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VOL.09  
2017

上海写字楼市场

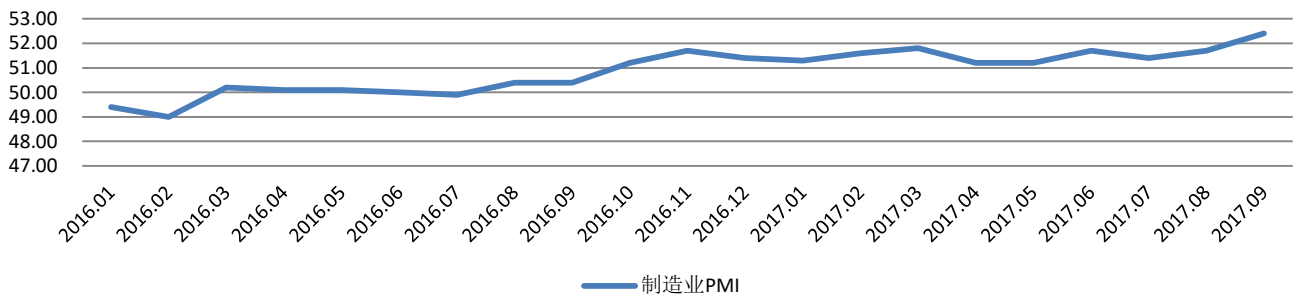
SHANGHAI | OFFICE



## 宏观经济

PMI指数持续稳步攀升，指数水平创下近年来新常态经济形势下新高，企业活动活跃

9月份中国 (PMI)为52.4%，较上月上升0.7个百分点，比8月提高0.7个百分点；服务业商务活动指数为54.4，上升1.8个百分点。实际上，官方9月制造业PMI数据达到了2012年5月以来的最高点，而非制造业商务活动指数也达到了2014年6月以来的最高点。中国PMI指数连续12个月保持在51%以上，9月份又上一个新台阶。



## Macroeconomic

PMI index rose steadily, the level of the index record in recent years, the new normal economic situation under the high, business activity.

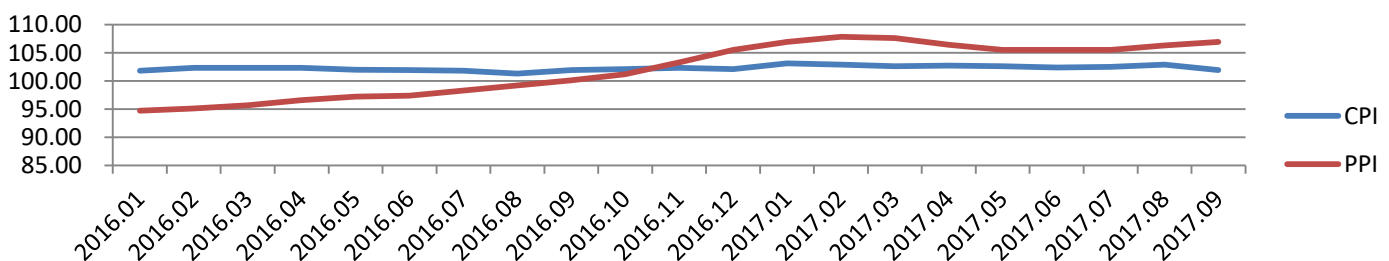
In September, China (PMI) was 52.4%, up 0.7 percentage points from the previous month, 0.7 percentage points higher than in August; the business activity index of service industry was 54.4, up 1.8 percentage points. In fact, the official manufacturing PMI data in September reached its highest level since May 2012, rather than the manufacturing business activity index, which has reached its highest level since June 2014. China's PMI index remained at over 51 for 51 consecutive months and reached a new level in September.

CPI小幅收窄PPI维持高位 9月物价或仍运行在合理区间

9月份全国居民消费价格指数 (CPI) 和工业生产者出厂价格指数 (PPI) 数据显示，CPI同比上涨1.6%，环比上涨0.5%；PPI同比上涨6.9%，环比上涨1.0%。

CPI narrowed slightly, PPI remained high, September prices or still running in a reasonable range

In September, the national consumer price index (CPI) and producer price index (PPI) data showed that CPI rose by 1.6%, up by 0.5%; PPI rose by 6.9%, up 1%.



## 市场资讯

### “持有物业”进一步向住宅蔓延

上海发布的《上海市住房发展“十三五”规划》明确提出，新增租赁住房预计达到70万套，占新增市场化住房总套数超过60%。目前已有6幅租赁住房用地出让，其中浦东占据3幅，嘉定、徐汇、长宁各占1幅，总成交面积18.12万方，总成交金额28.36亿元。

### 上海地产集团38亿获浦东新区世博会商办地块

9月29日，上海地产集团以底价38.02亿元竞得浦东新区世博会地区B片区一宗商办，楼面价1.99万元/平方米。地块位于世博会地区B片区，东至周家渡路，南至博成路，西至世博馆路，北至世博大道，出让面积为4.78万平方米（约72亩），容积率为4，建筑面积为19.12万平方米，起价为38.02亿元，楼面起价为1.99万元/平方米。

### 贯通沪西南北，嘉闵线正式启动

近日，上海嘉闵线建设传来重磅新消息，现项目专项规划公开招标。随着最新进度出炉，备受瞩目的嘉闵线将沿着马陆东部的澄浏路向南，基本可以确定经过南翔、江桥、大虹桥直达闵行莘庄，同时有望在南翔站与11号线汇合。轨道交通嘉闵线的开通，将大大弥补11号线未辐射地区，对于嘉定东部地区，特别是马陆东部、南翔产生极为重要的意义，将进一步加强嘉定城区与虹桥地区联通。

## Market information

### "Holding property" further spread to residential

Shanghai issued the "Shanghai housing development" 13th Five-Year "plan" put forward clearly, the new rental housing is expected to reach 700 thousand units, accounting for the new housing market more than 60% of the total 16072. At present, there are 6 rental housing land sold, of which Pudong occupies 3, Jiading, Xuhui, Changning each accounted for 1, the total turnover area of 181 thousand and 200 parties, the total turnover of 2 billion 836 million yuan.

### Shanghai real estate group won 3 billion 800 million Pudong New Area Expo consultation

In September 29th, Shanghai real estate group competing for 3 billion 802 million yuan to compete in Pudong New Area World Expo B area a business office, floor price 19 thousand and 900 yuan / square meter. Is located in the World Expo area B area, East Zhoujiadu Road, South to the west to Bo Cheng Road, Pavilion Road, north to the Expo Boulevard, transfer area of 47 thousand and 800 square meters (about 72 acres), the volume rate of 4, construction area of 191 thousand and 200 square meters, the starting price is 3 billion 802 million yuan, the floor price for 19 thousand and 900 yuan / square meters.

### Through the north and south of the Shanghai and Shenzhen, Jia Min line officially started

Recently, Shanghai Jia Min line to send heavy new news, now the project special planning open bidding. With the latest progress from high-profile Jia Min line along the eastern Malu Chengliu Road South, which can be determined through Jiangqiao, Nanxiang, Hongqiao to Minhang and Xhenzhuang, is expected in the Nanxiang station and line 11. Jia Min rail line opened, will greatly make up for the No. 11 line radiation area, to the east of Jiading, especially the eastern, Nanxiang Malu has a very important significance, will further strengthen China Unicom and Jiading District of Hongqiao



## 上海写字楼市场

## Shanghai office market

## 租赁市场

## Office Rental Market

9月全市主要写字楼平均租金报价为 6.46元/m<sup>2</sup>/天，平均成交租金为5.59元/m<sup>2</sup>/天，其中核心区写字楼平均租金报价为 8.3元/m<sup>2</sup>/天，实际成交租金为6.24元/m<sup>2</sup>/天；次中心区平均租金报价为5.14元/m<sup>2</sup>/天，平均成交租金为 4.31元/m<sup>2</sup>/天。

In September the city's main office rents average price for 6.46 yuan / square meters / day, average rent of 5.59 yuan / square meters / day, of which the core area of the average office rental price is 8.3 yuan / square meters / day, the actual turnover of rent for 6.24 yuan / square meters / day; the central area of the average rent price for 5.14 yuan / M / day, average rent of 4.31 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 (Zhuyuan)																						
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)
黄浦, Huangpu	商务中心	华旭国际大厦	1333m <sup>2</sup>
黄浦, Huangpu	联合办公	歌斐中心	8000m <sup>2</sup>
徐汇, Xuhui	wework	徐家汇国贸中心一期	4500m <sup>2</sup>

徐汇, Xuhui	万豪国际	徐家汇国贸中心一期	3000m <sup>2</sup>
普陀, Putuo	上海云展服饰有限公司	东渡长风嘉庭	551.78m <sup>2</sup>
杨浦, Yangpu	付泰信息	盐城东方广场	301.21m <sup>2</sup>
杨浦, Yangpu	中隆华夏	盐城东方广场	334m <sup>2</sup>
杨浦, Yangpu	金融公司	东方渔人码头	380m <sup>2</sup>
浦东, Pudong	泰国SCB银行	上海环球金融中心	750m <sup>2</sup>
浦东, Pudong	华英证券	上海世纪汇广场	2000m <sup>2</sup>
浦东, Pudong	联合办公	华勇大厦	3300m <sup>2</sup>
闵行, Minhang	争伯景观	虹桥新地中心	370m <sup>2</sup>
闵行, Minhang	佰康生物	虹桥新地中心	500m <sup>2</sup>
闵行, Minhang	投资公司	旭辉莘庄中心	2360m <sup>2</sup>
虹口, Hongkou	重庆会通华联物流上海分公司	宝矿国际大厦	200m <sup>2</sup>
虹口, Hongkou	皮具公司	利通广场	300m <sup>2</sup>
虹口, Hongkou	上海聚博房地产开发有限公司	金融街海伦中心	562.17m <sup>2</sup>
虹口, Hongkou	上海顺圆物流有限公司	金融街海伦中心	566.08m <sup>2</sup>
虹口, Hongkou	上海脉豪商务信息咨询有限公司	轻工国际大厦	600m <sup>2</sup>

## 销售市场

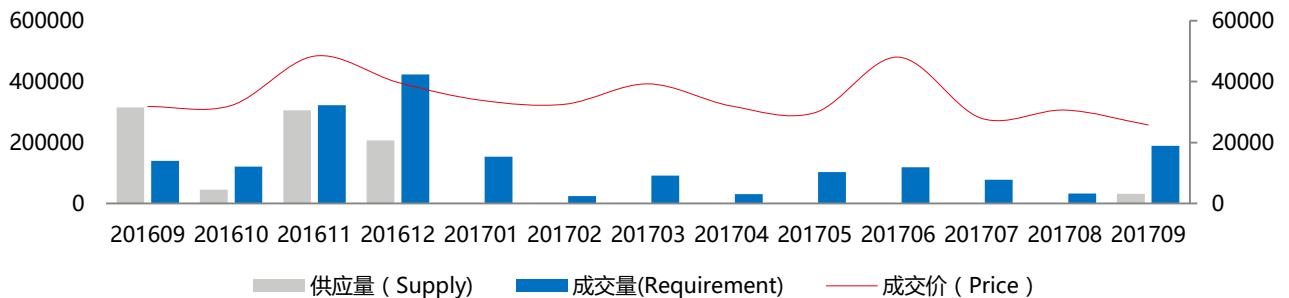
9月，上海写字楼市场供应31194m<sup>2</sup>，全部来自于嘉定新城中信泰富又一城，且于9月29日及9月30日大面积出售，成交价格分别为13905.45元/m<sup>2</sup>及13789元/m<sup>2</sup>。全市整体成交量18.86万m<sup>2</sup>，环比骤增483%，同比上升超过35%，占2017年至今总成交量的23%；成交均价25811.56元/m<sup>2</sup>，环比下降16%，同比跌幅为19%。

## Office Rental Market

In September, the Shanghai office market supply of 31194 square meters, all from Jiading Metro City and CITIC Pacific in September 29th and September 30th, and a large area of sale, the transaction price was 13905.45 yuan / square meters and 13789 yuan / square meters. The city's overall volume of 188 thousand and 600 square meters, the chain increased 483%, an increase of more than 35%, accounting for 23% of total volume since 2017; the average transaction price of 25811.56 yuan / square meters, a decline of 16%, representing a decrease of 19%.

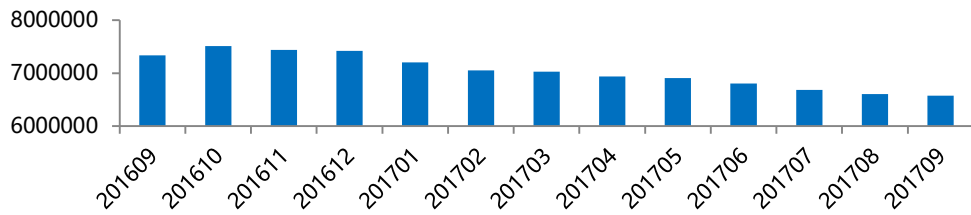
### 12个月以来全市办公供求趋势

( 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)
青浦 pudong	上海北竿山国际艺术中心	3F	195.65m <sup>2</sup>	¥14628.82/m <sup>2</sup>	¥2,862,100	9/7
		4F	198.44m <sup>2</sup>	¥14628.82/m <sup>2</sup>	¥2,902,900	
		3F	195.65m <sup>2</sup>	¥15621.72/m <sup>2</sup>	¥3,056,400	9/12
		4F	198.44m <sup>2</sup>	¥15621.72/m <sup>2</sup>	¥3,100,000	
闵行 Minhang	金源中心	20F	261.78m <sup>2</sup>	¥24584.57/m <sup>2</sup>	¥6,435,700	9/1
宝山 Baoshan	东智商务广场	8F	98.84m <sup>2</sup>	¥18821.47/m <sup>2</sup>	¥1,860,300	9/24
嘉定 Jiading	中信泰富又一城	6F、9F、15F、20F	2946.40m <sup>2</sup>	¥13905.45/m <sup>2</sup>	¥40,971,000	9/29
		6-14F、16-20F	28248.28m <sup>2</sup>	¥13789.00/m <sup>2</sup>	¥389,513,800	9/30
长宁 Changning	上海国际新闻大厦	7F	181.64m <sup>2</sup>	¥28862.11/m <sup>2</sup>	¥5,242,500	9/1
			369.42m <sup>2</sup>	¥29327.68/m <sup>2</sup>	¥10,834,200	9/19
奉贤 Fengxian	亿星商务大厦	15F	137.79m <sup>2</sup>	¥13294.51/m <sup>2</sup>	¥1,831,900	9/1
新静安 New Jing'an	创富中心	4F、5F、6F、7F、12F、13F	8094.87m <sup>2</sup>	¥30037.95/m <sup>2</sup>	¥243,153,300	9/18
		8F、10F、11F	4063.8m <sup>2</sup>	¥29936.27/m <sup>2</sup>	¥121,655,000	9/19
嘉定 Jiading	华泰中心	16F	377.95m <sup>2</sup>	¥27955.01/m <sup>2</sup>	¥10,565,600	9/12
		17F	416.10m <sup>2</sup>	¥28110.01/m <sup>2</sup>	¥11,696,600	9/4
宝山 Baoshan	同济创园	5F	374.75m <sup>2</sup>	¥25090.44/m <sup>2</sup>	¥9,402,600	9/19
		11F	734.10m <sup>2</sup>	¥23368.81/m <sup>2</sup>	¥17,155,000	9/26
闵行 Minhang	中庚·城开中心	5F	456.77m <sup>2</sup>	¥55211.64/m <sup>2</sup>	¥25,219,000	9/7
		13F	155.33m <sup>2</sup>	¥55329.37/m <sup>2</sup>	¥8,594,300	9/13
		10F	155.33m <sup>2</sup>	¥55337.51/m <sup>2</sup>	¥8,595,600	9/26
		18F	157.52m <sup>2</sup>	¥55337.51/m <sup>2</sup>	¥8,716,800	
		20F	154.98m <sup>2</sup>	¥55329.17/m <sup>2</sup>	¥8,574,900	9/25
浦东 Pudong	天安万科御河企业公馆	1F	643.50m <sup>2</sup>	¥39284.47/m <sup>2</sup>	¥25,279,600	9/6
闵行 Minhang	恒基旭辉中心	27号整栋	1969.52m <sup>2</sup>	¥35849.99/m <sup>2</sup>	¥70,607,200	9/13
		36号3F、401	1750.06m <sup>2</sup>	¥35789.96/m <sup>2</sup>	¥62,634,600	9/14
		36号2F、6F	2759.89m <sup>2</sup>	¥35745.59/m <sup>2</sup>	¥98,653,900	9/12
		36号402、403、404、7F	2337.03m <sup>2</sup>	¥35849.99/m <sup>2</sup>	¥83,782,700	9/13
		37号整栋	1969.52m <sup>2</sup>	¥3584.99/m <sup>2</sup>	¥70,607,200	

闵行 Minhang	恺尊广场	5F	429.52m <sup>2</sup>	¥26746.44/m <sup>2</sup>	¥11,488,100	9/2
		4F	1306.73m <sup>2</sup>	¥29621.72/m <sup>2</sup>	¥38,707,500	9/14
		8F	429.52m <sup>2</sup>	¥34263.07/m <sup>2</sup>	¥14,716,700	9/20
杨浦 Yangpu	文通大厦	2-10F	9026.57m <sup>2</sup>	¥36573.82/m <sup>2</sup>	¥330,176,800	9/10
闵行 Minhang	新华联国际中心	17号整栋	2383.81m <sup>2</sup>	¥60043.00/m <sup>2</sup>	¥14313.18	9/28
杨浦 Yangpu	绿地新江湾大厦 OFFICE PLUS	7F	166.25m <sup>2</sup>	¥34682.01/m <sup>2</sup>	¥5,765,900	9/5
			166.25m <sup>2</sup>	¥32724.86/m <sup>2</sup>	¥5,440,500	9/13
			166.25m <sup>2</sup>	¥34696.57/m <sup>2</sup>	¥5,768,300	9/19
		8F	168.18m <sup>2</sup>	¥35614.95/m <sup>2</sup>	¥5,989,700	9/14
			655.13m <sup>2</sup>	¥34339.69/m <sup>2</sup>	¥22,496,900	9/26
		4F	192.07m <sup>2</sup>	¥31093.97/m <sup>2</sup>	¥5,972,200	9/27
		5F	166.25m <sup>2</sup>	¥32338.41/m <sup>2</sup>	¥5,376,300	9/28
杨浦 Yangpu	新江湾科技广场	25号整栋	59429.11m <sup>2</sup>	¥24380.00/m <sup>2</sup>	¥1,448,865,700	9/26
		78号整栋	38425.03m <sup>2</sup>	¥24380.00/m <sup>2</sup>	¥936,791,900	
闵行 Minhang	浦江华侨城	1F	210.49m <sup>2</sup>	¥23328.43/m <sup>2</sup>	¥4,910,400	9/29
		2F	155.32m <sup>2</sup>	¥20482.96/m <sup>2</sup>	¥3,181,400	9/30
		3F	223.15m <sup>2</sup>	¥20473.80/m <sup>2</sup>	¥4,568,700	9/14
浦东 Pudong	禹洲城市广场	17号1F	445.77m <sup>2</sup>	¥12453.38/m <sup>2</sup>	¥5,551,300	9/14
		18号1F	445.77m <sup>2</sup>	¥12453.38/m <sup>2</sup>	¥5,551,300	
		19号1F	446.20m <sup>2</sup>	¥12724.10/m <sup>2</sup>	¥5,677,500	9/28
		31号1F	444.08m <sup>2</sup>	¥12944.50/m <sup>2</sup>	¥5,748,400	9/26
		32号1F	446.20m <sup>2</sup>	¥12745.52/m <sup>2</sup>	¥5,687,100	9/22
		35号1F	445.77m <sup>2</sup>	¥12727.17/m <sup>2</sup>	¥5,673,400	9/16
		36号1F	446.20m <sup>2</sup>	¥12944.50/m <sup>2</sup>	¥5,775,800	9/26
		9号1F	446.20m <sup>2</sup>	¥12745.52/m <sup>2</sup>	¥5,687,100	9/22
新静安 New Jing'an	绿地中央广场	1号整栋	527.82m <sup>2</sup>	¥48518.24/m <sup>2</sup>	¥25,608,900	9/25
		2号整栋	523.94m <sup>2</sup>	¥48518.24/m <sup>2</sup>	¥25,420,600	
宝山 Baoshan	绿地创新产业中心	42号整栋	1100.24m <sup>2</sup>	¥31177.14/m <sup>2</sup>	¥34,302,300	9/26
		42号整栋	1050.83m <sup>2</sup>	¥31177.14/m <sup>2</sup>	¥32,761,900	
		33号整栋	2201.25m <sup>2</sup>	¥34382.00/m <sup>2</sup>	¥75,683,600	
闵行 Minhang	艺博珠宝中心	2号4F	1135.89m <sup>2</sup>	¥66743.05/m <sup>2</sup>	¥75,812,700	9/28
		5号4F	1185.49m <sup>2</sup>	¥66743.05/m <sup>2</sup>	¥79,123,200	
		3号4F	1131.26m <sup>2</sup>	¥65624.36/m <sup>2</sup>	¥74,238,200	9/22
闵行 Minhang	融信绿地国际	5F	440.23m <sup>2</sup>	¥26653.61/m <sup>2</sup>	¥11,733,700	9/19
		9F	440.23m <sup>2</sup>	¥30314.49/m <sup>2</sup>	¥13,345,300	9/25
闵行 Minhang	西子国际中心	8F	260.36m <sup>2</sup>	¥27718.00/m <sup>2</sup>	¥7,216,700	9/12
普陀 Putuo	近铁城市广场	11F	72.21m <sup>2</sup>	¥41647.58/m <sup>2</sup>	¥3,007,400	9/28
普陀 Putuo	飞雕商务大厦	19F	108.46m <sup>2</sup>	¥19299.00/m <sup>2</sup>	¥2,093,100	9/26



## 土地市场

9月共计成交商办类土地4幅，总成交土地面积11.7万m<sup>2</sup>，预计总建筑面积为40万m<sup>2</sup>。其中，纯办公类土地1幅，商办类土地3幅。世博B06地块由上海地产以34.22亿元的溢价获得，该幅地块未来将以综合型餐饮旅馆及办公组成，预计建筑地上建筑面积达到20万m<sup>2</sup>，是未来世博板块最为重要的项目之一。

## Land market

In September a total turnover of commercial land 4, the total turnover of the land area of 117 thousand square meters, total construction area of 400 thousand square meters. Among them, 1 pure office land, 3 commercial land. The B06 plots obtained by the Shanghai real estate to 3 billion 422 million yuan premium, the plots of the future will be a comprehensive catering hotel and office building, building area is expected to reach 200 thousand square meters, is the future Expo plate is one of the most important projects.

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)
杨浦区平凉社区02B1-06地块	办公	2.5	16112.30m <sup>2</sup>	¥1,022,830,020	¥25392.00/m <sup>2</sup>	启东碧联置业有限公司	29%
浦东新区世博会地区B片区B06地块	商办	4	47800.90m <sup>2</sup>	¥3,801,999,870	¥19884.00/m <sup>2</sup>	上海地产(集团)有限公司	900%
七宝生态商务区18-03 地块	商办	2.9	30323.70m <sup>2</sup>	¥1,698,300,030	¥19312.00/m <sup>2</sup>	昆山浩捷信息咨询有限公司 上海万库投资管理有限公司	0%
七宝生态商务区17-04 地块	商办	3.5	22889.60m <sup>2</sup>	¥1,494,899,970	¥18659.00/m <sup>2</sup>	上海万库投资管理有限公司	34%

## 虹口区市场

## Hongkou District

## 租赁市场

## Office Rental Market

9月，虹口区主要写字楼平均租金报价在6.63-8.25元/㎡/天，平均成交价格为6.40-7.85元/㎡/天。平均空置率17%，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（60%）、上海白玉兰广场（65%）、星外滩10号楼（80%）。

In September, Hongkou District office rents average price in 6.63-8.25 yuan / square meters / day, the average transaction price of 6.40-7.85 yuan / square meters / day. The average vacancy rate of 17%, 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 (60%), Shanghai Hui White Magnolia Plaza (65%), the Bund star No. 10 (80%).

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	4.50
	瑞丰国际大厦	0%	5.00	5.50
	宝矿国际大厦	18%	5.00	7.50
	新华保险大厦	15%	6.80	8.00
	国际航运中心13号	0%	7.00	7.50
	国际航运中心18栋3号	0%	9.00	11.00
	星荟中心	66%	6.80	9.00
	上海白玉兰广场	70%	8.50	12.00
	中科招商财富中心	35%	8.00	9.00
	外滩588	3%	8.00	10.50
	盛邦国际大厦	9%	6.00	7.00
	中信广场	10%	7.00	10.50
四川北路	壹丰大厦	10%	6.00	6.50
	利通广场	7%	5.80	6.30
	凯德虹口龙之梦	6%	6.00	6.60
	虹口SOHO	2%	5.20	6.80
	高宝大厦	20%	5.20	6.20
	金融街·海伦中心	42%	5.50	6.90

## 销售市场

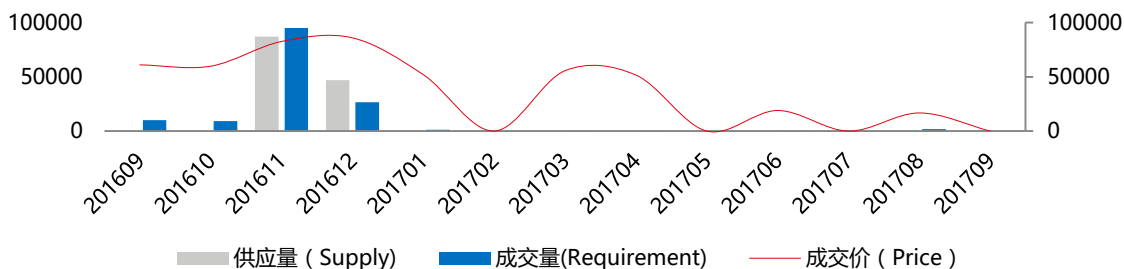
9月，虹口区写字楼供应与成交面积均为0㎡。2017年以来连续9个月无新增供应，目前全区存量面积为35.64万㎡，销售市场活跃度有所下降。

## Office Sales Market

In September, the Hongkou District office supply and turnover area of 0 square meters. Since 2017 9 consecutive months without additional supply, currently the region's stock area of 356 thousand and 400 square meters, the sales market activity declined.

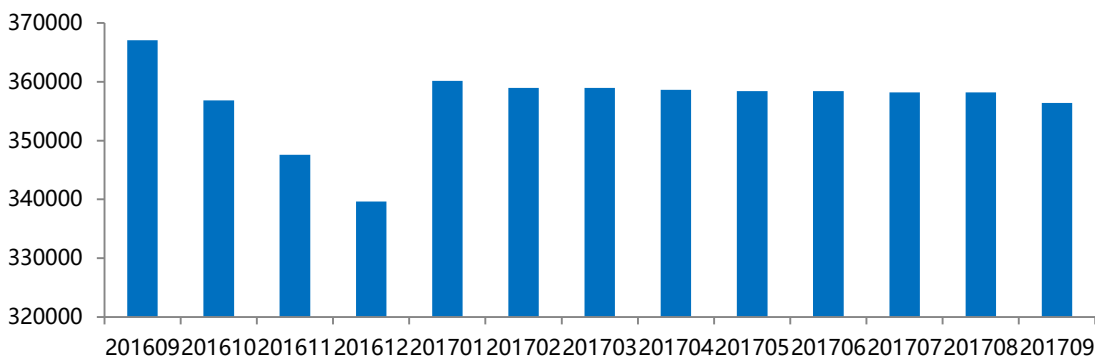
### 12个月以来虹口区办公供求价趋势

( 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4.08-6.21元/㎡/天，平均成交价格为3.90-5.91元/㎡/天。平均空置率32.43%，空置面积超过140万㎡，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㎡与19.07万㎡。

Minhang District office rents average price in 4.08-6.21 yuan / square meters / day, the average transaction price of 3.90-5.91 yuan / square meters / day. The average vacancy rate of 32.43%, 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

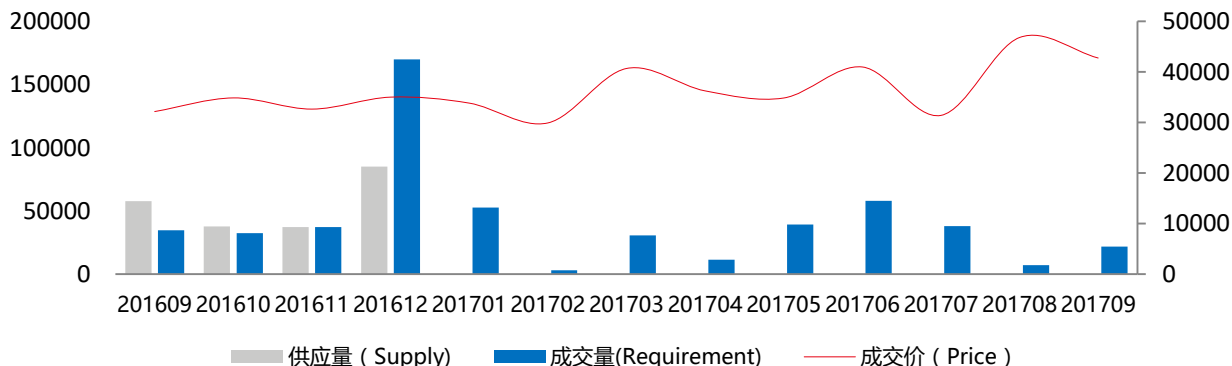
本月闵行区连续9个月无新增写字楼供应，成交面积为21859.73㎡，环比上升206%，成交均价42754元/㎡，环比有所下降，下降比例8.6%。目前全区存量面积为90.38万㎡，月均去化4.13万㎡。

## Office Sales Market

This month Minhang continuous 9 months of the new office supply, closing an area of 21859.73 square meters, an increase of 206%, the average transaction price of 42754 yuan / square meters, decline, decline in the proportion of 8.6%. At present, the existing area of 903 thousand and 800 square meters, to a monthly average of 41 thousand and 300 square meters.

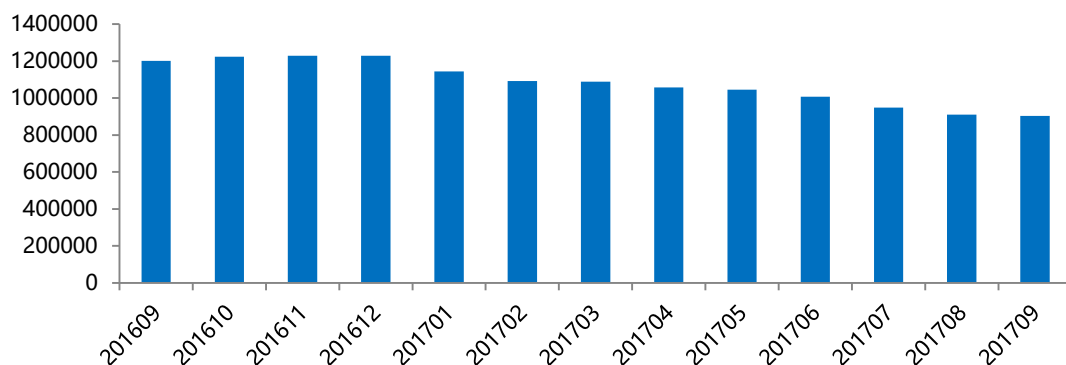
### 12个月以来闵行区办公供求价趋势

( 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

9月，杨浦区主要写字楼平均租金报价在5.32-6.25元/㎡/天，平均成交价格为5.09-5.96元/㎡/天。平均空置率35.25%，空置面积超过58.43万㎡，主要集中在北外滩区域。

In September, Yangpu District office rents average price in 5.32-6.25 yuan / square meters / day, the average transaction price of 5.09-5.96 yuan / square meters / day. The average vacancy rate of 35.25%, the vacant area of more than 584 thousand and 300 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

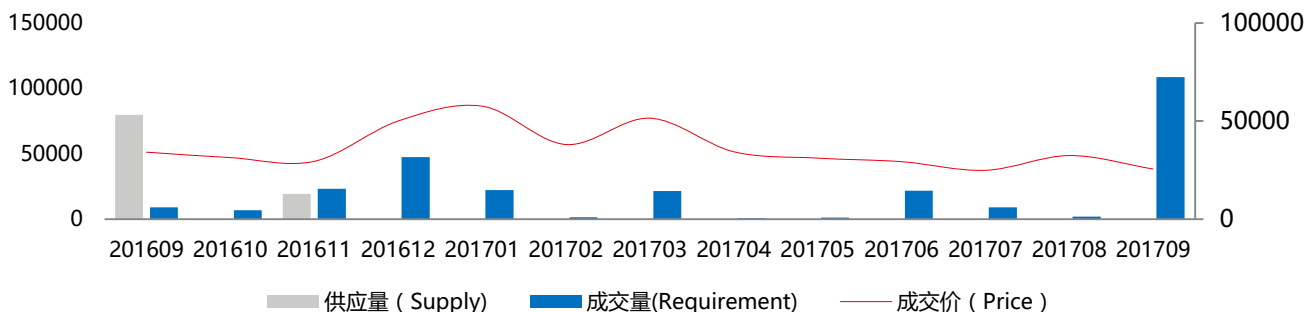
本月杨浦区无新增写字楼供应，自2016年12月以来连续10个月零新增。受文通大厦大宗成交影响，成交面积达到10.86万 $\text{m}^2$ ，成交均价2.55万元/ $\text{m}^2$ ，目前全区存量面积为76.54万 $\text{m}^2$ ，月均去化2.11万 $\text{m}^2$ 。

## Office Sales Market

There is no new office supply in Yangpu District this month. Since December 2016, it has not been added for 10 months. The building bulk turnover, closing an area of 108 thousand and 600 square meters, the average transaction price of 25 thousand and 500 yuan / square meters, currently the region's stock area of 765 thousand and 400 square meters, to a monthly average of 21 thousand and 100 square meters.

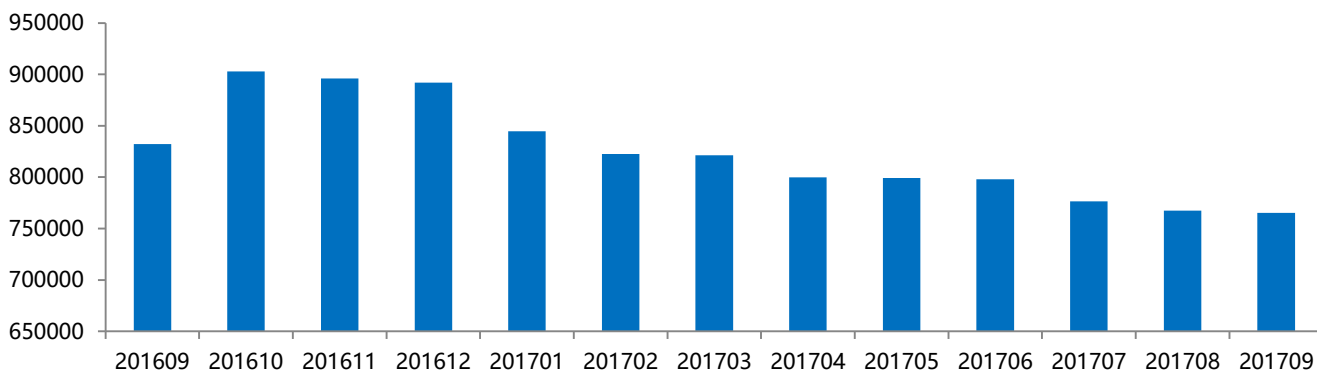
### 12个月以来杨浦区办公供求价趋势

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



### 12个月以来杨浦区办公存量变化趋势

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



## 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4.89-5.58元/ $\text{m}^2$ /天，实际成交价格为4.67-5.26元/ $\text{m}^2$ /天，平均空置率20.90%，空置面积28.15万 $\text{m}^2$ ，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 4.89-5.58 yuan / square meters / day, the actual transaction price for 4.67-5.26 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

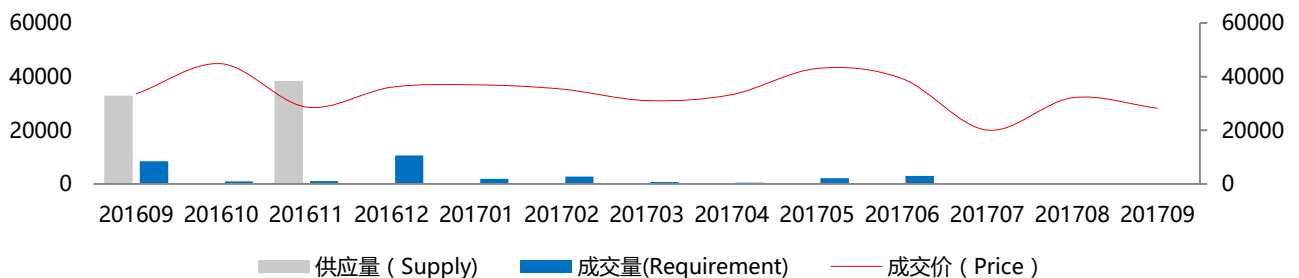
## Office Sales Market

本月普陀区无新增写字楼供应，成交面积仅180.67㎡，成交均价28230.93元/㎡，存量变化不大，维持在40万㎡左右，月均去化进一步萎缩，为2500㎡。

This month, Putuo District new office supply, closing an area of only 180.67 square meters, the average transaction price of 28230.93 yuan / square meters, the stock changed little, maintained at 400 thousand square meters or so, each month to shrink further, 2500 square meters.

### 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7.48-9.39元/㎡/天，实际成交均价为6.48-8.68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 7.48-9.39 yuan / square meters / day, the actual transaction price for 6.48-8.68 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
淮海西路	宏汇国际广场	20%	6.50	7.00
	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
漕河泾	上海环贸广场 (二期)	2%	11.00	12.80
	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

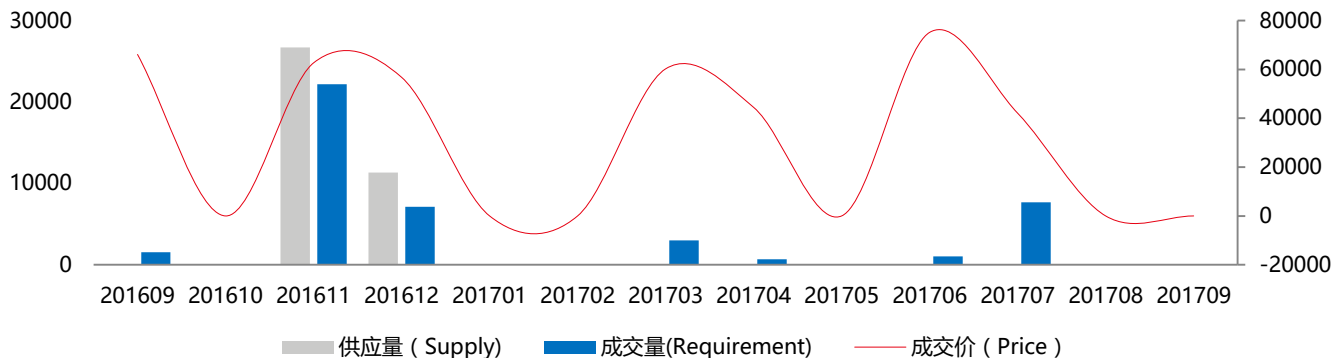
## Office Sales Market

本月徐汇区新增写字楼供应及成交面积均为零，2017年以来月均成交面积仅为1376m<sup>2</sup>，目前存量44.5万m<sup>2</sup>，预计去化周期将会非常漫长。

This month, Xuhui District new office supply and turnover of the area is zero, since 2017, the average monthly turnover area of only 1376 square meters, the current stock of 445 thousand square meters, is expected to cycle will be very long.

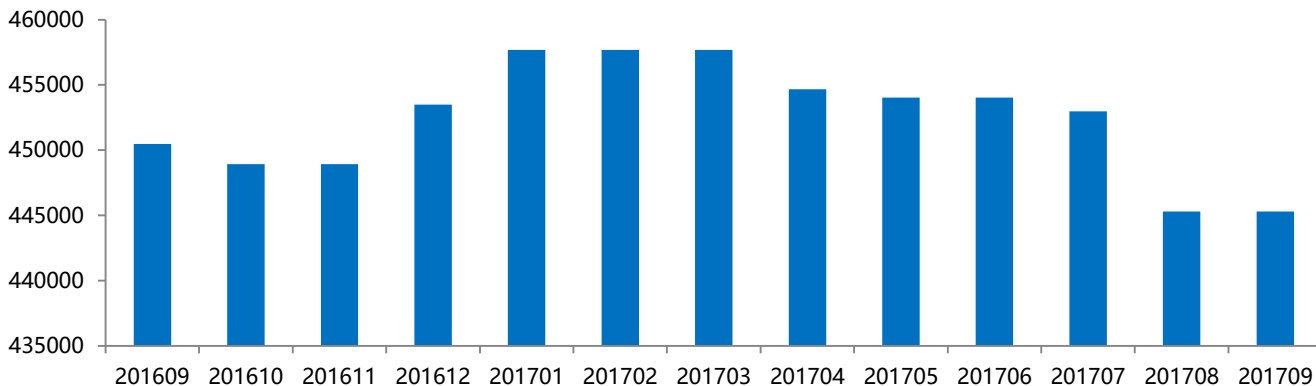
12个月以来徐汇区办公供求价趋势

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



12个月以来徐汇区办公存量变化趋势

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



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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

Transmit成立于1998年，成立至今已有19年，是国内最早一批专业从事商业地产服务的公司。经过十多年的发展，Transmit已经由最初的商业地产经纪这一单一服务到现在成为集商业地产“全生命周期服务”的专业化机构。包含了前期顾问咨询，中期租赁代理、营销推广，甚至到后期的资产管理及大宗交易投资等等服务。

### 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

## 研策部联系人

包欣巍

研策总监

[hunk.bao@transmit-sh.com](mailto:hunk.bao@transmit-sh.com)

祁敏

研策经理

[alina.qi@transmit-sh.com](mailto:alina.qi@transmit-sh.com)