

Xiamen Rental Housing Market

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

XIAMEN RENTAL HOUSING MARKET

2021–2025 Evolution and 2025 Review

City Research Series · English Edition

HOTEL STRATEGY

HOTEL STRATEGIES
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Six Sections for a Complete View of Xiamen

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Six Core Findings for Xiamen

Reconstructed year-end 2025 valid supply reached 84,418 units. Sample average rent was about RMB 1.93 per sq m per day and occupancy about 93.8%.

01

Continued expansion

Reconstructed year-end 2025 valid supply reached 84,418 units, up 15,051 or 21.7% from 2024.

02

Rental communities remain dominant

Rental communities contributed 65,559 units, or 77.7%, and youth apartments 17,326, or 20.5%. Together they represented 98.2%.

03

Strong spatial segmentation

EILT Tiers 1–3 contained 70,625 units, or 83.7% of citywide supply. Tiers 4–5 contained 13,793, or 16.3%.

04

Rent and absorption require joint analysis

Comparable 2025 samples averaged RMB 1.93 per sq m per day and 93.8% occupancy.

05

Communities drive incremental supply

Valid supply increased by 25,863 units from 2023 to 2025. Rental communities drove most of the 2025 increase.

06

Policy focus shifted to operating oversight

Asset screening must distinguish the island core, cross-island growth areas and industrial new towns.

Key Xiamen Rental Housing Metrics in 2025

84,418 units
Monitored supply

+21.7%
Year-on-year supply change

1.93
Daily rent (RMB/sq m/day)

93.8%
Average occupancy

01 Supply signal

Supply increased by 15,051 units in 2025. Rental communities contributed about 97.5% of the increase.

02 Rent signal

Sample rent declined by about 4.5% from 2024 but remained above the 2023 level.

03 Absorption signal

Sample occupancy was about 93.8% in 2025 and broadly stable from 2024.

04 Investment signal

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

Research Boundary and Comparable Data

The Xiamen supply series reconstructs 2023–2025 from the 16-city master and excludes same-address duplicates and projects opened in 2026.

01 **2023 baseline**

Xiamen had 58,555 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**

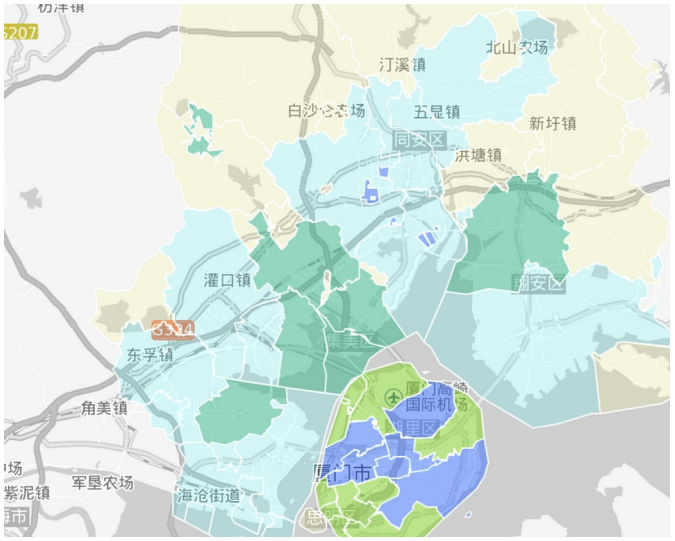
Comparable supply was 58,555, 69,367 and 84,418 units, supporting internally consistent analysis.

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.

Xiamen EILT Model and Spatial Tiers

Method, analytical dimensions and Tier 1–5 spatial distribution



Xiamen 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 Xiamen EILT map shows 51 demand-anchor areas across five tiers, including 21 in Tiers 1–3. Those tiers contain about 83.7% of year-end 2025 supply.

Applications

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

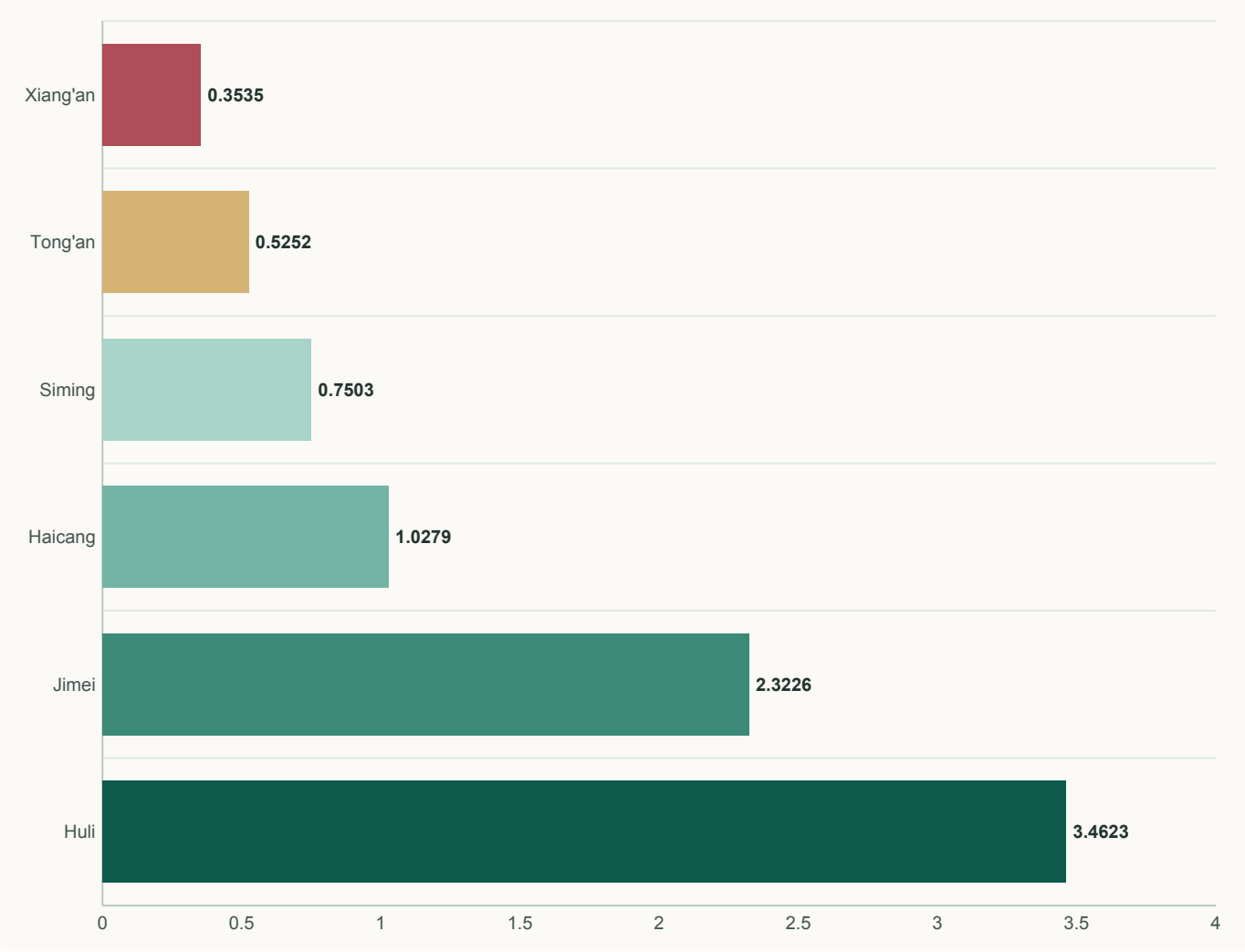
Limitations

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.

Xiamen institutional rental-housing supply by district, 2025

Unit: 10,000 units

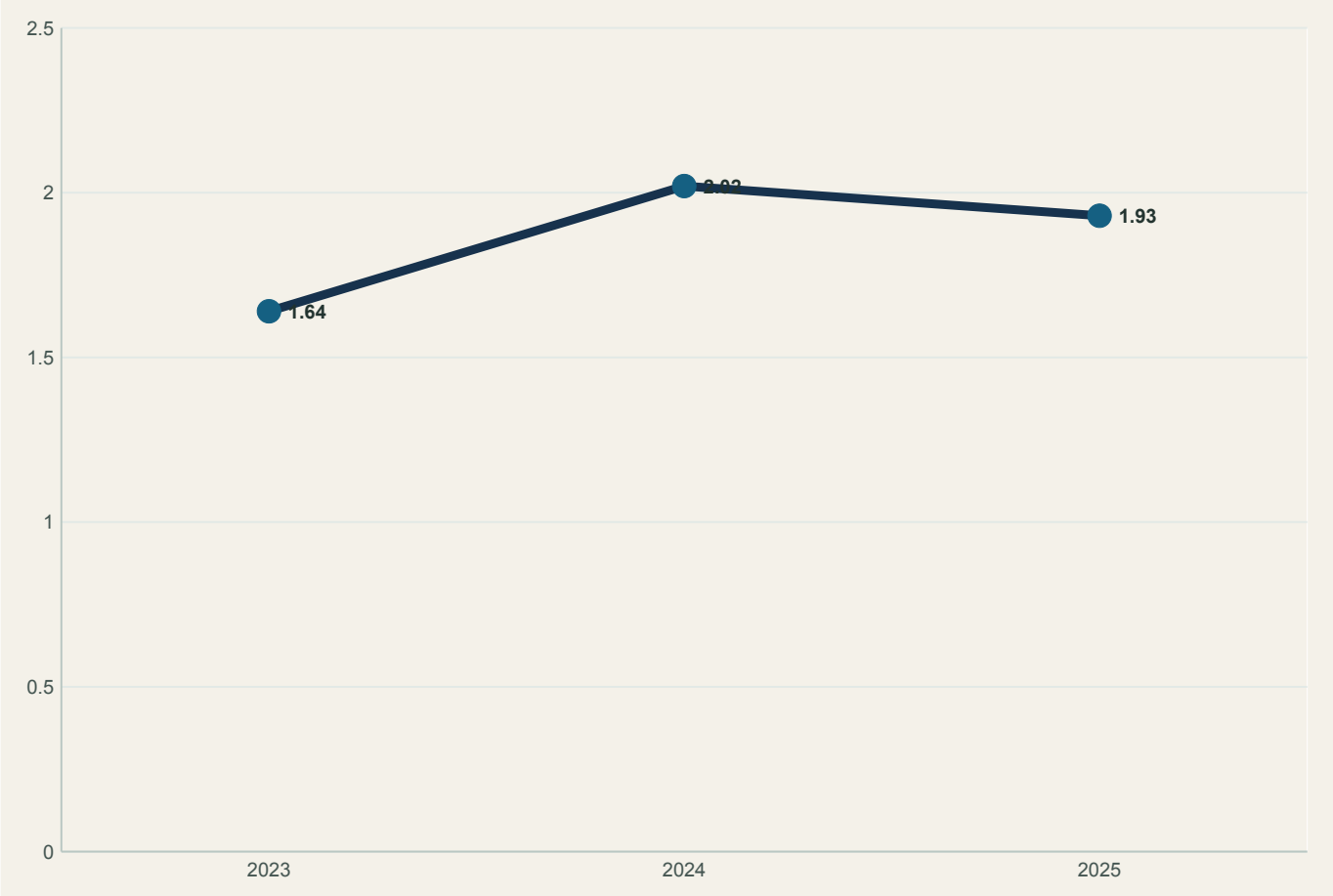


Huli held about 34,623 units, Jimei 23,226 and Haicang 10,279. Together they represented 80.7% of citywide supply.

District totals indicate supply concentration. Island and cross-island submarkets still require checks of commuting, industry and total rent.

Average Rent per Square Metre: 2023–2025

Sample average rent increased from RMB 1.64 per sq m per day in 2023 to 2.02 in 2024, then declined to 1.93 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.