

Tianjin Rental Housing Market

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

TIANJIN RENTAL HOUSING MARKET

2021–2025 Evolution and 2025 Review

City Research Series · English Edition

HOTEL STRATEGY HOTEL STRATEGIES 优尼华盛

CONTENTS

Six Sections for a Complete View of Tianjin

Section	Content	Page
01	Executive Summary, Research Scope and EILT Model	04—07
02	Policy evolution and operating impact	08—17
03	Market Scale and Product Supply	18—33
04	Rent, Occupancy and Demand Anchors	34—46
05	Capital Markets, Risks and Recommendations	47—51
06	Contact	52

Six Core Findings for Tianjin

Reconstructed year-end 2025 valid supply reached 51,685 units. Sample average rent was about RMB 1.69 per sq m per day and occupancy about 88.4%.

01

Continued expansion

Reconstructed year-end 2025 valid supply reached 51,685 units, up 3,281 or 6.8% from 2024.

02

Young professional apartments remain dominant

Youth apartments contributed 37,673 units, or 72.9%, and rental communities 10,053, or 19.5%. Together they represented 92.3%.

03

Strong spatial segmentation

EILT Tiers 4–5 contained 32,940 units, or 63.7% of citywide supply. Tiers 1–3 contained 18,745, or 36.3%.

04

Rent and absorption require joint analysis

Comparable 2025 samples averaged RMB 1.69 per sq m per day and 88.4% occupancy.

05

Youth apartments drive new supply

Valid supply increased by 6,140 units from 2023 to 2025. Youth apartments drove most of the 2025 increase.

06

Policy focus shifted to operating oversight

From 2021 to 2025, Tianjin policy continued to strengthen affordable rental housing, talent housing, rental regulation and existing-asset activation.

Key Tianjin Rental Housing Metrics in 2025

51,685 units
Monitored supply

+6.8%
Year-on-year supply change

1.69
Daily rent (RMB/sq m/day)

88.4%
Average occupancy

01 Supply signal

Supply increased by 3,281 units in 2025. Youth apartments contributed about 69.3% of the increase.

02 Rent signal

Sample rent increased by about 7.5% from 2024. Verify the result against effective rent and incentives.

03 Absorption signal

Sample occupancy increased by about 0.4 percentage points from 2024. Sample size remains limited.

04 Investment signal

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

Research Boundary and Comparable Data

The Tianjin supply series reconstructs 2023–2025 from the 16-city master and excludes same-address duplicates and old-brand entries.

01 **2023 baseline**

Tianjin had 45,545 valid monitored units in 2023, the start of the comparable series.

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**

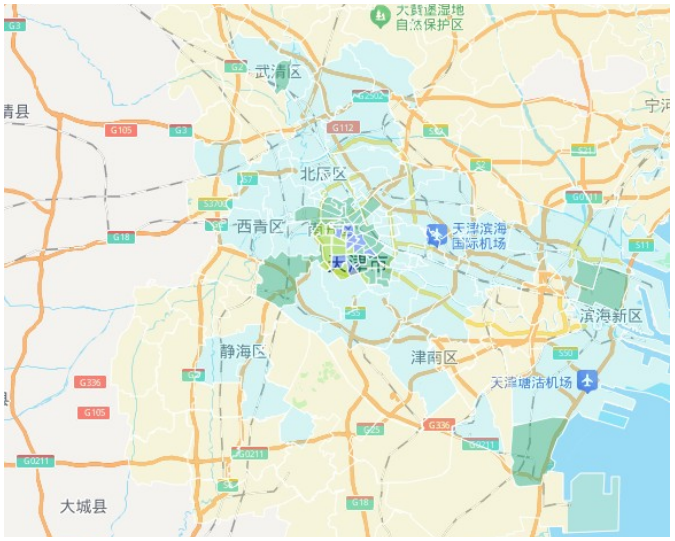
Comparable supply was 45,545, 48,404 and 51,685 units, supporting internally consistent analysis.

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.

Tianjin EILT Model and Spatial Tiers

Method, analytical dimensions and Tier 1–5 spatial distribution



Tianjin 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 Tianjin EILT map shows five demand-anchor tiers. About 63.7% of year-end 2025 supply sits in Tiers 4–5.

Applications

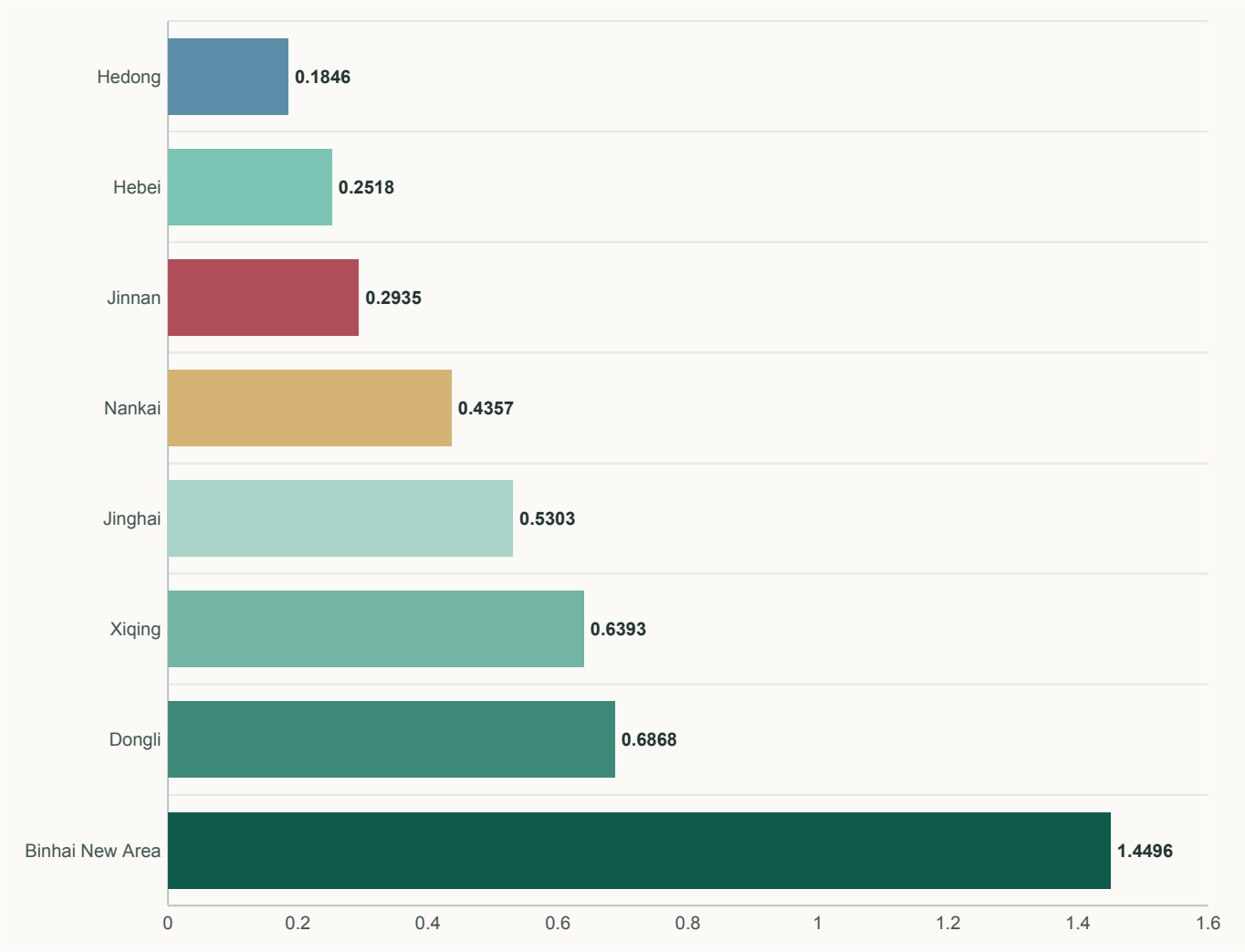
Submarket screening, city-level supply-demand comparison and preliminary project assessment.

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.

Tianjin institutional rental-housing supply by district, 2025

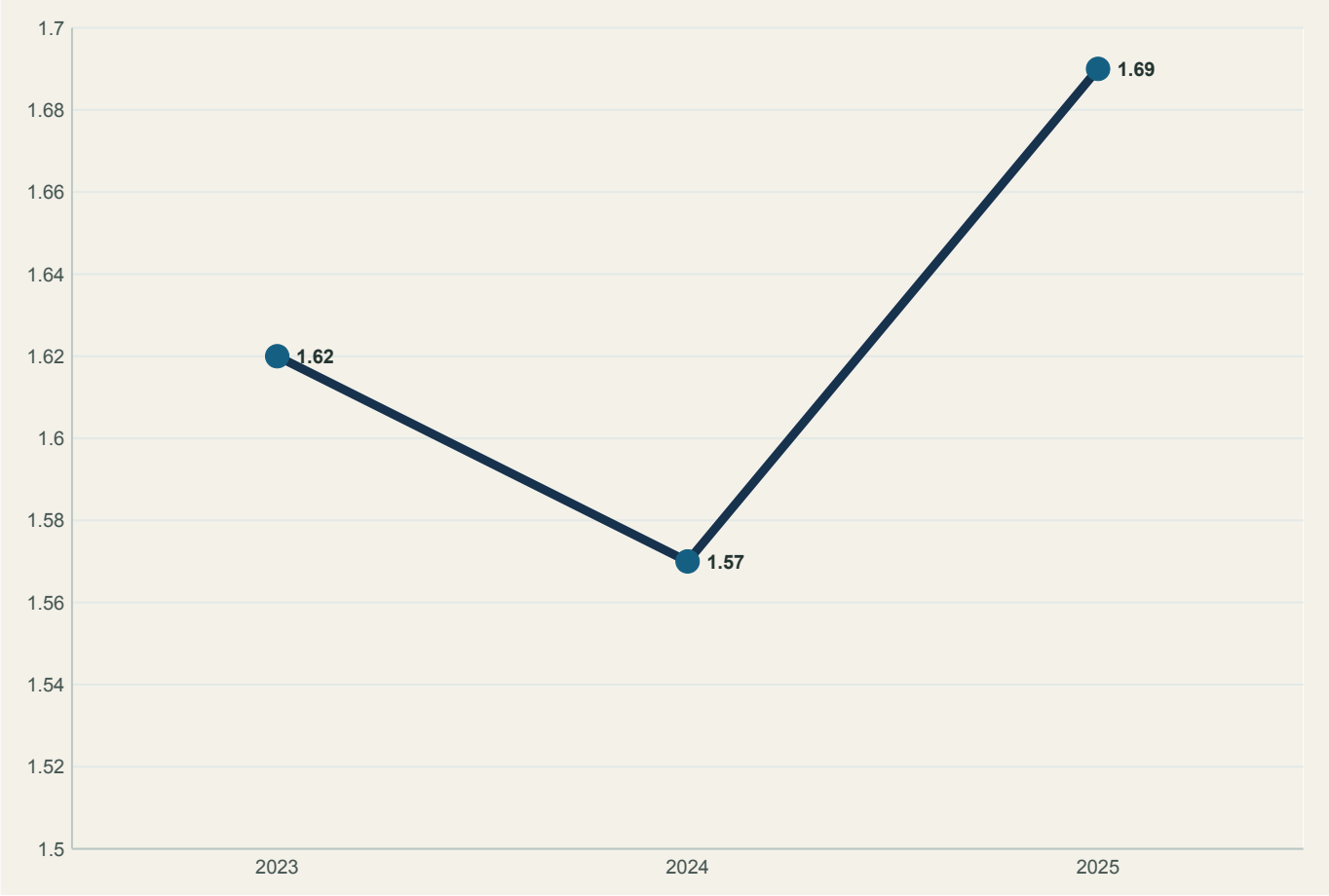


Binhai New Area held about 14,496 units, Dongli 6,868 and Xiqing 6,393. Together they represented 53.7% of citywide supply.

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 1.62 per sq m per day in 2023 to 1.57 in 2024, then recovered to 1.69 in 2025.



Sample average rent declined from RMB 1.62 per sq m per day in 2023 to 1.57 in 2024, then recovered to 1.69 in 2025.

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.