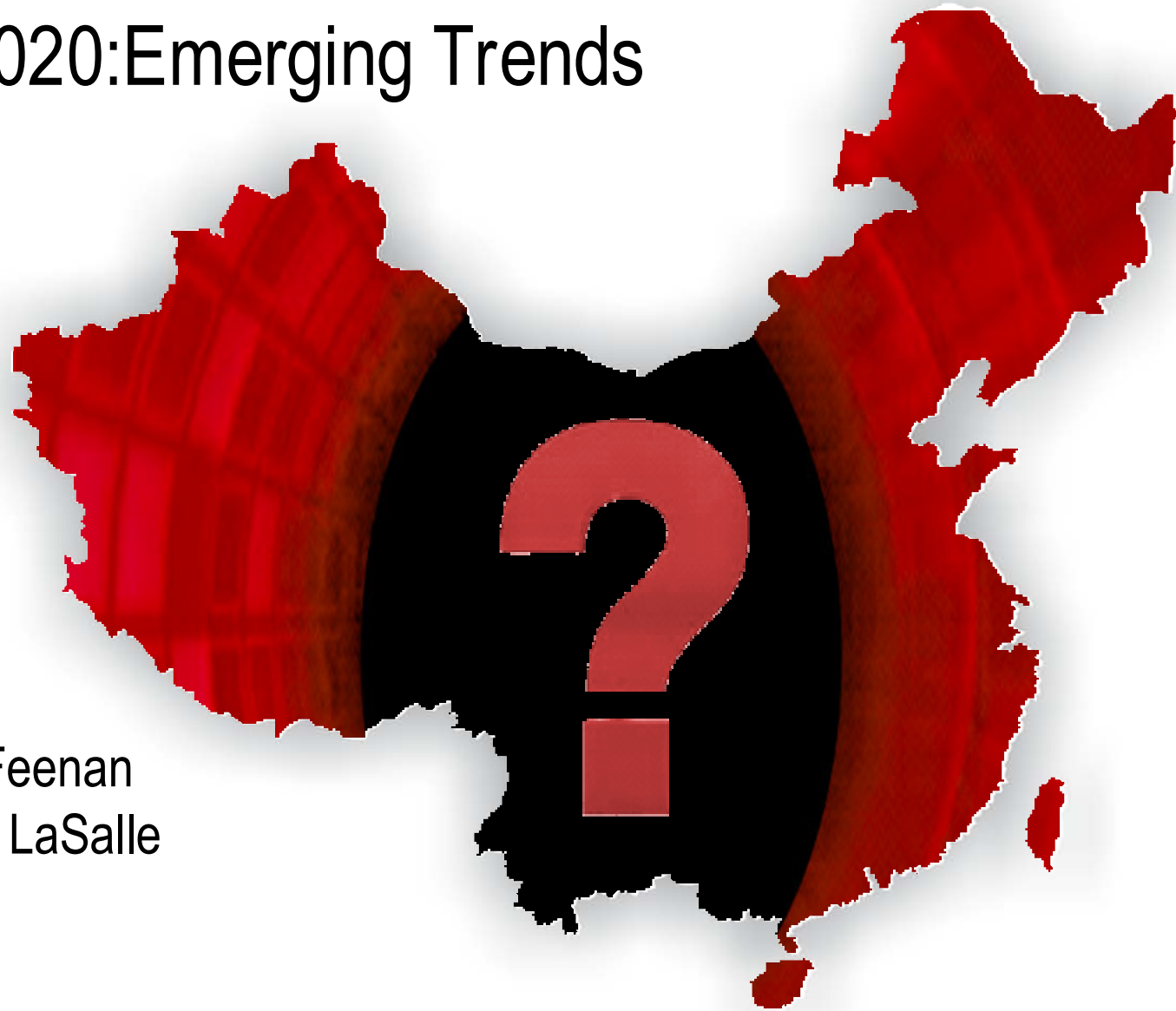


China 2020: Emerging Trends



Rosemary Feenan
Jones Lang LaSalle

Crisis or Opportunity?

危机?

or

机?



JONES LANG
LASALLE

仲量
聯行

2002: Identifying the Rising Urban Stars



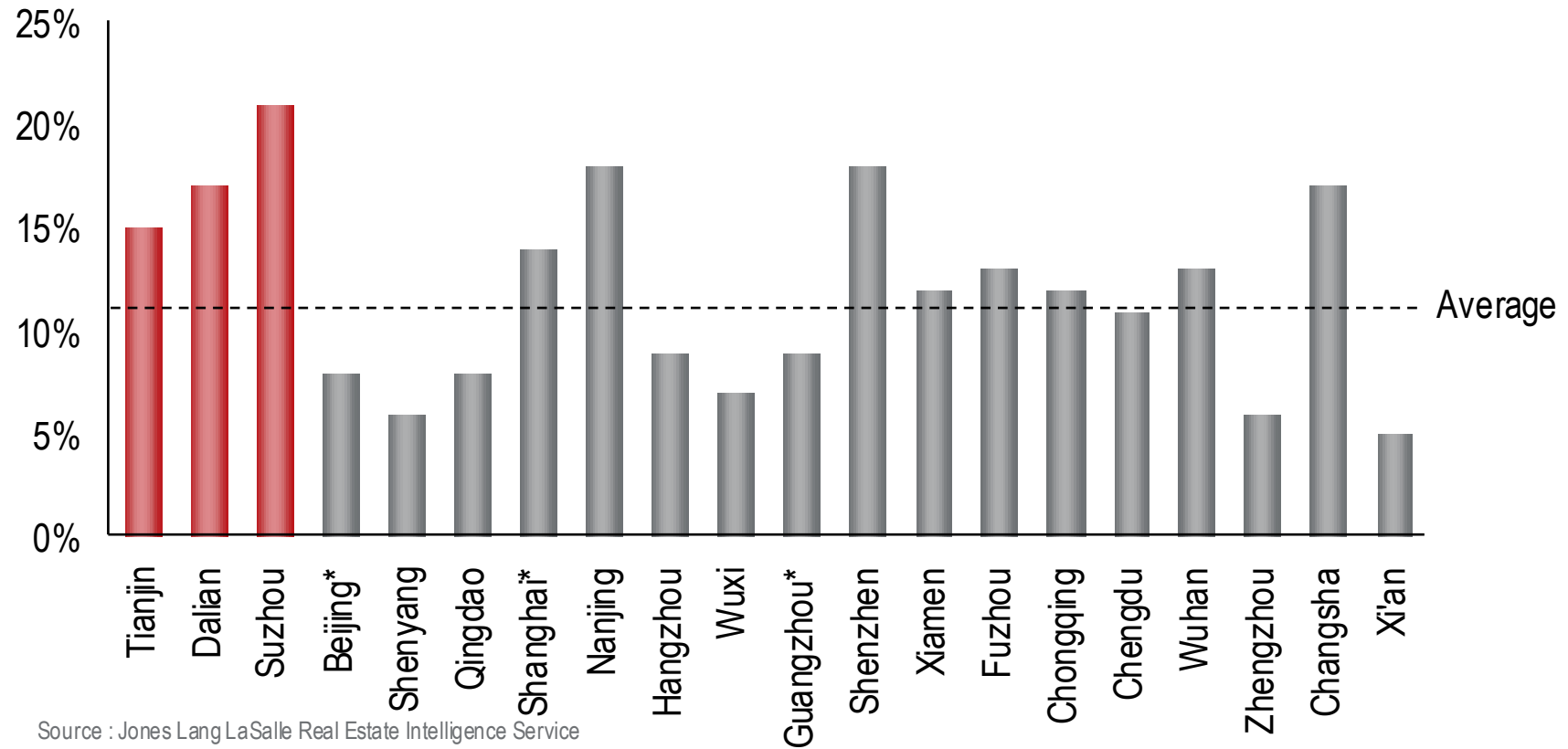
China 30: Mobilized for Growth

1	Beijing	20	Harbin
2	Shanghai	21	Changchun
3	Guangzhou	22	Jinan
4	Shenzhen	23	Changzhou
5	Hong Kong	24	Zhengzhou
6	Macau	25	Wuxi
7	Tianjin	26	Hefei
8	Dalian	27	Ningbo
9	Shenyang	28	Nanchang
10	Qingdao	29	Changsha
11	Xi'an	30	Kunming
12	Nanjing	31	Fuzhou
13	Suzhou	32	Nanning
14	Chengdu	33	Zhuhai
15	Wuhan	34	Wenzhou
16	Hangzhou	35	Urumqi
17	Chongqing	36	Lanzhou
18	Xiamen		
19	Dongguan		



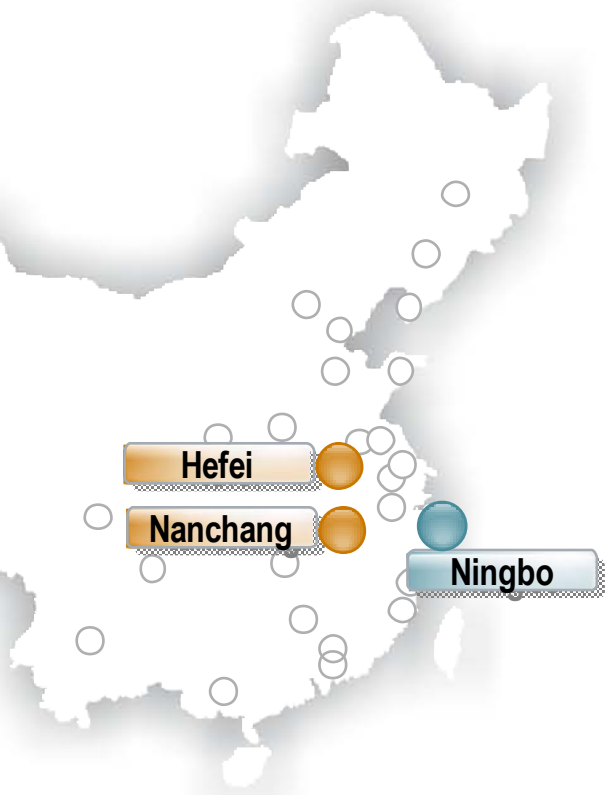
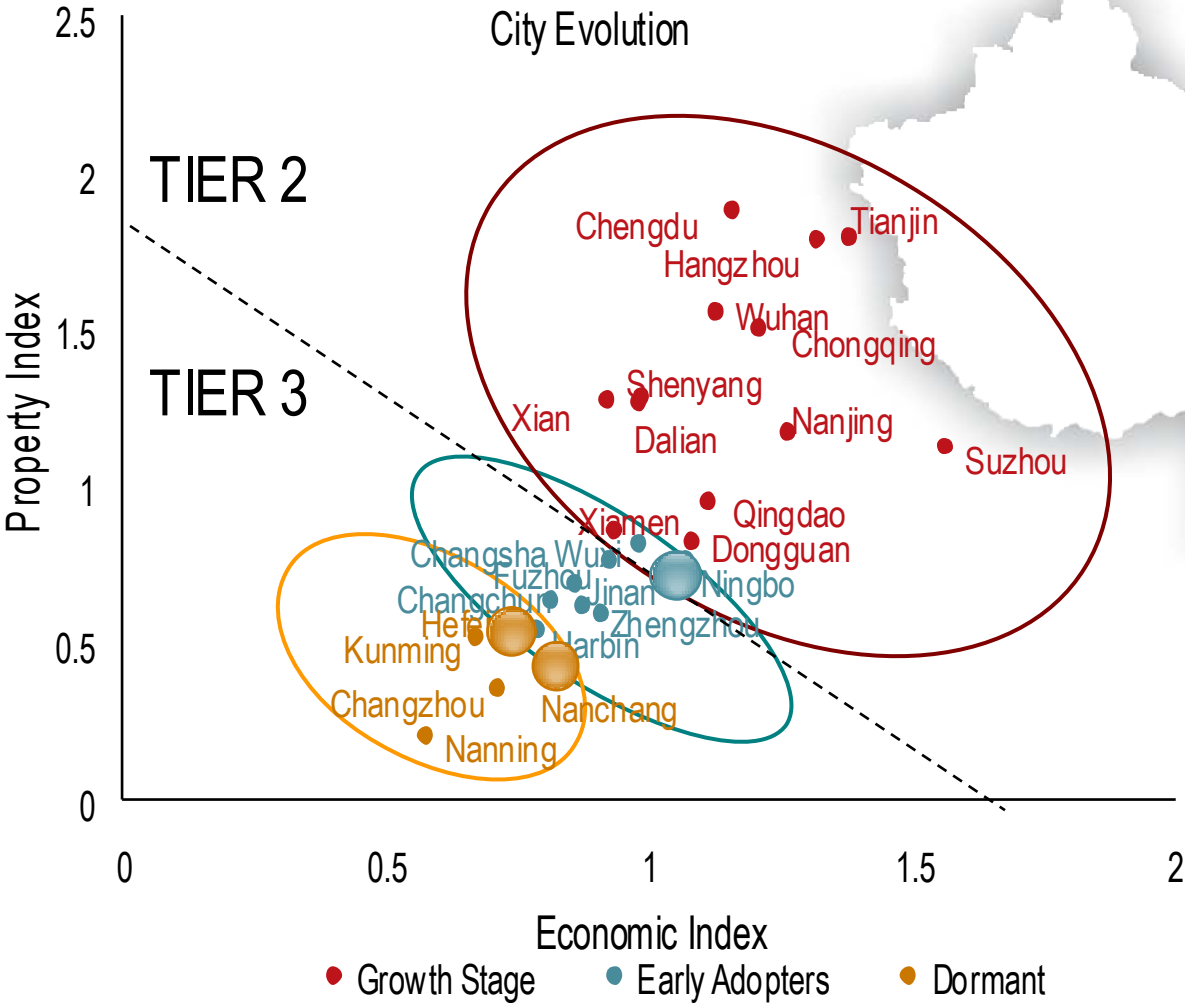
Office Capital Values

Compound Annual Growth Q305-Q308



Source : Jones Lang LaSalle Real Estate Intelligence Service

China 30: Moving Tiers



China 2020: The Real Estate Landscape

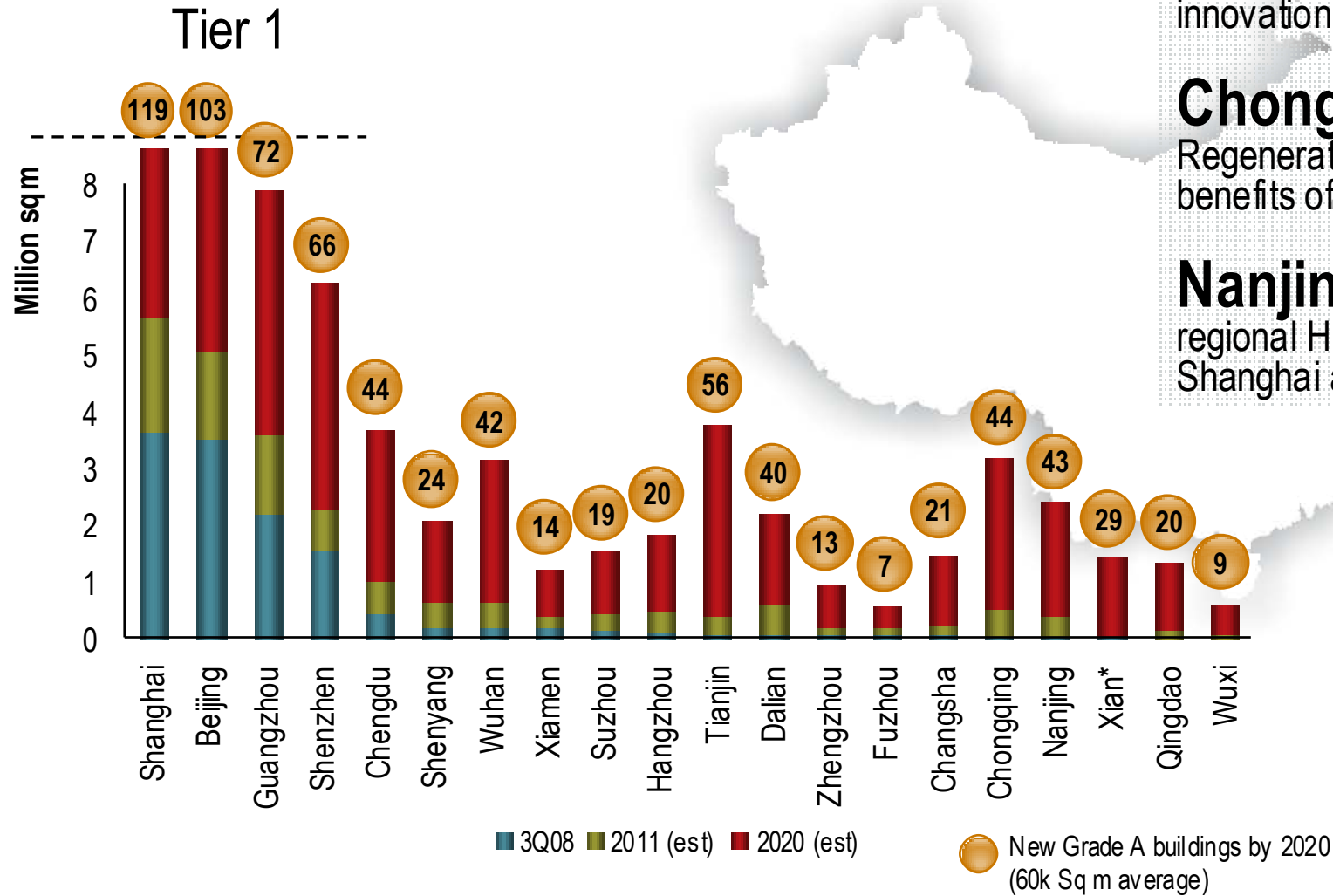
	1998	2008	2011	2020
A Office (m sq m)	2.9	11.9	22.9	55
Prime Retail (m sq m)	6	25.6	45.2	75
A Warehouses (m sq m)	0	6	11	73-90
Airports	143	148	192	244
Ports	158	314	330	400
Expressway (km)	8,700	54,000	65,000	85,000
Railway (km)	66,400	78,000	90,000	100,000
Subway (km)	87	668	1,000+	4,100

A = Grade A

Source: Government statistics and REIS



Total Grade A Office Space 2020



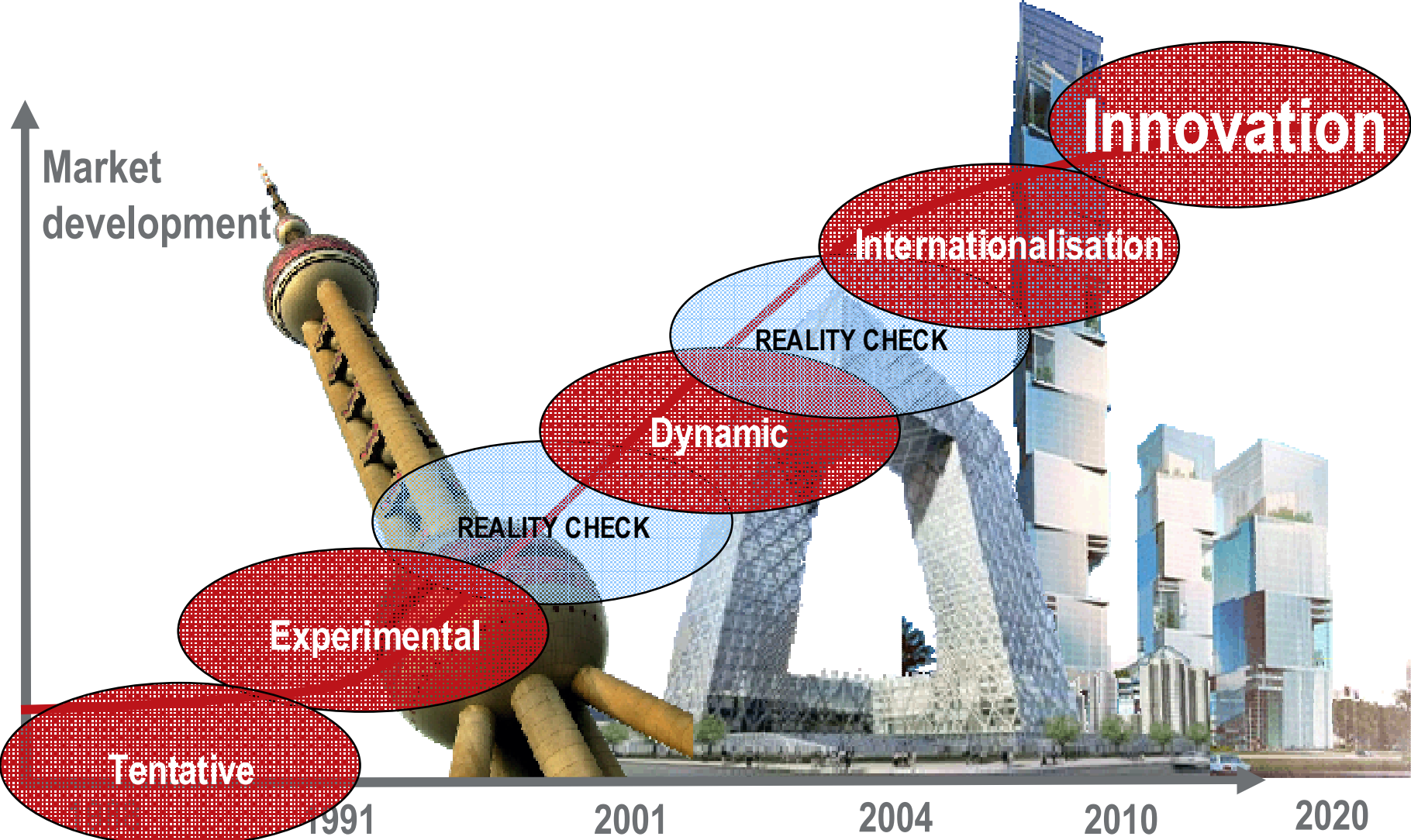
2020 Picks

Tianjin: growing port, financial centre, innovation hub

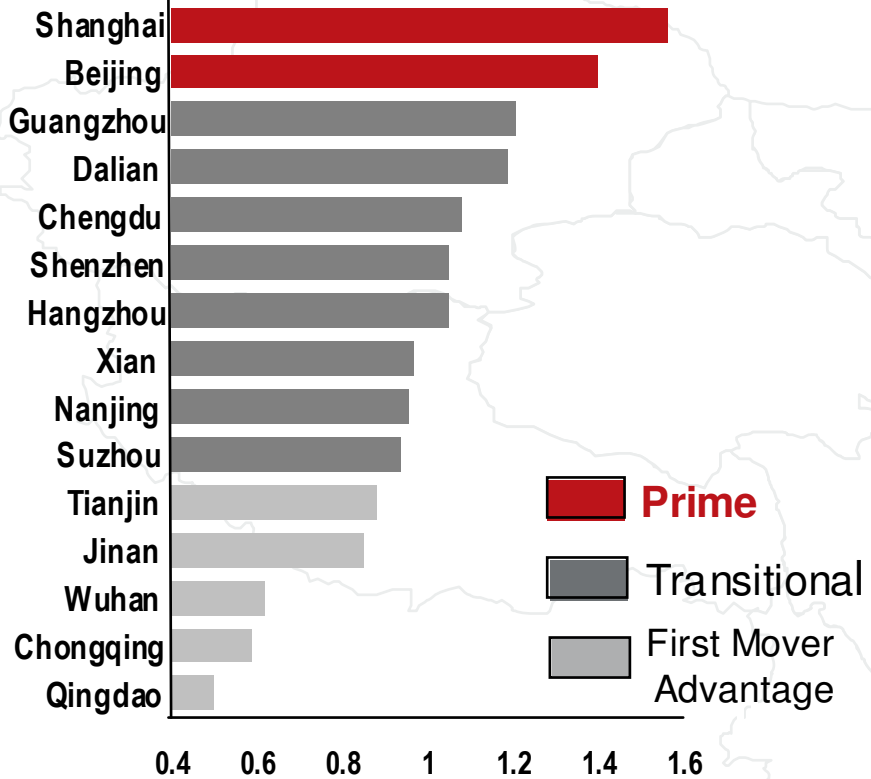
Chongqing: Regeneration phase - the benefits of centrality.

Nanjing: Domestic regional HQ - bridge - Shanghai and North

China Office Market : Phases of Evolution

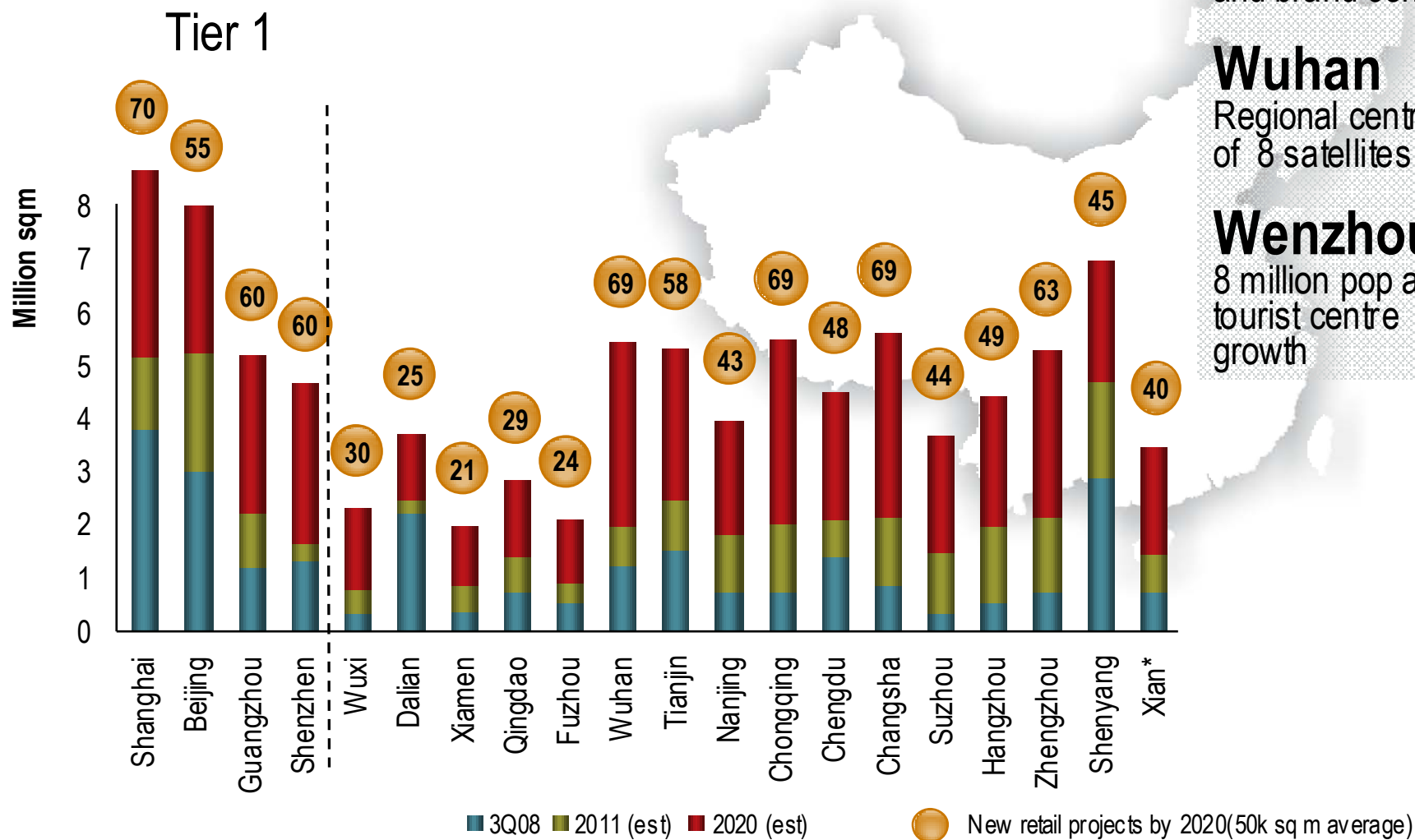


Future Business Park Hotspots ...and 40 more Cities?



City	R&D	BPO	HQ
Shanghai	High	High	High
Beijing	High	High	High
Dalian	Low	High	Low
Guangzhou	Medium	High	High
Shenzhen	Medium	High	High
Hangzhou	High	Medium	Medium
Xian	High	High	Medium
Chengdu	High	High	High
Nanjing	Medium	Medium	Medium
Suzhou	Low	Medium	Medium
Wuhan	High	Medium	Low
Tianjin	Medium	Medium	Low
Jinan	Medium	Medium	Low
Qingdao	Medium	Low	Medium
Chongqing	Medium	Low	Low

Total Prime Retail Space 2020



2020 Picks

Changsha

Transport hub and brand centre

Wuhan

Regional centre of 8 satellites

Wenzhou

8 million pop and tourist centre growth

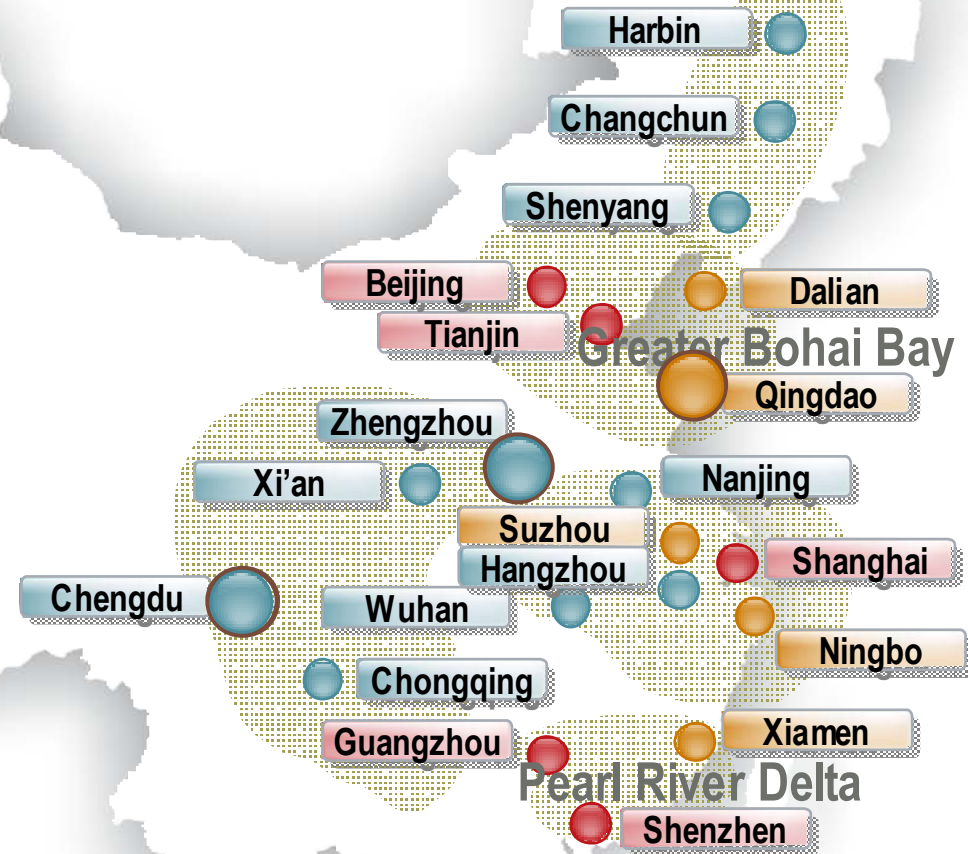
China 2020: Logistics – A Good Move

2020 Picks

Chengdu: largest logistics provision in western China

Qingdao: fastest growing port to benefit from rural reforms .

Zhengzhou: High speed rail I, metro International airport; Expressway



- 5 Primary Logistics Hubs
- 5 Secondary Logistics Hubs
- 10 Emerging Logistics Hubs
- 3 Potential Primary Logistics Hubs, 2020

China 2020: Trends and Signals of Change

Floridisation



2 Pockets and 7 Mouths



Mass Tourism: When Walls are Gateways

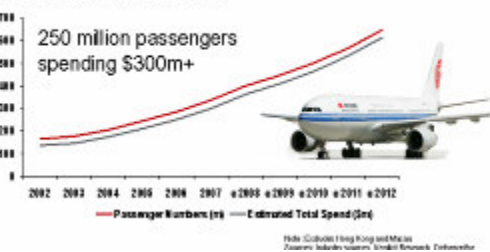


Retail: Live Uber Eco Urbany



Source: TrendWatching

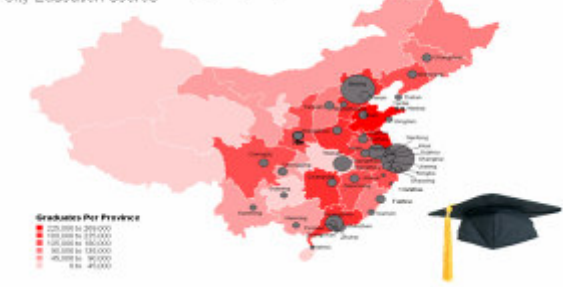
Chinese Airport Retail: Set for Take Off



ChinEther



The Future Geography of Education



Ecotopia? Sustainable City



China – The Middle Transparency Kingdom

Transparency Level	Market	2008 Score	Rank
High Transparency	Australia	1.20	2
	New Zealand	1.21	4
Transparent	Hong Kong	1.55	11
	Singapore	1.55	11
	Malaysia	2.25	23
	Japan	2.39	26
Semi Transparent	Taiwan	3.07	41
	South Korea	3.15	44
	Thailand	3.16	45
	Philippines	3.23	47
	China Tier 1 Cities	3.33	49
	India Tier 1 Cities	3.34	50
Low Transparency	India Tier 2 Cities	3.38	52
	Indonesia	3.51	55
	Macau	3.54	57
	India Tier 3 Cities	3.65	62
	China Tier 2 Cities	3.68	65
	China Tier 3 Cities	3.97	72
Opaque	Vietnam	4.29	77
	Cambodia	4.67	79



New Cities on the Radar

China 50

