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E Ũ A Đ

国泰君安证券股份有限公司
GUOTAI JUNAN SECURITIES CO., LTD.

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̀E ΰ A Đ

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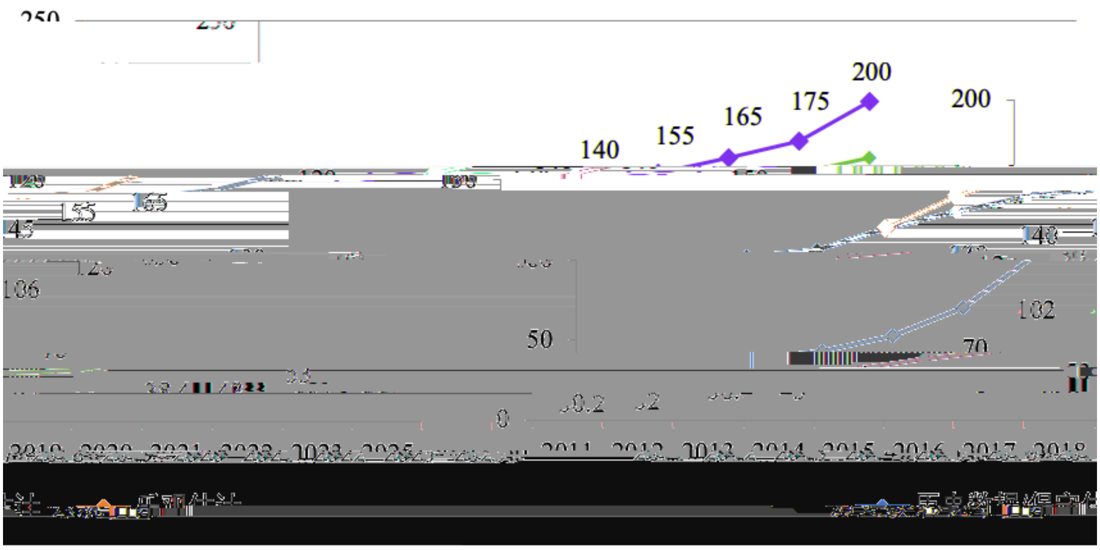

Allied Market Research Solar Photovoltaic Glass Market Analysis: Global Opportunity Analysis and Industry Forecast, 2019-2026 2019 2026 30.3% 2026 376

2

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	3.15	/	484.40	1,067.09

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	.	13.5m³

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ضي 98% ضي 95%

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ἳ ⌠

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2	4,200 ῴ ∃	53,860.12	35,000.00
3	Ḫ ˩	75,000.00	75,000.00
		292,121.10	**250,000.00**

75 Ʊ ῴ ∃ Đ ڠ 4,200 ῴ ∃

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[illegible] 40,192.71 [illegible] 23,461.80 [illegible] 59,404.56 [illegible] 62,719.10 [illegible] 10% [illegible]

3 [illegible] 2019 [illegible]

[illegible]

[illegible]	2020 6 30	2019 12 31	2018 12 31	2017 12 31

Ḥ ῷ	13.25%	13.13%	9.14%	7.06%
	11.41%	17.74%	10.53%	5.66%
⋎ A	2.60%	2.84%	6.78%	5.08%
شخ ṿ	9.09%	11.24%	8.82%	5.93%
̀Ẽ	12.56%	12.36%	7.66%	13.44%

88.71% 99.61% 96.43% 96.00%

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	2020 6 30	2019 12 31

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	52.49%	49.94%	38.74%	24.53%
ᛘ A	8.83%	6.20%	5.58%	5.87%
ﺦﺷ ٧	38.68%	34.26%	29.77%	22.36%
	20.71%	23.03%	26.80%	16.95%

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Ḥ شخ ‰	№ φ № ΐ
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№ شخ ‰

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	2020 6 30	2019 12 31

	6,403.75	33.78%	4,991.03	20.72%	3,386.22	21.85%	2,627.45	20.34%
	2,188.85	11.55%	5,994.05	24.89%	1,939.76	12.52%	2,328.47	18.02%
	1,013.94	5.35%	775.89	3.22%	1,896.84	12.24%	1,242.50	9.62%
	3,807.60	20.09%	5,605.74	23.28%	4,068.70	26.26%	2,122.63	16.43%

	1,728.31	6.65%	1,241.26	11.11%	587.84	5.10%	1,238.50	20.85%
	3,811.36	14.66%	1,569.62	14.05%	999.00	8.68%	1,493.67	25.14%
	1,459.60	5.62%	1,446.34	12.94%	1,326.99	11.52%	1,656.43	27.88%
	25,990.45	100.00%	11,174.30	100.00%	11,515.10	100.00%	5,940.54	100.00%

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	2020 6 30		2019 12 31		2018 12 31		2017 12 31	
1	25,824.24	98.74%	10,987.83	97.54%	11,400.51	97.88%	5,916.18	96.67%
1	328.58	1.26%	277.18	2.46%	246.34	2.12%	203.70	3.33%
	26,152.82	100.00%	11,265.61	100.00%	11,646.85	100.00%	6,119.88	100.00%

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	Ȅ	**2020 6 30**	**2019**	**2018**	**2017**
Ա	Ḥ ῲ	9.56	12.34	11.73	18.49
		9.48	7.85	8.48	8.49
	⅓ A	6.84	10.96	12.63	14.12
	۷شخ	8.63	10.38	10.95	13.70
	Ȅ	5.80	7.64	6.93	8.10

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	2020 1-6	2019	2018	2017

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˧ ⁞ ṿ ⁞ ṿ ‰ ﭴ	-	-	-	1,163.55
ḷ ỉ̀ ˜ ǵ ₮	-244.58	223.17	322.25	45.07
ỉ̀ ⋰	-	-	85.89	-
	1,031.84	3,647.83	4,629.13	2,272.50
ڗ	-191.52	-716.16	-955.57	-399.82
⋰	840.32	2,931.67	3,673.55	1,872.68

ɚ ṗ ̀Ḕ̃ №≢ 1,872.68 ̈Ḥ 3,673.55 ̈Ḥ 2,931.67 ̈Ḥ ǵ 840.32 ̈Ḥ ⑊ ᴅ №≢ 4.39% 9.02% 4.09% ǵ 1.82%

ɚ ṗ ̀Ḕ̃ ˜ ˚ ˚ ỉ̀ ṗ ̀Ḕ̃ ˩ ̀Ḕ̃ ≠ ⋰ ⋰ ⋰

ỉ́ ̀Ḕ̈Ḥ ᴇ ṿ ỉ́ ˩ ỉ̋ 2016 ˧ ‰ 2017 ˧ ⁞ ṿ ⁞ ṿ ‰ ỉ̀ ˜ ǵ ₮ ỉ̋ 2018 Ṣ

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2018 ↑

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	1,733.16	ο ῥ ⁝ ο ⅃ ʐ	0.24‶Ḥ/		
Ṣ ≠	377.81	: ο ῥ	ᾇ ο ﻨﻬ ≠ 50%	≠	ᵞ
A ῗ	100.00	Ḇ ο		ῗ	ᵞ
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ﯽ ﺿﺮ ą ↑	67.00	⁝ r ο		ﯽ ﺿﺮ ą ↑	ᵞ
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ῃ ‰̣ :	20.00	Ḇ ῗ Ḥ . ῥ		ῃ ‰̣ :	ᵞ
β	14.99	β		β	ᵞ
	1,458.66	: ↑			ᵞ
ἳ	108.56	:		:	ᵞ
ᵛᵎᵎ	**4,010.18**				

2017 ↑

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β	83.67	β		β	ᵞ
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Ⱎ ῥ :	48.12	Ḇ Ⱎ ῥ		Ⱎ ῥ :	ᵞ
ﻘﻤﻢ ٦ :	24.00	Ḇ ο ῥ		ﻘﻤﻢ ٦ :	ᵞ
	1,439.61	:			ᵞ

		↑			
ἳ	171.06	:		:	˜
...	**1,816.46**				

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32,625.64

1,499,895.14

			25,438.50					25,591.75
					2020 6 30			25,591.75
1	90	90	25,438.50	25,438.50	25,591.75	25,438.50	25,438.50	25,591.75	153.25 1	2

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68,465,092.00 ῞Ḥ ת ΐ ᵣ ą ’

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ΐ ת ⌈ ᴰ			

			ת			2020 6 30 ת				⌈ ῀ ą
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1	75 Ʊῲɜ ᴆ	75 Ʊῲɜ ᴆ	144,142.17	144,142.17	1,513.31 1	144,142.17	144,142.17	1,513.31	142,628.86	2

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Frost & Sullivan

Final Report for China's Photovoltaic Glass Market Study

2015

77.03% 2016 80.99% 2017 83.48%

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2017 2018 2019 ۼ 2020 ᒉ ̀Eٚ

⊦ ˜ №≢ 297,451.14 ˝Ḥ 303,980.17 ˝Ḥ 475,588.67 ˝Ḥ ۼ

249,620.39 ˝Ḥ ɐ ̀Eٚ ⊦ ɐ

[2007]500 2020 6 30

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[redacted]

4	1*1200t/d [illegible]	103.41	2	206.81	62.04	144.77	

[redacted]

[redacted]

					T+12	T+18
24	1*1200t/d	129.26	1	129.26	38.78	90.48
25	1*1200t/d	51.70	1	51.70	15.51	36.19
26	1*1200t/d	1,551.11	2	3,102.21	930.66	2,171.55
27	1*1200t/d	155.11	2	310.22	93.07	217.15
28	1*1200t/d	129.26	1	129.26	38.78	90.48
29	1*1200t/d	137.88	1	137.88	41.36	96.51
30	1*1200t/d	1,895.80	1	1,895.80	568.74	1,327.06
31	1*1200t/d	689.38	1	689.38	206.81	482.57
32	1*1200t/d	258.52	1	258.52	77.56	180.96
33	1*1200t/d	155.11	2	310.22	93.07	217.15
34	1*1200t/d	172.35	2	344.69	103.41	241.28
35	1*1200t/d	603.21	2	1,206.42	361.92	844.49
36	1*1200t/d	534.27	2	1,068.54	320.56	747.98
37	1*1200t/d	2,240.49	2	4,480.97	1,344.29	3,136.68
38	1*1200t/d	8.62	2	17.23	5.17	12.06
39	1*1200t/d	215.43	2	430.86	129.26	301.60
40	1*1200t/d MCC	689.38	2	1,378.76	413.63	965.13
41	1*1200t/d MCC	198.20	2	396.39	118.92	277.48

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					T+12	T+18
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42	1*1200t/d Έ ŋ ˗ ΐ ǁ ϗ	34.47	2	68.94	20.68	48.26
43	1*1200t/d Έ .	43.09	2	86.17	25.85	60.32
44	1*1200t/d Έ ˩	34.47	2	68.94		

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⅞ 53,860.12 ῎Ḥ ΐ ˜ 20,980.90 ῎Ḥ \l 38.95% ΐ 29,782.50 ῎Ḥ \l 55.30% 1,269.08 ῎Ḥ \l 2.36% ˩ 1,827.64 ῎Ḥ \l 3.39% ΐ r

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˜	ṗ		\l ɒ
		20,980.90	**38.95%**
1	ى	12,442.72	23.10%
2	ḱ	2,182.93	4.05%
3		2,152.20	4.00%
4	ΐ	4,203.05	7.80%
		29,782.50	**55.30%**
1	˜	29,782.50	55.30%
		1,269.08	**2.36%**
ضم	˩	**1,827.64**	**3.39%**
		53,860.12	**100.00%**

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1.1		48,998	0.07		3,625.83	1,087.75	2,538.08
2		48,998			2,253.89	676.17	1,577.72
2.1		48,998	0.05		2,253.89	676.17	1,577.72
3	ᄼ	36,069	0.18		6,563.00	6,563.00	
	ḱ				**2,182.93**	**1,947.74**	**235.19**
1	سجى ضر	39,198		0.006	235.19	-	**235.19**
2	ᄼ ḱ	36,069		0.05	1,947.74	1,947.74	-
ضم					**2,152.20**	-	**2,152.20**
1					93.00	-	93.00
2					130.00	-	130.00
3					51.50	-	51.50
4	/ ᴸ / / ↑				1,877.70	-	1,8

7		ΰ	30.00	6.00	180.00	90.00	90.00
8	U	ΰ	25.00	6.00	150.00	75.00	75.00
9	.	ῴ	3,500.00	6.00	21,000.00	10,500.00	10,500.00
10		ΰ	50.00	6.00	300.00	150.00	150.00
11	U		20.00	6.00	120.00	60.00	60.00
12		ΰ	30.00	6.00	180.00	90.00	90.00
13		Kuka	55.00	6.00	330.00	165.00	165.00
14	ج	ΰ	300.00	1.00	300.00	150.00	150.00
15	+	KCW2220B	10.00	1.00	10.00	5.00	5.00
16	' ˧	SLW100-200	60.00	1.00	60.00	30.00	30.00
17		Ḡ	300.00	1.00	300.00	150.00	150.00
18		LED	200.00	1.00	200.00	100.00	100.00

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	2020 ٦	**2019**	**2018**	**2017**
ῴ Ǝ /\ ≠	82.94%	81.87%	76.07%	77.61%
ῴ Ǝ ٧ ≠	87.17%	86.37%	79.94%	78.55%
ῴ Ǝ	98.78%	100.16%	95.93%	103.47%

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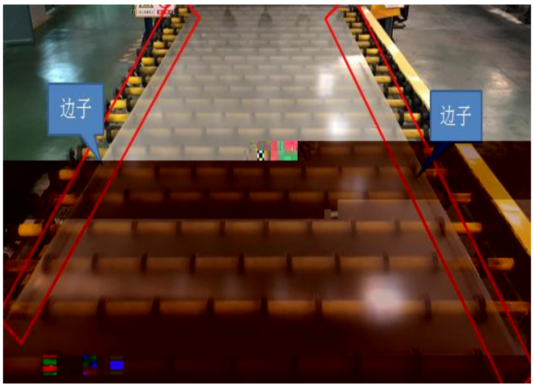

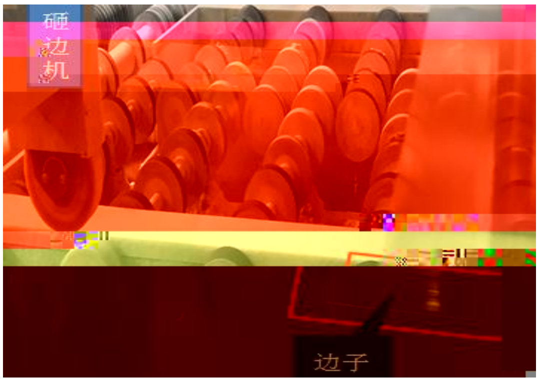

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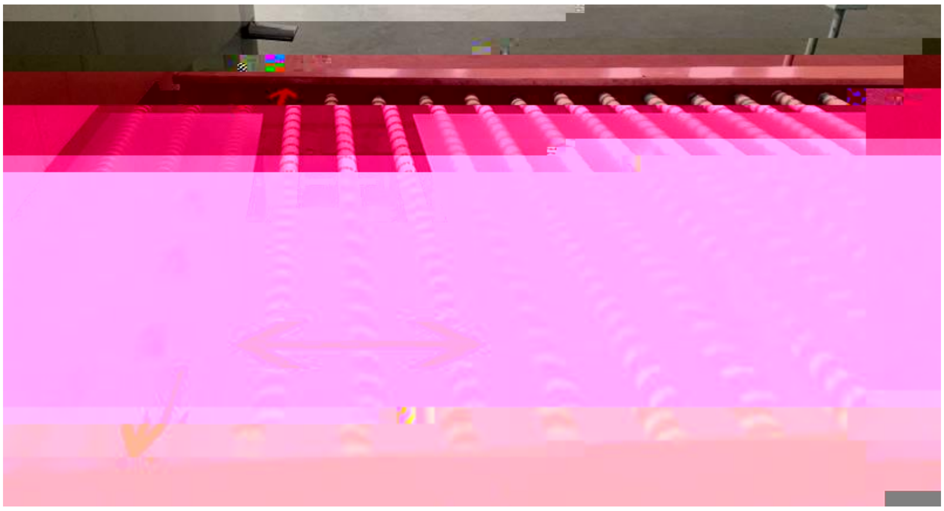

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o	2020 ˦		2019		2018		2017	
	˜	\l	˜	\l	˜	\l	˜	\l %
̀Ē̃	21.28	21.24%	37.48	22.47%	20.96	13.58%	20.27	14.45%
Ḥ ῳ̤	31.74	31.67%	58.87	35.30%	47.84	30.99%	49.42	35.24%
	5.91	5.89%	7.57	4.54%	5.88			

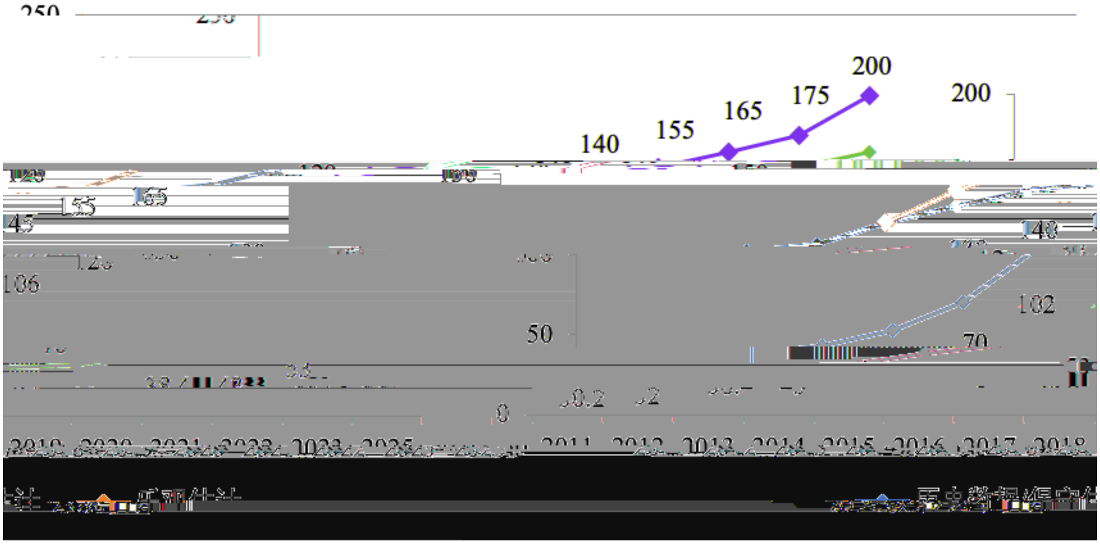
═ ╠ η ǚ ɜ ȕ η ˜ . ȕ ﻳﺠ

ﻳﺠ ᴰ ǚ ɜ ȕ ﺷﻲ Ḡ ˅|

ﻍ ﺿﺮ ˅| ǚ ɜ ȕ ĭ ﺷﻲ Ω̄ Global Market Outlook For Solar Power 2020-2024 ﻳﺠ ǚ ɜ ˥ Ψ 2019 η ȕ ⌠ 633.7GW 116.9GW ﻳﺠ ǚ ɜ 30.1GW ﻍ Ḡ η ﻳﺠ ǚ ɜ ˥ Ψ 2020 η ǚ ɜ 130GW ⌠ 140GW

2011-2025 η ǚ ɜ

˦ ᵝ GW



ﻳﺠ ǚ ɜ ˥ Ψ

ﺿﻲ ǚ ɜ ˩ ǚ ɜ Allied Market Research ȕ Solar Photovoltaic Glass Market Analysis: Global Opportunity Analysis and Industry Forecast, 2019-2026 2019 2026 η ǚ ɜ ﺷﻲ 30.3% ⌠ 2026 η ǚ ɜ ﺷﻲ ⌠ 376 ˝Ḥ ǚ ɜ ﺷﻲ . ʐ ﺷﻲ Ḡ

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2,400 Ư/ 163,260.98 ῎Ḥ U ڿ

7,955.35 ˜ 181,381.98 ῎Ḥ Ƃ ᴇ ⊦ ῤ

12.93% U ⁊ 7.49 Ƃ U r

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῁		T+12	T+24	T+36	T+48	……	T+120
1	˜	-	45,345.50	181,381.98	181,381.98	……	181,381.98
2		-	38,619.50	130,496.24	130,652.42	……	125,170.95
3	≠		14.83%	28.05%	27.97%	……	30.99%
4	ἴ ᶒ	-	-	-	1,489.16	……	1,582.54
5		-	2,503.81	10,015.23	10,015.23	……	10,040.22
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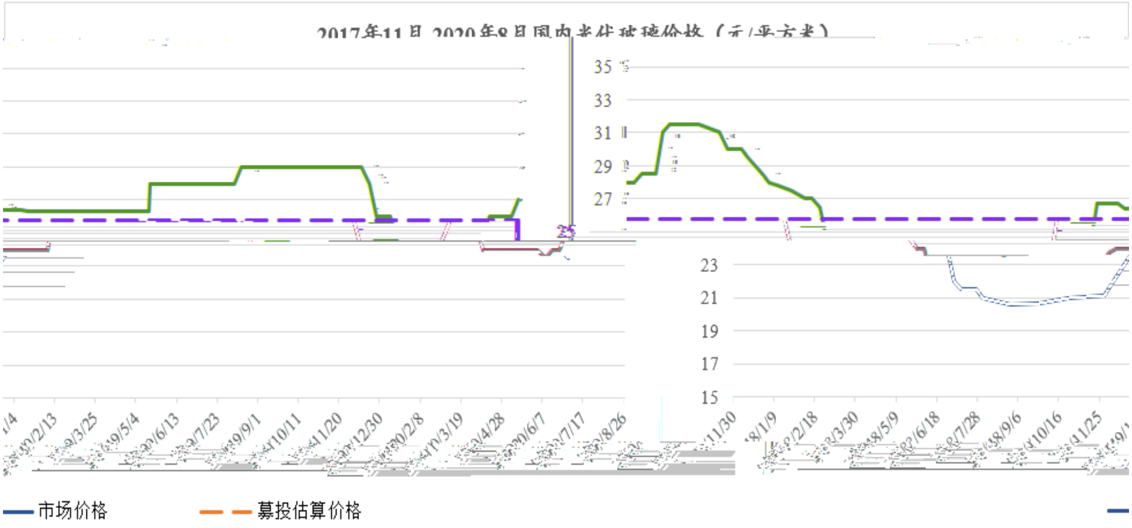
ᓄ		T+12	T+24	T+36	T+48	……	T+120
1	**ẏ**	**-**	**-**	**-**	**12,409.70**	……	**13,187.83**
1.1		-	5,894.91	23,579.66	23,579.66	……	23,579.66
1.2		6,397.31	13,965.96	10,391.83	10,391.83	……	10,391.83
1.2.1	ضي	1,005.50	670.33	-	-	……	-
1.2.2		807.10	-	-	-	……	-
1.2.3	[redacted]						

ـمـ		T+12	T+24	T+36	T+48	……	T+120
2	ٽ	-	1,686.38	6,745.53	6,745.53	……	6,745.53
3	آ	-	715.89	2,863.55	2,863.55	……	2,863.55
	ڤ	-	**2,406.63**	**9,626.54**	**9,626.54**	……	**9,626.54**
1	ڤ	-	2,406.63	9,626.54	9,626.54	……	9,626.54
ضم		-	**43,529.94**	**150,138.01**	**150,294.19**	……	**144,837.71**
1	ـمـ أ	-	28,191.78	112,767.10	112,923.28	……	113,211.29
2	نهـ	-	15,338.17	37,370.91	37,370.91	……	31,626.42



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ἳ 2018 “ 531 ” ǯ ῷ ᴟ شي E ض 2018 6-8 ₮

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2020 1-8 ῷ ᴟ شي E شخ E 26.47 ˝Ḥ/ Շ

2020 8 ῷ ᴟ شي E 27 ˝Ḥ/ Շ شخ ת

ج ⅂ E 25.76 ˝Ḥ/ Շ ᵀ ˙˙

ת ج ف E ᵀ ˜Ḥ№ ΰ ל ἳ

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2020 1-6	40.05%	38.88%
2019	32.87%	32.12%
2018	27.68%	26.17%
2017	31.12%	30.19%
	32.93%	**31.84%**
	28.05%	**N/A**

[redacted]

U [redacted]

79 [redacted]

9. [redacted]

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1	**ỵ**	**-**	**-**	**-**	**1,835.61**	……	**2,388.12**
1.1		-	4,149.60	10,374.00	10,374.00	……	10,374.00
1.2		1,968.71	5,121.53	7,985.88	7,985.88	……	7,985.88
1.2.1	ض	184.97	98.51	-	-	……	-
1.2.2		55.83	130.27	-	-	……	
1.2.3	ἳ W`E	1,727.91	1,698.40	-	-	……	-
1.2.4	/ا	-	2,974.64	7,436.60	7,436.60	……	7,436.60
1.2.5	˩ ɀ	-	219.71	549.27	549.27	……	549.27
2	**ﷺ**	**-**	**-**	**-**	**128.49**	……	**167.17**
3	**۷ ἳ ض ۷**	**-**	**-**	**-**	**91.78**	……	**119.41**
4	**ἳ ۷**	**-**	**-**	**-**	**220.27**	……	**286.57**

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	T+12	T+24	T+36	T+48	……

	T+12	T+24	T+36	T+48	……	T+120

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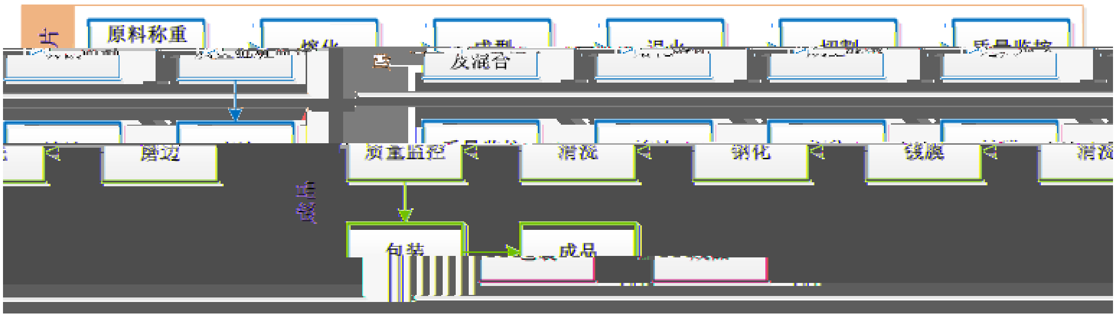

2019	13.98%
2018	10.60%
2017	14.59%
ُلأ شخ	**13.06%**
ת	**15.29%**

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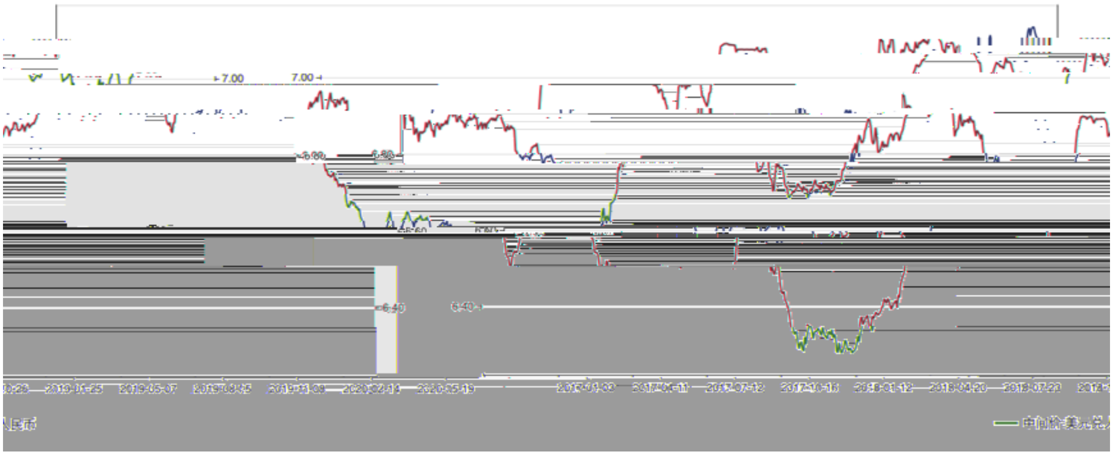
[illegible] 2018 [illegible] 9 [illegible] 1.62 [illegible]

3 [illegible]

[illegible]

	2020 1-6	2019	2018	2017
[illegible]	-200.50	352.70	-928.49	2,338.41
[illegible]	46,080.62	71,724.37	40,731.47	42,652.68
[illegible]	-0.44%	0.49%	-2.28%	5.48%

[illegible]



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38.84% 30.77%

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51,702.84 35.51% 30%

2017	4,320	42,652.68	10.13%
2018	8,775	40,731.47	21.54%
2019	5,265	71,724.37	7.34%
			18,360.00
			51,702.84
			35.51%

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2017 4,320

2019 6 24 2018

2018 8,775

2019 11 26 2019

2019 5,265

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