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VOL.08  
2017

上海写字楼市场

SHANGHAI | OFFICE



## 宏观经济

## Macroeconomic

### PMI指数稳中微升，中小型企业发展向好

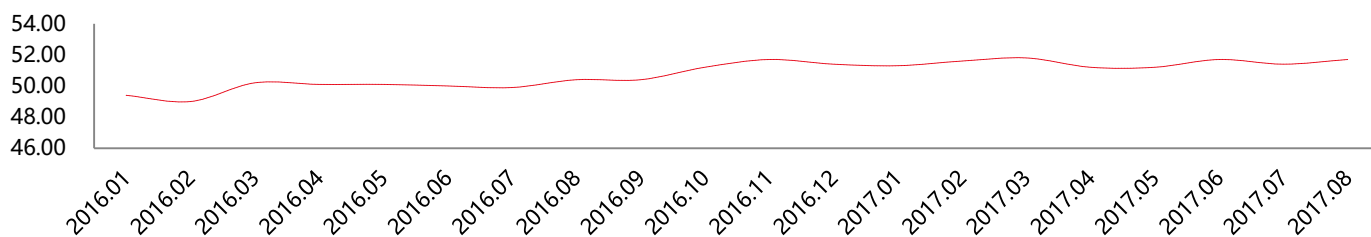
PMI index edged up slightly, small and medium enterprises to develop for the better

8月，PMI指数为51.7%，较上月上升0.3%，比预期的51.3%上浮0.4个百分点，制造业整体保持为重向好的发展态势。

In August, the PMI index was 51.7%, up 0.3% from the previous month, 0.4 percentage points higher than the expected 51.3%, and the manufacturing sector remained a good overall trend. Of enterprise scale, large enterprises PMI was 52.8%, a slight decrease of 0.1%; medium PMI was 51%, an increase of 1.4%, return to the expansion of the range; small business PMI was 49.1% last month rose 0.2 percentage points, the critical point is still lower than 50%.

分企业规模看，大型企业PMI为52.8%，环比微降0.1%；中型企业PMI为51.0%，环比上升1.4%，重新回到扩张区间；小型企业PMI为49.1%，环比上月回升0.2各百分点，仍低于50%的临界点。

2016.01-2017.08 PMI



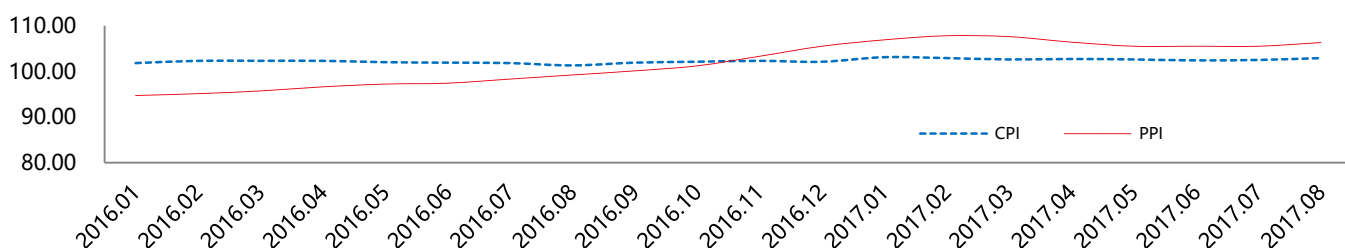
### CPI增速远超预期，创7个月以来新高

CPI growth is much higher than expected, a record high since 7 months

8月，我国CPI指数为102.9，环比上涨0.4%，同比上涨1.6%，涨幅扩大；PPI指数为106.3，受储运成本上涨影响，环比增幅为0.8%，同比上升7.1%。

August, China's CPI index was 102.9, up 0.4%, an increase of 1.6%, or expansion; PPI index was 106.3, affected by the storage and transportation costs rising, the chain increased by 0.8%, an increase of 7.1%.

2016.01-2017.08 CPI&PPI



## 市场资讯

### 上海拼了！“共享房屋”时代来临？

8月24日，上海一次性挂牌出让4幅地理位置极佳的“租赁住房”用地，其中浦东新区两幅分别位于龙阳路、南浦大桥；长宁区地块位于古北红宝石路；徐汇区地块位于漕河泾南宁路。上述地块楼面价仅为目前市场价格的10%，如全部开发为商品房，市场价值约为200亿元，此次上海市政府实际让利达183.13亿元。

### 张江科学城规划落地，产业与金融深度结合

上海市政府正式批复原则同意《张江科学城建设规划》，《张江科学城建设规划》的批复意味着张江将由“园区”升级为“城区”。整体规划面积95平方公里，将以张江高科技园区为基础，转型成为中国乃至全球新知识、新技术的创造之地和新产业的培育之地，现代新型宜居城区和市级公共中心，世界一流科学城。

### 万达“顶住压力”，完成伦敦市中心地块交易

8月21日，英国上市公司St Modwen发布公告称，中国万达集团收购伦敦市中心一区Nine Elms Square大型开发地块的交易已经正式完成。这块地的成交价是4.7亿英镑，不包括未来的后续投入。此前因为和融创的交易，国际三大评级机构之一的标普已经宣布将万达商业地产列入负面观察名单。

## Market information

### Shanghai is spelled! "Shared house" era?

August 24th, Shanghai, a one-time listing sold 4 pieces of excellent geographical location and the "rental housing" for the Pudong New Area two, located in Longyang Road, Nanpu bridge; Changning District is located in Gubei Ruby road; Xuhui District block is located in Caohejing Nanning road. The land floor price is only 10% of the current market price, such as all the development of commercial housing, the market value of about 20 billion yuan, the Shanghai municipal government actually let Lida 18 billion 313 million yuan.

### Zhangjiang Science City Planning landing, industry and finance depth combination

Shanghai municipal government officially approved the principle of "Zhang Jiang Science City Construction Plan", "Zhang Jiang Science City Construction Plan" approved, means that Zhang Jiang will be "Park" upgraded to "city.". The overall planning area of 95 square kilometers, the Zhangjiang hi tech park as the foundation, and the world Chinese transformation has become the cultivation of new knowledge and new technology creation and new industrial land, modern livable city and municipal public center, the world first-class science city.

### Wanda to withstand pressure to complete the central London block trading

August 21st, the British listed company St Modwen announced that the acquisition of China Wanda Group in the central city of a district Nine Elms Square large development plots of the transaction has been officially completed. The price of the land is 470 million pounds, excluding future investments. Earlier, because of the financial and trading transactions, one of the world's three major rating agencies, standard & Poor's has announced the inclusion of Wanda Commercial Real Estate negative watch list.

## 上海写字楼市场

## Shanghai office market

## 租赁市场

## Office Rental Market?

8月全市主要写字楼平均租金报价为5.59元/㎡/天，平均成交租金为5.49元/㎡/天，其中核心区写字楼平均租金报价为7.43元/㎡/天，实际成交租金为6.61元/㎡/天，其中徐家汇板块由于港汇三菱大单成交导致价格有所下降；次中心区平均租金报价为4.80元/㎡/天，平均成交租金为4.46元/㎡/天。

In August the city's main office rents average price for 5.59 yuan / square meters / day, average rent of 5.49 yuan / square meters / day, of which the core area of the average office rental price is 7.43 yuan / square meters / day, the actual turnover of rent for 6.61 yuan / square meters / day, of which Xujiahui plate due to the Hong Kong exchange MITSUBISHI into a single to cause the price decline; the central area of the average rent price for 4.80 yuan / square meters / day, average rent of 4.46 yuan / square meters / day.

核心区写字楼租赁报价 (Core area office rental quotation)																							
核心区板块 (Core plate)	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	
竹园 (Zhuoyuan)																							
中山公园 (Zhongshan Park)																							
延安中路 (Middle Yan'an road)																							
徐家汇 (Xujiahui)																							
世纪公园 (Century Park)																							
人民广场 (People Square)																							
南外滩 (The South Bund)																							
南京西路 (West Nanjing Road)																							
陆家嘴 (Lujiazui)																							
淮海西路 (West Huaihai Road)																							
淮海中路 (Middle Huaihai Road)																							
虹桥商务区 (Hongqiao business district)																							
不夜城 (Sleepless city)																							
北外滩 (The North Bund)																							
八佰伴 (Yaohan)																							

数据说明：由于监测范围涉及20世纪90年代以后楼宇，故数据跨度较大

次中心区写字楼租赁报价 (Sub central office rental quotation)																						
板块 (Plate)	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
中环商务区 (Middle ring business district)			—	—																		
张江 (Zhangjiang hi tech)		—	—	—	—	—																
莘庄商务区 (XZ business district)		—	—	—	—	—																
五角场 (Wujiaochang)		—	—	—	—	—	—															
万体馆 (Wan Ti)		—	—	—	—	—	—															
四川北路 (North Sichuan Road)			—	—	—	—	—	—	—	—	—	—	—									
市北 (North City)			—	—																		
七宝商务区 (Qibao business district)			—	—	—	—																
临空经济圈 (Airport Economic Circle)			—	—	—	—																
金桥 (Jinqiao)		—	—	—	—	—																
虹桥开发区 (HQ Development Zone)			—	—	—	—	—	—	—	—	—	—	—	—								
大宁 (Daning)		—	—	—	—	—																
大柏树 (Dabaishu)			—	—	—	—																
打浦桥 (Dapuqiao)			—	—	—	—	—	—	—	—	—	—	—									
长寿路 (Changshou Road)				—	—	—	—															
长风生态区 (CF Ecological District)		—	—	—	—	—																
漕河泾 (CHJ Development Zone)			—	—	—	—	—	—	—	—	—	—	—									
曹杨 (Caoyang)		—	—	—	—	—																

数据说明：由于监测范围涉及20世纪90年代以后楼宇，故数据跨度较大

## 成交摘要

## Transaction summary

辖区 (District)	成交客户 (Closing customer)	成交楼宇 (Office Building)	成交面积 (Closing areas)
静安, Jing'an	卡斯柯, Casco	市北智汇园	8000m <sup>2</sup>
黄浦, Huangpu	Coasta(Cruise)	都市总部大楼	2000m <sup>2</sup>
黄浦, Huangpu	中航嘉信商务旅行管理有限公司上海分公司	海洋大厦	1600m <sup>2</sup>

徐汇, Xuhui	GK Design	东航滨江	1500m <sup>2</sup>
徐汇, Xuhui	Toshiba	世纪商贸广场	2250m <sup>2</sup>
浦东, Pudong	天津银行	宝钢大厦	14000m <sup>2</sup>
浦东, Pudong	鼎力集团	星辰银行大厦	1300m <sup>2</sup>
浦东, Pudong	和熙投资	旦震国际	1172m <sup>2</sup>
浦东, Pudong	华英证券	世纪汇	2000m <sup>2</sup>
浦东, Pudong	君智投资	环球金融中心	3200m <sup>2</sup>
闵行, Minhang	德国大陆	虹桥新地中心	2500m <sup>2</sup>

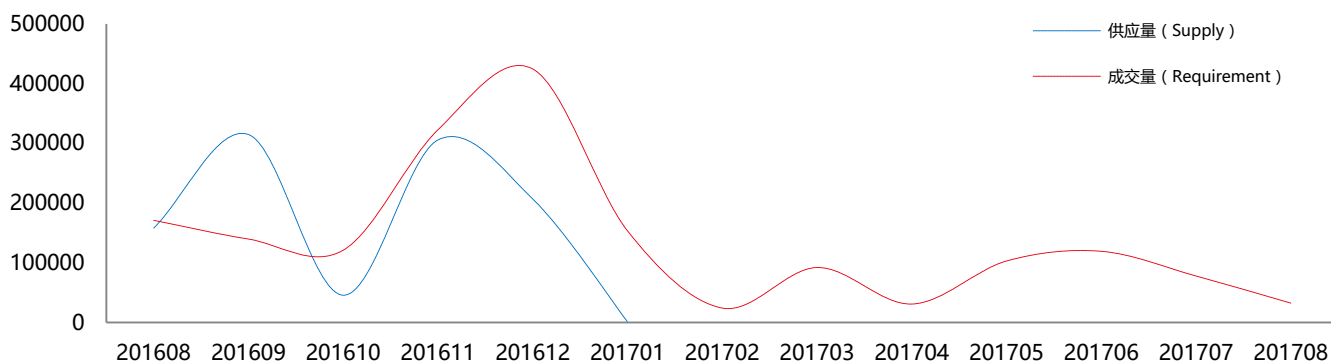
## 销售市场

8月，上海写字楼市场无新增供应量，这是继今年2月以来连续第7个月供应量为零。整月写字楼成交量为3.24万m<sup>2</sup>，环比下降58.41%，同比下降81.07%；成交均价29747.21元/m<sup>2</sup>，环比上涨6.30%，同比上涨9.25%。

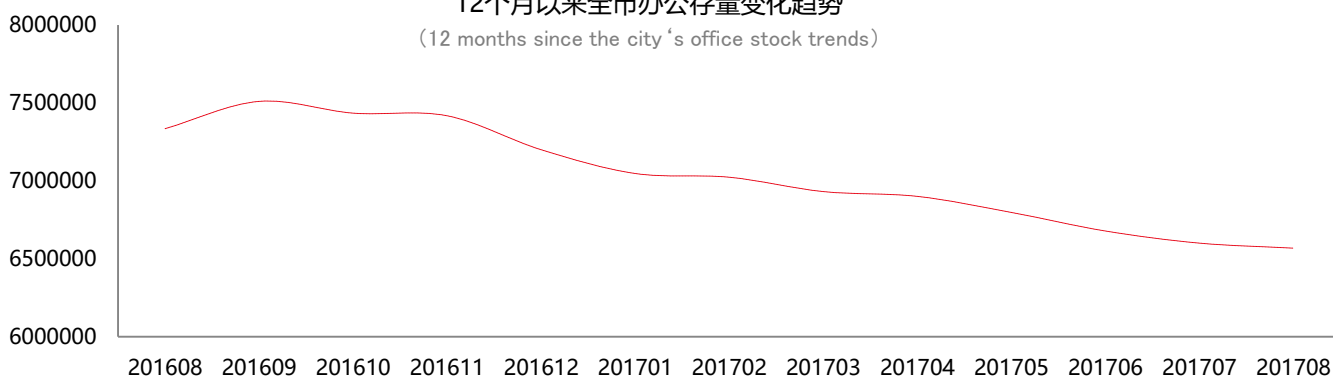
## Office Rental Market?

August, the Shanghai office market no new supply, which is the seventh consecutive month since February this year, the supply of zero. The whole month office turnover of 32 thousand and 400 square meters, a decline of 58.41%, down 81.07%; the average transaction price of 29747.21 yuan / square meters, up 6.30%, an increase of 9.25%.

12个月以来全市办公供求趋势  
(12 months since the city's office supply and requirement trends)



12个月以来全市办公存量变化趋势  
(12 months since the city's office stock trends)



## 成交摘要

## Transaction summary

辖区 (District)	成交楼宇 (Office Building)	成交楼层 (Closing floor)	成交面积 (Closing areas)	成交价格 (Transaction price)	成交总价 (Total transaction price)	成交日期 (Closing date)
浦东, pudong	BHC中环中心	21F	535.19m <sup>2</sup>	¥ 24761.33/m <sup>2</sup>	¥ 13,252,000	8/11
闵行, Minhang	万科七宝国际	6F	999.94m <sup>2</sup>	¥ 30769.00/m <sup>2</sup>	¥ 30,766,900	8/22
松江, Songjiang	平高世贸中心	16F	125.63m <sup>2</sup>	¥ 20599.43/m <sup>2</sup>	¥ 2,587,900	8/30
长宁, Changning	国际新闻大厦	6F	181.64m <sup>2</sup>	¥ 29268.56/m <sup>2</sup>	¥ 5,316,300	8/7
		7F	1267.71m <sup>2</sup>	¥ 28290.86/m <sup>2</sup>	¥ 35,864,600	8/18,2123,25,30
		11F	132.63m <sup>2</sup>	¥ 27732.82/m <sup>2</sup>	¥ 3,678,200	8/21
嘉定, Jiading	华泰中心	8F	377.95m <sup>2</sup>	¥ 27249.99/m <sup>2</sup>	¥ 10,299,100	8/9
		13F	416.10m <sup>2</sup>	¥ 27900.00/m <sup>2</sup>	¥ 11,609,200	8/4
杨浦, Yangpu	嘉誉国际广场	8F	489.47m <sup>2</sup>	¥ 30980.76/m <sup>2</sup>	¥ 15,164,200	8/8
静安, Jing'an	嘉里不夜城	9F	164.04m <sup>2</sup>	¥ 29436.93/m <sup>2</sup>	¥ 4,828,800	8/1
		10F	84.03m <sup>2</sup>	¥ 34671.77/m <sup>2</sup>	¥ 2,913,500	8/14
闵行, Minhang	恺尊广场	7F	1306.73m <sup>2</sup>	¥ 28986.28/m <sup>2</sup>	¥ 37,877,300	8/10
闵行, Minhang	新华联国际中心	独栋	2278.61m <sup>2</sup>	¥ 56000.00/m <sup>2</sup>	¥ 127,602,200	8/16
杨浦, Yangpu	新江湾Office Plus	2F	204.76m <sup>2</sup>	¥ 30308.73/m <sup>2</sup>	¥ 6,206,000	8/24
		3F	164.93m <sup>2</sup>	¥ 32353.32/m <sup>2</sup>	¥ 5,334,400	8/16
		7F	639.96m <sup>2</sup>	¥ 32379.84/m <sup>2</sup>	¥ 20,721,800	8/4,16
		8F	500.03m <sup>2</sup>	¥ 34669.19/m <sup>2</sup>	¥ 17,335,700	8/31
静安, Jing'an	明园森林都市	6F	887.87m <sup>2</sup>	¥ 28000.00/m <sup>2</sup>	¥ 24,860,400	8/27
浦东, Pudong	星月科技园	1F*2	2852.66m <sup>2</sup>	¥ 34492.35/m <sup>2</sup>	¥ 98,395,000	8/23
静安, Jing'an	绿地中央广场	1F*2	1230.77m <sup>2</sup>	¥ 44698.04/m <sup>2</sup>	¥ 55,013,000	8/31
		11F	1988.90m <sup>2</sup>	¥ 37166.00/m <sup>2</sup>	¥ 73,919,900	8/5
虹口, Hongkou	绿地北外滩中心	11F	303.45m <sup>2</sup>	¥ 50363.00/m <sup>2</sup>	¥ 15,282,500	8/31
普陀, Putuo	苏宁天御广场	11F	86.90m <sup>2</sup>	¥ 32138.19/m <sup>2</sup>	¥ 2,792,800	8/1
闵行, Minhang	虹桥富力悦都	1F	953.65m <sup>2</sup>	¥ 55982.64/m <sup>2</sup>	¥ 53,387,800	8/16
闵行, Minhang	虹桥正荣中心	2F	287.25m <sup>2</sup>	¥ 46060.38/m <sup>2</sup>	¥ 13,230,800	8/30
闵行, Minhang	融信绿地国际	9F	433.70m <sup>2</sup>	¥ 31029.57/m <sup>2</sup>	¥ 13,457,500	8/17
		10F	875.68m <sup>2</sup>	¥ 31029.57/m <sup>2</sup>	¥ 27,172,000	8/17
金山, Jinshan	金山国际贸易城	2F	93.18m <sup>2</sup>	¥ 7169.49/m <sup>2</sup>	¥ 668,100	8/17

## 土地市场

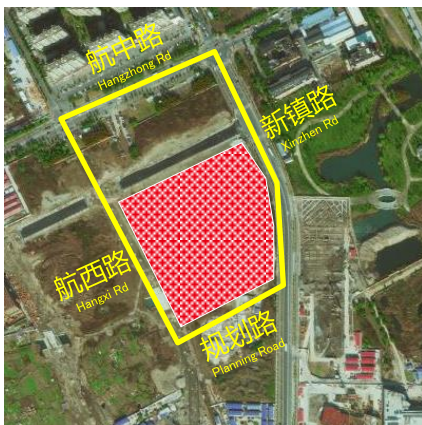
上海8月共计成交土地商办类土地6幅，总成交土地面积11.02万 $m^2$ ，预计总建筑面积为29.39万 $m^2$ 。其中，纯商业类土地3幅，商办类土地3幅，原备受关注的华漕镇MHPO-1402单元42-07地块在8月10日被紧急终止出让。

## Land market

Shanghai in August a total turnover of land business class land 7, the total turnover of the land area of 114 thousand and 300 square meters, total construction area of 295 thousand and 400 square meters. Among them, 4 pure commercial land, commercial land 3, the original concern of the town of MHPO-1402 units 42-07 plots in August 10th were terminated by the urgent transfer.



古美北社区S110502单元117K-02



七宝生态商务区19-01地块



徐泾镇西虹桥徐南路北侧07-04地块



夏阳街道盈港路南侧15-02地块



莘庄工业区01单元31C-01A地块



浦江镇新选址一号基地w1-07地块

地块 (Parcel name)	类型 (Type)	容积率 (Volume ratio)	占地面积 (Area covered)	成交价 (Transaction price)	楼板价 (Floor price)	成交企业 (Closing enterprise)	溢价率 (Premium rate)
闵行——古美北社区 S110502单元117K-02	商办	2.54	34049.9	2,220,000,000	25,668	上海万源房地产开发有限公司	31.87%
闵行——七宝生态商务区 19-01地块	商办	3.7	15982	1,064,400,000	17,999	上海上坤浦益置业有限公司	0%
青浦——徐泾镇西虹桥 徐南路北侧07-04地块	商办	2.5	33807.1	963,699,970	11,402	上海威歆实业有限公司	90.04%
青浦——夏阳街道 盈港路南侧15-02地块	商业	2.5	7111.1	352,000,000	19,800	江苏茂悦房地产开发经营有限公司	371.41%
闵行——莘庄工业区 01单元31C-01A地块	商业	2.6	15488.7	450,800,000	11,194	上海市莘庄工业区经济技术发展有限公司	11.94%
闵行——浦江镇新选址一号基地 w1-07地块	商业	1.5	3718.6	8,010,000	1,436	上海江晨投资管理发展有限公司	1.26%



## 虹口区市场

## Hongkou District

## 租赁市场

## Office Rental Market

8月，虹口区主要写字楼平均租金报价在5.29-6.54元/㎡/天，平均成交价格为5.42-6.14元/㎡/天。平均空置率18.94%，空置率超过50%的楼宇有上海明珠创意产业园二期（100%）、合生财富广场（90%）、一方大厦（100%）、星荟中心（80%）、上海白玉兰广场（74%）、中科招商国际财富中心（50%）、星外滩10号楼（100%）。

In August, Hongkou District office rents average price in 5.29-6.54 yuan / square meters / day, the average transaction price of 5.42-6.14 yuan / square meters / day. The average vacancy rate of 18.94%, the vacancy rate of more than 50% buildings with two Pearl Shanghai Creative Industry Park (100%), (90%), Hopson Fortune Plaza one building (100%), star center (80%), Shanghai Hui White Magnolia Plaza (74%), China Merchants International Fortune Center (50%), the Bund 10 No. (100%).

板块 (Block)	楼宇名称 (Office building)	空置率 (Vacant space%)	成交租金 (Rent)	
			从 (From)	至 (To)
北外滩	上海海湾大厦	0%	3.80	4.00
	瑞丰国际大厦	0%	5.40	5.80
	宝矿国际大厦	18%	5.30	6.50
	新华保险大厦	15%	7.10	8.00
	国际航运中心13号	0%	6.80	7.50
	国际航运中心18栋3号	0%	9.00	9.50
	星荟中心	66%	6.60	8.00
	上海白玉兰广场	70%	7.80	10.00
	中科招商财富中心	35%	8.00	9.00
	外滩588	3%	8.00	10.00
	盛邦国际大厦	9%	5.70	6.50
	中信广场	10%	7.00	9.80
四川北路	壹丰大厦	10%	6.00	6.70
	利通广场	7%	5.90	6.50
	凯德虹口龙之梦	6%	6.00	6.60
	虹口SOHO	2%	5.40	6.70
	高宝大厦	20%	5.60	6.20
	金融街·海伦中心	42%	5.50	6.90

## 销售市场

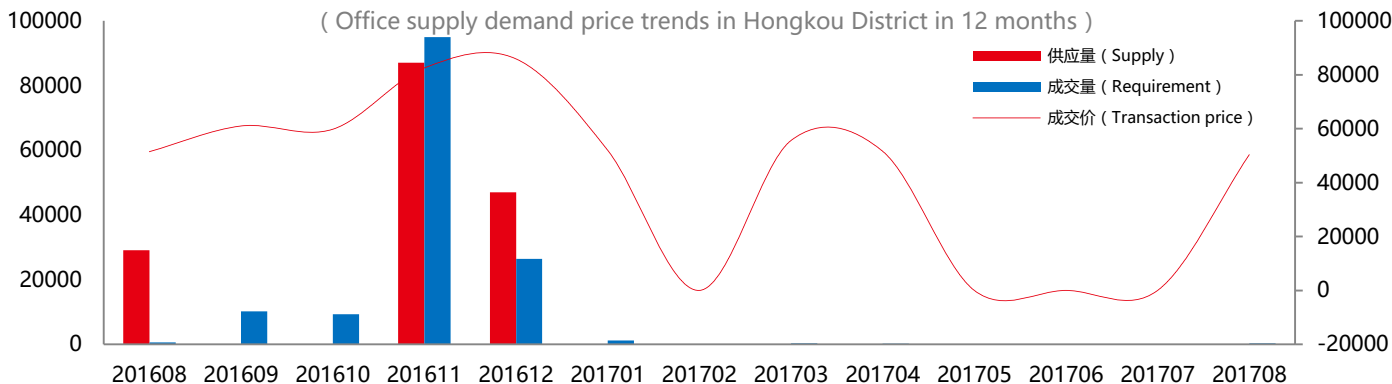
8月，虹口区无新增写字楼供应，成交面积为303.45m<sup>2</sup>，成交均价50363元/m<sup>2</sup>。2017年以来连续8个月无新增供应，目前全区存量面积为35.64万m<sup>2</sup>，缓慢下降。

## Office Sales Market

In August, Hongkou District new office supply, closing an area of 303.45 square meters, the average transaction price of 50363 yuan / square meters. Since 2017 8 consecutive months without additional supply, the stock of further contraction, currently the region's stock area of only 356 thousand and 400 square meters.

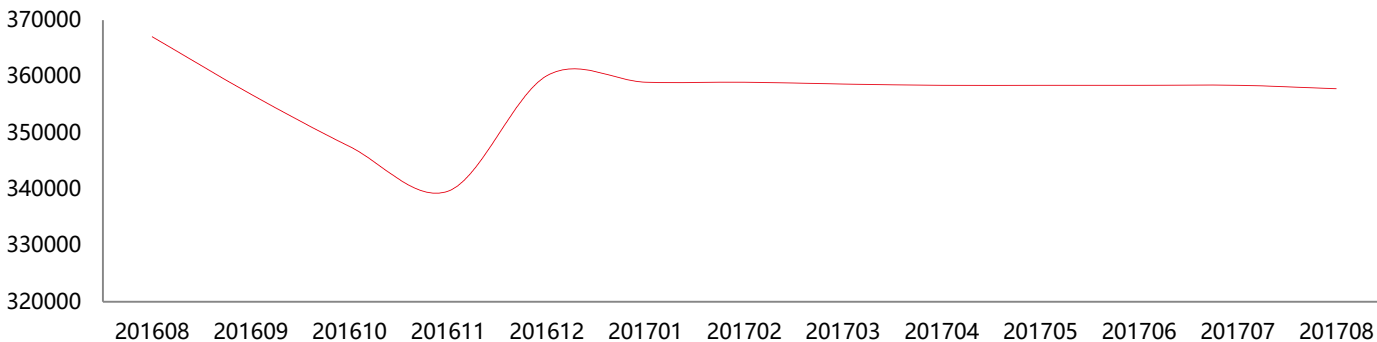
12个月以来虹口区办公供求价趋势

( Office supply demand price trends in Hongkou District in 12 months )



12个月以来虹口区办公存量变化趋势

( Change trend of office stock in Hongkou District in 12 months )



## 闵行区市场

## Minhang District

### 租赁市场

### Office Rental Market

闵行区主要写字楼平均租金报价在4.08-4.73元/m<sup>2</sup>/天，平均成交价格为3.90-4.44元/m<sup>2</sup>/天。平均空置率37.43%，空置面积超过140万m<sup>2</sup>，主要集中区域为虹桥商务区及莘庄商务区，主要楼宇空置面积分别为42.15万m<sup>2</sup>与19.07万m<sup>2</sup>。

Minhang District office rents average price in 4.08-4.73 yuan / square meters / day, the average transaction price of 3.90-4.44 yuan / square meters / day. The average vacancy rate of 37.43%, the vacant area of more than 1 million 400 thousand square meters, the main focus area for the Hongqiao business district and Xhenzhuang business district, the main area of vacant buildings is 421 thousand and 500 square meters and 190 thousand and 700 square meters respectively.

板块 (Block)	楼宇名称 (Office building)	空置率 (Vacant space%)	成交租金 (Rent)	
			从 (From)	至 (To)
虹桥	虹桥天地	15%	7.00	7.50
	虹桥新地中心	50%	5.80	6.20
	虹桥绿谷(东区)	7%	5.00	5.50
	万通中心	70%	5.80	6.20
	虹桥万科中心	30%	7.00	7.50
	虹桥丽宝广场	80%	4.80	5.70
莘庄	闵行凯德龙之梦	4%	5.00	5.50
	东苑丽宝广场	1%	5.00	5.50
	丰树商业成D栋	满租	5.00	5.50
	丰树商业城B栋	86%	4.50	5.50
吴中路	金虹桥商务广场	满租	5.00	5.50
	虹桥国际广场	2%	5.50	6.00
	莱茵虹景中心	4%	5.00	5.50
	宏汇莲花广场	40%	4.50	5.00
莲花路	城开中心	35%	5.50	6.00

## 销售市场

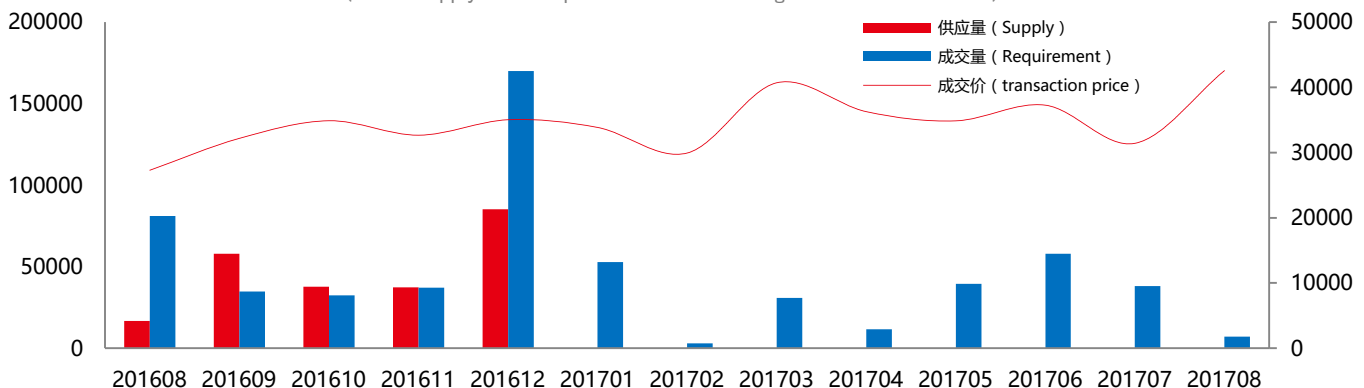
## Office Sales Market

8月，闵行区无新增写字楼供应，成交面积为7135.56㎡，成交均价42533元/㎡。同样为连续8个月零新增供应，目前全区存量面积为90.38万㎡，月均去化2.28万㎡。

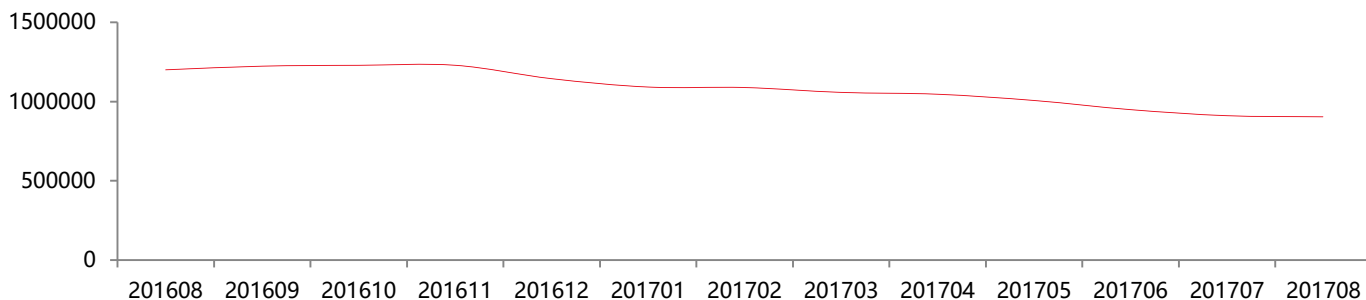
In August, Minhang District new office supply, closing an area of 7135.56 square meters, the average transaction price of 42533 yuan / square meters. As for the 8 consecutive months of new supply, the stock of the current area of 903 thousand and 800 square meters, to a monthly average of 22 thousand and 800 square meters.

### 12个月以来闵行区办公供求价趋势

(Office supply demand price trends in Minhang District in 12 months)



12个月以来闵行区办公存量变化趋势  
(Change trend of office stock in Minhang District in 12 months)



## 杨浦区市场

## Yangpu District

### 租赁市场

### Office Rental Market

8月，杨浦区主要写字楼平均租金报价在4.08-4.56元/㎡/天，平均成交价格为4.14-4.52元/㎡/天。平均空置率40.52%，空置面积超过62.64万㎡，主要集中在北外滩区域。

In August, Yangpu District office rents average price in 4.08-4.56 yuan / square meters / day, the average transaction price of 4.14-4.52 yuan / square meters / day. The average vacancy rate of 40.52%, the vacant area of more than 626 thousand and 400 square meters, mainly concentrated in the northern region of the Bund.

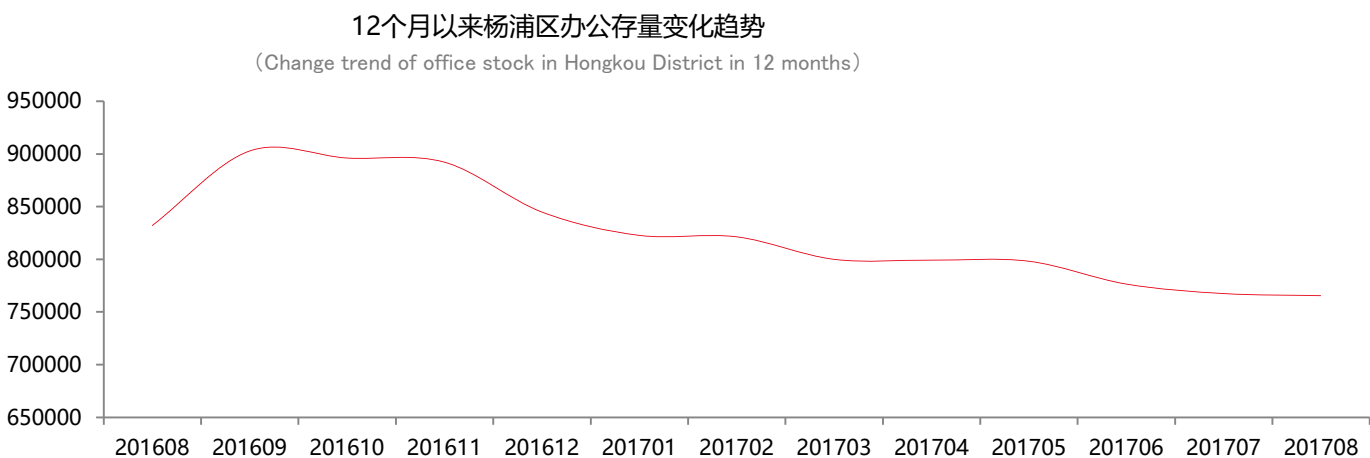
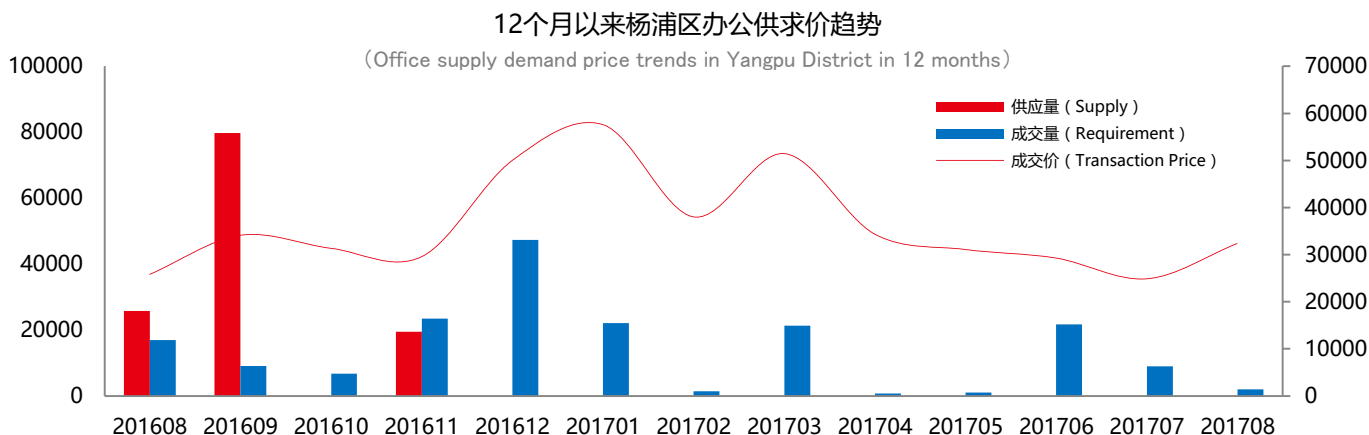
板块 (Block)	楼宇名称 (Office building)	空置率 (Vacant space%)	成交租金 (Rent)	
			从 (From)	至 (To)
东外滩	东方渔人码头	69%	5.30	7.30
	滨江国际广场(北2幢)	15%	4.30	5.10
	君欣时代广场	50%	4.50	5.00
	文通大厦	2%	4.80	5.60
	北美广场	1%	4.60	5.60
	西门子大楼	0%	4.00	5.00
	燕舞-东方保利广场B1	56%	5.40	6.00
	宝地广场	20%	6.30	7.10
五角场	合生国际中心	25%	6.10	7.50
	万达广场	10%	3.80	5.50
	中航天盛广场	15%	5.60	6.00
	创智天地三期	2%	5.20	5.60
	创智天地四期	10%	5.40	5.80
新江湾城	尚浦中心一期	15%	6.00	6.30

## 销售市场

### Office Sales Market

本月杨浦区无新增写字楼供应，自2016年12月以来连续9个月零新增。成交面积1999.15㎡，成交均价32394.74元/㎡，受政策影响办公整体成交量有所萎缩，目前全区存量面积为76.55万㎡，月均去化仅1.4万㎡。

There is no new office supply in Yangpu District this month, 9 months since December 2016. The turnover area of 1999.15 square meters, the average transaction price of 32394.74 yuan / square meters, affected by the policy office overall trading volume has been shrinking, currently the region's stock area of 765 thousand and 500 square meters, to the monthly average of only 14 thousand square meters.



## 普陀区市场

### Putuo District

## 租赁市场

### Office Rental Market

普陀区本月主要写字楼平均租金报价为3.89-4.38元/㎡/天，实际成交价格为4.06-4.50元/㎡/天，平均空置率20.90%，空置面积28.15万㎡，其中长风生态商务区空置率为21.10%。

Putuo District this month is the average office rental price for 3.89-4.38 yuan / square meters / day, the actual transaction price for 4.06-4.50 yuan / square meters / day, the average vacancy rate of 20.90%, the vacant area of 281 thousand and 500 square meters, of which the vacancy rate of 21.10% Changfeng ecological business district.

板块 (Block)	楼宇名称 (Office building)	空置率 (Vacant space%)	成交租金 (Rent)	
			从 (From)	至 (To)
长风生态商务区	汇银铭尊	满租	3.80	4.30
	天洁大厦	5%	4.50	5.00
	海亮大厦	7%	4.70	5.20
	上海跨国采购中心	6%	6.00	7.00
	新城控股大厦	15%	5.00	5.50
	北岸长风E座	2%	5.00	5.40
	长风嘉庭国际	30%	4.50	5.30
曹杨	环球港	12%	6.50	7.00
	长城大厦	1%	5.20	6.50
	伸大厦	1%	4.00	4.50
	我格广场	3%	5.00	5.50
长寿	友力国际大厦	4%	4.00	4.30
	现代大厦	2%	4.00	4.50
	中港汇大厦	10%	5.50	6.00
	平高国际广场	5%	4.20	4.50
真如	品尊国际	10%	5.50	6.00
	新城市中心广场	15%	4.00	4.20
甘泉	德必易园	1%	2.80	4.00

## 销售市场

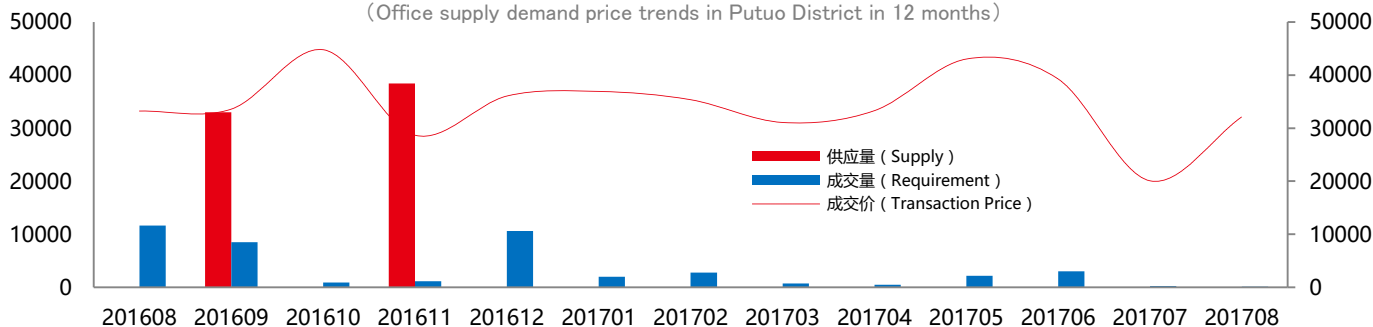
## Office Sales Market

本月普陀区无新增写字楼供应，受政策影响，大量酒店式公寓产品滞销，成交面积仅86.9 m<sup>2</sup>，成交均价32138.19元/m<sup>2</sup>，存量维持在40万m<sup>2</sup>左右，月均去化3000m<sup>2</sup>，去化压力巨大。

This month, Putuo District new office supply, affected by the policy, a large number of hotel style apartments products unsalable, closing an area of only 86.9 square meters, the average transaction price of 32138.19 yuan / square meters, 400 thousand square meters of stock maintained at around to a monthly average of 3000 square meters, to the great pressure.

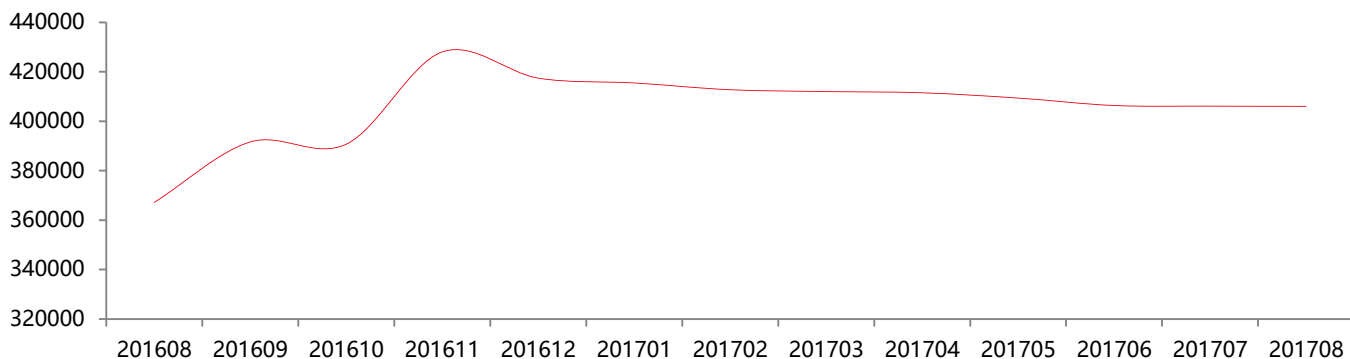
12个月以来普陀区办公供求价趋势

(Office supply demand price trends in Putuo District in 12 months)



## 12个月以来普陀区办公存量变化趋势

(Change trend of office stock in Putuo District in 12 months)



## 徐汇区市场

## Xuhui District

## 租赁市场

## Office Rental Market

徐汇区本月主要写字楼平均租金报价为5.42-5.89元/㎡/天，实际成交均价为4.71-5.19元/㎡/天，平均空置率10.75%，空置37.18万㎡。

Xuhui District this month is the average office rental price for 5.42-5.89 yuan / square meters / day, the actual transaction price for 4.71-5.19 yuan / square meters / day, the average vacancy rate of 10.75%, the vacant 371 thousand and 800 square meters.

板块 (Block)	楼宇名称 (Office building)	空置率 (Vacant space%)	成交租金 (Rent)	
			从 (From)	至 (To)
徐家汇	上海实业大厦	2%	7.80	8.50
	腾飞大厦	15%	6.80	7.50
	港汇广场	25%	10.50	12.50
	徐家汇国际大厦	10%	6.50	7.50
	城建地产大厦	满租	6.00	7.00
	中金国际广场 (B座)	7%	7.00	7.50
	中金国际广场 (C座)	满租	6.50	7.00
	城开大厦	10%	6.80	7.50
	T20	5%	9.50	11.50
	永丰国际广场	6%	6.00	6.50
	宏汇国际广场	20%	6.50	7.00
淮海西路	淮海国际广场	2%	8.80	13.50
	上海环贸广场 (一期)	满租	11.00	12.80
	上海环贸广场 (二期)	2%	11.00	12.80
漕河泾	越虹广场	2%	4.50	5.00
	美通科创空间	满租	4.50	4.80

## 销售市场

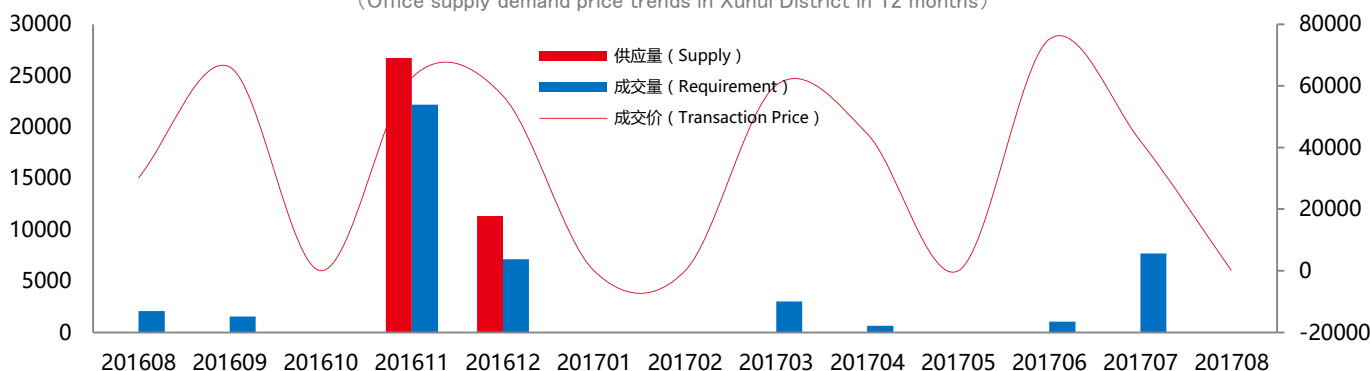
## Office Sales Market

本月徐汇区新增写字楼供应及成交面积均为零，2017年以来总共成交仅1.24万 $m^2$ ，月均成交面积1548.74 $m^2$ ，作为核心商务区，徐汇区已经进入“存量市场”。

This month, Xuhui District new office supply and turnover of the area is zero, since 2017 a total turnover of only 12 thousand and 400 square meters, the average monthly turnover area of 1548.74 square meters, as the core business district, Xuhui District has entered the mature stock market in the region more than 90% offices and 100% of the new office building is a type of property.

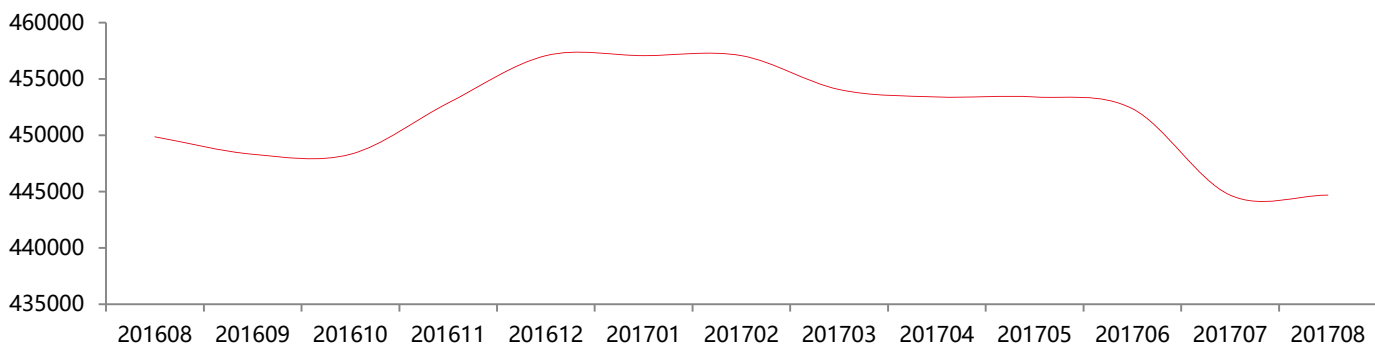
12个月以来徐汇区办公供求价趋势

(Office supply demand price trends in Xuhui District in 12 months)



12个月以来普陀区办公存量变化趋势

(Change trend of office stock in Putuo District in 12 months)



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### 咨询顾问全程服务

前期、规划设计、招商政策、物业管理、资产升级、投资交易

### 企业客户一体化服务

选址、租赁买卖交易、项目施工、设备、租约管理

### 投资者服务

战略顾问、投资咨询、项目开发与管理、租赁代理、物业与资产管理、企业评估与咨询、大宗交易

### 资产管理服务

租务管理、物业管理、设备及设施管理、收购与转让

2016年正式设立投资业务、资产管理模块

2015年闵行区政府区域楼宇产业经济研究课题独家委托机构

2013年森集团地产投资战略顾问伙伴

2013年中星集团战略合作协议

2012年普陀区人民政府战略合作协议

2011年闸北区人民政府战略合作协议

2011年闵行区莘庄商务开发公司战略合作协议

2011年闵行区莘庄镇订战略合作协议

2010年长宁区虹桥临空管理委员会战略合作协议

2007年虹口区政府开创四川路商业街商业新格局

2005年嘉定区政府为安亭新源路商业街提供服务，取得空前成功

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