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021-51365368

- 1.
- 2. R290
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9. 10 %
- 10.
- 11.
- 12. 50 4
- 13. 9
- 14. 24
- 15.

16.

17.

5.

6. 2014

7.

8. 2014

-
- 17. ASK
 - 18.
 - 19.
 - 20.
 - 21. :Mink
 - 22. EDWARDS SEMICON China 2014

- 1. : , ---
- 2. : , ---
- 3. ---
- 4. (002158):14 2014
- 5. 4 21 1.52%
- 6.
- 7. : , ---
- 8. : , ---
- 9. ---
- 10. : , ---

11. : ,

12.

1

		2020	50	
2050	75.			1/3
	430			1.
20		97		
				40
				400
	200			

2 R290

R290

HCFC

R22

R410A

R22

2013

HCFC

2009

2010

2030

HCFC

R410A

R410A

R410A

HCFC

1.2

R290

R22

3000-4000

30

700 -800

R410A

R410A

R290 R32 R290 R161

http://www.chinahvacr.com/News/Class1/201404/News_3106901.shtml

3

4 14 14

1 1 1 2

1.35 28.74%

2% 1%

8

9

http://bao.hvacr.cn/201404_2045830.html

4

21.5

430

1%

2.3

20

3%

97%

20

50%

2050 2020 50%
75%
1/3
40
400
200

http://www.chinahvacr.com/News/Class1/201404/News_3106867.shtml

5

“ ”

SOHO

2013 11

1000

2015

16%

2014

1.7

5

2012

54.2%

200

20%-30%

3000 /

350

30% 1

8%

5 10

http://www.chinahvacr.com/News/Class1/201404/News_3106984.shtml

6

337.7

2011

6000

1000

7000

300

http://www.chinahvacr.com/News/Class1/201404/News_3107389.shtml

7

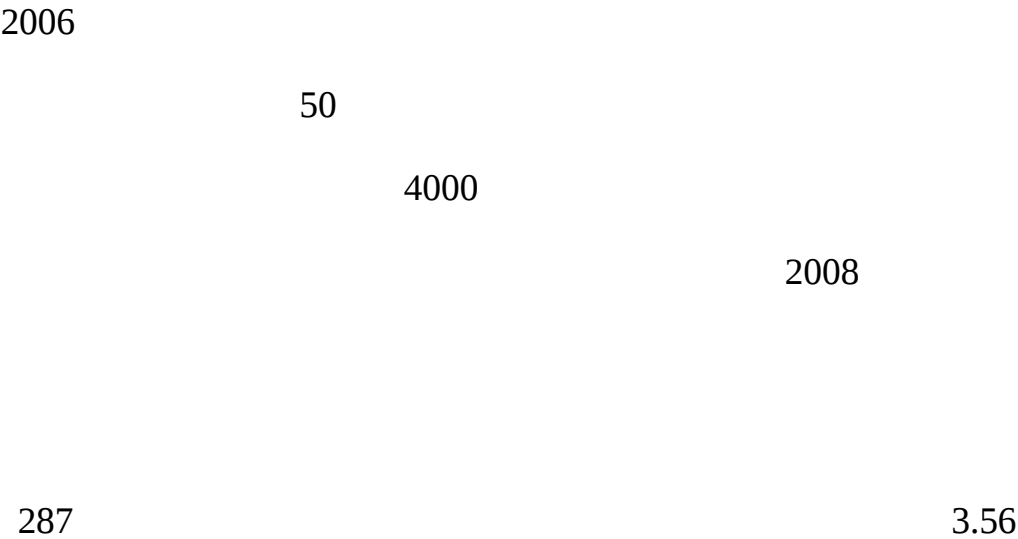
50

70%

,

http://www.chinahvacr.com/News/Class1/201404/News_3107349.shtml

8



10

2000

80

2010

2009 30%. 2011 28%.2012

20% 30%.

2013 2013

10

25000 2012 30%.2014 3

2013 2012

26% 2014 20% 2012

2013 2012 45% 30% 40%

2013

30%

20-30

2013

2014

2014

2014

3P 50P

15

3P 15P

40P

3 5

2014

5P 15P

40P

40P

15P 30P

10

GEA

2011 70% 80% 15%

2013 2014

http://www.chinahvacr.com/News/Class1/201404/News_3106856.shtml

11

(20091367-T-469)

(GB/T19680-2013)

()

()

()

http://bao.hvacr.cn/201405_2046335.html

12

50

4

2014

50

1600

4



11 66

7 42

8

3 11

7

20%

5%

2013 1 11

[2013]5

2014

http://bao.hvacr.cn/201405_2046415.html

13

9

2014 4 20 9

600

32

320

4.9 2015 10

6000

http://bao.hvacr.cn/201404_2046125.html

14

24

(

18

1/10

500

24

http://bao.hvacr.cn/201405_2046827.html

15

4 23

http://bao.hvacr.cn/201404_2046260.html

16

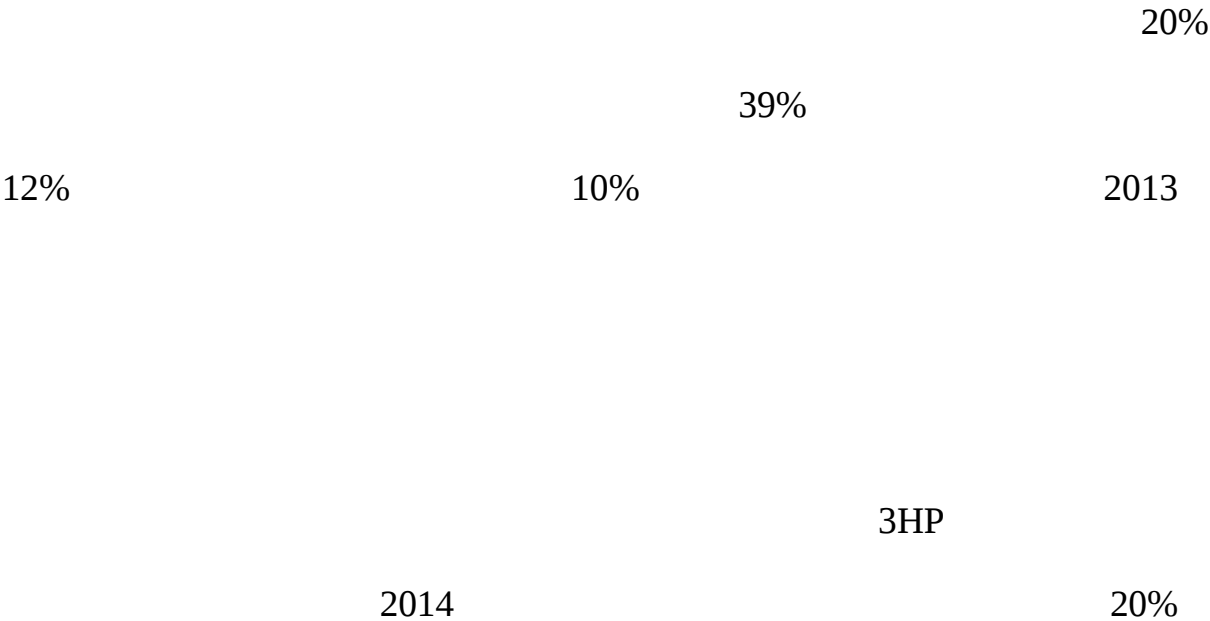
2014 2020

1

l8Cđ

http://bao.hvacr.cn/201404_2045776.html

17



EVI

http://bao.hvacr.cn/201405_2046716.html

18

2013

2014

<http://www.compressor.cn/News/hyqx/2014/0409/72505.html>

<http://www.compressor.cn/News/hyqx/2014/0317/72251.html>

20 2014

4 15

INVT-LX600

INVT-LX800

100

INVT-LX600 INVT-LX800

<http://www.compressor.cn/News/hyqx/2014/0417/72702.html>

21

2014 3 18

2014 2 5

2014 4

22

2014 3 3

2014 4

1

<http://www.compressor.cn/News/hyqx/2014/0408/72493.html>

22

95%

3-5

5

Made in China

GasPure

<http://www.compressor.cn/News/hyqx/2014/0313/72205.html>

23

()

:

1

3. 0

2

3

4

5

<http://www.compressor.cn/News/hyqx/2014/0303/72043.html>

24

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<http://www.chinesevacuum.com/ShowArticle.aspx?id=43973&pid=39>

25

26

70

6

7

4

26

30%

4K2K	55.3%			22.8%					
	13.5%	8.4%		6			39~65		
		40	48	55	60	65			
				4K2K					
WitsView									
		32	39	40	42		opencell		
		3		32	40	42			

WitsView

0.5~0.6

<http://www.chinesevacuum.com/ShowArticle.aspx?id=43805&pid=39>

27	FTO								
				ITO				FTO	

					FTO				
					FTO				
100									
					FTO				
200K-300K									
					FTO				
					FTO OGS G+G				
500K									
					FTO				
400K-500K					100				
					ITO				
					ITO				
					​				
					FTO SnO2 SnO2:F				
FTO	FTO	ITO							
					FTO				
					FTO OGS				
					FTO OGS OCA/OCR				

ITO 40% FTO

600 ITO

OGS 600Mpa

ITO OGS OGS

FTO OGS 0.5mm 90%

OGS FTO OGS

FTO OGS

FTO ITO

<http://www.chinesevacuum.com/ShowArticle.aspx?id=43761&pid=39>

28 2014

2 14

19

10

2013

6,600

95%

2015

3

250

100℃

1,000

100-250℃

250-400℃

3,000

7,470

10

1

.
2050 1/4

90

60%

<http://www.chinesevacuum.com/ShowArticle.aspx?id=43654&pid=39>

29

4 23 2013

2013

2012

2013 36GW 12.5%
47% 8.7%.

2013

7

15

15%

2013

3230

2090

1140

10

23.6%

50

63.6%

http://www.chinahvacr.com/News/Class1/201404/News_3107339.shtml

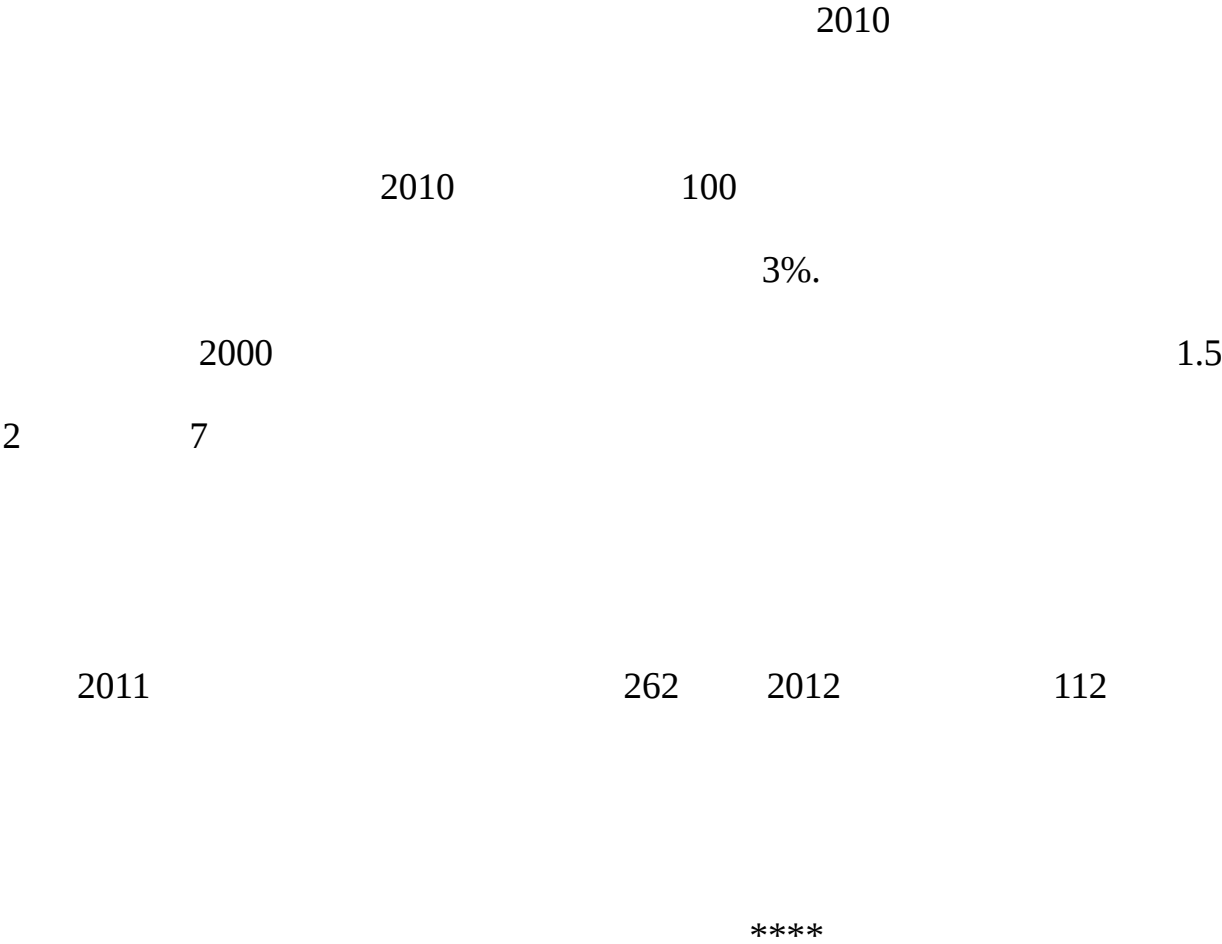
30

2013

10

2006

2010



http://www.chinahvacr.com/News/Class1/201404/News_3107030.shtml

31

2008

4~5

2008

*ST

2014-2018			
2012			
17			
2012	1823		25.3
2011	63.6%	60.7%.2013	

http://www.chinahvacr.com/News/Class1/201404/News_3107033.shtml

1

R22 R717 R134A R404A R407C R410A R502 R507

H.Krigar 1878 1934

A.Lysholm SRM

1957 1961

1960

SRM

1

2

3

1

2

		5	5
	6	12	
3			
4			
5		3 4	
6			
	10-15%	25-40%	4
		5%	
4			
		6	

D

D

1-2.6% 10000-26000ppm

10m3/min 8bar

79L/min 40% 0.4bar

82L/min 2.6% 26000ppm

27℃

10bar 2

	400	510	630	816
25-40bar	1000m3/min		6000	

1

35bar

60bar

40bar

61.6bar

100bar

2

3

4

1989

LG-5/7

5

6

7

8

1

2

3

4

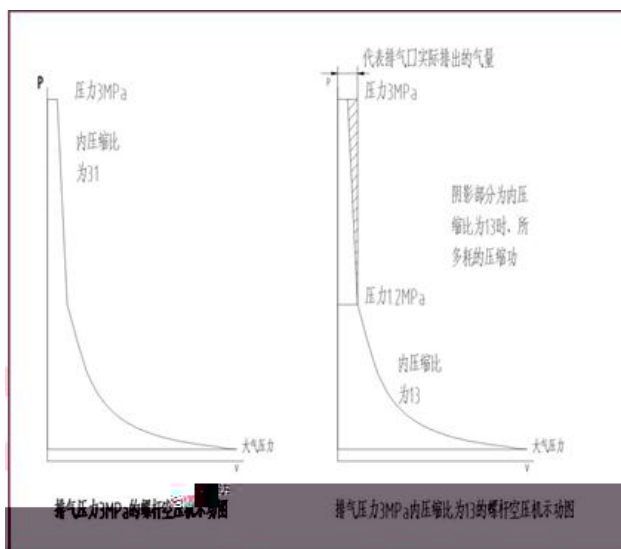
5

1

6

3MPa

31



61.6bar

7

8

9

21

2005

2010

2014 4

2 2013

2013

2013

1

31

2013

1-11

731873

6.29%

165348

4.2%

100.96%

2012

9.35%

31

18

0.82%-27.2%

20%

7

27.2%

27.25%

26.85%

24.07%

24.07%

21.31%

20.78%

5

20%

2

31

2013

1-11

738880

5.49%

3

31

2013

1-11

9471

19.9%

2012

4

31

2013

1-11

704641

1.3% 31

21

	0.04%-38.15%	8	10%	5
20%				38.15%
			25.05%	
	24.72%			20.78%
5				
31			2013	1-11
	35244	21.6%		3.6% 2012
	0.9			
31		22		
		117.24%		
116.48%			66.61%	
	63.44%			
6				
	31		2013	1-11
	898646	0.65%		0.56%
	0.3%		0.77%	
7				
	2013	5		
	=	-	-	-

-

31 27964 1.1%

4.1% 1-11

35.6% 24.5% 135.5%

2012 11



8

31 2013 1-11

253208 14.7% 112469

30.6% 11

9

6.13% 2012 1.53

39.57% 2012 50.12 66.99% 2012

16.97		0.86	2012	0.61
	5.17%	2012	6.68	
151.94	2012	47.05		
2013				
	2013			
1				
1				
	4			5
2				

1%-99%

-17℃

2013

1.3

40%

2

GB19153-2009

1

II

15%

III

30%

3

	LNG	BOG
	BOG	BOG
-160℃	API618	
		BOG
4		
		65%-85%

/

t/aPP	6K-375MG		
2K300/375		2K-140MG	
-130℃	4MG124	EO/EGCO2	
6 LNG	BOG	LNG	
6K-375MGBOG	-162℃	60 t/aLNG	
4K-300MG	-162℃		
7		2D-140MG100Nm3/h	
250℃			
2D-160MG	300℃		
8			
PSA			
9	CO2	CO	
	BOG		
10			
11			
ORC			
3			

2013

1 2013

139

2 2013 31

615

2

1

ISO

1

2

5

50%

2014 4

3

30%-60%

70%

2006

50

4000

2014 1

7000

287

3.56

2.48

6.52

2015

5269

7%.

http://www.chinahvacr.com/News/Class1/201404/News_3107230.shtml

30% 40%-60%.
20% 1200 -1800

70%
2005 15% 2012 30%

<http://news.ehvacr.com/news/2014/0415/91052.html>

5

3
1 1 8 1

STCE1008

STCE1009 LED

8 1

STCE1010

2013 10

3

6

LED

LED

<http://news.ehvacr.com/news/2014/0321/90822.html>

6

2014

2014

[2014]668

2014

2014

1

2

3

40

4

5

24

26

6

1

1

7

2

5

3

1

2

3

4

5

2014

1

2

2000

5000

1

3

4

5

2014

1

7

2

5

3

4

2014

1

2

3

1

1

2

1

2

3

4

5

3

2014

2013

2014

4

http

//tzs.ndrc.gov.cn/xmrjxz

imo

2014 4 29

2013

15%

2000

8% 10% 12%

1000



.doc



2014

.doc



.doc



.doc

<http://news.ehvacr.com/news/2014/0404/90980.html>

7

2009

2013

2009

•
;

;

2100

5500

2009

360.37

2009	EMCA	65	450	2008
385	16.88%;			
2008	386	502	30.05%	EMCA
/				EPC
			2008	129
2009	181	40.31%;	2008	65000
113000	73.85%			
2010		2006	2010	EMCA
89	560	5 ;		
	76	782	9 ;	1.6
	17.5	10 ;	47.3	836.29
	16 ;	13.1	287.51	
22 ;			86.18	1064.85
		215.45	2662.13	11 ;
			1800	
2011				
!				
			16%	
	17%			

2011

2011			EMCA		
2011			3900		
1719			1472		
782	88.23%		1000		
1250.26		49.5%			287
	412.43		43.45%		1648.39
			175000		378000
116%					
2012			2012		
	4175		7%;		
	2339		122		40
43		14%			
		2011	1250.26		1653.37
32.24%			3905		505.72
	22.62%		1774.46		
4430					
59.2%	26.7%	14.1%			
		10	6	5	18
					1
83			5	12	1

46

2013	EMCA			2013
				2012
1653.37	2155.62	30.38%;		2012
557.65	742.32	33.12%		2559.72
	6399.31	;		2012
4175	2013	4852	16.22%;	2012
43.5	50.8	16.78%		

2014

<http://news.ehvacr.com/news/2014/0424/91175.html>

8 2014

NPDSolarbuzz

2014

(Demand-constrainedMarket)

(Supply-drivenMarket)

NPDSolarbuzz

MichaelBarker

2014

50%

(PVCell)

2010

2013

2013

2013

--

60%

Barker

2014

NPDSolarbuzz

FinlayColville

<http://news.ehvacr.com/news/2014/0314/90713.html>

1.

80

?

80 ?

Wahlers

Luerssen

20

?

?

Wahlers

Ecoline

10

7%

?

Wahlers

http://bao.hvacr.cn/201404_2045966.html

2.

4

2013

VZH

2012

VZH

；

IT&

VZH

47

94kW

VZH

30%

 $\pm 0.3^{\circ}\text{C}$

VZH

167kW

10%-100%

VZH

http://www.chinahvacr.com/News/Class9/201405/News_3108631.shtml

3.

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4 20 ，

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		2011	2012
	，		
	， 2013		，
	， 2011	3	，
	，	，	，
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	， 2	，	，
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		，	
	，	，	
，	，	，	
	IT	，	2013
600		，	
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		，	，
	，	，	
	，	，	
	，	，	

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，

，

（ ）

，

2013 6

10

10%

42.62% 37.35%

2012 2013

5 31 2012 2013

19.87% 19.9%

90%

2000

,2014 200

,2009 2013

345 670 28.5% 9.8%

http://www.chinahvacr.com/News/Class9/201405/News_3108526.shtml

4.

2014 5 9 , MicroluxTechnology,Inc. TomTNguyen

Microlux

MEMS

1,000

630

63% Microlux

370

37%

100

MEMS

Microlux

http://www.chinahvacr.com/News/Class9/201405/News_3108492.shtml

5.

MOMA

MOMA

MOMA

MOMA

MOMA	10	8
		MOMA ()
16	4	

MOMA BC

3000

http://www.chinahvacr.com/News/Class9/201405/News_3108692.shtml

6.

2014 4 9 2014

14

2013 12

6-8

15

400kW 4 10 8

340kW	57.12	14.41
-------	-------	-------

199.48

10

2010 3

2013

1.5MW

1

8000

8

10MW

1.2

1

10MW

3500

http://www.chinahvacr.com/News/Class9/201405/News_3108248.shtml

8.

2014 5 7
70

2014

2013 400
10% 40

-20°C -12°C

40℃

COP

3.0

2008

2013

D

SET-FREE

http://www.chinahvacr.com/News/Class9/201405/News_3108087.shtml

9.

3500

2014

3

http://www.chinahvacr.com/News/Class1/201404/News_3107028.shtml

10.

2014 4 2015 3

24

1500

2012

13 3

853

http://bao.hvacr.cn/201404_2045980.html

11.

2014 4

10

http://bao.hvacr.cn/201405_2046559.html

12. 4

4 23

2014 1

2014

3.74

5.99%

0.21

2.53%

2014

,

, 4

,

4

,5

http://bao.hvacr.cn/201405_2046728.html

13.

1992-1997

300% 1997

?

?

?

500

500

1972

24

80

?

1992

2000

1992

8

22

2009

2014

2018

5

8

!

http://bao.hvacr.cn/201405_2046693.html

14. 2014

25

33 1206

100 6

T

SV

B

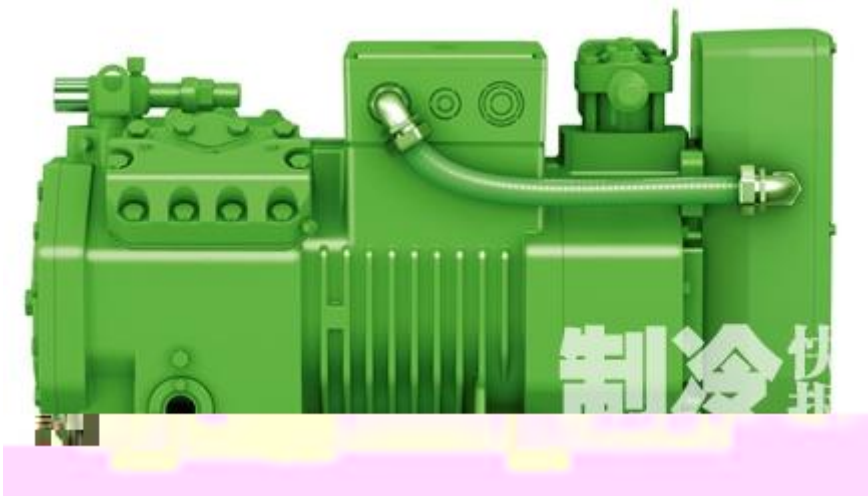
http://bao.hvacr.cn/201404_2046129.html

15. 2014
2014 4 9 11

Ecoline

25Hz 87Hz

70%



CSVH3

CSVH3

CSVH

2

CSVH37

550Kw +5/50*C

960m3/h,

CSVH38

660K w (+5/50*C)

1156m3/h

CSH

CSVH3



ESEER IPLV SCOP

Modbus

Ecoline

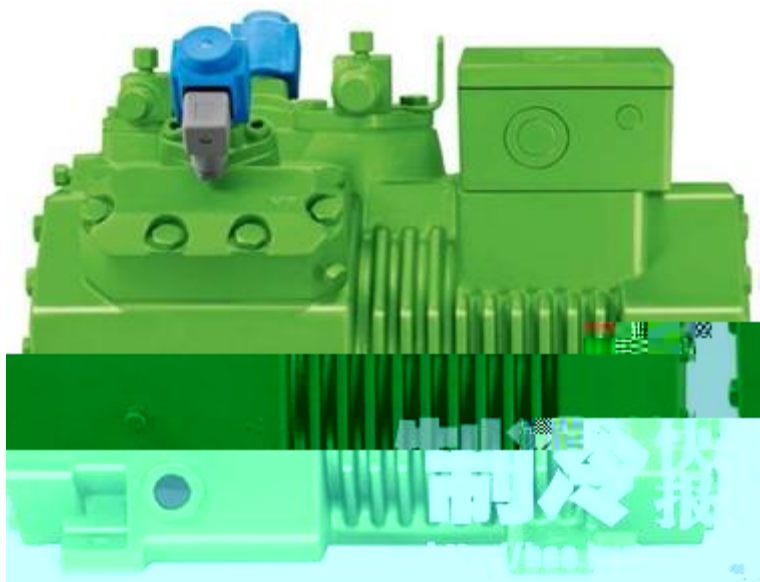
CRII

CRII

CRII

10% 100%

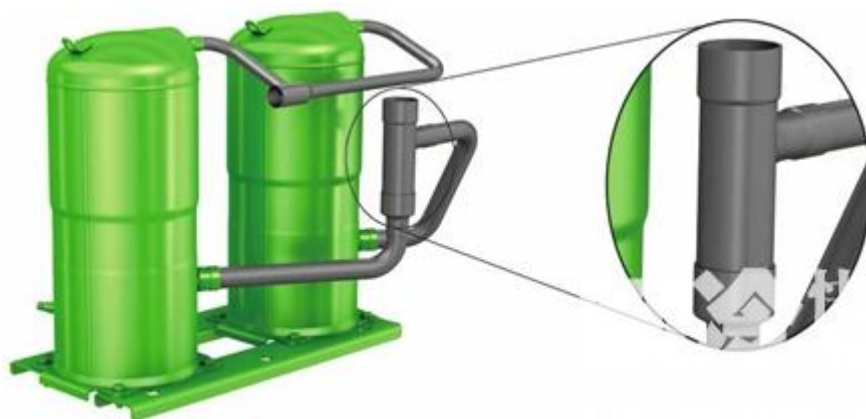
5%



BITZER

BITZER

Advanced Header Technology (BAHT) BITZER



BITZER BAHT

15

CO2

CO2

CO2

CO2



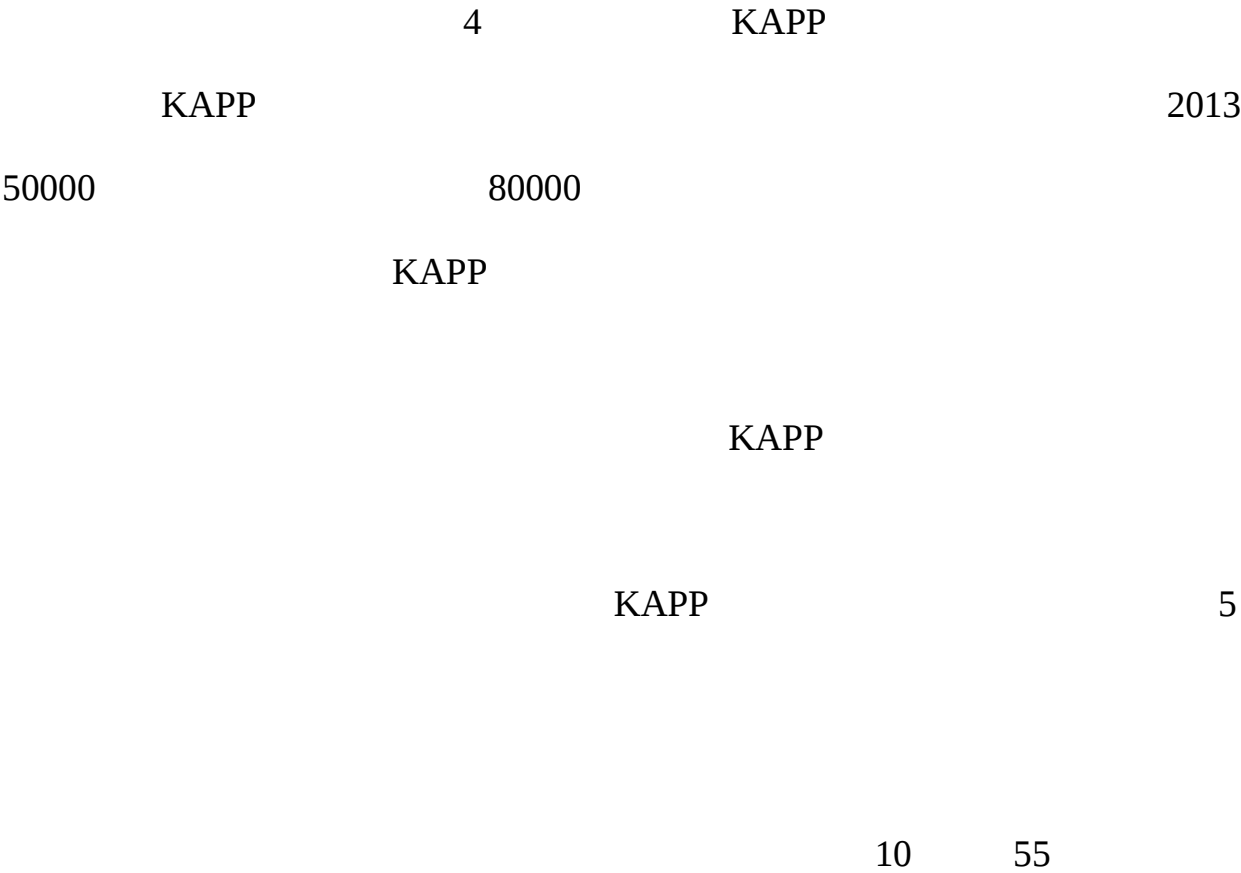
http://bao.hvacr.cn/201404_2045953.html

16. 5

1990

4 2000

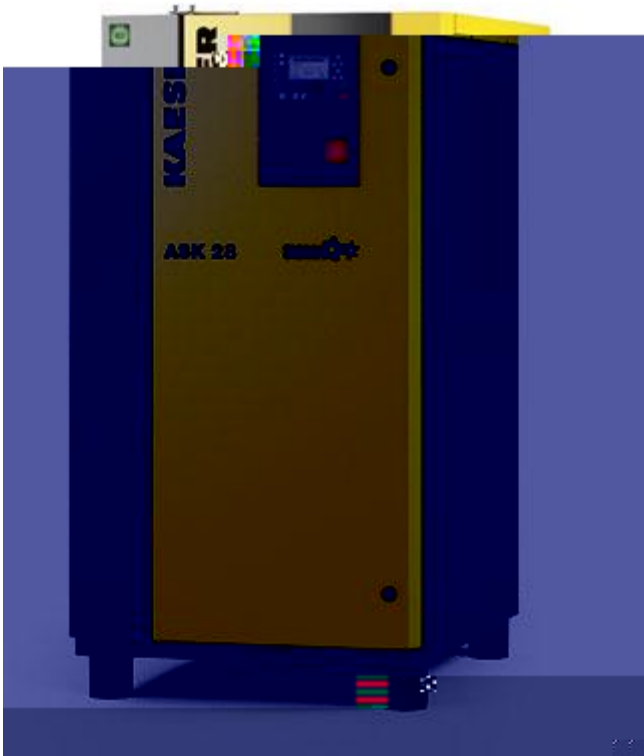
6 300 59



<http://www.etyjx.com/2014/05/07710510176.shtml>

17. ASK

ASK



ASK

SIGMA

IE3

20% ASK

0.79 4.65 m³/min /

SIGMA

IE3

ASK

ASK

0.79 4.65

m³/min 5.5 15bar

<http://www.compressor.cn/News/qyzc/2014/0423/72776.html>

18.

4 14

TQM

<http://www.compressor.cn/News/qyzc/2014/0425/73031.html>

19.

2 28

1955

20.

- ;

- ;

- ;

-

- 12 18 ;

-

IR

&

Centac

Centac

AirCare

12

4000H

IR

<http://www.chinairn.com/news/20140519/10525862.shtml>

21. :Mink

Mink MV 1202 A			Busch		Mink	
Busch			50Hz		950m3/h	
60Hz	1150 m3/h;					
Busch		11	Mink		50Hz	
62	950m3/h	60Hz	75	1150 m3/h		

Edwards	3	18-20	(Shanghai New
International Expo Centre	SNIEC)	SEMICON China	
	STP-iXA4506	(large-capacity)	
(turbomolecular pump	TMP)		
SEMICON China			
Edwards			Edwards

Edwards	STP-iXA4506	(large-capacity)
(turbomolecular pump TMP)		
FPD LED		STP-iXA4506
(4300 l/s N2)	(4300 sccm N2)	
LCD		(physical-vapour deposition
PVD) PVD		
Edwards	iH600 iXM1200 / 1800	STP
iXA3306 iXH645H		
iH600	PECVD LPCVD	
iXM1200 / iXM1800	Edwards	
STP-iXA3306		
(rack-type)		
iXH645H	MOCVD	LED
	iXH	

<http://www.chinesevacuum.com/ShowArticle.aspx?id=43810&pid=39>

1. : ,

， 36.1%，

， 14.9%， 12

， ，

， #B ，

1



9.5%; , ,

20% 25% 2013 ,

548 , 23.7%, 2.4 42.2%

:

, , 2013

, ,

, 2013 , 238

, 24.6%, 2.3 23.5%

:

, ,

,2013 , , ,

20 , 0.92

: 2014-2016 1,013

1,199 1,412 ,EPS 0.770 0.937 1.106

,

:

,

<http://finance.qq.com/a/20140331/005765.htm>

3.

2014-03-31

			8.50	1.49		21.3%	39.9%
	1.38	28.8%	EPS0.62				
			2014-16	EPS	0.75	0.91	1.11
19.5		2014	26	PE			
						2014	
36.1%		3.6		1			2
			3				
		2014					
1	448		367	2			884

LB

<http://yanbao.stock.hexun.com/dzgg487503.shtml>

4. (002158):14 2014

2014-04-17

			14		15
			()		
			1.88	19.6-23.5	
			1.94	20.18	
			1.78	-	
		-	1.85	-	
		-	1.87	-	
			1.87	21.84	
			1.88	18.17	
			1.83	-	
			1.78	-	

<http://stock.10jqka.com.cn/20140417/c564969270.shtml>

5. 4 21 1.52%

2014-04-21

2100

1%

2065.83

1.52%

816.5

7353.6

1.37%

937.9

IPO

A

IPO

IPO

6%

4 18

20

28

16

					4				
					8				
				28		2012	10	25	
									IPO
		1	ST		5%		89		
13	ST		30		5%				

IPO

IPO

IPO

IPO

IPO

2100

2080

IPO

(000530,)

1

2013

2014

(601688,)

2013

3~6

2014

2014

3

1.4

3.5

16%

2012

50%

2014

(002158,)

<http://stock.hexun.com/2014-04-24/164206323.html>

7. : , ---

2014-03-31

:
2013 8.5 , 21.3%; 1.7 ,
35.2%; 1.49 , 39.9%
0.62 10 3.5 , 1
:
13 5.5 ,
23.8% 3 , 42.2% 2.4 , 24.6%
2.4 , 23.5%
13
, ,
, 30% ,13

，

，

，13

，

， 12

，13

， 36.1%，

， 14.9%， 12

，

，

1

14

20%

:

，

，

2014-2016

0.74 0.86 0.99 ， 23 20 17

，

<http://finance.qq.com/a/20140331/017208.htm> To

8. : , ---

2014-03-31

2013 850 , 21.3%;
 149 , 39.9%,EPS 0.62
 0.35 , 10 1
 ,2013 644 ,
 9.5%; , ,
 20% 25% 2013 ,
 548 , 23.7%, 2.4 42.2%
 :
 , , 2013
 , ,
 , 2013 , 238
 , 24.6%, 2.3 23.5%
 : ,
 , ,
 ,2013 , , ,
 20 , 0.92
 : 2014-2016 1,013
 1,199 1,412 ,EPS 0.770 0.937 1.106
 ,

：

，

<http://finance.qq.com/a/20140331/005765.htm>

9.

2014-03-31

		8.50	1.49		21.3%	39.9%
1.38	28.8%	EPS0.62				
		2014-16	EPS	0.75	0.91	1.11
19.5	2014	26	PE			
					2014	
36.1%	3.6		1		2	
		3				
	2014					
1	448	367	2		884	

2013 40%

LB

<http://yanbao.stock.hexun.com/dzgg487503.shtml>

10. : , ---

2014-04-01

2013 8.5 , 21.34%,

1.49 , 39.9%, ,

,

, 2014 2015

0.81 0.98 , 2014 25 , 26.13

20.18 ,

2 , ,

,4 32.68%, 65.82%

3.63 , 36.12% 1

3,000 , ,

30%

LB

,

,

,

,

,

2014 2015 0.81

0.98 , 2014 25 , 26.13 20.18 ,

<http://finance.qq.com/a/20140401/021953.htm> T

11. :

2014-04-28

2014 1 ,23B5.8 0 0 1 193FE TJ14EBA2381F6F9A02113038A59F15B10SP
29 ħ

12.

2014-04-28

1.83 2915 26.97% 42.95%

2662 43.20% EPS 0.12

2014-16 EPS 0.79 +0.04 1.01 +0.1 1.21 +0.1

20.5 2014 26 PE

26.97%

20%

2013

10%

20%

2013

50

2013

33.33%

1

5.47% 9.93%

0.29%

2013

10

2014

200

30%

2014

100

<http://www.cfi.net.cn/p20140428000585.html>