



上品綜合工業股份有限公司

ALLIED SUPREME CORP.

股票代碼：4770

2023年第二季法人說明會

June 13th, 2023

*We are the company which can offer you
complete solution in Fluoropolymer*

<https://www.alliedsupreme.com/>

免責聲明



本簡報及同時發佈之預測性資訊，皆基於當前情況之預期以及對未來事件的預測，未來若有任何變更或調整時，本公司並不負責隨時提醒或更新。

預測性資訊依然受未知的風險、不確定因素以及其他因素之影響，故本公司未來實際所發生的營運結果、財務狀況，業務展望以及營運擴張，可能與預測性資訊有所差異。

簡報目錄 Contents



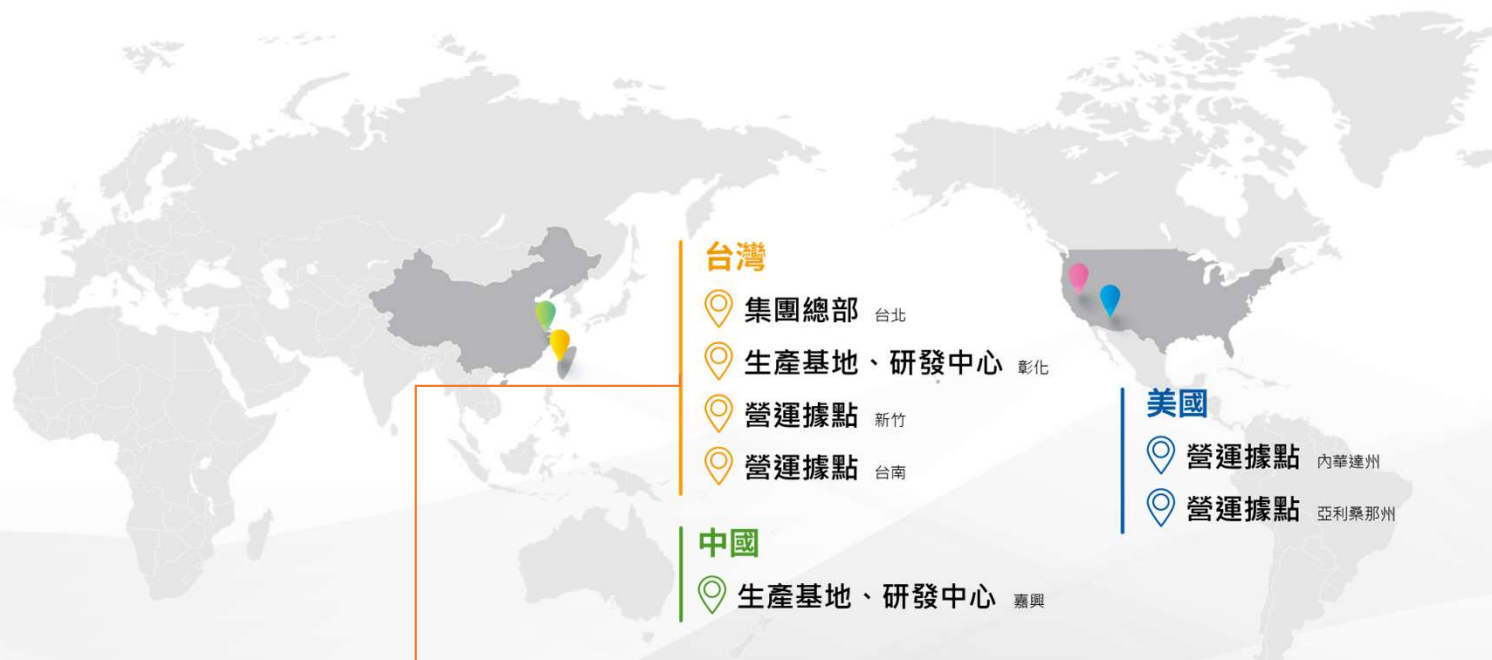
1. 公司介紹 (Company Profile)
2. 經營績效 (Operation Performance)
3. 營運展望 (Business Outlook)
4. 交流問答 (Q & A)



01

公司介紹

關於上品



台灣

- 集團總部 台北
- 生產基地、研發中心 彰化
- 營運據點 新竹
- 營運據點 台南

中國

- 生產基地、研發中心 嘉興

美國

- 營運據點 內華達州
- 營運據點 亞利桑那州



創立時間

1981年



實收資本額

790,370,000元



上市時間

2021/12
股票代號 4770



員工人數

集團員工762人
台灣總公司485人

(2023/Q1)



台灣生產基地、研發中心
/ 彰濱工業區 /

<https://www.alliedsupreme.com/>

主要產品及產業概況



上游原料 Raw Material

Fluoropolymer
Raw Material Provider



<https://www.alliedsupreme.com/>

上品集團生產產品 ASC Products

Semi-Finished
Products



Final Products



下游客戶 Customers

Customers

IC Industry
(半導體產業)

EL Chemical Industry
(電子化學品產業)

LCD Industry
(面板產業)

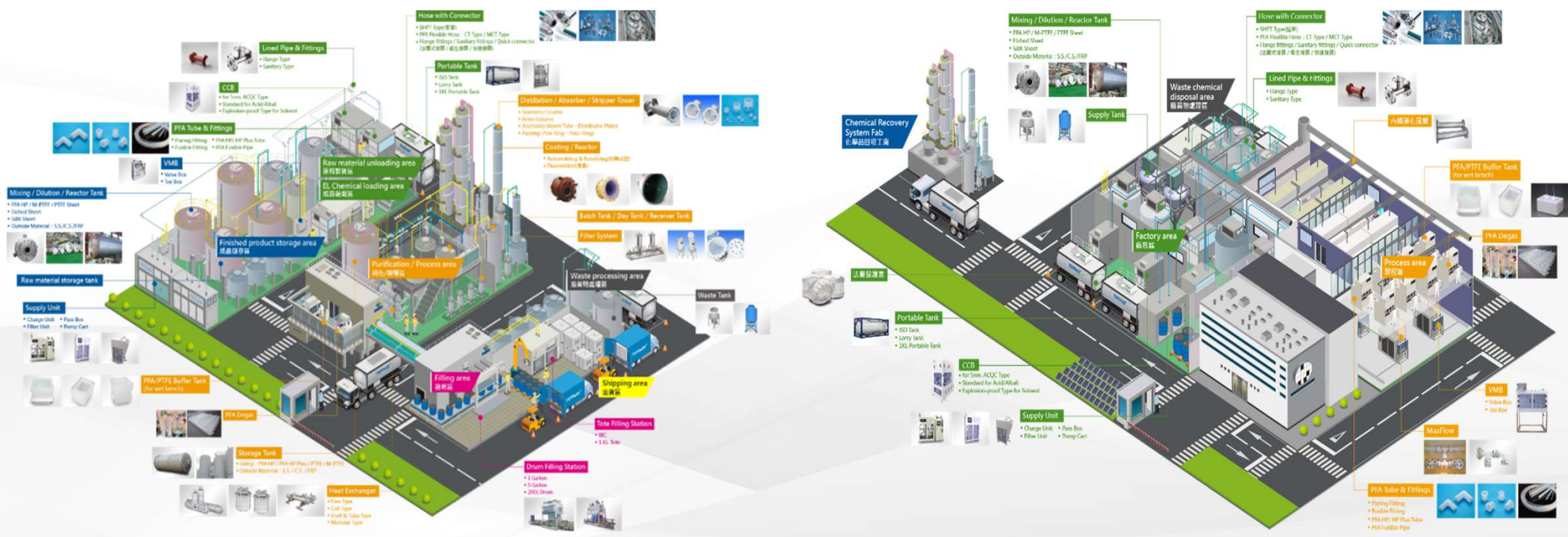
Petrochem
(化工產業)

上品設備的重要性

高純電子化學品為半導體製程良率的關鍵，
TEFPASS®為高純化學品品質維穩的成功所在



產品應用場景-從“電子化學品製造商”至“半導體晶圓廠”



<https://www.alliedsupreme.com/>

核心競爭優勢



產品線	上品	同業
氟原料	X	X
氟半成品材料生產	V	X
氟內襯設備加工	V	V
工程服務	V	X

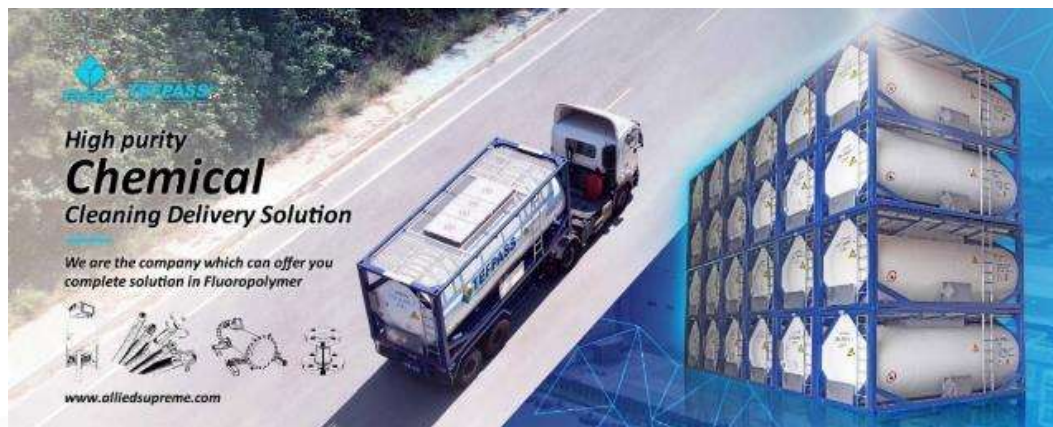
可為全球電子化學品之生產廠商及其使用客戶之在地化提供關鍵設備

高值化ESG產品



上品公司以TEFPASS® GBK Sheet專利技術研發出TEFPASS® USP GBK Sheet系列，作為內襯材質，應用於高純電子級特用化學品槽車，可有效大幅降低化學品清洗的次數、使用量及清洗後廢棄化學品的產生，更加合乎半導體產業在奈米世代製程對於品質要求之嚴苛條件。

上品獨有高純電子級特用化學品槽車因投入原料研發及一站式生產技術，使氟素內襯槽車為近三年銷售而推升的主力核心產品



<https://www.alliedsupreme.com/>

高值化ESG產品



上品為減少浪費及降低塑料桶廢棄物產生而努力

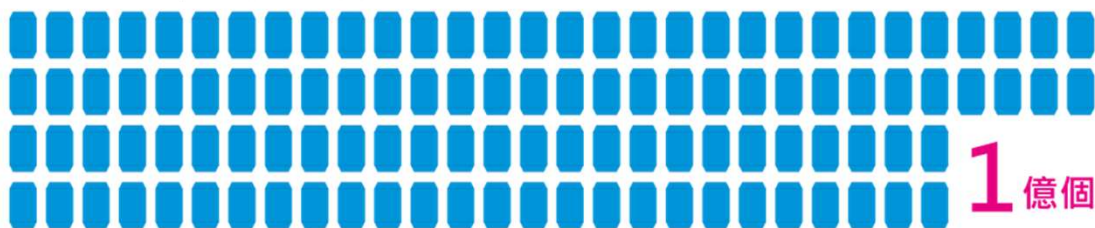
200L PE桶



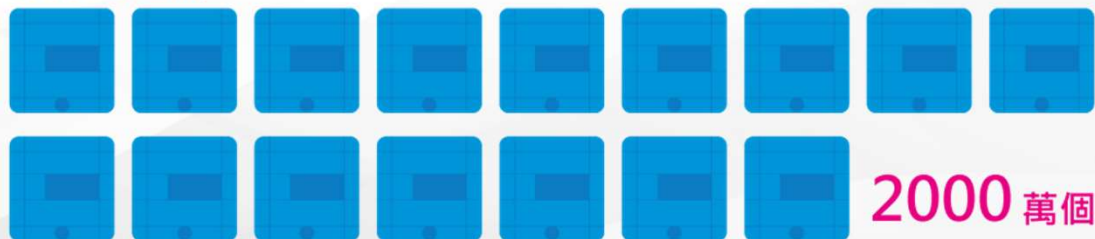
1000L PE桶



200L PE桶, 10年產生的廢棄物:



1000L PE桶, 10年產生的廢棄物:



TEFPASS®Sheet/GBK Lined ISO-TANK, 10年產生的廢棄物:

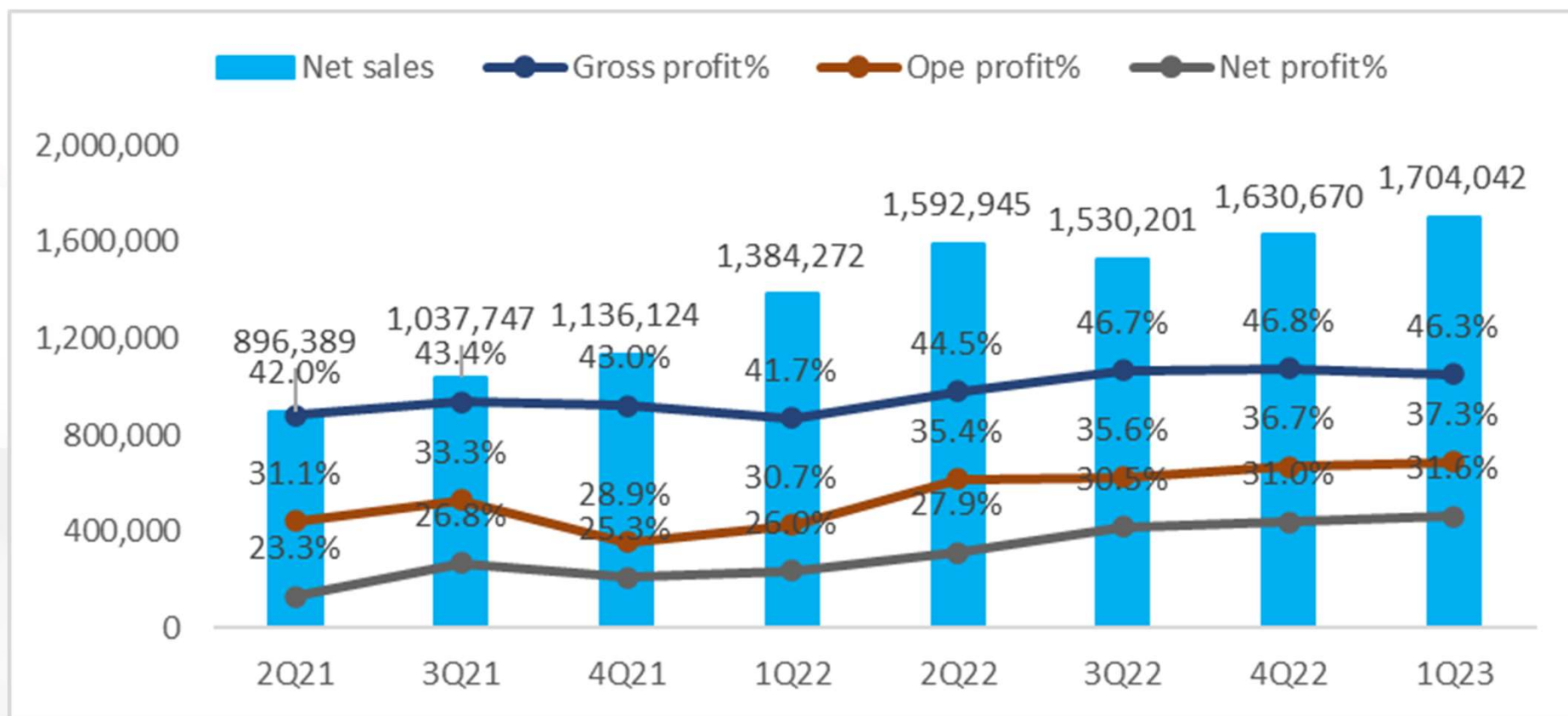


02

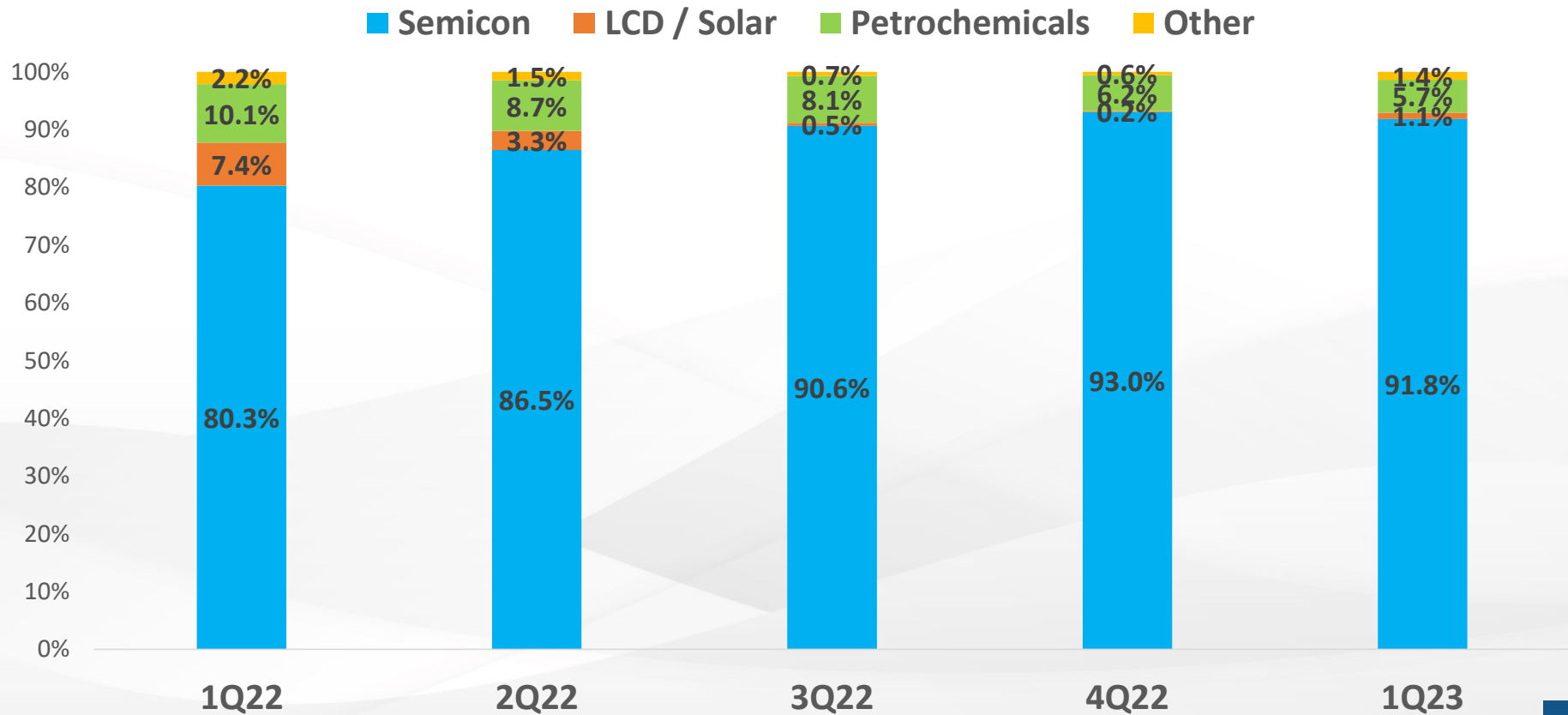
經營績效



財務績效



2023 Sales revenue % by Industries (産業別)

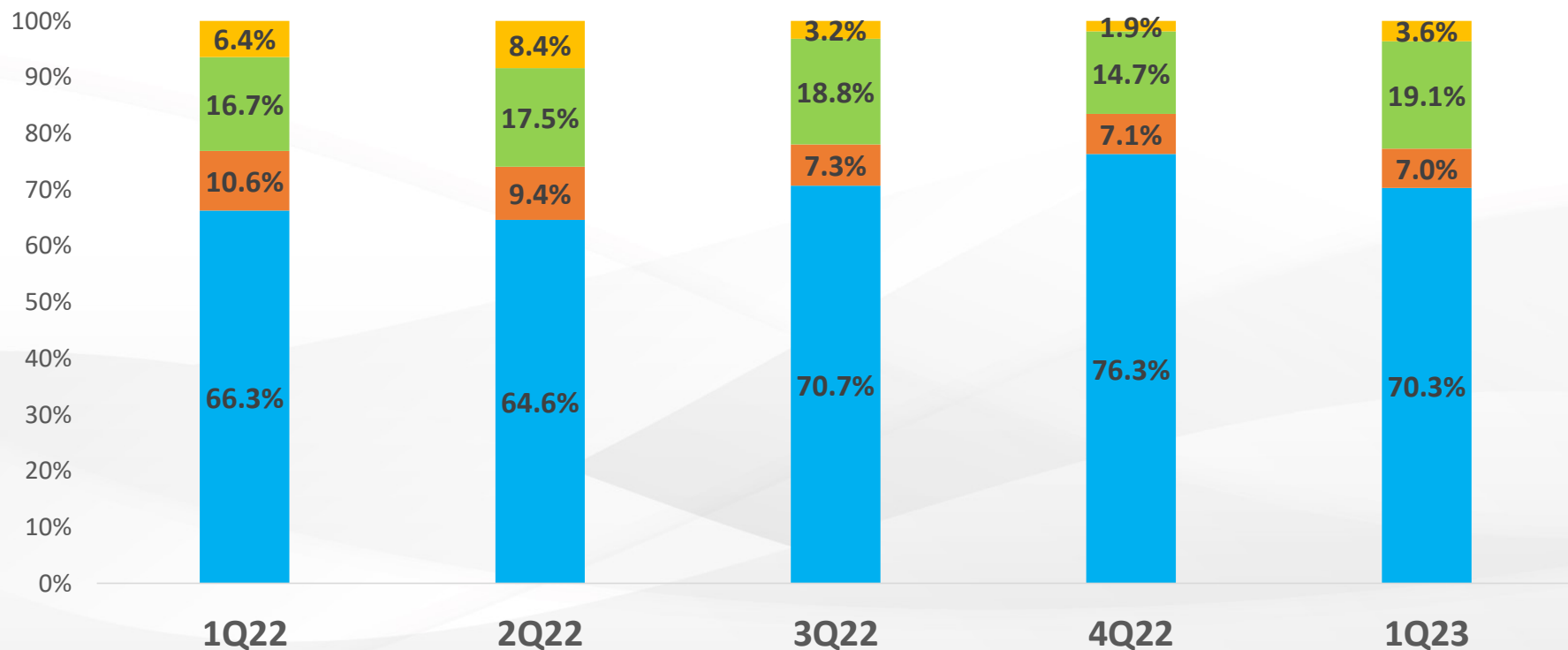


<https://www.alliedsupreme.com/>

2023 Sales revenue % by Products (產品別)

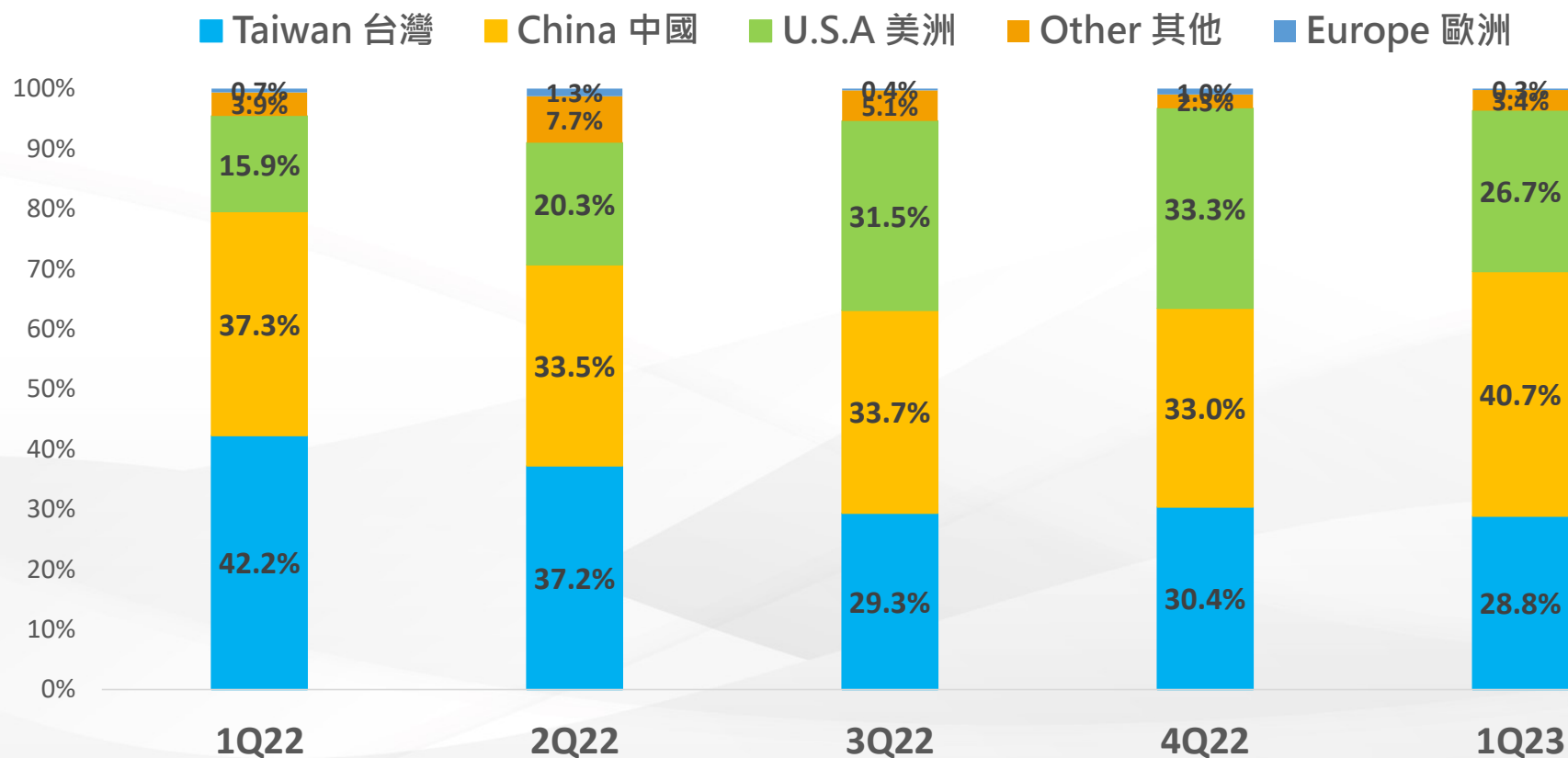


■ Lined Equipment ■ Lined Pipe & Fitting ■ Other Material ■ Engineering



<https://www.alliedsupreme.com/>

2023 Sales revenue % by Customer' s Location (地區別)



<https://www.alliedsupreme.com/>

03

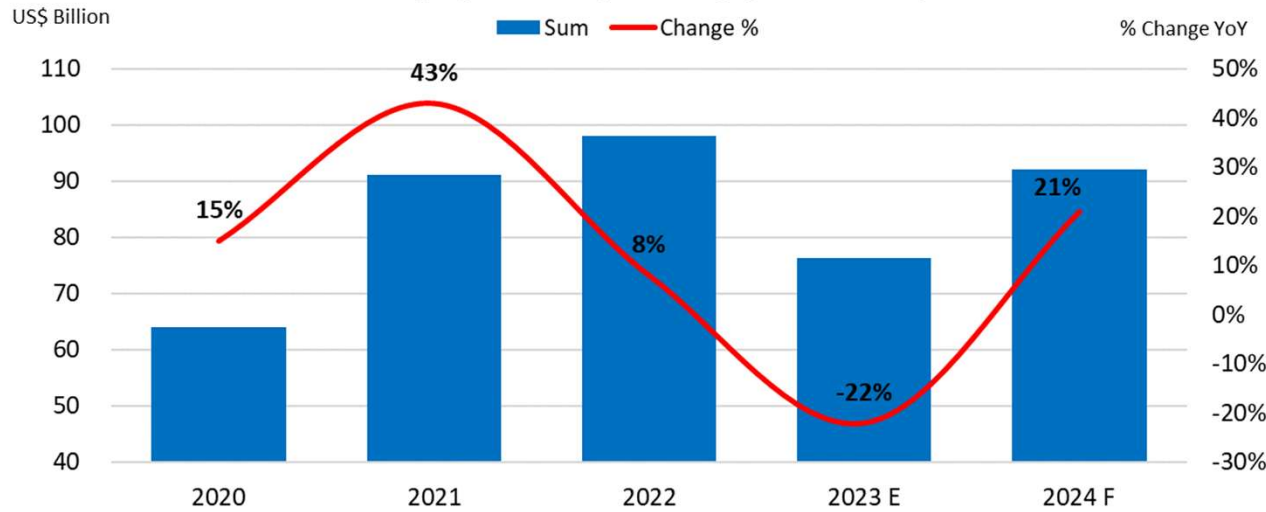
營運展望



GLOBAL FAB EQUIPMENT SPENDING ON TRACK FOR 2024 RECOVERY AFTER 2023 SLOWDOWN, SEMI REPORTS



Fab Equipment Spending (Front End)



Source: World Fab Forecast Report, 1Q23 Update, Published By SEMI

Taiwan Continues to Lead Equipment Spending

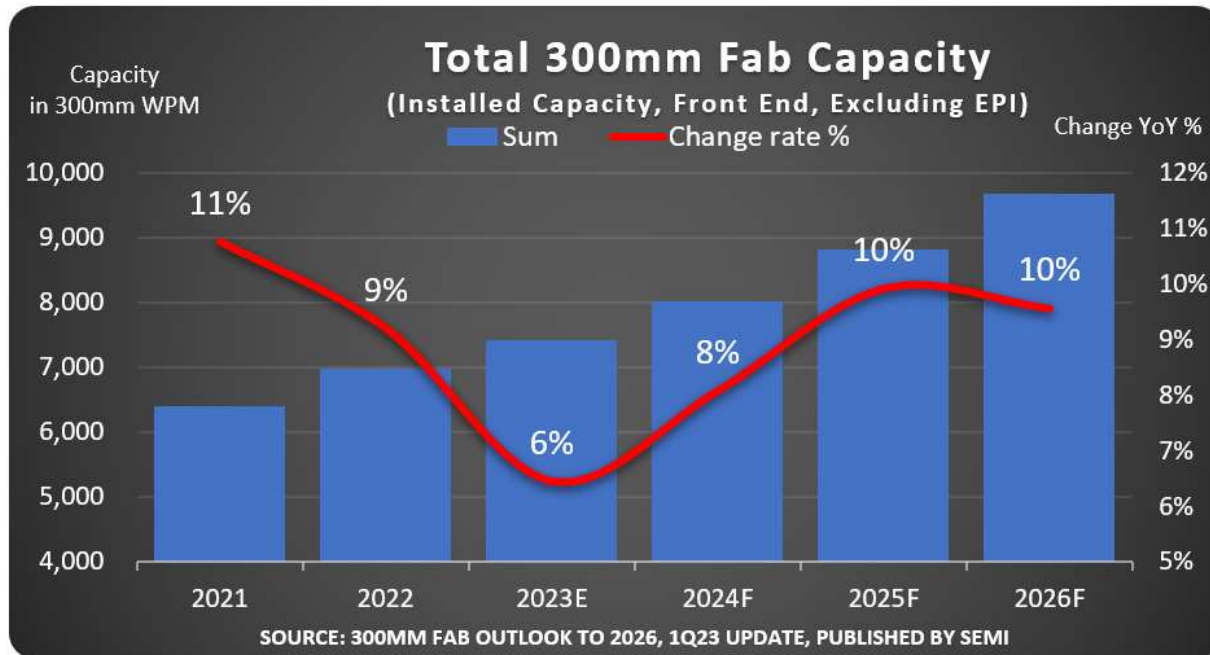
Taiwan is expected to retain the global lead in fab equipment spending in 2024 with US\$24.9 billion in investments, a 4.2% YoY increase, followed by Korea at US\$21 billion, a YoY 41.5% jump. While China is forecast to place third in equipment spending worldwide in 2024, U.S. export controls are expected to limit the region's spending to US\$16 billion, comparable to the region's investments in 2023.

The Americas is expected to remain the fourth largest region in spending with a record US\$11 billion in investments in 2024, a 23.9% YoY increase. Europe & Mideast is also forecast to log record investments next year, increasing spending by 36% to US\$8.2 billion. Fab equipment spending in Japan and Southeast Asia is expected to increase to US\$7.0 billion and US\$3.0 billion, respectively, in 2024.

<https://www.semi.org/en/news-media-press-releases/semi-press-releases/global-fab-equipment-spending-on-track-for-2024-recovery-after-2023-slowdown-semi-reports>

<https://www.alliedsupreme.com/>

2026 All-Time High in Store for Global 300mm Semiconductor Fab Capacity After 2023 Slowdown, SEMI Reports



<https://www.semi.org/en/news-media-press-releases/semi-press-releases/2026-all-time-high-in-store-for-global-300mm-semiconductor-capacity-after-2023-slowdown-semi-reports>

<https://www.alliedsupreme.com/>

Regional Outlooks

Due to U.S. export controls, China will continue to focus government investments on mature technology to lead in 300mm front-end fab capacity, increasing its global share from 22% in 2022 to 25% in 2026, reaching 2.4 million wafers per month, the SEMI 300mm Fab Outlook to 2026 shows.

Korea's worldwide 300mm fab capacity share is expected to slip from 25% to 23% from 2022 to 2026 on weak demand in the memory market. Taiwan is on track to retain third place despite a slight dip in share from 22% to 21% during the same period, while Japan's share of worldwide 300mm fab capacity is also expected to edge down, from 13% last year to 12% in 2026, as competition with other regions increases.

Powered by strong demand in the automotive segment and government investment, the Americas and Europe & Mideast are expected to see 300mm fab capacity share growth from 2022 to 2026. The Americas' global share is forecast to rise 0.2% to nearly 9% by 2026, while Europe & Mideast is projected to increase its capacity share from 6% to 7% and Southeast Asia is expected to maintain its 4% share of 300mm front-end fab capacity during the same period.



04

Q & A



Thank you

TEFPASS@alliedsupreme.com

<https://www.alliedsupreme.com/>