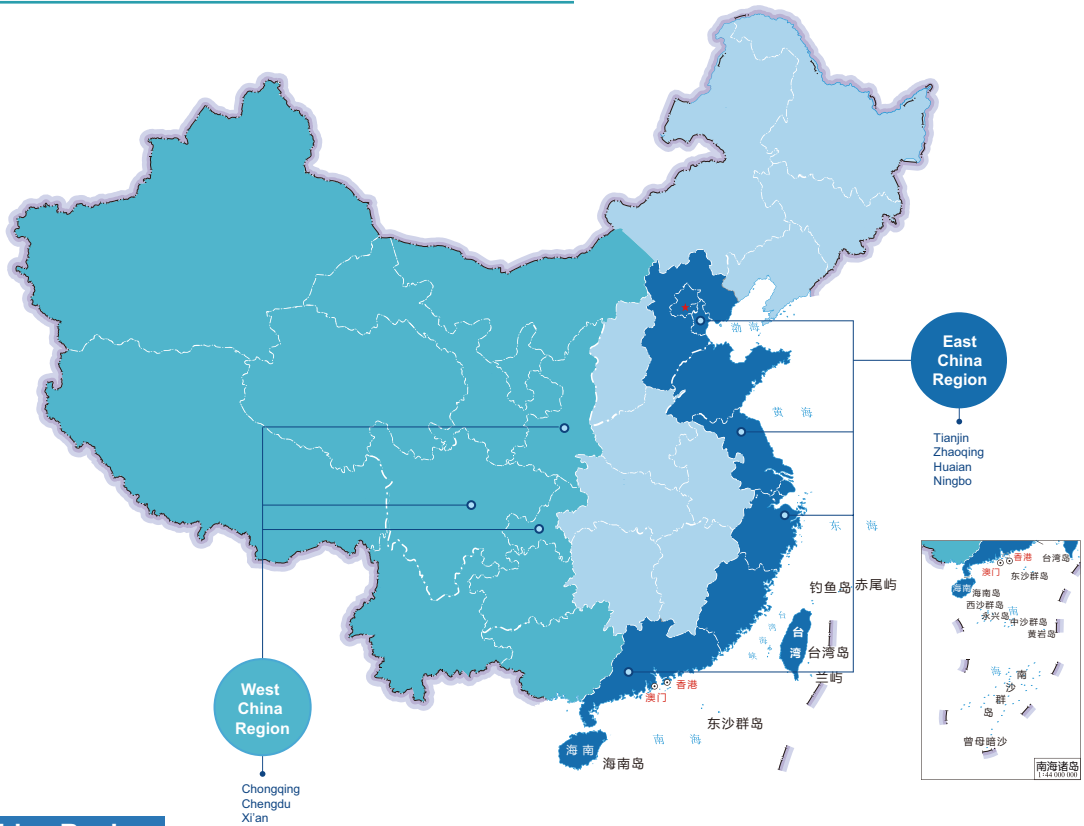
*Source: (WIC) Warehouse In Cloud (www.50yc.com) ● Vacancy Rate

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

City	Average Rent Fee (RMB/m ² per month)	Month-to-Month Comparisons	Vacancy Rate	Month-to-Month Comparisons (Percentage point)
Beijing	47.83	1.08%	5.06%	-0.70
Shanghai	46.84	0.50%	6.89%	0.58
Shenzhen	41.65	0.61%	12.87%	1.26
Suzhou	34.25	0.58%	3.84%	0.36
Hangzhou	32.26	0.84%	8.64%	-0.20
Ningbo	29.20	-0.95%	9.68%	0.36
Guangzhou	32.51	1.94%	6.24%	-0.98
Dongguan	30.98	0.05%	12.90%	-0.79
Nanjing	28.80	-0.17%	12.56%	0.05
Foshan	29.59	0.00%	4.38%	-1.89
Jiaxing	32.01	0.88%	19.56%	0.02
Changsha	26.20	0.51%	15.53%	-0.06
Tianjin	30.32	-0.12%	12.28%	-0.64
Wuxi	29.47	-0.67%	5.04%	0.26
Dalian	24.28	0.01%	35.02%	0.00
Changchun	21.55	0.81%	18.09%	0.63
Chongqing	24.58	-1.28%	25.75%	-0.75
Wuhan	25.26	0.23%	17.03%	-0.22
Zhengzhou	23.21	1.19%	11.00%	-2.26
Shenyang	20.88	-1.02%	19.76%	0.66
Hefei	24.30	0.01%	4.98%	0.00
Kunming	25.30	1.17%	6.70%	-2.16
Harbin	23.97	4.35%	7.22%	0.26
Chengdu	23.90	-0.25%	19.72%	-0.27
Qingdao	23.05	0.70%	4.89%	-1.67
Xi'an	25.69	1.43%	9.48%	-0.67
Guiyang	23.04	0.50%	5.49%	-0.31
Taiyuan	17.40	-0.93%	8.19%	-0.11
Jinan	25.69	0.55%	11.38%	-6.23
Nanchang	21.19	3.07%	17.10%	0.88
Shijiazhuang	20.38	-1.19%	16.97%	-3.31
Lanzhou	20.33	-2.26%	4.59%	-0.24

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

Recommendations of the Warehouses



East China Region

Warehouse Address: Baodi District, Tianjin
Rentable Area: 75,000 square meters
Project Features: The warehousing park enjoys convenient transportation, which can directly reach Beijing International Trade area through the Beijing-Harbin Expressway, which takes only one hour, and it is only a 40-minute drive from the park to downtown Tianjin through the nearby Jingji Expressway.
Contact: Sui Chao
Tel: 18610640033

Warehouse Address: Sihui City, Zhaoqing City, Guangdong Province
Rentable Area: 25,000 square meters
Project Features: This warehousing park is located in the Mafang Development Zone, Dasha Town, Sihui City, with superior geographical location, convenient transportation and sound conditions for the development of logistics park. The park is only 50 kilometers away from the center of Guangzhou. Through the Erguang Expressway and National Highway 321, which runs through the east-west region, the park can quickly access the urban areas of Guangzhou, Baiyun Airport, Zhaoqing, Foshan, Jiangmen and Zhongshan.
Contact: Sui Chao
Tel: 18610640033

Warehouse Address: Qingjiangpu District, Huaian City, Jiangsu Province
Rentable Area: 31,230 square meters
Project Features: This storage park is located in the national Huaian Economic Development Zone, which can provide 4 international standard single-story steel structure warehouses, the total building covers an area of 57,568 square meters. The park is adjacent to Beijing-Shanghai Expressway, and

connecting Changshen Expressway, Yanhuai Expressway, Yanjing Expressway, G15 Coastal Expressway and Huai-Xu Expressway. At the same time, it is surrounded by G205 National Highway, S235, S237 and S238 provincial highways. The Xinchang Railway in the region is integrated with the Beijing-Hangzhou Grand Canal, together with Huaian Lianshui Airport, providing an efficient multimodal transport network for the project.
Contact: Shen Jianfeng
Tel: 15858329935

Warehouse Address: Zhenhai District, Ningbo City
Rentable Area: 83,250 square meters
Project Features: This storage park is located in the logistics hub port of Zhenhai District, Ningbo City, including three double-deck ramp depots, with a total area of about 112,000 square meters. The park has a superior geographical location and is an excellent choice for regional distribution centers and storage centers.
Contact: Shen Jianfeng
Tel: 15858329935

West China Region

Warehouse Address: Nanan District, Chongqing
Rentable Area: 30,000 square meters
Project Features: There are 7 new standard high platform libraries in the park, with a height of 9 meters and a built-in platform. The park is close to the Donggang wharf, with all kinds of supporting facilities and perfect security system.

Contact: Chen Jia
Tel: 18380355719

Warehouse Address: Shuangliu District, Chengdu City, Sichuan Province

Rentable Area: 5,000 square meters

Project Features: This warehousing park is located in the central area of Chengdu Shuangliu International Airport Airport Logistics Park, within which are standard warehouses with Class-C II fire protection qualification. The park has convenient transportation, being 3 kilometers away from the entrance of

the airport highway, 4 kilometers from the entrance of Chengya Expressway and 15 kilometers from the city center.

Contact: Chen Jia
Tel: 18380355719

Warehouse Address: Changan District, Xi'an, Shanxi Province

Rentable Area: 40,000 square meters

Project Features: The park has convenient transportation, superior location and complete supporting facilities.

Contact: Li Chen
Tel: 13119138713

Introduction of China Association of Warehousing and Distribution:

China Association of Warehousing and Distribution (CAWD) originated from previous China Association of Warehousing and Storage which was approved by the former Ministry of Domestic Trade and registered with the Ministry of Civil Affairs in 1995. It was renamed as China Association of Warehousing and Distribution in May 2016 after being approval by the State Assets Commission of the State Council and examined by the Ministry of Civil Affairs. It is a non-profit organization in the national warehousing and distribution industry. There are 12 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):

Warehouse in Cloud takes Warehouse in Cloud platform (www.50yc.com) as its core, aiming at innovating the new mode of domestic supply chain logistics, creating the world's leading industrial Internet integrated service platform and building an open, digital, intelligent Internet of Things digital supply chain ecological network through approaches such as the internet warehousing big data, iCloud warehouse technology, digital operation and data value-added service, combined with intelligent Internet of Things application and artificial intelligence technology. With science and technology as the core driving force, the company ploughs the supply chain and logistics industry. At present, the company has a first-class technical level of R & D team, experienced operation and management expert team, rapid response implementation team, bringing together the top management and technical personnel in the industry. Digital products and services have covered all aspects of the supply chain from end to end.

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