

2019年5月

中国通用仓储市场动态报告

在中国仓储与配送协会指导下，物联云仓《中国通用仓储市场动态报告》已连续发布十期，《报告》通过对物联云仓实时数据进行汇总、整理，全面反映我国主要物流节点城市的仓储设施租金水平和空置情况，体现通用仓储市场的供需动态变化，总结市场发展规律，预测市场发展趋势，为了解仓储市场发展情况、合理投资提供参考依据。

物联云仓延续往期《报告》成果，不断扩大统计范围，加强仓储市场分析，发布《2019年5月中国通用仓储市场动态报告》。2019年5月，物联云仓全国在线仓库面积新增509万 m^2 ，总面积超2.80亿 m^2 ，较2019年4月增长1.82%；在线可租面积超2,822万 m^2 ，较4月增长5.24%。仓库资源覆盖32个省份，212个城市，6,361个园区。

• 2019年5月 中国通用仓储设施租金水平

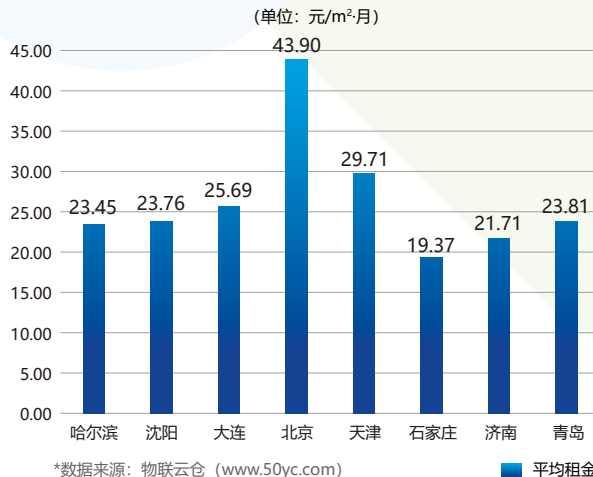
全国30个城市仓库平均租金为27.51元/ m^2 ·月，环比上涨0.62%。其中，华南¹、华东地区仓库平均租金高于华北、华西、华中地区。相较4月，华东、华南、华西、华北地区仓库平均租金均有不同程度上涨，涨幅分别为1.20%（华东）、0.87%（华南）、0.63%（华西）、0.30%（华北）；华中地区下降0.13%。

仓库平均租金最高的城市仍然是北京、上海、深圳，均高于40元/ m^2 ·月。相较4月，因618电商大促来临，上海部分电商企业租仓备货，仓库需求增加，仓库平均租金上涨了0.86%；此外，因“5·16”坍塌事故，上海市政府陆续开展消防安全专项行动，对厂房、仓库以及施工工地等进行消防安全重点排查，未来上海仓储市场或将有所波动。

仓库平均租金最低的城市为石家庄、南昌，均低于20元/ m^2 ·月。相较4月，石家庄仓库平均租金波动不大，市场平稳；南昌部分第三方空置仓库业主加大招商优惠力度，使该地仓库平均租金有所下降，降幅为2.26%。

仓库平均租金波动最大的城市为合肥，环比上涨3.08%。合肥从5月到10月陆续开展消防安全专项整治行动，重点整治防火分隔不到位、疏散通道不畅通、违规存放易燃易爆危险品、消防设施损坏停用等突出问题，一些老旧不合规仓库面临整顿或关闭，部分租户另寻合适仓源，导致市场仓库需求增加，仓库平均租金有所上涨。

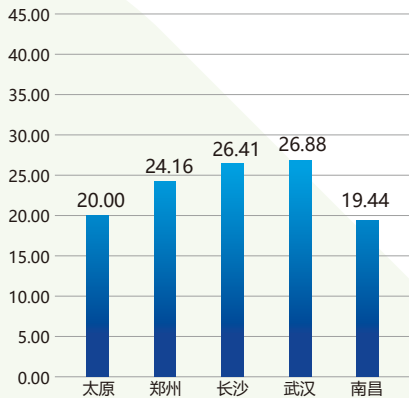
5月华北地区仓库租金情况



1.本报告中的地理分区依据物联云仓平台业务进行划分。

5月华中地区仓库租金情况

(单位: 元/m²·月)

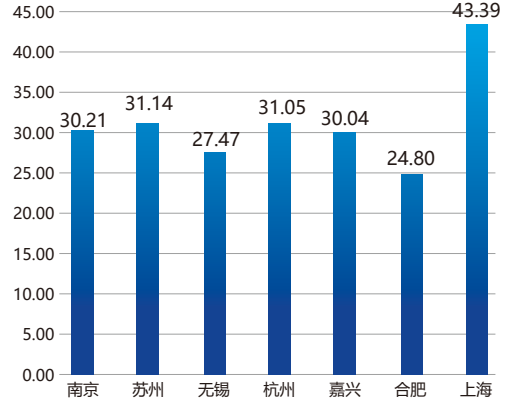


*数据来源: 物联网云仓 (www.50yc.com)

■ 平均租金

5月华东地区仓库租金情况

(单位: 元/m²·月)

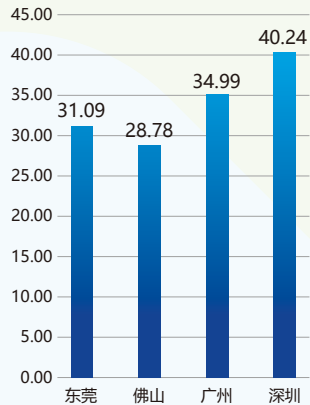


*数据来源: 物联网云仓 (www.50yc.com)

■ 平均租金

5月华南地区仓库租金情况

(单位: 元/m²·月)

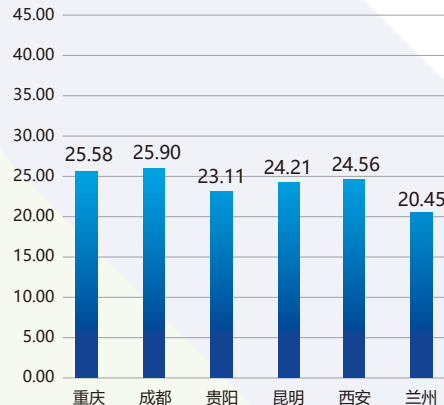


*数据来源: 物联网云仓 (www.50yc.com)

■ 平均租金

5月华西地区仓库租金情况

(单位: 元/m²·月)



*数据来源: 物联网云仓 (www.50yc.com)

■ 平均租金

• 2019年5月 中国通用仓储设施空置率情况

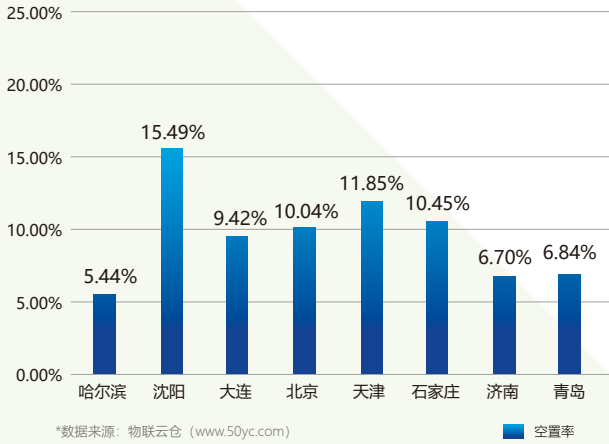
全国30个城市仓库平均空置率为9.64%，环比下降1.3%。其中，华西、华中地区仓库空置率高于华东、华北、华南。相较4月，华南、华中、华北、华西地区仓库空置率有所下降，降幅分别为3.62%（华南）、2.71%（华中）、1.31%（华北）、0.29%（华西）；华东地区仓库空置率环比上涨0.19%。

仓库空置率最高的城市为重庆、深圳，均超过17%。相较4月，重庆因618电商节临近，电商租仓备货增多，仓库需求有所增加，导致仓库空置率有小幅下降，降幅为2.26%；从供应方面来看，未来三个月，重庆将有10.24万m²仓库投入入市，如九江大道丙二类仓库（7月建成）、江津区新建产业园高台库（8月建成）；从需求方面来看，据重庆统计局数据显示，1-4月，支柱产业中，汽车产值下降17.3%，汽车制造业降速明显，未来汽车配套服务企业仓储需求疲软，仓库空置率或将回升。

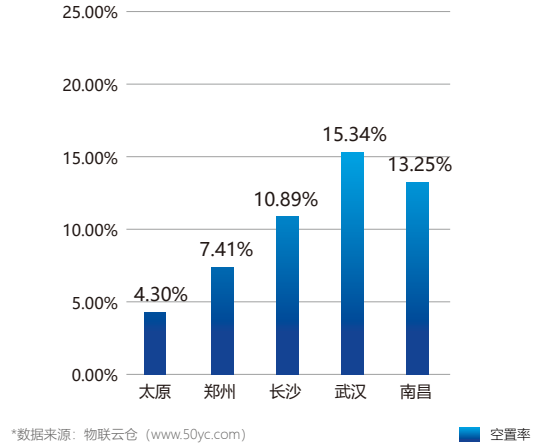
仓库空置率最低的城市为佛山、苏州，均低于3%。相较4月，两个城市仓库空置率波动不大，仓储市场基本保持平稳。

与4月相比，仓库空置率波动最大的城市为东莞，环比下降13.22%。因618电商大促即将来临，一方面，京东、菜鸟的服务商为应对大促，临时租用部分第三方仓库；另一方面，部分中小电商也积极租仓备货。

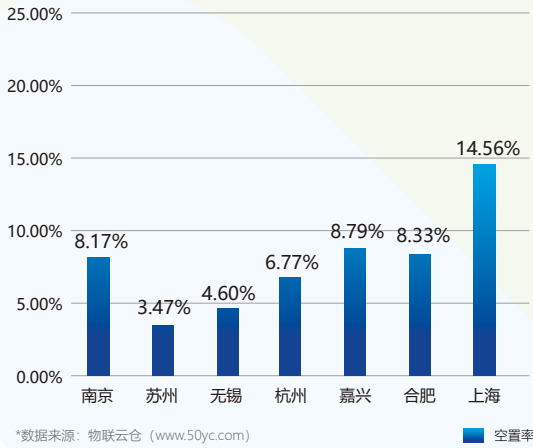
5月华北地区仓库空置率情况



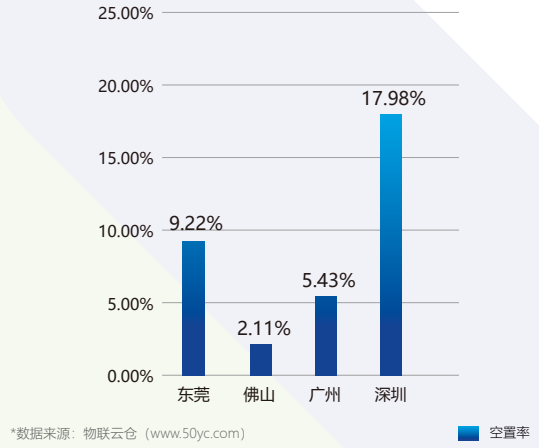
5月华中地区仓库空置率情况



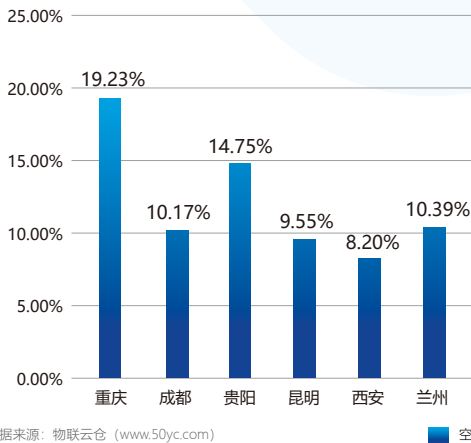
5月华东地区仓库空置率情况



5月华南地区仓库空置率情况



5月华西地区仓库空置率情况

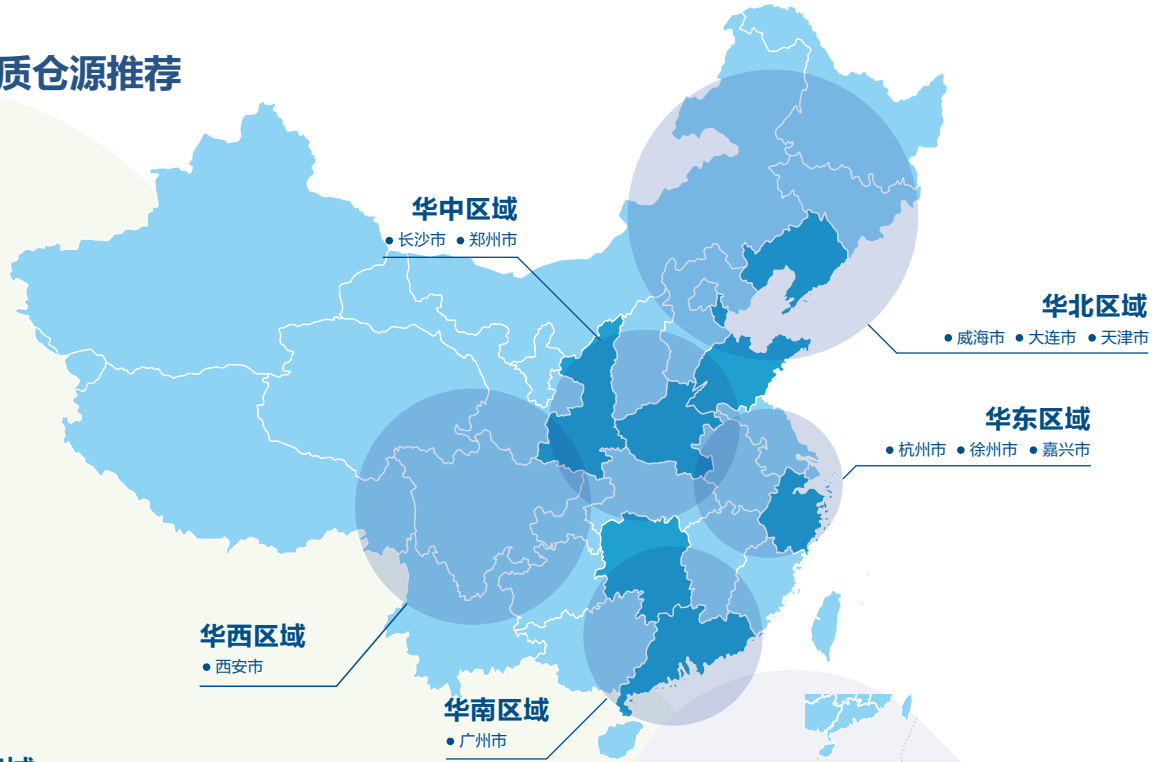


• 表：全国30个城市平均租金和空置率一览表

城市	平均租金 (元/m ² ·月)	环比变化	空置率	环比变化
北京	43.90	0.32%	10.04%	-0.70%
上海	43.39	0.86%	14.56%	1.32%
深圳	40.24	-0.05%	17.98%	0.41%
苏州	31.14	-0.32%	3.47%	-0.25%
杭州	31.05	-0.51%	6.77%	-5.00%
广州	34.99	1.51%	5.43%	-0.92%
东莞	31.09	-0.54%	9.22%	-13.22%
南京	30.21	2.44%	8.17%	2.59%
佛山	28.78	2.86%	2.11%	-0.79%
嘉兴	30.04	3.05%	8.79%	0.08%
长沙	26.41	-0.04%	10.89%	-1.61%
天津	29.71	0.88%	11.85%	-2.26%
无锡	27.47	0.51%	4.60%	0.40%
大连	25.69	-0.73%	9.42%	1.91%
重庆	25.58	0.20%	19.23%	-2.26%
武汉	26.88	0.22%	15.34%	0.41%
郑州	24.16	1.34%	7.41%	-1.46%
沈阳	23.76	-0.50%	15.49%	0.33%
合肥	24.80	3.08%	8.33%	2.21%
昆明	24.21	0.75%	9.55%	-3.72%
哈尔滨	23.45	0.00%	5.44%	-1.65%
成都	25.90	0.12%	10.17%	-0.12%
青岛	23.81	0.46%	6.84%	-0.65%
西安	24.56	0.49%	8.20%	1.80%
贵阳	23.11	0.00%	14.75%	2.24%
太原	20.00	-0.30%	4.30%	-2.82%
济南	21.71	0.51%	6.70%	-4.02%
南昌	19.44	-2.26%	13.25%	-8.11%
石家庄	19.37	1.63%	10.45%	-3.49%
兰州	20.45	2.51%	10.39%	0.31%

*数据来源：物联云仓 (www.50yc.com)

• 优质仓源推荐



华南区域

仓库地址：广州市增城区荔新公路仙村路口
 可租面积：12,000平方米
 项目特点：高台库，丙二类消防，设施齐全，地理位置优势明显，交通便利，距广惠高速1公里

联系人：朱柏全
 联系电话：18380284317

华西区域

仓库地址：西安经济技术开发区泾河工业园
 可租面积：50,000平方米
 项目特点：紧临310国道，通过西禹高速连接周边四横八纵的高速网，与西安咸阳国际机场、西安高铁北站等交通枢纽站形成强大的立体交通网络

联系人：黄天将
 联系电话：18123304630

华东区域

仓库地址：杭州市萧山区党柯路
 可租面积：20,000平方米
 项目特点：园区设施齐全，交通便利，杭州绕城高速17公里，杭州市中心40公里，萧山机场5公里

联系人：毛林林
 联系电话：17767108004

仓库地址：徐州新沂市马陵山西路
 可租面积：500,000平方米
 项目特点：该园区有保税区、高台库以及冷库，能够满足客户多种需求，园区区位优势明显，距离高速口不足1KM，距离码头不足3KM，交通便利

联系人：徐坤
 联系电话：18018127953

仓库地址：嘉兴市秀洲区王店镇吉蚂西路
 可租面积：44,000平方米
 项目特点：交通便利，丙一/丙二类消防，仓库净高10米，园区可为客户提供公寓、宿舍、餐厅、商超等配套设施

联系人：沈建锋
 联系电话：15858329935

华中区域

仓库地址：郑州市经开国际物流园新安路
 可租面积：6,000平方米
 项目特点：高标库，超大雨棚，大车进出方便，配套设施齐全；交通便利，距离京港澳高速4公里，离107国道3公里，主道链接郑州环线配送方便

联系人：王坤
 联系电话：15225100971

仓库地址：长沙市望城区望城大道
 可租面积：4,000平方米
 项目特点：高台库，月台，进深24米，一层净高9米，每个门配一个自动升降平台，超大雨棚，大车进出方便，配套设施齐全

联系人：王坤
 联系电话：15225100971

华北区域

仓库地址：威海市环翠区羊亭镇
 可租面积：100,000平方米
 项目特点：丙二类消防，仓库按照标准物流仓储厂房建设，拥有普通仓、标准仓、保税仓等多种类型，也可根据客户需求定制

联系人：杨飞
 联系电话：13061208829

仓库地址：大连市三十里堡临港工业区
 可租面积：50,000平方米
 项目特点：园区为丙二类高标仓，具有暖库，交通便利，距离沈大高速8公里，距渤海大道仅0.5公里

联系人：井绍轩
 联系电话：13889244310

仓库地址：天津市北辰区陆路港
 可租面积：30,000平方米
 项目特点：园区规划合理，可出入各类大型车辆，配套完善，有办公室，食堂；交通方便，近S1S2多条高速及G205，G112；城市配送，快递中转的优质场所

联系人：隋超
 联系电话：18610640033

中国仓储与配送协会简介

中国仓储与配送协会前身是1995年经原国内贸易部审批、在国家民政部登记注册的中国仓储协会，2016年5月经国务院国资委审批、民政部核准，更名为中国仓储与配送协会，是全国仓储配送行业的非营利性社会组织。现有冷链物流、共同配送、保税仓储、危险品仓储、金融仓储、中药材仓储、自助仓储、技术应用与工程服务、包装与单元化物流、智慧物流、家居物流等11个分支机构。协会以推动中国仓储配送行业现代化、促进现代物流业的发展为宗旨，重点围绕各类仓储与配送设施建设、各类配送中心发展、仓配一体化服务与技术创新等开展政策研究、行业管理与自律、标准制定与实施、信息统计、资源整合、培训咨询、会议交流等。

物联云仓简介

物联云仓（www.50yc.com）是由四川物联亿达科技有限公司推出的互联网仓储综合服务平台，于2015年10月上线，主要提供仓库租赁、仓配一体、仓库物资、仓库技术等服务。物联云仓旨在通过互联网仓储服务平台+云端应用+线下服务的方式，为传统行业实现高效、经济、快速的转型升级提供坚强支撑。

THE DYNAMIC REPORT OF CHINA' S

GENERAL WAREHOUSE MARKET IN MAY 2019

At present, The Dynamic Report of China' s General Warehouse Market has been issued ten consecutive times under the guidance of the China Association of Warehousing and Distribution. Through collecting and sorting out the real-time related information, this report reflects the vacancy situation and rental level of warehousing facilities in major logistics node cities of China in a comprehensive manner, demonstrates the dynamic change of supply and demand in general warehousing market, summarizes the rule of market development, predicts the development trend of the market and provides reference for comprehending the development of warehousing market and making rational investment into this market.

Warehouse In Cloud (WIC) has launched The Dynamic Report of China' s General Warehouse Market in May 2019 after extending the results of previous reports, expanding the scope of selected statistics and deepening the analysis of warehousing market. In May 2019, the total available warehouse area of Warehouse In Cloud (WIC) increased by 5.09 million square meters, with a total area of over 280 million square meters, an increase of 1.82% compared with April 2019; the rentable area exceeded 28.22 million square meters, an increase of 5.24% from April, and warehouse resources has covered 32 provinces, 212 cities, and 6,361 parks.

Rental level of Warehousing Facilities in China in May 2019

The average rent of warehouses in 30 cities across the country was RMB 27.51/m² per month, an increase of 0.62% from the previous month. Among them, the average rent in South China¹ and East China was higher than that in North China, West China and Central China. Compared with April, the average warehouse rents increased by 1.20% in East China, 0.87% in South China, 0.63% in West China and 0.30% in North China respectively, while those in Central China decreased by 0.13%.

The cities with the highest average warehouse rent remained to be Beijing, Shanghai and Shenzhen, all above RMB 40/m² per month. Compared with April, with the advent of the "618 Shopping Festival" , some e-commerce enterprises in Shanghai rented more warehouses for preparing goods, which led to an increase of 0.86% in the average warehouse rent. In addition, due to the collapse accident happened on 16th May, the Shanghai municipal government has launched a special fire safety campaign to carry out key fire safety checks on factories, warehouses and construction sites, and the Shanghai warehousing market may fluctuate in the future.

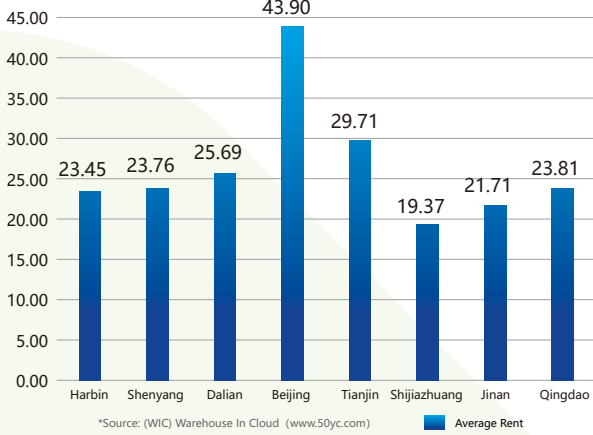
The cities with the lowest average rent of warehouses were Shijiazhuang and Nanchang, all of which were lower than RMB 20/m² per month. Compared with April, the average rent of Shijiazhuang warehouse fluctuated little, and the market was stable. Some third-party warehouse owners in Nanchang have increased their preferential efforts to attract investment, so that the average rent of warehouse has been reduced by 2.26%.

The city with the largest fluctuation in the average rent of warehouse was Hefei, up 3.08% from the previous month. From May to October, Hefei government launched a special rectification campaign on fire safety, focusing on prominent problems such as inadequate fire prevention separation, unobstructed evacuation passageways, illegal storage of flammable and explosive dangerous goods, damage and discontinuation of fire-fighting facilities and so on. Some old and irregular warehouses are facing rectification or closure, and some tenants started to look for alternative warehouse sources, resulting in an increase in the demand for warehouse as well as the average rent of warehouse.

1. The geographical divisions in this report are based on the platform operation of Internet of Warehouses.

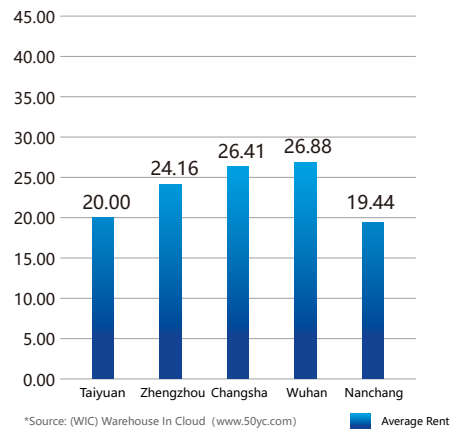
North China Warehouse Rent in May

(RMB/m² per month)



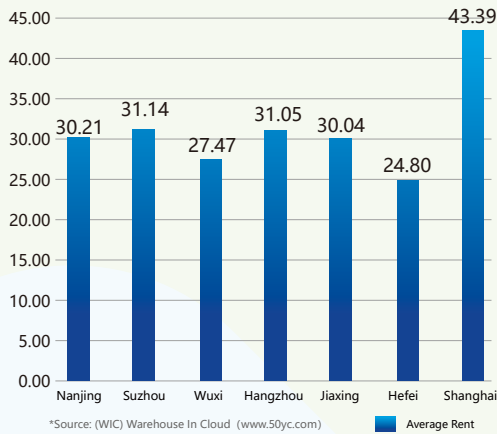
Central China Warehouse Rent in May

(RMB/m² per month)



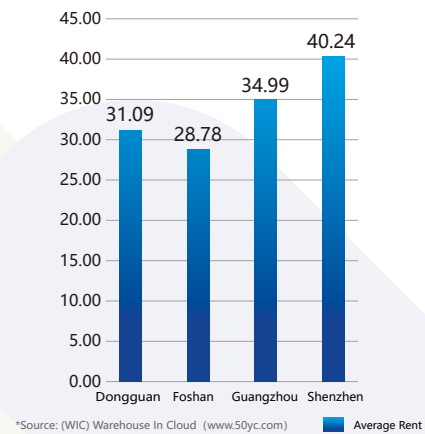
East China Warehouse Rent in May

(RMB/m² per month)



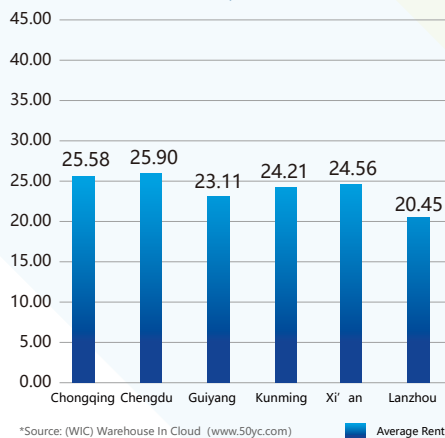
South China Warehouse Rent in May

(RMB/m² per month)



West China Warehouse Rent in May

(RMB/m² per month)



China's Warehousing Facilities Vacancy Rate in May 2019

The average vacancy rate of warehouses in 30 cities across the country was 9.64%, down 1.3% from the previous month. Among them, the vacancy rate of warehouses in West and Central China is higher than that in East China, North China and South China. Compared with April, the warehouse vacancy rate decreased by 3.62% in South China, 2.71% in Central China, 1.31% in North China and 0.29% in West China respectively, and the warehouse vacancy rate in East China increased by 0.19% from the previous month.

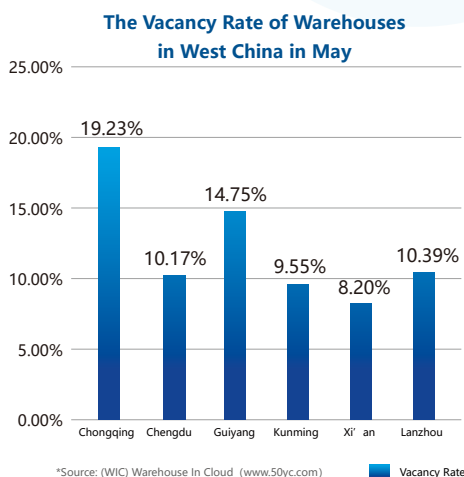
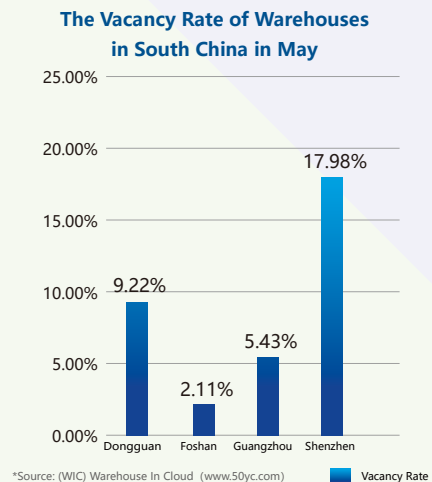
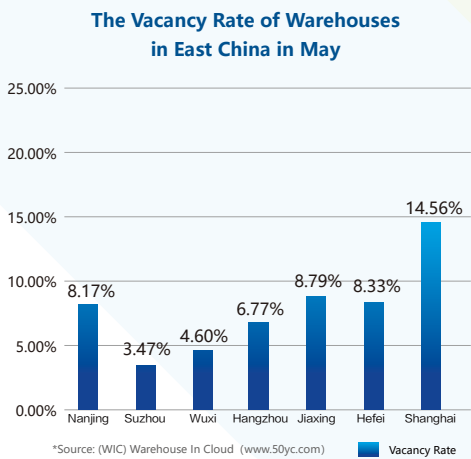
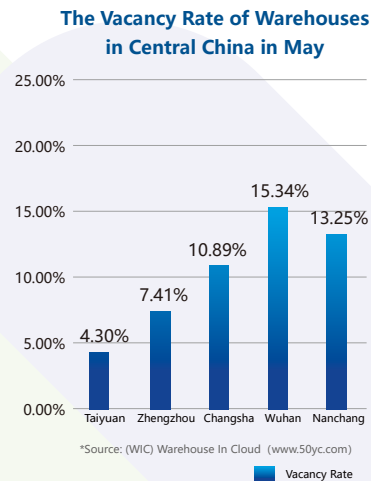
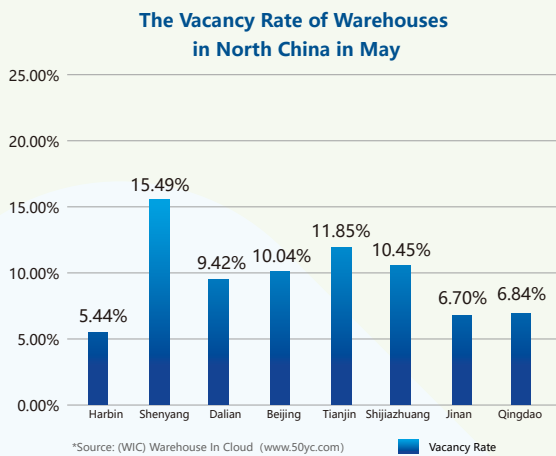
The cities with the highest warehouse vacancy rates were Chongqing and Shenzhen, both of which were more than 17%. Compared with April, due to the approach of the "618 Shopping Festival", e-commerce tenants increased their stock of goods and the demand on warehouse, resulting in a slight decrease of 2.26% in the vacancy rate of warehouse in Chongqing. From the perspective of the supply side, in the following three months, Chongqing will put 102,400 square meters of warehouses

into the market, such as the warehouse with C-class II fire protection qualification on Jiujiang Avenue which will be completed in July, and the high-rise warehouses in the new-built industrial park in Jiang-jin District that will be completed in August. From the perspective of the demand side, according to the data of the Chongqing Statistic Bureau from January to April, among all the pillar industries, the output value of automobiles decreased by 17.3%, and the automobile manufacturing industry decreased significantly. In the future, the warehouse demand of automobile supporting service enterprises is weak, and the warehouse vacancy rate may rebound.

The cities with the lowest warehouse vacancy rates were Foshan and Suzhou, both less than 3%. Compared with April, the vacancy rate of warehouses in these two cities fluctuated little, and the warehousing market remained basically stable.

Compared with April, the city with the largest fluctuation in warehouse vacancy rate was Dongguan, down 13.22% from the previous month. In response to the "618 Shopping Festival", service providers of e-commerce companies such as JD.com and Cainiao temporarily rented some third-party warehouses for stocking goods. Meanwhile, some small and medium-sized e-commerce companies are also actively renting warehouses for goods.

The Vacancy Rate of Warehouses in North China in May

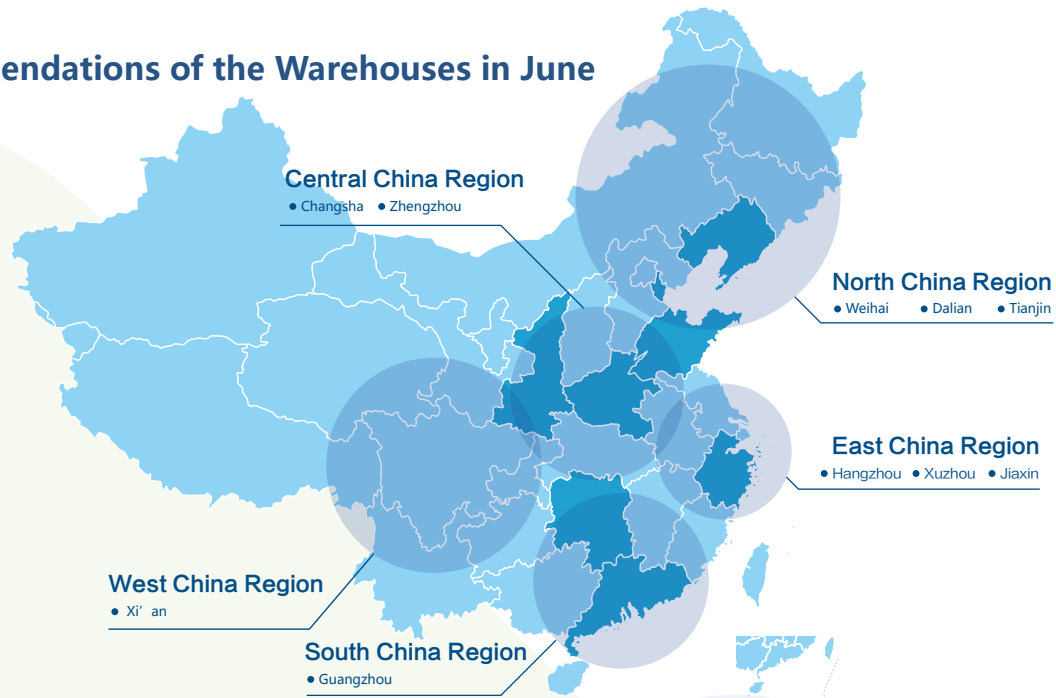


List of Average Rents and Vacancy Rates in 30 Cities of China

City	Average Rent Fee (RMB/m ² per month)	Month-to-Month Comparisons	Vacancy Rate	Month-to-Month Comparisons
Beijing	43.90	0.32%	10.04%	-0.70%
Shanghai	43.39	0.86%	14.56%	1.32%
Shenzhen	40.24	-0.05%	17.98%	0.41%
Suzhou	31.14	-0.32%	3.47%	-0.25%
Hangzhou	31.05	-0.51%	6.77%	-5.00%
Guangzhou	34.99	1.51%	5.43%	-0.92%
Dongguan	31.09	-0.54%	9.22%	-13.22%
Nanjing	30.21	2.44%	8.17%	2.59%
Foshan	28.78	2.86%	2.11%	-0.79%
Jiaxing	30.04	3.05%	8.79%	0.08%
Changsha	26.41	-0.04%	10.89%	-1.61%
Tianjin	29.71	0.88%	11.85%	-2.26%
Wuxi	27.47	0.51%	4.60%	0.40%
Dalian	25.69	-0.73%	9.42%	1.91%
Chongqing	25.58	0.20%	19.23%	-2.26%
Wuhan	26.88	0.22%	15.34%	0.41%
Zhengzhou	24.16	1.34%	7.41%	-1.46%
Shenyang	23.76	-0.50%	15.49%	0.33%
Hefei	24.80	3.08%	8.33%	2.21%
Kunming	24.21	0.75%	9.55%	-3.72%
Harbin	23.45	0.00%	5.44%	-1.65%
Chengdu	25.90	0.12%	10.17%	-0.12%
Qingdao	23.81	0.46%	6.84%	-0.65%
Xi' an	24.56	0.49%	8.20%	1.80%
Guiyang	23.11	0.00%	14.75%	2.24%
Taiyuan	20.00	-0.30%	4.30%	-2.82%
Jinan	21.71	0.51%	6.70%	-4.02%
Nanchang	19.44	-2.26%	13.25%	-8.11%
Shijiazhuang	19.37	1.63%	10.45%	-3.49%
Lanzhou	20.45	2.51%	10.39%	0.31%

*Source: (WIC) Warehouse In Cloud (www.50yc.com)

Recommendations of the Warehouses in June



South China Region:

Warehouse Address: Lixin Highway Xiancun Intersection, Zengcheng District, Guangzhou City
 Rentable Area: 12,000 square meters
 Project Features: A high-rise warehouse with C-class II fire protection qualification. It has convenient transportation and complete supporting facilities. It is one kilometer away from the Guangzhou-Huizhou Expressway.
 Contact: Zhu Baiquan
 Tel: 18380284317

West China Region:

Warehouse Address: Jinghe Industrial Park, Economic and technological Development Zone, Xi'an City
 Rentable Area: 50,000 square meters
 Project Features: This warehouse is close to the 310 National Highway and is well-connected to the surrounding high-speed networks through Xiyu Highspeed Road, forming a strong three-dimensional traffic network with Xi'an Xianyang International Airport, Xi'an High-speed Railway North Station and other transport hubs.
 Contact: Huang Tianjiang
 Tel: 18123304630

East China Region:

Warehouse Address: Dangke Road, Xiaoshan District, Hangzhou City
 Rentable Area: 20,000 square meters
 Project Features: The warehouse park has complete supporting facilities and convenient transportation. It is 17 kilometers from the Hangzhou Belt Highway, 40 kilometers from downtown Hangzhou and five kilometers from Hangzhou Xiaoshan Airport.
 Contact: Mao Linlin
 Tel: 17767108004

Warehouse Address: Malingshan West Road, Xinyi City, Xuzhou City
 Rentable Area: 500,000 square meters
 Project Features: This park has bonded warehouses, high storages and refrigeration storages, which can meet many kinds of requirements. The park has obvious location advantages and convenient transportation as is less than one kilometer from the high-speed port and less than three kilometers from the wharf.
 Contact: Xu Kun
 Tel: 18018127953

Warehouse Address: Jima West Road, Wangdian Town, Xiuzhou District, Jiaxin City
 Rentable Area: 44,000 square meters
 Project Features: The warehouses in this park are all equipped with C-class I and C-class II fire protection qualification. The net height of warehouses is 10 meters. This park can provide customers with apartments, dormitories, restaurants, supermarkets and other supporting facilities. It is also convenient in transportation.
 Contact: Shen Jianfeng
 Tel: 15858329935

Central China Region:

Warehouse Address: Xin'an Road, Jingkai International Logistics Park, Zhengzhou City
 Rentable Area: 6,000 square meters
 Project Features: This warehouse is a high-standard warehouse equipped with extra-sized rain shed and complete supporting facilities. It has convenient access for the heavily loaded vehicles to come in and out of the park. It enjoys convenient transportation, with four kilometers away from Beijing-Hong Kong-Macao Expressway and three kilometers from the 107 National Highway, and the main road links the Zhengzhou Ring Road.
 Contact: Wang Kun
 Tel: 15225100971

Warehouse Address: Wangcheng Avenue, Wangcheng District, Changsha City
 Rentable Area: 4,000 square meters
 Project Features: This is a high-platform warehouse with 24 meters in width and a net height of nine meters. Each door is equipped with an automatic lifting platform. The warehouse is covered with extra-sized rain shed and has complete supporting facilities. It has convenient access for trucks.
 Contact: Wang Kun
 Tel: 15225100971

North China Region:

Warehouse Address: Yangting town, Huancai District, Weihai City
 Rentable Area: 100,000 square meters
 Project Features: the warehouse was constructed in accordance with the standards of logistics warehousing plant and has C-class II fire protection qualification. The park has a variety of warehouse types, such as general warehouse, standard warehouse, bonded warehouse and so on, which can also be customized according to the needs of customers.
 Contact: Yang Fei
 Tel: 13061208829

Warehouse Address: Sanlibao Port Industrial Zone, Dalian City
 Rentable Area: 50,000 square meters
 Project Features: This park is a high-standard warehouse with conservatory storehouses. It enjoys convenient transportation as is eight kilometers away from Shenda Expressway and only 0.5 kilometers away from the Bohai Avenue.
 Contact: Jing Shaoxuan
 Tel: 13889244310

Warehouse Address: Lulu Port, Beichen District, Tianjin City
 Rentable Area: 30,000 square meters
 Project Features: This part has reasonable layout as it has convenient access for all kinds of large vehicles. It has completed supporting facilities such as offices and canteens. The warehouse park is adjacent to several highspeed roads such as S1 and S2 and national highways such as G205 and G112, suitable for urban distribution and express transit.
 Contact: Sui Chao
 Tel: 18610640033

Introduction of China Association of Warehousing and Distribution:

China Association of Warehousing and Distribution (CAWD) originated from previous China Association of Warehousing and Storage which was approved by the former Ministry of Internal Trade and registered with the Ministry of Civil Affairs in 1995. It was renamed as China Association of Warehousing and Distribution in May 2016 after being approval by the State-owned Assets Supervision & Administration Commission of the State Council and examined by the Ministry of Civil Affairs. It is a non-profit organization in the national warehousing and distribution industry. There are 11 branches including joint distribution, cold chain logistics, bonded warehousing, dangerous goods warehousing, financial warehousing, traditional Chinese medicine warehousing, technical application and engineering services, packaging and unitized logistics, intelligent logistics, self-service warehousing, steel warehousing, etc. Aiming at promoting the modernization of China's warehousing and distribution industry and the development of modern logistics industry, the association carries out the function of policy research, industry management and self-discipline, industry standards formulation and implementation, information and statistics collection, resource integration, training consultation, conference and exhibition and so on focusing on the construction of various warehousing and distribution facilities, the development of various distribution centers and integrated warehousing and distribution services and technological innovation.

Introduction of Warehouse In Cloud (WIC):

WIC(www.50yc.com) is an Internet warehousing integrated service platform presented by Sichuan WULIANYIDA Technology Co., Ltd. It was launched in October 2015, mainly providing warehouse leasing, warehouse and distribution integration, warehouse materials, warehouse technology and other services. WIC aims to provide strong support for traditional industries to achieve efficient, economic and rapid transformation and upgrading by Internet warehousing service platform + cloud application + offline service.

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