

Chongqing Rental Housing Market

Market Evolution, 2021–2025, and In-Depth Review of 2025

CHONGQING RENTAL HOUSING MARKET

2021–2025 Evolution and 2025 Review

City Research Series · English Edition

HOTEL STRATEGY

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Six Sections for a Complete View of Chongqing

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Six Core Findings for Chongqing

Reconstructed year-end 2025 supply reached 98,957 units. Sample average rent was about RMB 0.90 per sq m per day and occupancy about 95.5%.

01

Continued expansion

Reconstructed year-end 2025 supply reached 98,957 units, up 7,508 from 2024. Net change includes openings, phases and database corrections.

02

Rental communities remain dominant

Rental communities contributed 77,100 units, or 77.9%, and youth apartments 21,072, or 21.3%. Together they represented 99.2%.

03

Strong spatial segmentation

EILT Tiers 1–3 contained 42,656 units, or 43.1% of citywide supply. Tiers 4–5 contained 56,301, or 56.9%.

04

Rent and absorption require joint analysis

Comparable 2025 samples averaged RMB 0.90 per sq m per day and 95.5% occupancy. Both youth and community products had comparable samples.

05

Communities drive incremental supply

Comparable supply increased by 28,850 units from 2023 to 2025. Rental communities drove most of the 2025 increase.

06

Policy focus shifted to operating oversight

From 2021 to 2025, Chongqing policy expanded from affordable-rental mobilisation toward existing-asset activation, talent housing, rental regulation and urban renewal.

Key Chongqing Rental Housing Metrics in 2025

98,957 units	+8.2%	0.90	95.5%
Monitored supply	Year-on-year supply change	Daily rent (RMB/sq m/day)	Average occupancy

01 Supply signal

Supply increased by 7,508 units in 2025; read this with concentrated openings, phases and database corrections.

02 Rent signal

Sample rent declined by about RMB 0.23 per sq m per day from 2024; effective rent still needs incentive and vacancy adjustment.

03 Absorption signal

Sample occupancy increased by about 6.8 percentage points from 2024; the limited sample does not replace asset diligence.

04 Investment signal

Use EILT, product, competitors and stabilisation rather than the city average for asset decisions.

Research Boundary and Comparable Data

The Chongqing supply series reconstructs 2023–2025 from the 16-city master using actual opening years. Rent and occupancy use verified project samples; city averages do not replace asset diligence.

01 **2023 baseline**

Chongqing had 70,107 monitored units in 2023, the start of the comparable series. District, product and EILT analysis use a consistent project boundary.

02 **2022 rent and occupancy**

Only verified rent and occupancy samples are used for 2022. The report does not create a comparable supply figure where none exists.

03 **2023–2025 main series**

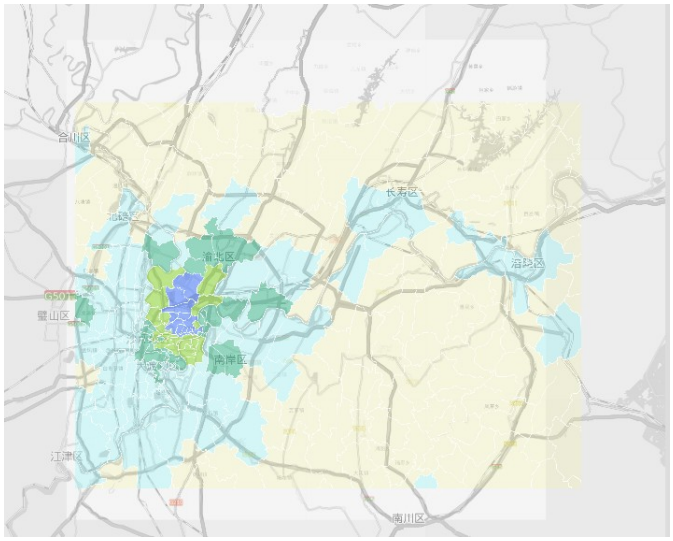
Comparable supply was 70,107, 91,449 and 98,957 units, supporting internally consistent product, EILT, rent and occupancy analysis.

04 **New openings versus net change**

Annual database changes include openings, closures, acquisitions, rebranding, phased delivery and historical revisions. Actual openings are reported separately only when a project-level list is available.

Chongqing EILT Model and Spatial Tiers

Method, analytical dimensions and Tier 1–5 spatial distribution



Chongqing EILT spatial tier map

EILT Dimensions

E — Employment
Employers and job density

I — Industry
Industry clusters and growth

L — Living
Population, amenities and affordability

T — Transport
Commute time and rail access

Standard EILT Legend

Tier 1 | Tier 2 | Tier 3 | Tier 4 | Tier 5

The Chongqing EILT map shows five demand-anchor tiers. About 43.1% of reconstructed year-end 2025 supply sits in Tiers 1–3.

Applications

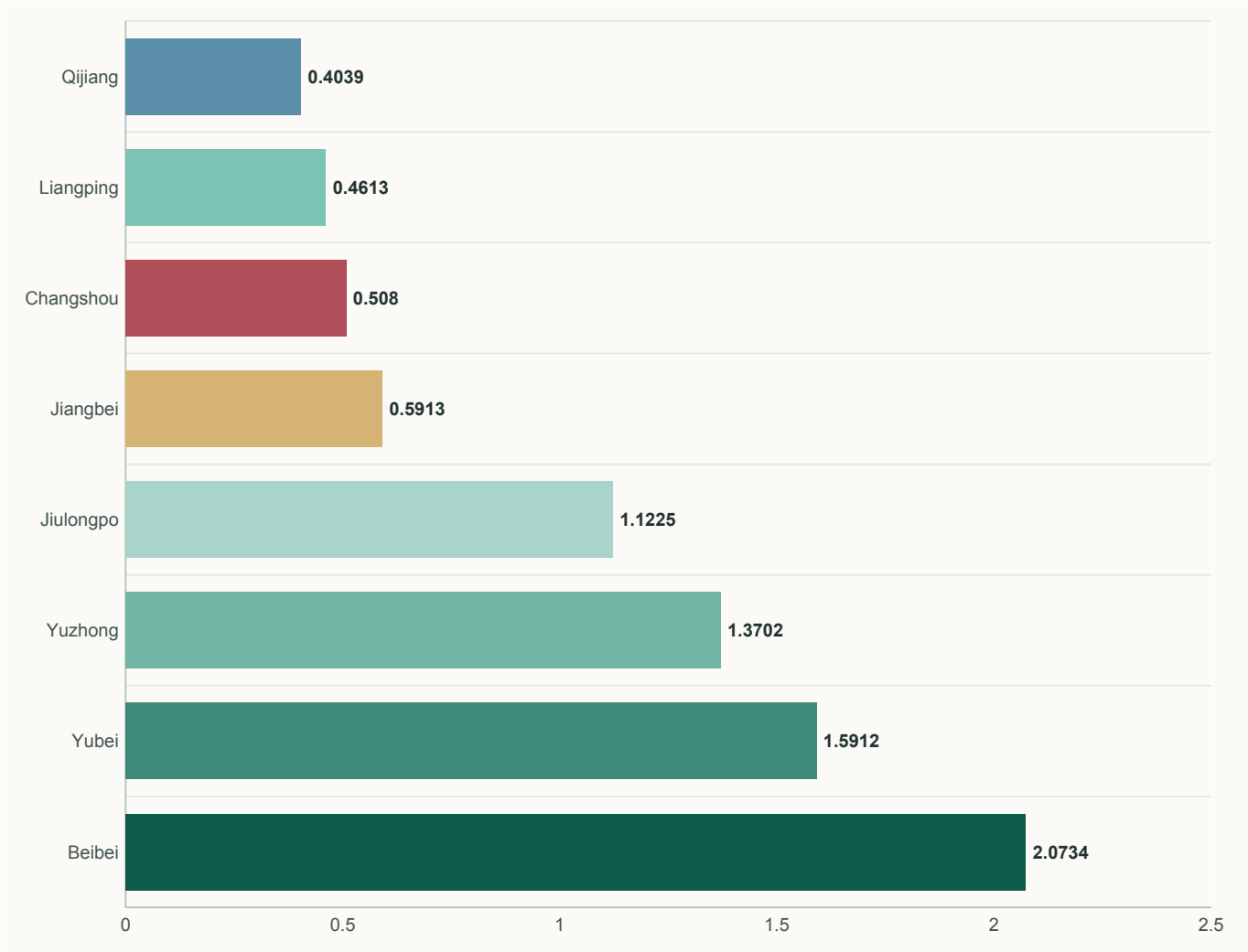
Submarket screening, city-level supply-demand comparison and preliminary project assessment.

Limitations

Supports city and submarket assessment but does not replace project-level legal, technical or financial due diligence.

Base map: Map Wuyou. EILT tiers and analysis: report research.

Chongqing institutional rental-housing supply by district, 2025

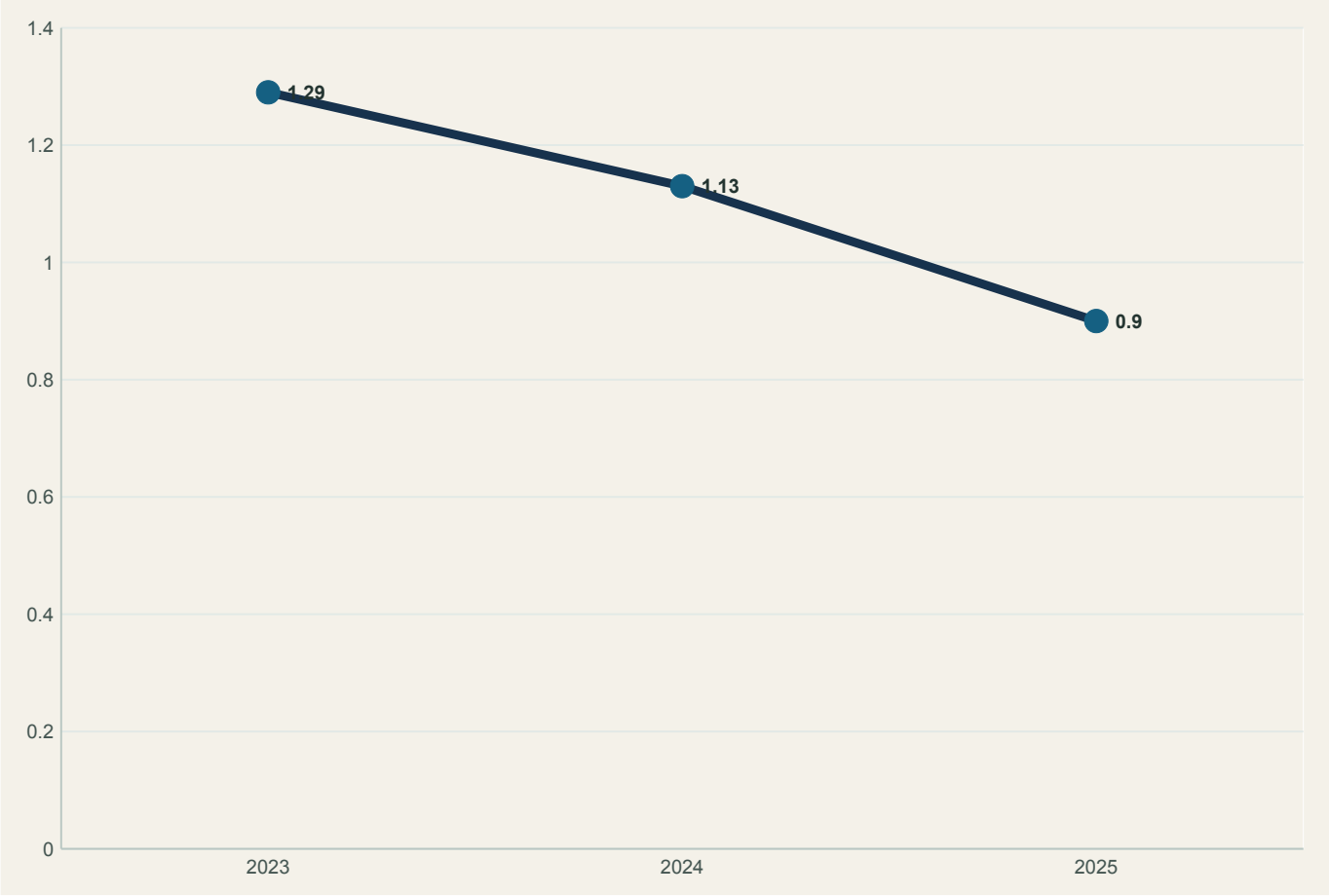


Beibei held about 20,700 units, Yubei 15,900 and Yuzhong 13,700. Together they represented 50.9% of citywide supply.

District totals indicate supply concentration but do not replace submarket and asset-level competitor checks.

Average Rent per Square Metre: 2023–2025

Sample average rent declined from RMB 1.29 per sq m per day in 2023 to 1.13 in 2024 and 0.90 in 2025.



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A higher community share, price competition and tenant affordability reduced the city average. Asset analysis should adjust for incentives, area efficiency, collection and vacancy days.